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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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Administrator Manual

Last UpdatedFeb 10, 2023

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Getting Started

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. When administrators log in, they have access to additional screens and functions for managing the organization.

This quick guide is designed to help you learn more about ClubExpress and begin setting up your site. More detailed instructions on site functions and modules can be found in other sections of our Help Site.

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Learn About ClubExpress

Monthly Hosting Fee and Rates

ClubExpress only charges for active members in your database, not expired members or non-member contacts*.

We also don't charge for members who do not need to log into your website (for example, child members in a family membership), or for phone and email support. For a full list of what we don't charge for, or to use our Hosting Fee Calculator, go <u>here</u>.

Active Mem- bers	Monthly Charge per Primary Mem- ber	Monthly Charge per Secondary Mem- ber
Up to 100	\$0.40	\$0.20
101 - 250	\$0.36	\$0.18
251 - 500	\$0.32	\$0.16
501 - 1000	\$0.28	\$0.14
1001 - 1500	\$0.24	\$0.12
1501 - 2000	\$0.20	\$0.10
2001 - 2500	\$0.18	\$0.09
2501 - 3000	\$0.16	\$0.08
3001 - 5000	\$0.14	\$0.07
5001 - 8000	\$0.12	\$0.06
More than 8000	\$0.10	\$0.05

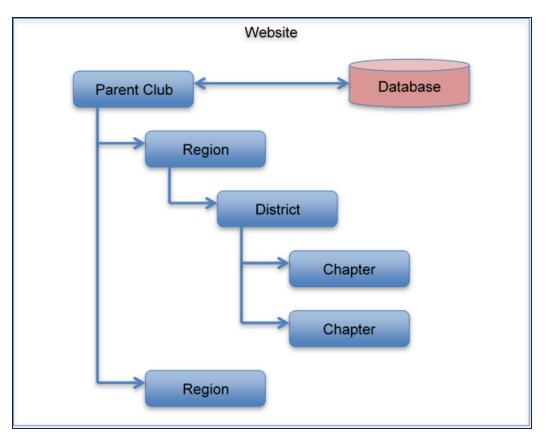
Active Member Charges

*Non-member contacts are free up to 5x the number of active members in your database. For example, a club with 100 members can have up to 500 non-member contacts. Every non-member over that amount is a \$0.02 charge per month for the overage only.

Organizations with Chapters

ClubExpress includes built-in support for organizations with chapters, districts and regions (see "Organization Data" on page 510). We support two basic models:

One website where members join at the parent club (top) level



In this model, **everything is attached to the parent organization**, which exerts tight control over the subgroups within the organization (chapters, etc.) There is only one website and all members can login to that website. The database is attached to this parent organization.

The parent organization is responsible for defining its own regions, districts and chapters. (You can have one, two, or three levels of subgroups; contact ClubExpress to define the actual number of levels. You can also change the name of each level.) Each subgroup can have its own administrators who have control over that subgroup and any groups below it.

Example: A chapter administrator can manage the members of that chapter only but a district administrator can manage all members of the district and chapters within the district, but not members of other districts or chapters within those other districts.

You can configure member types with different options for joining chapters:

- Must join one chapter only;
- May join one chapter only (but not required);
- Must join at least one chapter but can join any number;
- May join any number of chapters (but not required).

These options can apply not only to the primary member but also to any secondary and/or tertiary members defined as part of the member type.

You can also define different fees for each chapter, district and region, and specify how often these fees should be applied.

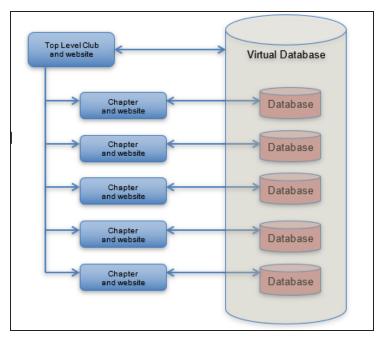
Example: Some clubs will charge a separate chapter fee for each child in the membership, while others will charge a single chapter fee whether there are one or multiple children in the membership.

ClubExpress allows you to define separate bank accounts at the chapter, district and region levels, so that membership and event registration fees can be distributed automatically.

The following modules and functions within ClubExpress have been enabled for subgroups:

- Events calendar. Subgroup administrators can define events at the subgroup level. These events can be especially color-coded and labeled.
- Committees can exist at any level and draw members from that level. Subgroup committees will be visible just to the members of that subgroup.
- Custom web pages can be defined at any level and managed by administrators at that level.
- Discussion forums can exist at any level and draw members only from that level and below.
- In the People Manager, subgroup administrators will only see the members at their subgroup level and below.
- Subgroup administrators can send blast emails to the members of their subgroup only, including the ability to filter to levels below the current level. For example, a region administrator can email every active member of the region, or select just the members of a district or chapter within the region. But she cannot email members of another region.
- Reports and data exports run by a subgroup administrator are filtered automatically to the members of that subgroup. Some reports also allow the subgroup admin to filter to a lower level. For example, a district admin could run such a report on the members of a single chapter only.

Multiple websites where members join at the local (lowest) level



In this model, **each chapter has its own website and database**. Members join at the chapter level and the chapter is responsible for defining member types and dues. Members login to their chapter website to update their profiles, participate in chapter discussion forums, register for events, and make payments, etc.

These chapters (or individual clubs) may also be part of a larger organization. This organization does not control how the individual clubs are defined but it does serve in a "parent" role, aggregating members, events, programs, discussions, etc. The larger organization will have its own website and members of the individual clubs can login to this website to participate in activities at the higher level. Members are handled at the lower level but members can register for events and participate in discussion forums and committees at the higher level.

The larger organization will have a virtual database. Administrators defined at the top level can view (but not update) member contact information for all members in all of the linked individual clubs. ClubExpress also allows you to define "super" administrators who can login to any of the individual club websites to help manage these sites. Generally, the large organization will not have its own members, although the system does allow you to define members at this level to manage this website.

The following modules and functions within ClubExpress have been enabled for multi-tier organizations that follow this model:

- Members can login to their local club and the parent club. But there is only one database entry, attached to their local club. When they update their personal profile from the parent club, the system is updating the database entry in the local club.
- Members can sign up and pay for events at the top level. The transaction and payment history will appear in their profile no matter which website they are logged into.
- The Member Directory at the top level will show all members in all linked clubs, respecting the visibility settings defined for each member.

- Committees, contacts and discussion forums defined at the top level can draw on members from any linked club.
- At the parent club level, the Chapter Finder module will display all linked clubs, using any of the map or org. tree options.
- You can define a master website template and require that all linked clubs use this template. Individual clubs can have their own page header to express the identity or location of that club. You can also define one or more content boxes on this template that are managed at the top level but visible at all levels.
- The top-level club has a special set of aggregator reports and data exports that display member data for all linked clubs.
- The Business Directory module at the parent club level can be configured to include member entries from every local club.

The ClubExpress monthly fees can be paid by each individual club or the top-level club can pay them and the individual linked clubs pay nothing. Either way, the fee is based on the aggregate of active members across all linked clubs.

If your organization matches this model, contact ClubExpress to set up this hierarchy and define the linked clubs. We will also define "super administrators", website templates, and shared content boxes.

Internationalization for Clubs Outside the United States

ClubExpress provides extensive support for clubs and associations outside the United States.

Internationalization

- The **currency symbol** can be configured to display up to 4 characters, so that members and nonmembers know that their payments will be in the local currency. For example, in Australia, you could use "\$AUS", "AUS\$", or "AUD".
- In Canada, Australia, the UK, and Europe, clubs and associations can use Authorize.Net as the payment gateway to make payments through the website in the **local currency**, with the funds flowing directly into a **local bank account**. We are also planning to support other payment gateways.
- ClubExpress supports payments using **PayPal** in the local currency.
- **Dates** will be shown in the local format based on your browser configuration (not your operating system.) The US uses mm/dd/yyyy but other countries use dd/mm/yyyy or yyyy.mm.dd.
- **Numbers** will be shown in the local format. The US and other countries use a comma for the thousand's separator and a period for the decimal separator but some countries, especially in Europe, reverse these.
- **Time zones** can be configured at both the club or association level and the individual member or non-member level. At the club level, this ensures that deadlines such as an event close registration or a survey close date happen at the correct local time. At the individual member or non-member level, this ensures that transactions, payments, event registrations, and other information will be shown at the correct local date and time. With the correct time zone, forum message posting times are properly localized as well.

- Units of measurement are shown in the metric system everywhere in the world except the US!
- The system supports tax (Sales Tax, VAT, GST, etc.) to be charged on membership dues, additional charges, event registrations, etc. The correct term will be used for each country where the club or association is based.
- ClubExpress **reports** are available in A4 paper size.

Privacy and Conformance with International Regulations

ClubExpress fully conforms to the newest and strictest international regulations for the collection, storage, and processing of member and non-member data.

Compliance

At the time of writing, these are the EU General Data Protection Regulation (GDPR). By using ClubExpress, we make it easy for your club or association to also conform to these regulations, although you accept the ultimate responsibility for how personal data is handled.

Like most online service providers, we have decided to apply these regulations to everyone, even if the chances are slim that you will have an EU citizen as a member or in your non-member database. You really have no way of knowing whether someone is an EU citizen so it makes sense to apply these most stringent of rules to everyone.

The **Privacy Policy** (linked at the bottom of each page) explains how ClubExpress handles privacy when member and non-member data is collected, stored, and processed. It also provides the justification for why ClubExpress and your club or association needs this data, and how it will be used.

When members log in the first time, they will see a special screen asking them to consent to having their data stored in the US; to receiving transactional messages from ClubExpress on behalf of your club or association; and to the sharing of your data with third parties for official club purposes (such as credit card processing.) Such consent is required; members cannot proceed without providing it.

They also have the option to accept or decline general purpose emails from your club or association, such as newsletters or event announcements.

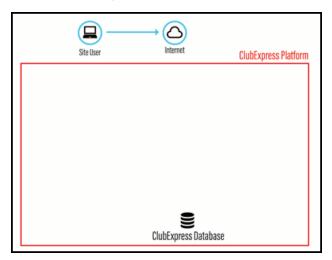
If your club shares member and/or non-member data with third parties for marketing or fund-raising **purposes**, members and non-members are presented with the third question, allowing them to opt-out of being included in these lists. If you don't do this, it's easy to turn this question off.

ClubExpress also makes it easy for you to define your **Data Protection Officer ("DPO")**, who is responsible for protecting the personal data of members and non-members. The DPO also handles inquiries about data security, potential breaches, and requests to be removed or forgotten completely from your organization's records, as required by the GDPR.

Note: Protecting personal data does not stop with ClubExpress however. When you run a report or one of the data exports built into ClubExpress, perhaps for backup or analysis purposes, this data moves outside our control. It is important to instruct board and committee members, administrators and coordinators at all levels, and any paid staff you may have, in how to handle and protect personal data in their possession.

How ClubExpress Works

This section 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

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.

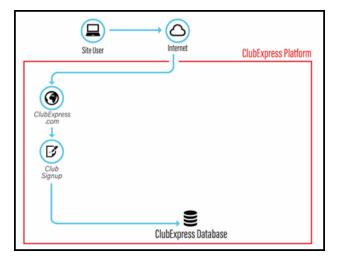
Within the platform is a sophisticated database that is used to store everything associated with your club or association, including member information, the content of your website, financial transactions and even the photos used on various pages.

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

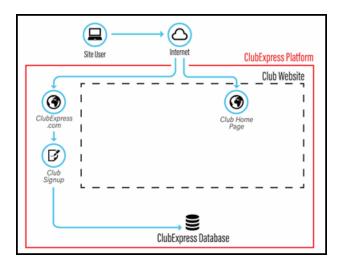
	Site User		ClubExpress Platform
ClubExpress .com			
		ClubExpress Database	

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



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. An administrator steps through a short wizard to create the account and log in to the new website. He or she is then presented with a Setup Check List of additional tasks that must be completed before the website and membership database can be turned on.

Initial Website

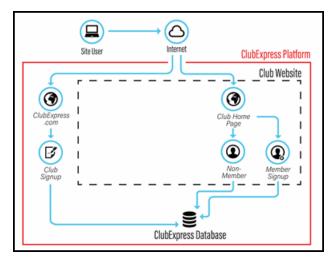


Once a club or association is signed up, ClubExpress automatically creates an initial website in the platform, with a default home page that can be extensively customized.



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.

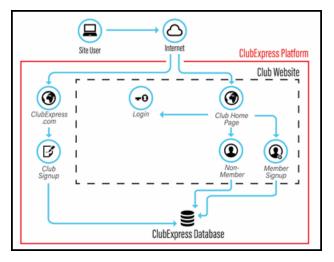
Member Signup



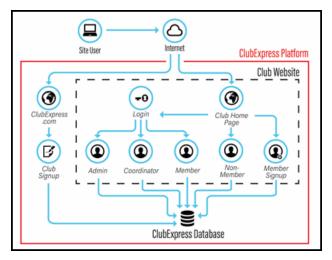
One of the features in ClubExpress is a wizard that allows new members to sign up entirely online. Members provide their basic contact information, establish a user account and password, answer clubspecific questions, select a membership type from options that you define, and pay for their membership 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.

<u>Login</u>



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.



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.

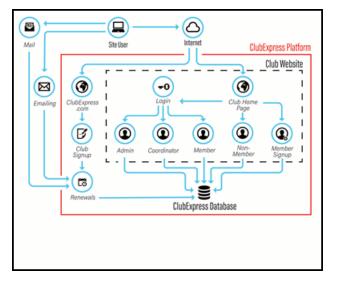
ClubExpress includes more than 22 purpose-built modules to handle many of the common activities that clubs and associations perform, including committee tracking, online discussion forums, documents, photo albums, surveys/polls, member interests, blogs, event calendar and registration, volunteering, 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.

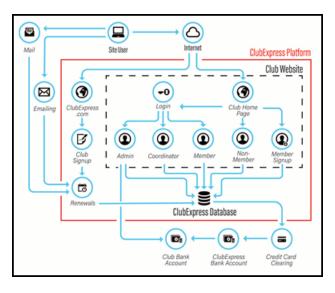
In addition, ClubExpress supports coordinators that you designate who have special administrative rights over a specific module or page, adding and updating content within that module or page only. Finally, the system recognizes a category of users called administrators who have complete control over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

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



ClubExpress collects member signup and renewal fees, event registrations, donations, and 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.

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.

(ClubExpress also supports your own merchant account for clubs and associations that want deposits to godirectly into your bank account. With this option, the back-end payment gateway must be Authorize.Net or Stripe. Note that ClubExpress will require you to have your own merchant account under some special circumstances. Please contact us if you are interested in this option.)

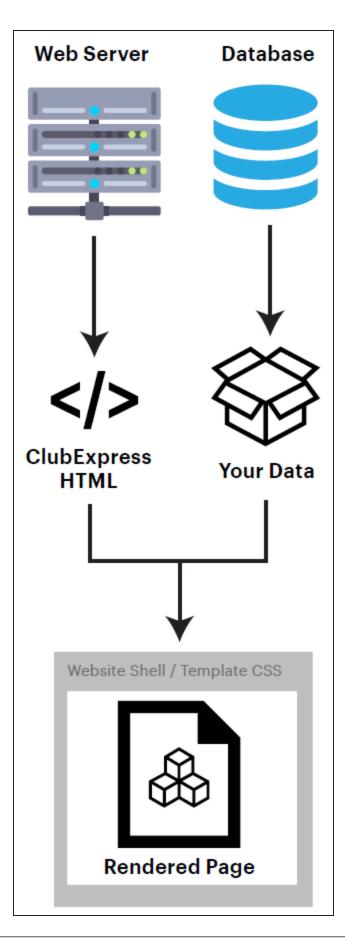
At the end of each month, we use the same automated bank transfer facility to withdraw our monthly fee from your bank account. A complete accounting of all bank deposits and withdrawals is also provided online.

Static Web Pages and Custom Pages

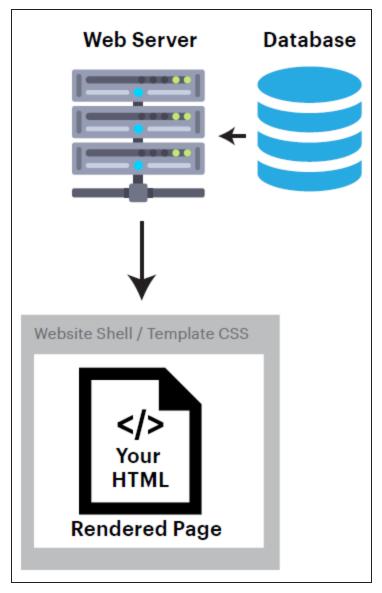
Your website is made up of a few basic components:

- administrative functions only administrators and coordinators can access (like databases and setup options),
- built-in modules that have an administrative side used to configure the module and a user side site visitors access to use the module (for example, the Event Calendar), and
- custom pages you use to deliver information to your members, like your organization's history, or resources for members of a professional association.

Information collected from your website is stored in a database that feeds information into modules and searchable databases you use on your website. For example, the People Manager provides a way for you to search through members and non-members stored in the database. Similarly, the Transaction Search feature allows you to view information for every transaction generated on your website. Built-in modules are also connected to your database and use the information to determine what should be visible to members and non-members, and how they can interact with the module. For example, when a member accesses the Event Calendar, the member only has access to events based on their member type, or any selected interests or committees of which they are a member. The user interfaces (pages) of databases and built-in modules are built by combining your data and predefined HTML and displayed in a master page. The page is displayed after the data are inserted/altered by code. The HTML for these pages cannot be altered, modified or rearranged, and additional HTML cannot be added. CSS changes are permitted (e.g. heading styles, button styles, etc.)



Custom pages and the home page do not have any direct interaction with the database. The information displayed on these pages (your HTML) is untouched and displayed as it is stored in a master page. These pages are created by you and can be modified as often as you need.



ClubExpress Users

ClubExpress defines a number of user categories.

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.com

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. 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 function, 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.)

Blog Author

In the Blogs function, each blog is authored by an individual who is usually a member of your club or association with specialized knowledge or experience. When you define a blog, you will link it to an author who will then have administrative rights over that blog, with the ability to create, edit and delete blog postings and comments (if enabled.)

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 event reminder emails to registrants, process payments, run reports and export event data.

Function, Custom Web Page and Photo Album Coordinators

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

Administrators define coordinators, by clicking the Coordinators icon on the Control Panel, or on the Custom Pages Manager or Photo Albums Manager screens.

Subgroups: For selected functions, custom web pages and photo albums, if your club has subgroups, when you define a coordinator you can pick the level that this person can manage.

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

Subgroups: 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.

Example: A chapter administrator has access to the People 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.

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 – Club tab – Setup 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 the **Control Panel** link. This is a special version of the Control Panel showing only the administrative functions available to that coordinator.

• For functions with a user and an admin component, by clicking the pencil icon in the Page Tools Widget on the right side of the screen.

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.

Administrators can also appoint and remove other administrators. This is done by clicking **Control Panel – Club tab – Setup 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 Administrators' Discussion Forum

If you activate the Discussion Forums function, administrators will see a special forum at the end of the list for administrators only. This forum allows you to post questions that are available to all administrators across all ClubExpress clubs, and to the Support team in our office. You can also participate in discussions about the best ways to use ClubExpress for your organization. You should be careful not to post club-confidential information in this forum, since it is used by many ClubExpress customers.

Super Administrators

If you are part of a multi-tier organization with individual clubs that are linked to a parent club, you can define super administrators who are members of one club but who can login to any club website within the hierarchy to help manage those sites and databases. There is no user interface for this feature; contact ClubExpress to define a super administrator.

The System Administrator

At ClubExpress, we have system 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.

Setup Check List and Free Trial

- Get started with ClubExpress by creating your account, and signing up for a trial site
- Once you sign up, get help completing the Setup Check list and moving your site into Trial Mode

Creating Your Account

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.

Example: <u>http://ShortName.clubexpress.com</u>.

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.

Grab the right information to make it easy get 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.

Sign up for a trial site

Step 1

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

In the blue bar below the header image, click the "Sign Up For a Free Trial" link. You will see the following screen:



Phone, Fax, & Emai	I		
Organization Phone Organization Fax Organization Email			
Legal Info			
Legal Name If the legal	name of your club is different from the commonly used club name, enter it here.		
Not-for-Profit C Yes C No Is this a not-for-profit organization? (seconding to section 501(c) of the IRS tax code)			
	Continue to Step 2 🔛		

This screen prompts for the basic information about your club or association, including its official name, year of founding and purpose, contact information and not-for-profit 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.

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.

	chicagocorvettes.clubexpress.com	
Example:	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 and associations that don't have their own Internet domain name, whether or not they enable "Always Secure" mode.
- For clubs and associations that have their own domain name but choose not to purchase an SSL Certificate so that their website can always be displayed using https:// ("Always Secure" mode.) In this case, when members log in, we will switch to the subdomain format using the ClubExpress SSL Certificate.

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.

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 also that the following is **never** correct:

www.chicagocorvettes.clubexpress.com

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

Step 2

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

NEW CUS	STOMER	REGISTRATION		
Enter your contact i "Continue to Step 3	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.) 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 if you need to make changes.			
Club Admir	Club Administrator Contact Information			
First Name		•		
Last Name		•		
Phone	847-255-0210	•		
Email Address	info@clubexpress.com	n	•	
User Name	•			
Password	•			
Re-enter Passwo	•			
			Return to Previous Page	Continue to Step 3 >

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.

Step 3

E.

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

NEW CUSTOMER REGISTRATION		
The following agreement governs your use of the ClubExpress platform. Please review it carefully and acknowledge your acceptance by clicking on the "I Agee" checkbox at the bottom of the page. Then click the "Complete Sign-Up" button. When you do so, your account and an "empty" website can go live. You can also go back to the prior steps if you need to make changes.		
Clubexpress Subscription Agreement		
1. License.		
Gembrook Systems, LLC ('Gembrook') grants Dan Test 3 ('Dan's Test Club') a license to use the ClubExpress website and platform ('ClubExpress') to manage club operations and services provided to your members and visitors. This license is granted subject to Dan's Test Club's acceptance of and compliance with the terms and conditions of this Agreement.		
In accepting this license, Daris Test Club agrees to outsource certain aspects of club operations to Gembrook, including basic management of the membership database and the club's website, membership signups, renewals and expirations, event registrations, donations, E-Commerce, online payment processing via credit card, the storage of documents, photos and video, security and integrity of the data stored in the system, data backups, reliable access, and support.		
You agree that this license is not exclusive (Gembrook may grant the same license to other organizations) and that it is not transferable to another organization without Gembrook's permission and the signing of a new Agreement. This license will remain in effect until terminated by either party in accordance with the Termination provisions described below. However, some provisions will survive the termination of this Agreement.		
20. Miscellaneous.		
(a) This Agreement shall be governed by the laws of the State of Illinois, excluding its conflict of law provisions. Dan's Test Club expressly agrees that jurisdiction for any claim or dispute relating to or arising out of this Agreement resides in the courts of the State of Illinois.		
(b) If a court should hold any provision of this Agreement invalid or unenforceable, such provision shall be modified to the minimal extent necessary to render it enforceable without losing its intent, or severed from this Agreement if no such modification is possible, and other provisions shall remain in full force and effect.		
(c) No party's failure or delay in exercising any right or remedy under this Agreement will operate as a waiver of such right or remedy; and no single or partial exercise by a party of any right or remedy under this Agreement will preclude any additional or further exercise of such right or remedy or the exercise of any other right.		
(d) Gembrook may transfer or assign its rights and obligations under this Agreement without permission of Daris Test Club. This Agreement shall be binding upon and shall inure to the benefit of the parties, their successors and permitted assigns.		
(e) Gembrook's employees are not authorized to make modifications to this Agreement, or to make any additional representations, commitments or warranties binding on Gembrook, except in writing signed by an authorized officer of Gembrook.		
(f) This Agreement, including related content on the ClubExpress.com website, such as the introductory and sign-up pages, and including the Terms of Use and Privacy Policy, all of which are incorporated by this reference, sets forth Gembrook's entire liability and your exclusive remedy with respect to the service, and is a complete statement of the agreement between Dan's Test Club and Gembrook.		
☐I agree on behalf of Dan's Test Club		
Return to Previous Page Complete Sign-Up 🗸		

This screen lists the subscription 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.

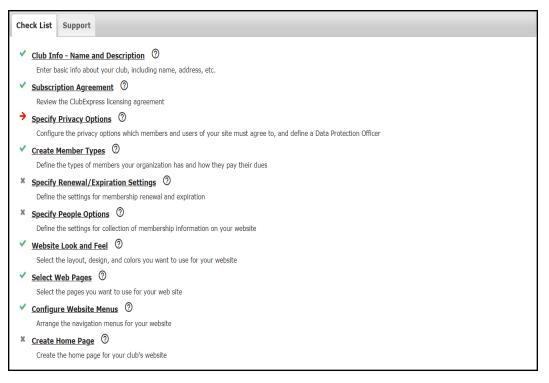
Click the **Complete Sign-Up** button to complete the sign-up process.

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. We will take you to this new website.

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.

Setup Check List and Trial Mode

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



The **SetupCheck List** tab represents options that need to be completed to initially configure your membership database and website. The **Support** tab describes various support resources, including the online help system, administrator manual, video tutorials, our online support forum and our contact information.

If you are ready to go live immediately, please contact our Customer Success Team at support@clubexpress.com. Or call 1-866-HLP-CLUB (457-2582 - outside the US, +1 847-255-0210). We will accelerate our customer verification process. In the meantime, you can get started on the Setup Check List, and set up your payment method using the link on the Setup Check List page. Once these steps are complete, you will be charged our basic \$150 Setup fee, and your website will be live.

Note that for clubs and associations outside the US, the Enter Bank Account option will not appear. Instead, please contact Support to provide us with credit card information to handle the initial setup fee, monthly hosting charges, and any other charges your club or association may incur.

The first couple of items on the Setup Check List 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.

In Setup mode, the public side of your website is disabled. If anyone enters the URL for your website, they will be taken to the login page. Only full administrators can login and they are initially taken to the Setup Check List. To add additional administrators, perform the following steps:

- 1. Select Control Panel Public tab Admin Functions panel People 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 Club tab Setup panel Administrators / Coordinators
- 5. To the list of administrators, add the member just added to the database.

Note: If every item on the Setup Check List has a green check mark, you can go into Trial mode. Call us to make this change.

Once your website is live, this Setup Check List screen is no longer shown. Instead, each item is accessed from the Control Panel and can be updated at any time.

Select Web Pages

ClubExpress includes special functions to add interactive features to your website, such as an event calendar, discussion forums, document library, committees, interests, surveys, and member directory. As part of the Setup Check List, you can initially enable the functions you want to use. The following screen will be displayed:

Setup Check List Support				
✓ <u>Club Info - Name and Description</u> ^⑦				
Enter basic info about your club, including name, address, etc.				
Subscription Agreement				
Review the ClubExpress licensing agreement				
Specify Privacy Options				
Configure the privacy options which members and users of your site must agree to, and define a Data Protection Officer				
✓ <u>Create Member Types</u> ⑦				
Define the types of members your organization has and how they pay their dues				
* Specify Renewal/Expiration Settings				
Define the settings for membership renewal and expiration				
* Specify People Options				
Define the settings for collection of membership information on your website				
✓ Website Look and Feel ⑦				
Select the layout, design, and colors you want to use for your website				
✓ <u>Select Web Pages</u> ⑦				
Select the pages you want to use for your web site				
✓ Configure Website Menus ⑦				
Arrange the navigation menus for your website				
× <u>Create Home Page</u> ⑦				
Create the home page for your club's website				

Check the functions you want to initially enable and click **Save.** You only need to check one of the boxes; other functions can be enabled and configured at any time.

Beyond the Check List

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 Setup Check List is actually just a shortcut to some of the 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 Setup Check List item through the Control Panel.)

Please review the following items on the Control Panel. While not essential, they are also things that you will ultimately want to configure:

- <u>Configure the Member Signup/Renewal Wizard</u>
- Member Interests
- Additional Member Data (if required)
- Additional Charges (if required)
- <u>Member Joining Agreement</u> (if required)
- Website Options
- Events

If your organization has chapters, etc., please contact ClubExpress to discuss the best way to set these up.

Trial Mode

If you want to sign up for ClubExpress Trial Mode, complete everything on the Setup Check List. 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;
- Configure a domain name to point to your website;
- Define email accounts based on the club's domain name(s);
- Configure discussion forums as email-based listservers;

Trial mode is limited to 8 members and 8 non-members, basically your board of directors or technology committee. It's designed to evaluate ClubExpress and decide if we're the right solution for your organization. Once you decide to go with us, you should enter your bank information and provide a PDF verifying your back account (a bank statement or canceled check). We then switch you into Active mode, charge the setup fee and you can continue building out the website and database before going live.

Set Up Your Website

- Learn about the Control Panel
- Learn how to add a <u>coordinator</u> to your site
- For clubs with chapters, districts or regions, learn about Subgroup Administrators
- Get help running ClubExpress reports
- Learn how to enable and disable built-in ClubExpress modules
- Add photo album
- · Learn how to use the Page Builder to add a custom page to your website

Control Panel and Standard Dialogs

When a club or association administrator logs into the website, the system places a special **Control Panel** option at the end of the menu (or along the top left edge of the screen, depending on the template you are using.)The Control Panel is where an administrator manages every aspect of the organization's operations. Learn more about the Control Panel and standard administrator dialogs <u>here</u>.

Coordinators

Coordinators are granted limited access to functions on the back end of your website by an administrator. These functions can include specific modules, reports and databases. Learn more about assigning functions to a coordinator <u>here</u>.

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. Learn more about setting up subgroup administrators <u>here</u>.

Reports

Your website includes hundreds of built-in reports using your organization's data. Get help running reports <u>here</u>.

Enabling Modules

ClubExpress offers more than 20 built-in modules on your website, but you do not have to use them all! Learn how to enable or disable a function <u>here</u>.

Add a Photo Album

You can create an infinite number of photo albums on your website to show past events, member collections and more. Learn how to create and manage photo albums <u>here</u>.

Content Editor

In a number of places within ClubExpress, you can use the Content Editor to created fully formatted items, such as blog posts, blast emails and event descriptions. Learn more about the Content Editor <u>here</u>.

Page Builder

The Page Builder is an editing environment for creating and editing custom pages and your home page. Learn more about the Page Builder <u>here</u> or read the <u>How To Guide</u> on building a custom page.

Logging In

Every primary and secondary member has his or her own account in ClubExpress. When a website is first displayed, the **Member Login** link allows members to login into their accounts with a unique user name and password and to access member-only features. Learn more about logging in, and managing your password and privacy; see Logging In.

Desktop Site, Mobile Site, Mobile App

Your desktop website includes features to make navigating as an administrator easy. Learn more about your desktop interface; see "Desktop Site, Mobile Site and Mobile App" on page 71.

Your website is also accessible on mobile devices and tablets, and each page on your website is mobilefriendly, even the custom pages you create! Learn more about the mobile interface of your website; see "Accessing a ClubExpress Site on a Mobile Device" on page 77.

You can also purchase a branded mobile app for your organization that members can use not only to access your website, but extra features that are specific to the mobile app. Learn more about the mobile app; see "Mobile App" on page 1180.

The Member Profile

The Member Profile is where you and your members modify personal or business information and preferences as a member. Availability of these options depends on the options configured by your club. In a business membership, for example, you will see a Company Profile link to update the contact information for the business. Learn more about the member profile; see "Member Profile" on page 1307.

Collecting and Processing Payments on Your Website

ClubExpress gives you several options for collecting payments on your website, including options to process credit card transactions. Learn more about your options; see "Collecting and Processing Payments" on page 471.

Logging In

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

Logging In

one + Login Ogin			0
Č	nt and click "Login". Your user name is not case-sensible but	l your password is. Click "Cancel" to return to the Home Page.	
User Name	•		
Password	•		
	e on this computer this option on a shared or public computer		
Login 🖌 Cancel 🗶 Forg	ot My UsernameiPassword 🔓		
rouble logging in? <u>Cick here</u> for as	sistance.		

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

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 dialog is displayed:

Enter your emainame and a ne	ername/Password all address below. If your email address is on file, your user ew password will be emailed to you. If your email address is than one member, you may also enter your first name to help	×
Email Address First Name		
	OK 🖌	-

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 will not generate a new password. If this occurs, or if your email address is no longer valid, **contact a club or association officer to have your password reset manually**.

Logging in as a Different User

If you use a shared computer, there is an option on the drop-down name panel to log in as a different user:



When you use this option, any Remember Me setting is ignored and you will see the Login screen to enter the new username and password.

Privacy Options

As an existing member, when you login the first time only, you may see a screen similar to the following:

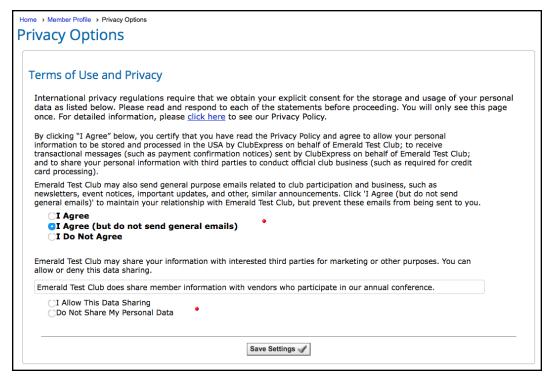
ome > Member Profile > Privacy Options Privacy Options		
	Terms of Use and Privacy	
	International privacy regulations require that we obtain your explicit consent for the storage and usage of your personal data as listed below. Please read and respond to each of the statements before proceeding. You will only see this page once. For detailed information, please <u>click here</u> to see our Privacy Policy.	
	By clicking "I Agree" below, you certify that you have read the Privacy Policy and agree to allow your personal information to be stored and processed in the USA by ClubExpress on behalf of Emerald Test Club; to receive transactional messages (such as payment confirmation notices) sent by ClubExpress on behalf of Emerald Test Club; and to share your personal information with third parties to conduct official club business (such as required for credit card processing).	
	Emerald Test Club may also send general purpose emails related to club participation and business, such as newsletters, event notices, important updates, and other, similar announcements. Click 'I Agree (but do not send general emails)' to maintain your relationship with Emerald Test Club, but prevent these emails from being sent to you.	
	○I Agree ○I Agree (but do not send general emails) ○I Do Not Agree	

You are asked to consent to the following 3 provisions:

- That your personal information will be stored and processed in the USA by ClubExpress on behalf of your club or association.
- That you will receive transactional emails (such as renewal notices or payment confirmations) sent by ClubExpress on behalf of your club or association.
- That your personal data will be shared with third parties to allow your club or association to conduct its official business (such as credit card processing.)

You must agree to this option as a condition of membership.

When you click **I Agree** or **I Agree (but do not send general emails)**, the screen will update and may show an additional question:



The next question gives you the option to accept general purposes emails concerning club or association business, such as a newsletters or event notices.

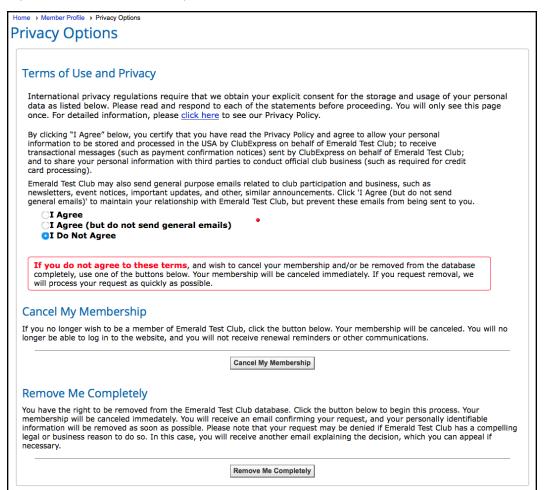
If your club or association shares personal data with third parties for marketing or fund-raising purposes, the final question allows you to opt in or out of having your personal data included in such lists. You may see some additional text from your organization explaining how and why they share such information and why it's important for your personal data to be included. If your club or association does not share personal data for this purpose, this question will not appear.

You can change these options at any time by going to the Privacy Options screen on your personal Profile.

Click Save Settings to save these changes and proceed into the member section of the website.

If you are not willing to agree to these terms, you cannot continue your membership. Your club or association has chosen ClubExpress to maintain its member records and the terms listed above are required for us to fulfill our contractual responsibilities. You have the option of simply cancelling your membership or of being removed completely from the database.

If you click I Do Not Agree, you will see the following screen:



- **Cancel My Membership** cancel your membership immediately. You will be prompted to confirm this action. You will no longer be able to log in to the website. You will not be further charged and you will not receive any more communications from the organization. Note however that if you change your mind, this action can be reversed and your membership reinstated.
- **Remove Me Completely** cancel your membership and have your personal data removed completely from the organization's database. This option conforms to international regulations and the "Right to be Forgotten". You will be prompted to confirm this action. Your membership will be canceled immediately and your "remove me" request will be submitted to the club or association for approval. Note that they have the right to decline this request but must provide a reason. You then have the right to appeal this decision with your local Data Processing Authority.
 - If the request is approved, you will be notified by email. All personally identifiable information will be deleted from the database.
 - Your club may need to maintain accurate records such as transactions, payments, event attendance, etc.
 - This information will be retained but it will also be anonymized.
 - This decision cannot be reversed. If you change your mind you will need to rejoin the organization from the beginning.

Pending Payments and Renewals

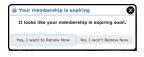
When members login, if they have a pending payment, they will see the following popup message:

You have a pending payment	nt 🔊		
It looks like you have at least one pending payment.			
Yes, I want to make a Payment	No, I won't Pay Now		

Members can click the **Yes**,... button to jump directly to the Pending Payment screen, or the **No**,... button to ignore the payment and continue with what they were doing.

This dialog encourages members to complete pending payments and will help clubs and associations collect funds sooner.

If members logging in are in the Renewal Cycle (where the first renewal notice has been sent out) they will see the following popup message:



Members can click the **Yes**,... button to jump directly to the first page of the renewal wizard, or the **No**,... button to hold off on renewing.

This dialog encourages members to renew more quickly once the initial notices go out. It will help clubs and associations accelerate their renewals.

Turning Off These Notices

These popup notices can be turned off by an administrator on the Control Panel – Website tab – Setup section – Website Options screen.

Security

Your website should always be displayed in secure mode (https://) using TLS 1.2, the most current and approved SSL standard. Users must be running a reasonably recent computer or mobile device and browser:

- Windows Users you must have Windows 7 or newer. Windows XP and Vista will not work. And in some cases, your browser may need to be manually configured; see below.
- Mac Users You must have OS X 10.9 ("Mavericks") or newer.
- Android Users Version 5.0 ("Lollipop") or newer.
- iOS Users Version 5.0 or newer

Browser Support:

- Google Chrome (version 30 or higher), Mozilla Firefox (version 27 or higher), Apple Safari (version 7 or higher), Microsoft Edge (all versions), Microsoft Internet Explorer (version 11 or higher)
- If you are still using IE 8-10, TLS 1.2 may be available but is not enabled by default. Select Tools Internet Options Advanced, then scroll to the end of the list. Uncheck the SSL, TLS 1.0 and TLS 1.1
 boxes, check the TLS 1.2 box and save.

<u>Cookies</u>

Logging in to the web site requires that your web browser allows "cookies". A cookie is a small bit of info stored on your computer by the web site which allows the site to remember you after you have logged in. This cookie contains no personal information, and cannot be used by any other web site.

The following sections explain how to enable cookies for the most common web browsers. After following these instructions, try to log in again. If you still have a problem logging in, please call ClubExpress toll-free at 1-866-HLP-CLUB (457-2582 - outside the US, +1 847-255-0210) and we will be happy to work with you to resolve it.

If you are using Internet Explorer, please follow these directions:

Logging In

- Select "Tools Internet Options" from the browser menu. A box title "Internet Options" will appear.
- Select the "Privacy" tab. If you do not see the "Privacy" tab, you are probably using a business computer configured with a restrictive security policy. Contact your network administrator to see if it is possible for you to access the site with this computer.
- Click the "Advanced" button. A box titled "Advanced Privacy Settings" will appear.
- Check the "Override automatic cookie handling" checkbox.
- Select "Accept" under "First Party Cookies".
- Select "Block" or "Prompt" under "Third Party Cookies". (This is optional, but recommended.)
- Check the "Always allow session cookies" checkbox.
- Press the "OK" button in both the "Advanced Privacy Settings" and "Internet Options" popups.

If you are using Windows 10 with the new Edge browser:

- Press the three-dot More Actions button on the top right
- Select Settings from the menu that shows up.
- Tap or click View Advanced Settings. You'll need to sll down to the bottom of the page
- Press the dropdown arrow under the Cookies field
- Select Block Only Third Party Cookies
- After picking your option, you can exit the settings panel by clicking anywhere else on the page.

If you are using Google Chrome:

- Select the Chrome menu icon Chrome menu.
- Select Settings.
- Near the bottom of the page, select Show Advanced Settings.
- In the "Privacy" section, select Content settings.
- Select Allow local data to be set (recommended).
- Select Done.

If you are using Mozilla Firefox, please follow these directions:

- Click the menu button in the top right corner and choose Options.
- Select the Privacy panel.
- Under History, set "Firefox will" to Use custom settings for history.
- Check mark Accept cookies from sites to enable Cookies.
- Choose how long cookies are allowed to be stored:
- Keep until: they expire: Each cookie will be removed when it reaches its expiration date, which is set by the site that sent the cookie.
- Keep until: I close Firefox: The cookies that are stored on your computer will be removed when Firefox is closed.
- Keep until: ask me every time: Displays an alert every time a website tries to send a cookie, and asks you whether or not you want to store it.
- Close the Options tab. Any changes you've made will automatically be saved.

If you are using Safari, please follow these directions:

- Select "Safari Preferences" from the menu. The "Preferences" settings box will appear.
- Click on the "Security" tab.

Logging In

- For the "Accept Cookies" option, select "Only from sites you navigate to" (recommended) or "Always".
- Close the "Preferences" box.

If you are using Netscape Navigator, please follow these directions:

- Select "Tools Options" from the browser menu. A box title "Options" will appear.
- Click on the "Site Controls" option.
- Check the "Allow cookies" checkbox.
- Check the "From originating site only" checkbox. (This is optional, but recommended.)
- Press the "OK" button.

If you are using the Opera browser, please follow these directions:

- Select "Tools Preferences" from the browser menu. A box title "Preferences" will appear.
- Click on the "Advanced" tab.
- Click on the "Cookies" tab.
- Check the "Allow cookies" checkbox.
- Check the "From originating site only" checkbox. (This is optional, but recommended.)
- Press the "OK" button.

Desktop Site, Mobile Site and Mobile App

Every club site has the same basic make-up and page options. Each site also dynamically adjusts for viewing on mobile devices and tablets as long as your club is not using the old website template or theme for your website look and feel.

For an additional cost, we can also build a mobile app for your club, with additional features like local meet-up options and a chat function.

Desktop Site

Below is an example of a ClubExpress Desktop Site.



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 screen:

Home > Add Me					
Add Me To Your Mailing List					
Complete the information belo	w to be added to our mailing and emailing list.				
First Name	1× •				
Last Name	•				
Email Address	•				
Country	United States of America 😋 Show All				
Address 1					
Address 2					
City					
State	< Select >				
Zip Code					
Timezone	< Select > Show All				
Phone					
Cell Phone					
Fax					
Title					
Organization					
How did you hear about us?	Select				
Category	Category Which categories best describe you.				
	(Check all that apply)				
	2008 Peach State 1/2 Marathon				
	Guest				
	Member Referral				
	Save 🖋 Cancel 🗶				

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.

Social Networking Links

If your club or association has a presence on social networking services such as Facebook, Twitter, and LinkedIn, you can configure links to these pages. These links will appear on a special panel towards the top of your website:



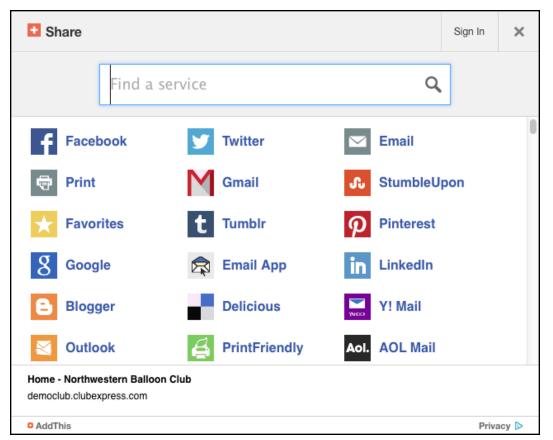
In the above example, the first link is to the club's Facebook page.

You can also enable a *Sharing* link (the second one above) to allow members and non-members to share interesting website content on their personal social networking pages or feeds. Clicking this link displays a screen similar to the following:



This panel allows members to share content on Facebook, Twitter, Pinterest, or LinkedIn. It will also show the count of how many times the page has already been shared.

Clicking the orange "+" sign displays additional links, including a *More...* option that leads to almost 300 other services:



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 appearances (for example, as a narrow strip across the top of the page, above the page header.)

For clubs and associations using the new look and feel tools (added in version 6.0), the login panel will look like this:



	0 6	Martin Smith 🔽
	Martin Smith info@clubexp 847-255-0210	ress.com
Profile		
🔁 Renew		
S Payment	Due	
Logout		

- 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 their name and a down-pointing arrow. Hovering over the name and arrow displays the drop-down menu shown above, with links to the Profile screen, the member's Bio screen, a link to login as a different user, and a Logout link.
- Members who log in and whose membership is up for renewal will see the red icon shown above on the left. This is a shortcut to the renewal page, allowing members to renew their memberships with a couple of mouse clicks. A Renew link will also appear in the drop-down menu.
- If your club has enabled Trial memberships, trial members will see the same link to upgrade their memberships.
- Members who have pending payments will see the second red icon shown above (\$ symbol.) This is a shortcut to the Payments screen, allowing members to pay online or print an invoice to mail a check. A Payment Due link will also appear in the drop-down menu.
- 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.
- Members who log in and whose membership is up for renewal will see a red 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 blue 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.

Page Header

Every page within an organization's web site 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 125-130 pixels in height so that it doesn't dominate the page. ClubExpress includes a custom designer to build this header.

Menu

Every page includes a series of links to jump to other portions of your organization's web site. This is the navigation menu and it 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. ClubExpress supports different menus for public users and members after they have logged in, and even different menus based on your member type. ClubExpress also supports sub-menus; an arrow will indicate that there are additional choices below that item.

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.

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.)

Page Tools Widget

Floating on the right side of the website is the Page Tools Widget

¹The 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.



This widget appears on every page and may have between four and six icons. The arrow only will initially be visible. Hovering over it slides the full panel out and moving away slides it back in again.



Users with admin rights over a page or function may see a "pencil" icon at the end of the list, allowing them to jump to the Admin side of the function or to edit the content of the page.

With the example on the right, the widget will retain its position for up to 7 days if you drag it off to the side of the browser window. Note however that this is done via a browser cookie so the saved position may be different on the public side of the website vs. after you have logged in as a member (because the domain names are different.) Just move it a second time and you'll be all set.

Content Box(es)

Some ClubExpress templates include additional areas which your club or association is using to list sponsors or upcoming events or other content which should appear on every page.

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 web site (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 that brings up the *clubexpress.com* web site in a separate window.

Skip Navigation

For disabled users who access the website via a screen reader, ClubExpress includes a Skip Navigation link at the top of the page, to jump immediately to the page content. This link is normally invisible to users without a screen reader.

Internationalization

ClubExpress provides support for international members of US-based clubs.

- Dates will be shown in the local format. The US uses mm/dd/yyyy but other countries use dd/mm/yyyy or yyyy.mm.dd.
- Numbers will be shown in the local format. The US and other countries use a comma for the thousands separator and a period for the decimal separator but some countries, especially in Europe, reverse these.

ClubExpress also provides extensive support for clubs and associations outside the United States.

- Payments will be made in your local currency, using both credit cards and PayPal. Look for the currency symbol to confirm this. For example, in Australia, you could use "\$AUS", "AUS\$", or "AUD".
- Local time zone support ensures that transactions, payments, event registrations, and other information will be shown at the correct local date and time.
- Units of measurement are shown in the metric system everywhere in the world except the US!

Accessing a ClubExpress Site on a Mobile Device

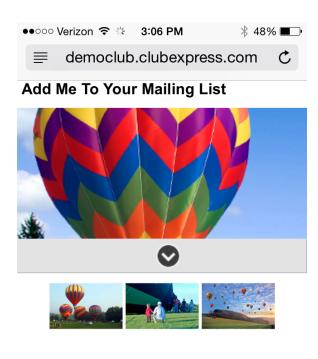
ClubExpress websites dynamically adjust themselves for mobile devices such as smartphones and tablets.

When you come to a ClubExpress website using a smartphone for the first time, you will see a screen similar to the following:

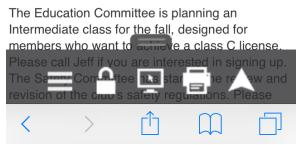
•0000	Verizo	n 🗢 🔆	3:06 PM		∦ 48	% 🔳 י
≡	der	noclub	.clubex	press.	com	Ç
	New	Mobile	e Webs	ite		\otimes
and pho	l wor ones.	k bette	s been r on tab are som site:	olets an	d cell	
	he so	reen. I	olbar at t includ to the	les:	ttom	of
		Login	Link.			
	1	Access	s to you	r profile	e.	
	ř		to swite e (and)
	ų	-	oping ca oriate).	rt icon	(if	
C	q		ch tool oriate).	icon (if		
T It	8	suppor	t link (n rt from ewhat l	mobile	devic	
F	•	the cu	to retur rrent pa	age.	-	of
		NAV CAA	la diffe 	rent ho	me	
<		>				

This screen explains how the website works, including the toolbar options at the bottom. Scroll down and click **OK** to hide this screen and proceed to the website. You will only see it once.

On a smartphone, the main website will look similar to the following:



Committee News



At the top is a standard link for non-members to add themselves to the club's mailing list.

Below that is the page header. You can define a special header just for the mobile version of the website. If you don't do this, you will see a portion of the club's standard page header.

Below that is a "common content box". This panel appears on every page but it is initially collapsed. Tap the down-arrow icon to expand it. The system allows you to define two of these content boxes, one at the top below the page header and a second just above the footer.

Next you will find the home page. As with the page header, ClubExpress allows you to define a special home page just for the mobile version of the website. If you don't do this, the standard home page will be displayed but it may not be entirely suitable for use on a mobile device.

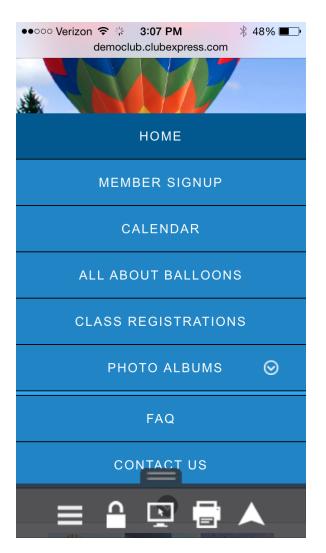
At the bottom of the screen, floating above the content is a standard toolbar with the following options:

lcon	Description
(Menu)	Tapping this icon displays the website menu.
(Login)	Tapping this icon allows you to login to the website.
(Profile)	When you are logged in, the Login icon changes to this one. Tapping it displays your indi- vidual Profile menu.
(Full site)	Tapping this icon allows you to switch to the full website. While this may not make a lot of sense on a smartphone, it's certainly feasible on a tablet, many of which have a similar resolution to a desktop or laptop computer. If you switch to the full site, this toolbar is still visible and this icon changes to a different one that allows you to toggle back to the mobile site.
(Print)	Tapping this icon allows you to print the current screen on any printer to which your mobile device is connected (for example, through Apple AirPrint.) Note that printing support is quite spotty on mobile devices.
(То Тор)	Tap this icon to jump back to the top of the screen.
	Mobile Site Icons

Note that the overall look and feel for the mobile website is the same for all clubs and associations. It does not depend on the Website Look and Feel that you have configured for the main website. But you can customize the general appearance of the mobile site by using a special page header.

Menus

When you tap the **Menu** icon, you will see a popup menu similar to the following:



Tap a menu choice or tap the icon again to hide the menu. For submenus on a smartphone, tap the down arrow and the submenu will appear inline with the main menu. (On tablets, the submenu will appear to the side.)

As with the main site, the menu will different for the public vs. members, and may even be different for different member types.

Logging in

When you tap the **Login** icon, you will see a screen similar to the following:

●●○○○ Verizon 중 ﷺ 3:09 PM
Login
Please enter your user name and password and click "Login". Your user name is not case- sensitive but your password is. Click "Cancel" to return to the Home Page.
User Name
Password •
O Remember me on this computer
Login 🖌
Cancel 🗙
Forgot My Username/Pas

Enter your username and password then tap the **Login** button to complete the login process. Or tap **Cancel** to cancel out and return to the previous screen. As with the main website, you can tap the **Remember me** option to have the system remember you on this device, so that you don't need to explicitly login each time. But you should never select this option on a device that you share with other people (such as a tablet at your local public library.)

Member Profile

Once you have logged in, tap the **Profile** icon to display the following screen:

●●○○○ Ve	rizon 🗢 🔆	3:10 PM	*	47% 🔳
	democlu	ub.clubex	press.co	om C
	info	rtin Smit @clube> -255-021	(press.c	×
	Home			
2	Profile			
6	Paymer	nt Due		
0	Logout			license. ning up.
revision contact	of the cho's and if	safety regional with the safety regional safet	s im	lease tant
<	>	Ê	\square	

This popup menu allows you to jump to the home page, view your **Profile** screen or **Logout**. If you currently owe money, you will also see a **Payment Due** option and if your club or association is using the E-Commerce Storefront and you have placed items in your shopping cart, you will see a **Shopping Cart** option as well.

Other Screen Changes

Changes have been made to various ClubExpress modules and special functions to better accommodate mobile devices.

Example: Here is the Event Calendar:



The icons at the top allow you to switch between views and also to navigate forward and backward within the calendar. The default mobile view is **List** but you can switch to the grid view if you want.

A small number of screens are best viewed in landscape mode rather that portrait (for example, the Document Library screen and the Payment page.) For these screens, if you are portrait mode, you will see a message asking you to rotate your device into landscape mode before the page content will appear.

Other Changes

For administrators and coordinators, all module and club level administration screens are disabled when you're on a mobile device using the mobile layout. You cannot switch into the admin side of a module and you cannot display the Control Panel.

Note however that you can switch from the mobile site over to the full site, where admin screens *are* available. This may make sense on a tablet but we don't recommend it on a smartphone.

ClubExpress now allows you to create special mobile versions of your Custom Web Pages, the static pages that make up much of the website. We strongly encourage you to do this, in order to make your website more accessible to people using a mobile device.

Note: This mobile functionality is not available if your club or association is still using our old template/theme system for controlling the look and feel of your website. We strongly recommend that you convert to the new "Website Look and Feel" architecture to take advantage of these new features.

The Mobile App

ClubExpress also has a mobile app for your club or association. In addition to the full website, the mobile app also includes special functions for members, based around "channels", which are groups of members defined in various ways (for example, interest groups, committees, chapters, member types, opt-in, etc.) Mobile channel features include a live chat function, meets, events, a member directory, and polls.

The app needs to be built and deployed to the Apple Store and Google Play before members can download it. Once members have logged into the app, new options appear on their Profile screen to update app preferences and channel memberships. Some channel functions such as Chat and Meets can also be accessed from the website. See "Mobile App" on page 1180.

Control Panel, Standard Dialogs and Functions

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

	ership - Active: 13	Pending: 2 Expir	ed: 1		
ople	Website	Money	Club	Communications Support	
					\rm Show Notices 🎤 Configure
dmin l	Functions				
Peo	ple Manager			鸄 People Lookup	🏂 User Data Removal Requests
🔓 Sub	group Member	Manager		🔱 New Member Signup	Reports
/ebsite	e Modules (Vi	sibility: P=Public	, M=Member	s, NA=Not Active)	⊙ Switch to View Mode
				🌆 Committees (PM)	E Standard Member Directory (PM)
	ck in Desk (M)			and a	
Che	ck in Desk (M) rests (PM)			19 Volunteering (PM)	
Che				Volunteering (PM)	
Che Inte				Volunteering (PM)	Additional Member Data
Che Inter etup Men	rests (PM)	5			Section Additional Member Data

The Control Panel is where an administrator manages every aspect of the organization's operations. It has six sections, five of them representing the major categories of "things" that clubs and associations need to manage:

- People, including members and non-members;
- Website, including areas for the public and members-only;
- Money, including transactions, payments and credits;
- **Club**, including basic club information, administrators, titles, etc. This section also allows you configure chapters, districts and regions if they apply to your organization. Note that this keyword will be the same as the keyword you specified for your organization ("Association", "Society", etc.)
- Communications, including emailings to members and non-members.
- Support, listing the support resources available to club and association administrators.

(For ClubExpress customers that are Aging-in-Place Villages, a **Services** section appears between People and Website, It includes much of the special functionality added for Villages that are part of the Village-to-Village Network.)

Each of the first five sections has the following three panels:

- Admin Functions, showing the databases and reports for that category;
- Website Modules, listing the enabled modules for that category
- **Setup**, listing the various configuration functions that are used once when your website/database is first configured;

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

Websites are built from a combination of **built-in functions, custom web pages and photo albums** (as well as the home page, and the built-in admin screens to manage a member's personal profile and the Control Panel.) Individual functions can be enabled or disabled; if a function 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.

Functions have a "user" side, available to members and sometimes also to non-members. Most functions also have an "admin" side to configure that function. This admin side is accessible in two ways:

When the Website Modules panel is in Edit Mode (where the panel says "Switch to View Mode"), and

Via the pencil icon in the Page Tools Widget, floating on the right side of the website and accessible to club administrators and that function's coordinators only from any page in the function.

Show Notices



Select **Show Notices** to show recent ClubExpress notices.

rent Membership - Active: 13 Pending: 2 Ex	pired: 1	
eople Website Money	Club Communications St	upport
		🕕 Hide Notices 🎤 Configure
Notices From ClubExpress		
No new notices at this time. You can re	ad older notices by clicking here	
Admin Functions		
🍰 People Manager	鸄 People Lookup	🥵 User Data Removal Requests
🎎 Subgroup Member Manager	New Member Signup	Reports
Website Modules (Visibility: P=Pub	lic, M=Members, NA=Not Active)	Switch to View Mode
Deck In Desk (M)	🧟 Committees (PM)	Standard Member Directory (PM)
Interests (PM)	Volunteering (PM)	
Setup	Renewal/Expiration Set	tings Additional Member Data
Setup & Member Types	See Renewal/Expiration Set	

New notices will appear in the panel. If there are no new notices, select the available link to read old notices.

Select Hide Notices to collapse the panel.

Note: Notices are only visible to administrators; coordinators will not see notices.

Configure



Select Configure to show the Configure pop-up dialog.

Configure	ଡଚ୍ଚତ
Select Function Additional Charges Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation	
Close X	

Use this option to assign coordinators, enable and disable website modules, and configure active module settings including its title, menu text, visibility, and whether it's active or not..

Subgroups: 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.

View Mode

O Switch to View Mode

The default view for the modules listed in the Website Modules panel is Edit Mode. In Edit Mode, selecting the module link will take you to the admin side of the module. Select Switch to View Mode to switch to View Mode. In View Mode, selecting the module link will take you to the user side of the module.

Note: Some modules do not have an admin side and will only display in the Website Modules panel in View Mode, for example Chat and Meets (used with the Mobile App). Once you have enabled those modules, be sure to select Switch to View Mode in order to access the item.

Control Panel Coordinators

Each function can have one or more coordinators who have the right to modify the contents of that function only. When viewing the main screen of a function, coordinators see a pencil icon in the Page Tools Widget, on the right side of the screen.

Configure

Select the Configure icon to view the Configure pop-up dialog.

Select Function Additional Charges Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Manager People Manager People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation Peopter Mailing Labels (ILSA Lot)	Configure		888
Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Lookup People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation People Mailing Labels (INA Lat	Select Function		
Close 🗙	Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Lookup People Manager People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation	Select a function from the list to begin	
		Close X	

On the left side of the pop-up dialog you will see a list of admin functions, website modules and reports for that category. Select the **function**, **module or report** to which you want to add a coordinator. Once you select the item, the right side of the pop-up dialog will display a *Coordinators tab*. To add a coordinator, click the **Add Coordinator** button and select the member.



Note: Some admin functions or website modules may allow you to select a subgroup in addition to a coordinator. For more information on Subgroup Administrators, see "Subgroup Administrators" on the next page.

To remove a coordinator, click the **Remove** link by the coordinator's name.

Any active member can be a coordinator and that person will have administrative access to that function only.

Members with coordinator rights (partial admins) will also see a **Control Panel** link at the bottom of the menu. Clicking it displays only selected options. If the member has no rights to a specific panel or any of the options in a section, that panel or section will not be shown.

Note: To assign multiple functions to a coordinator at one time, see "Administrators/Coordinators" on page 503.

Subgroup Administrators

Subgroups: 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 will see the same screens but with only selected functions that relate to their chapter, district or region.

Function	Description
People Man- ager	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 mem- ber is administering.
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 Pay- ments	Process check payments that arrive in the mail, or cash received at an event. Only pay- ments for subgroup members and non-members will be shown.
Open Cred-	View, add and edit credits which have not been fully allocated

Administrative Functions

Function	Description
its	
Bank Account Activity	View club-level transactions initiated by ClubExpress against your bank accounts and display reports to reconcile these transactions against bank statements.

Administrative Functions

Custom Pages

Function	Description	
Add Custom Page	Add a new custom web page.	
Administrative Functions		

Built-in Functions

Function	Description
Committees	Manage committees assigned to the subgroup(s) that this member is administering.
Documents	Manage document folders and the documents within them, for the subgroup(s) that this member is administering.
Discussion For- ums	Manage forums for the subgroup(s) that this member is administering.
Event Cal- endar	Manage events for the subgroup(s) that this member is administering.

Built-in Functions

Reports

Administrators: Receiving a 500 error when running PDF reports and using the Adobe Acrobat browser extension? Learn how to adjust your browser's extension settings and get back to running reports! See Adobe Acrobat Browser Extension Error

Reports are organized into categories. Selecting a report displays a series of dialogs that allow you to select an individual report and then specify report sorting, filtering, formatting and output options.

To run a report, select the **Reports** link in the Admin Functions panel.

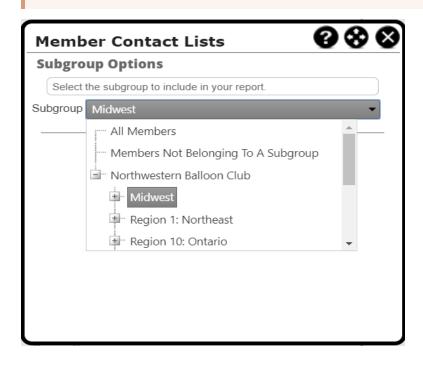
In the *Reports* pop-up dialog, select the **report group** you want to browse. A new pop-up dialog will appear containing all the reports in that group.

Member Contact Lists	8
Select Report	
Many reports have two or more variations. Select the one which meets your needs.	
Membership Directory with Spouse	
Contact info, sorted by name Emergency Contact Info Contact info, sorted by member number Detailed contact info, sorted by name Detailed contact info, sorted by zip Membership Directory with Birthdays Membership Directory Detailed contact info, sorted by member number	
Cancel 🗙 Next 🕨	

Subgroup Filtering

For many reports, the next screen allows you to filter the report based on a subgroup.

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:



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:

Member Contact Lists	\$
Member Options	
Check the boxes to select the types of members to include in your report.	
 Active Members New Members with Payment Pending 	
Expired Members Other Inactive Members	
Trial Members Prospective Members	
Member Type All Member Types Member Levels All Members Include only members without email addresses Cancel Next	

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:



This screen allows you to include all records in the report or to filter by a pre-defined date range (current or previous year, month or week, yesterday or today) or by a user-specified range of dates.

Output Options

The final screen before a report is printed is shown below.

Members	hip Info 🛛 😯 😵	8
Output O	ptions	
is, modify it to	or your report. You may accept the suggested title as suit your needs, or replace it completely. Click the button to create your report.	
Report Title	Members By Join Date	
Output Format	 Adobe Acrobat (PDF) HTML CSV (unformatted) MS Word (formatted) MS Excel (formatted) 	
Paper Size	 USA (Letter) International (A4) 	
	Cancel 🗶 Run Report 🛷	_

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)

International users may select A4 as the output paper size for reports, as well as for mailing labels.

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.

Standard Dialogs

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

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:



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 a PC keyboard to quickly move the highlighted choice up or down. On a Mac, use **[Command-Control-Up]** and **[Command-Control-Down**].

Clicking the Alpha button will sort in alphabetical order. Click the button once for ascending order, and again for descending order.

On a PC, the display sequencer also supports **[Shift-click]** to select a contiguous block of items, and **[Ctrl-click]** to select multiple discrete items. On a Mac, **[Shift-click]** is the same to select a contiguous block but use **[Command-Option-click]** to select multiple discrete items.

When you move the selected items up or down, they are all moved at once. Click the **Alpha** button to reorder the whole list alphabetically in one fell swoop!

Member and Non-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:

Select Coord	inator	8
button to select all r restrict the list, you a first name. You m	I last name in the text box above a members whose last names match may add a comma after the last na ay also search by first name alone n the field, and then entering a full o	your entry. To further me and enter all or part of by entering a comma as
Search For	smith	Search 🛷
Search Results	Smith, Bob(9558) Smith, Bruce(2756) Smith, Codi(2067) Smith, Martin(1015) Smith, Mary(1953) Smith Jr, Bob(2469)	•
	Select Cancel 🗙]

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.

Subgroups: For multi-tier clubs and associations (with chapters, etc.), the member selector may include a member's chapter name, to help distinguish members with the same name in different chapters.

A similar selector is used in places where you need to select a non-member from the Non-member Database.

Subgroup (Level) Selector

Subgroups: For clubs and associations with subgroups a level selector is displayed in various places in the system.

Example: When you define coordinators for a module that supports subgroups, you can specify to which subgroup the coordinator has rights.

Member Contact Lists 0000
Member Options
Check the boxes to select the types of members to include in your report.
Active Members
Expired Members Other Inactive Members
Trial Members Prospective Members
Member Type All Member Types Member Levels All Members Include only members without email addresses
Cancel 🗶 Next 🕨

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.

Enabling and Disabling a Website Module

When you sign in as an administrator, select the Control Panel link to navigate to the Control Panel and manage the website modules on your site.



Select the Configure icon to view the Configure pop-up dialog.

Configure		0 & 0
Select Function		
Additional Charges Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Lookup People Manager People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation Peopler Lookup	Select a function from the list to begin	
	Close 🗙	

On the left side of the pop-up dialog you will see a list of admin functions, website modules and reports for that category.

Select the module to enable. Once you select the module, the right side of the pop-up dialog will display both a *Configure Tab* and a *Coordinators tab*.

Configure			0
Select Function Additional Charges Additional Member Data Check In Desk Committees Interests Member Attachments Member Types New Member Signup People Lookup People Lookup People Manager People Options Privacy Options Renewal/Expiration Settings Standard Member Directory Subgroup Member Manager User Data Removal Requests Volunteering Reports - Achievement Reports Reports - Mailing Labels (Internation Peoperts - Mailing Labels (ILSA Late)	Functio Me SEO / Brow	Coordinators Status Active Al Name Committees In Name Committees In Name Committees In Text Committees Visibility Any Web Site Visitor Ink Text Save Cancel Cancel	
	(Close 🗶	

Status

- Active the module is active, visible in the Control Panel and available for everyone to use (depending on your Visibility settings).
- **Inactive** the module has been enabled, is visible in the Control Panel and can be configured, but it's not currently active.
- Disabled/Hidden the module is completely turned off and will not display on the Control Panel.

Function Name, Menu Text, SEO/Browser Title - 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). Function Name represents the name you want to use for the function within ClubExpress. **Menu Text** is the name for the module when it appears on any menu on your website (see "Menus" on page 351). The **SEO/Browser Title** allows you to control the title of the page when it's shown in your browser. Customizing this value can improve your visibility in search engines.

Visibility controls who can see this function: all visitors to the website, or members only after they have logged in. Some functions are more logical to place on the public side of a website, while others are

generally made available only to members. Selecting Any Web Site Visitor allows both members and nonmembers to view the module.

Note: Some modules do not have an admin side and will only display in the Website Modules panel in View Mode, for example Chat and Meets (used with the Mobile App). Once you have enabled those modules, be sure to select Switch to View Mode in order to access the item.

Note: If you select Any Web Site Visitor for a module but only place the module on your Member Menu, a non-member might still be able to access the module with a direct link they might get from someone who is a member of your organization.

Quick Links allow you to define a simplified URL which points directly to an event or a special page on the website. 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. Specify the **name** of the Quick Link. The actual link will be your website URL, followed by a forward slash, followed by the Quick Link text. See "Quick Links" on page 365.

Example: www.chicagocycles.org/events

Select **Save** to save your changes, or **Cancel** to close the window without saving. Select **Close** to close the Configure pop-up dialog.

Disabling a Function

If you wish to take a function **off-line** so that you can work on it, select the **Configure** icon then select the **Inactive** and select **Save**. The function is still enabled but will no longer be visible on menus.

If you no longer wish to include the function in your website, select the **Configure** icon then select the **Disabled/Hidden** and select **Save**. The window will be closed and the function will no longer be enabled or visible in the Control Panel

Content Editor

In a number of places within ClubExpress, you can use the Content Editor to create fully formatted items, such as blog posts, blast emails and event descriptions.

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 font, size, and color;
- Specify the bold, italic and underline attributes;
- Select background color;
- Indent and outdent;
- Specify numbered or bulleted lists;
- Insert horizontal lines;
- · Insert and resize images;
- · Insert links to external websites and email;
- Use your computer's clipboard, including cut, copy and paste;
- Undo and redo changes;
- Insert special characters;
- · Insert "smileys", small graphics designed to display an emotion;
- Spellcheck your text;
- View your page in design mode, HTML mode or Preview mode;
- Zoom the text for finer control;
- · Print the text being edited;
- Specify left, center, right or fully justified text;
- · Insert and specify the properties of tables and individual cells;
- Insert group boxes;
- · 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;
- 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.

Note: When you create or edit content in the editor, you will see a session timeout warning after 55 minutes. Press the appropriate button to extend your session for another 55 minutes. If you do not press the button within 5 minutes, your session will expire and all changes will be lost. In general, we

Content Editor

ecommend saving your content on a regular basis. Saving and then editing again every 20-30 minutes s a small price to pay when the alternative might be to lose an hour or more of work.

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User Interface and the Toolbar

When you view the Content Editor on the Profile – Membership Directory screen, or when you create or edit a formatted description for an event, you will see a window similar to the one below:

Editing Ballooning Resources	0 & 8
🔏 🕼 🕙 - @ - Styles - B I 坦 A - 三三三 注 注 律 😣 🗃 🖾 🚔 🔏	Insert Page Row 🛛 🕄
	*
	100% Width
	50/50
	60/40
	40/60
	75/25
	25/75
	33/33/33
	25/25/50
	50/25/25
	25/50/25
	25/25/25/25
Save 🗸 Cancel 🗶	

At the top of the screen is a toolbar of buttons, with similar functions grouped logically. 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.

Click the last icon on this toolbar to display a second toolbar with more advanced actions.

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.

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.

Working with Page Rows

On the right is a panel that allows you to insert specially formatted page rows. Page rows allow content you create to adapt to all screen sizes (tablets, mobile phones, etc.). Different combinations of columns and widths are available, as well as options to float images to the left or right of text.

Click an option to insert a row with that format into the edit panel. The panel is shown with two boxes of dashed lines; these boxes will not be displayed when you save your page. Your content is entered within the inner box; the outer box represents 10px of padding on all sides of your content.

A blank line is also entered above and below the new panel, allowing you to position the cursor so that you can add more rows or enter content that does not need to be in a row.

Editing Ballooning Resources	0
↓ ↓ </th <th>Insert Page Row</th>	Insert Page Row
	100% Width
	50/50
	60/40
	40/60
	75/25
	25/75
	33/33/33
	25/25/50
Com- 🖓	50/25/25
Words: 0 Characters: 0 DIV > DIV > DIV > RemoveElement	25/50/25
Save Cancel X	

The following screen shot shows a custom page with multiple rows:

The current page row is highlighted. When more than one row has been added to the page, new icons appear on the side panel to move the current row up or down, or to delete it.

You should not try to delete the outer and inner boxes, since they control the edit area responsiveness. If you don't want a specific row, cut and paste its content to a different part of the page and then click the Delete icon to remove that row.

When you edit an existing custom page that has not been updated to use this model, we will place the page's content within a "1 box 100% Width" container. This will not affect the original content of the page.

In general, row layouts cannot be changed (unless you're a very experienced website developer); once you have picked the set of boxes, you are stuck with them for that row.

Rows can be inserted anywhere (for example, into other rows) to form more complex layouts.

We strongly recommend that you use these page rows for all content on the page. They will ensure that your content is properly formatted for, and responsive to, mobile devices.

Working with Widgets

The side panel has a second tab that allows you to insert predefined widgets into your page. Widgets are described in more detail in a special section below.

Insert Widget 🛛 🛞
₩ *
🗔 Insert Poll
Insert Slideshow
Insert Upcoming Events
lnsert News Itom / Article
f Insert Facebook Feed
💟 Insert Twitter Feed
🙈 Insert Weather
B Insert Accordion
A Insert New/Renew Members

The side panel can be hidden at any time to allow greater width in the editor and shown to access its special functions. Just click this icon on the right of the top-toolbar.

Using the Editor

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.

The editor window can be repositioned and dragged wider/longer and the editor will resize automatically to fit within the new window. You can also click the **Maximize** icon in the top-right corner of the window to maximize it to the full size of your active browser view-pane.

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.

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

Many toolbar buttons use the same icon and perform the same function as a typical word processor such as MS Word.

Top Row

Icon	Description
*	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.
14	Paste text from your computer's clipboard at the current cursor position. The shortcut key [<i>Ctrl-V</i>] performs the same function. Note that the system will block attempts to paste an image copied to the clipboard because the resulting HTML would be in a binary format that many browsers cannot handle. Images should instead be uploaded to the website before they are inserted into your content using one of the other toolbar options.
B	Paste text from Microsoft Word, stripping out the overly complex formatting that Word places there. Note that if you try to paste Word content using one of the other paste options (or the keyboard shortcut), the system will also strip out most Word-specific formatting because it can wreak havoc on a well-formatted HTML page.
	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.
9.	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.

Icon	Description
(° •	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 allow- ing you to paint the rows and columns in the table and to specify other options.
2	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.
2	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.
	Insert an image from your graphics library and other club-level photos (for example, logos).
["""	Insert a Group Box (FieldSet). This is a special HTML element that allows you to collect and organize other elements.
Ω.	Insert a Special Symbol. Click the small drop-down arrow to display a popup window of spe- cial characters. Click a character to insert it in your text.
m	Insert an audio, video or Flash image, or a reference to a YouTube or Vimeo video.
•	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

lcon	Description	
	text.	
*	Create and insert a widget.	
Top Row Icons		

Second Row

Icon	Description
Normal	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. You can add your own styles to this list, to maintain consistency in the look and feel of your pages. This is done using the View/Edit Custom CSS option on the Appearance screen.
Arial 🔹	Click the drop-down arrow to see a list of standard fonts and custom fonts that you have added to your website. The change applies to the current line or block.
Siz€▼	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.
В	Click to bold the current block of text or to start bolding from the cursor position. <i>[Ctrl-B]</i> also works.
Ι	Click to <i>italicize</i> the current block of text or to start italicizing from the cursor pos- ition. <i>[Ctrl-I]</i> also works.
Ū	Click to underline the current block of text or to start underlining from the cursor. <i>[Ctrl-U]</i> also works.
A/a	Click to convert the highlighted text to lower case.
⁴ A	Click to convert the highlighted text to UPPER case
× ²	Click to convert the highlighted text to ^{superscript}
×2	Click to convert the highlighted text to subscript
A •	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.
گ∌ ◄	Click to select the background color. The same color picker described above is displayed.
盗	Click to display a popup Style Builder dialog. This dialog allows you to specify com- plex style information for the selected text.

Icon	Description	
	Click to begin a numbered list of items.	
:=	Click to begin a bulleted list of items.	
4 <u></u>	Click to insert a horizontal rule across the page.	
ABC	Spellcheck your text. A popup dialog will appear to highlight misspellings and other errors. See the section below for more details. The shortcut key [F7] performs the same function.	
科	Find text on the current page or find and replace. The shortcut key [<i>Ctrl-F</i>] performs the same function.	
Second Row Icons		

Options at the Bottom

Icon	Description
🦯 Design	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.
<>> HTML	HTML View. This view allows you to see and edit the underlying HTML source code.
C Preview	Preview. This view allows you to see the page as it will generally look when it's being viewed.
9	Full Screen Mode. This mode makes the edit box slightly larger by hiding all non-editor controls.
Zoom 🔹	Zoom. Click the drop-down arrow to zoom your text in to see more detail or out to see more of the page.
2	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 doc- ument.

Bottom Row Options

Summary of Shortcut Keys

Shortcut	Description
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

Shortcut	Description	
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	
Keyboard Shortcuts		

Hyperlinks

Clicking the Insert Link toolbar button displays the following popup window:

Build a Link
The "Link Type and Address" panel allows you to create various types of links: to a page within your web site; to an external web page; to an email address; or to an anchor within the current web page. First, select a link type. One or two additonal choices will appear based on the selection you have made. Make your selection, then go to the "Link Properties" panel to specify the appearance of the link. A link may be displayed as text or an image. Enter the link text, or select an image, as appropriate. For web page links, you can specify whether the destination will appear in a new window or in the current window.
Link Type and Address
Link Type Built-in Module ≑
Built-in Module Forums ÷
Link Properties
Link Display Type 💿 Text 💿 Button 💿 Image
Link Text Forums
Target Window 💿 Same Window 💿 New Window
Save 🖋 Cancel 🗶

The link builder supports 16 types of links:

- 1. **Built-in Module** Link directly to any of the built-in modules (or extra cost modules, if enabled). The next field is a drop-down list of available modules.
- 2. **Custom Page** Link to any custom pages you have created. The next field is a drop-down list of custom pages.
- 3. **Photo Album** Link to a photo album. The next field is a drop-down list of categories; once you select a category, you can select a photo album within that category.
- 4. **Future Event** Link to an event. 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** –Link to a document stored in your documents module. The next field is a drop-down list of categories; once you select a category, you can select a document within that category.
- 6. Donation Link to any donation fund. The next field is a drop-down list of available funds.
- 7. Survey Link to any survey. The next field is a drop-down 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 The next field will prompt for the Email Address.
- 10. **Anchor** 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** Link to any blog. The next field is a drop-down list of available blogs.
- 13. **Quick Link** Link to external sites and some internal functions using a shortened url. To add external sites to the list of available links, see "Quick Links" on page 365
- 14. **Volunteering Opportunity** Link to any volunteering opportunity. The next field is a drop-down list of available opportunities.
- 15. **Resource Scheduler** Link to any resource available for reservations. The next field is a drop-down list of available resources.
- 16. Ad Hoc Form Link to any ad hoc form. The next field is a drop-down list of available forms.

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**, the field is replaced by a button that displays the ClubExpress Select an Image window, described in the following section.

For linking to another ClubExpress module, a custom web page or a photo page, or an external website, 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 builder.

Insert Photo

Clicking the **Insert Photo** toolbar button displays the following popup window:

ad the Race is On! ay Trip ay Trip ay Tripping illoons over the Countryside gstockphoto_Air_Balloon_165031.jpg gstockphoto_Air_Balloon_2571855.jpg gstockphoto_Balloon611148.jpg	
hotos Preview hotos Preview hotos avg Trip alloons over the Countryside igstockphoto_Air_Balloon_165031.jpg igstockphoto_Balloon_611148.jpg	
hotos Preview Ind the Race is On! Ay Trip verial Image bay Tripping alloons over the Countryside igstockphoto_Air_Balloon_165031.jpg igstockphoto_Balloon_611148.jpg	
And the Race is On! Day Trip Aerial Image Day Tripping Salloons over the Countryside Digstockphoto_Air_Balloon_165031.jpg Digstockphoto_air_balloons_2571855.jpg Digstockphoto_Balloon_611148.jpg	
And the Race is On! Day Trip Aerial Image Day Tripping Balloons over the Countryside bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_air_balloons_2571855.jpg bigstockphoto_Balloon611148.jpg bigstockphoto_Balloon611149.jpg	
Aerial Image Day Tripping Balloons over the Countryside bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_air_balloons_2571855.jpg bigstockphoto_Balloon611148.jpg	
Day Tripping Balloons over the Countryside bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_air_balloons_2571855.jpg bigstockphoto_Balloon611148.jpg	
bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_air_balloons_2571855.jpg bigstockphoto_Balloon611148.jpg	
bigstockphoto_air_balloons_2571855.jpg bigstockphoto_Balloon611148.jpg	
bigstockphoto_Balloon611149.jpg	
Specify Display Format	
 Display As Link Text 	
 Display As Thumbnail Image (click to show large size) 	
 Display As Embedded Image On Page 	
Select 🖌 Cancel 🗶	
Select V Cancel A	

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.

Reference Materials

Photos 321

Insert Image

Clicking the **Insert Image** toolbar button displays the following popup window:

Select an Image	⊜ 0 ⊗
new image from your compute	one of the available graphics libraries. You may also select a r. The new image will be uploaded to your club's web ailable for future use on the system.
Image Files	Preview
Computers.jpg dgrey072.jpg exclamation.jpg FireworksFlag.jpg image.jpg launch sm.jpg Launching.jpg Launching2.jpg MemberVideoImage.jpg menustripe.png sky.jpg stain_1jpg	
	Select 🖋 Cancel 🗶
Upload New Image Choose File no file selected	1
	Upload 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, the 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.

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:

Properties	
Width 120 px	
Height 80 px 🖑	
Border Color 👌 🗸	
Border Width 🛟	
Alt Text	
Long Description	
Image Alignment 🛛 🛪 🗸	
Margin Top 🗘 Right 🛟 Bottom 🗘 Left 🛟	
OK Cancel	

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 join the two fields.
- 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.

Reference Materials

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.

Embedding a Linked YouTube or Vimeo File (Preferred)

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.

Uploading and Playing Media Files

Selecting the first choice displays the following dialog:

Insert Audio/Video
Audio/Video/Flash files need to be uploaded to a folder in the Documents module before they can be selected on this dialog. Select a Documents module folder then a file from that folder.
Select File
File Source 🔘 Upload New File 💿 Select Existing File
Source Folder Various clubs media files +
Select File AYL-Video.avi
Audio/Video Properties
File Type Audio Video Interleave File
Width 450 px •
Height 300 px 🔶
Auto Play
Insert V Cancel X

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 MEPG video)
- QT / MOV (Quicktime movies)
- MP3 (Audio file standard)
- WAV (Windows sound file)
- AAC (Apple Audio Codec, used by iTunes)

Understanding GroupBoxes

Upcoming Events

Here is information about training classes and races scheduled for the next month.

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.

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.

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 the height: attribute and manually adjust the width: attribute to fit the contents you have placed in the GroupBox.

Insert Widget

ClubExpress currently supports many widgets that can be inserted wherever the editor is used, including the page header, common content boxes, the home page, custom web pages, etc. Note that the widgets with an asterisk only appear if that module has been enabled.



See "Add Poll" on page 1005

Select this option to insert a quick poll, consisting of a single question with multiple radio buttons. Members select one radio button as their "vote" and can then immediately view the results of all votes cast so far.

Polls are available to members only and the system will enforce one vote per member. Behind the scenes, polls are stored in the Surveys module and you can use the facilities of that module to modify a poll, view results, or output reports or exports.

When you click the Insert Poll option, you will see a screen similar to the following:

	I			 		-
are working or	om the list below and click n. You may also click 'Edit' oll' to insert a new poll.					
	Active Polls					
	Best Balloon Colors	Insert	<u>Edit</u>			
	Best yacht	Insert	Edit			
	Favorite Color	Insert	Edit			
	Landing	Insert	Edit			
	Planning Poll 1	Insert	Edit			
	Types of Ballooning	Insert	Edit			
	Create New Poll					

Click **Insert Poll** to insert an existing poll at the cursor position. While the editor is in edit mode, the poll will appear as an empty box; you cannot view the poll until you save the page.

Click Create New Poll and you will see the following screen:

Select P	
Create a r reached th	new poll by filling in the fields below, and pressing the 'Save' button. If you have his page by clicking the poll button in the html editor, the new poll will be inserted ige you are working on.
Poll Name	Best Balloon Colors
Question	What are thee best colors for a balloon?
Answers	40 of 500 characters used Blue Red Green
	Vellow White Rainbow
Button Text	Enter each answer on a separate line. 35 of 1000 characters used Vote Now!
	Save 🖌 Cancel 🗶

The Poll Name is used as the heading. The Question is displayed above the choices. In the Answers box, enter the actual poll choices, one per line. You can also specify the text for the voting button.

Content Editor

When you click **Save** the poll is created and the dialog disappears. You must click the **Insert Poll** button again to see and select your new poll for adding to the current page. When members view the page, the poll will appear as follows:

Be	st Balloon Colors
	hat are best colors for a alloon?
0	Blue
\circ	Red
\circ	Green
0	Yellow
\circ	White
\circ	Rainbow
	Vote Now!

Poll Responses	
What are best colors balloon?	s for a
Blue	0.0 %
Green	0.0 %
Rainbow	100.0 %
Red	0.0 %
White	0.0 %
Yellow	0.0 %
Your Answer: Rainbow	

Right-click on this container to see the following options:

- Select **Replace Poll** to bring up the dialog above, allowing you to change poll options.
- Select **Delete** to remove the poll widget.



See "Photo Albums" on page 938

Select this option to create a slideshow on a page. You will see the following dialog:

Slideshow	68
Select Photo Album	
Category Ballooning +	
Photo Album Balloons in Flight \$	
Slideshow Features	
Width px	
Height px	
Appearance Include Border, Navigation, and Caption Button	
Show Images Only	
Save 🖌 Cancel 🗶	
	11.

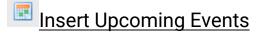
Slideshows are based on photo albums, so before you insert a slideshow, you must first create a photo album and add the photos you want to it. Slideshows work much better when all photos are the same size, so take some care in picking photos or crop them to the same size before adding them.

Select **Category** to pick a category of photos and then **Photo Album** to pick a page within the selected category.

Specify the width and height and the type of slideshow you want. For shows in your page header or a content box, it often looks better to have the images only, without anything around. For shows embedded on the home page or a custom page, you may want to enable the border, navigation controls and titles. (Note that full captions are not displayed.)

When you click **Save**, a container of the specified size is placed in the editor. Right-click on this container to see the following options:

- Select **Replace Slideshow** to bring up the dialog above, allowing you to select a different photo album or change other properties.
- Select Refresh Data if you have added photos to the photo album; it updates the slideshow so that
 these new photos are included. Note that the widget will refresh automatically every morning after
 the system is reset overnight.
- Select **Delete** to remove the slideshow.



See "Event Calendar " on page 764

Select this option to add a dynamic list of upcoming events to the page. You will see the following dialog.

Upcoming Events Widget
Create a list of upcoming event for display on your website. Enter a title, the number of days in the future to include, and optionally select one or more event categories.
Title Upcoming Events
Time Period 30 days
Width 500 px
Categories Include All Categories
Select Categories A selected
✓ Check all X Uncheck all 3
I Club Ride
✓ "B*" Club Ride
✓"C" Club Ride
Board Meetings
Chapter Meetings
Club Ride
Save 🖌 Cancel 🗶

Specify the title, how many "days out" to look and the width. For widgets placed in a vertical content box down the left or right side of the template, narrower is better (for example, 150px or less.) For widgets placed in the page header or the home page, there's much more room for a wider, nicer display.

The widget can include all event categories or you can select individual categories to include.

Example: You might show just events open to the public, or events related to the mission of your organization (for example, a bicycle club might show rides and social events only, while a professional association lists seminars only.) Internal events such as committee meetings may not be shown.

When you click the **Select Categories** option, a list of categories will be shown and you can check one or more of them. Click the small arrow on the right side to expand or contract this list.

When you click **Save**, a container of the specified size is placed in the editor. Right-click on this container to see the following options:

- Select **Edit Event List** to bring up the dialog above, allowing you to select different categories or change other properties.
- Select Refresh Data if you have added events; it updates the widget so that these new events are
 included. Note that the widget will refresh automatically every morning after the system is reset
 overnight.
- Select **Delete** to remove the upcoming events widget.

Multiple widgets can be placed on the page. For example, you might have one listing "Upcoming Riding Events" and another listing "Upcoming Education Events", each based on different categories.



See "News / Articles" on page 929

Many clubs and associations use the News / Articles function to collect and organize small articles for republishing on the home page, in event reports, or in blast emails.

Select this option to paste a news item or article into the current editor session. You might use this option when you're building out the home page of your website, or a blast email comprising a series of articles written by other officers or club experts. You will see the following dialog:

Insert News Item /	Article	9	0	8
Find News Item / Article				
News Category	Announcements ‡			
Author				
Keyword		Search 🔗		
News Item / Article				=
Headline	Mary Jones Recevies Civic Award	\$)	
	Include Headline Exclude	e Headline		
	OK 🖌 Cancel 🗶			

Specify any combination of a category, author, or keyword and click **Search**. Matching articles will be loaded into a drop-down list. Select one then specify whether the system should insert just the article or the article and headline.

Click **OK** to complete the operation or **Cancel** to close the dialog without inserting the news item / article.

Note that the inserted text is statically inserted. It is not linked back to the original and will not be updated if the original is updated.



See "News / Articles" on page 929

Select this option to insert a live news feed with a page of your website (often the home page.) When you select this option, you will see the following screen:

	recent news articles for display on your website. Enter a title, the back to search for active/created date, and optionally select one or varies
	Recent Articles
Time Period	days
Width	рх
Max. Height	рх
	Optional: This is the maximum height of the widget before vertical scrollbars will appear
Catgories	 Include All News Categories
	Select Category
	Save 🖌 Cancel 🗙

Specify a title to use on widget and how many days back it should look, The Width option controls how wide it should be on the page while the Max. Height option controls the maximum height before vertical scrollbars appear.

The widget can display items from all news categories or just selected categories.

Click **Save** to complete the operation and insert the widget on your page, or **Cancel** to close the dialog without inserting the news item / article.

Insert Facebook Feed

Select this option to place a dynamic panel showing your club's Facebook feed within a page of your website (often the home page!) When you select this option, you will see the following screen:

Insert Facebook Feed	Q
If you have a Facebook site configured in your social networking options the feed address will default to your site's URL. To insert a facebook feed for another Facebook Page, please copy and paste the URL for that site. For best viewing, please choose a height and width greater than 200px x 200px	
IMPORTANT: Facebook Like Box / Feeds do not work with "Groups" on Facebook. You must use a Facebook Page link, and the publishing properties must be configured so that everyone can view posts	
- Facebook Feed Options	
Height 800 px	
Width 500 px	
Facebook URL enter the whole url including http(s)://	
http://www.facebook.com/MyClubFeed Test	
Save 🗸 Cancel 🗙	

Specify the height and width of the panel. The minimum values are 200 x 200px but for best effect, you will need a panel considerably larger. The feed itself will scroll vertically within the panel.

If your club has already defined its Facebook page under Social Networking, this page will be shown automatically. If not, you can just enter it.

Click Save to create the Facebook widget and return to the editor, or Cancel to return without saving.

Right click on the widget to edit these properties.

Note that the widget will only show posts from the past 60 days. You also need to set visibility to "International" (remove country restrictions) and visible to anyone 13+. These are Facebook requirements.

🔽 Insert Twitter Feed

Select this option to place a dynamic panel showing your club's Twitter feed within a page of your website (often the home page!) When you select this option, you will see the following screen:

Insert Twitter Feed
If you have a Twitter page configured in your social networking options the feed address will default to your Twitter user name. To insert a Twitter feed for another Twitter Page, please type in the User Name (e.g.: CNN, nytimes). For best viewing, please choose a height and width greater than 200px x 200px
Twitter Feed Options
Height 500 px
Width 300 px
Twitter User Name MyClubFeed Test
Save 🗸 Cancel 🗶

Specify the size and Twitter User Name, then click **Save** to create the feed and return to the editor, or **Cancel** to return without saving.

Right click on the widget to edit these properties.

Note that the Twitter Feed requires JavaScript to be enabled (which it should be by default, but some clubs do turn it off.)

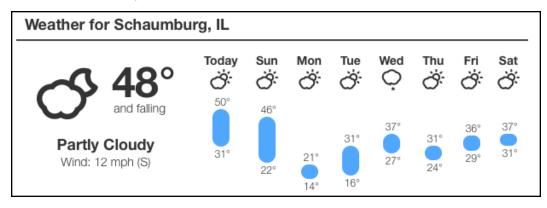


When you select this option, you will see a screen similar to the following:

Insert a weat you want weat from your clu	eather Widget & Construction of the location ather for. The latitude and longitude will be automatically filled b's Geo-location. If the below fields are blank, you may wish to address portion of the "Name and Description" page in the
Weather Fee	d Options
Width	600 px
Latitude	42.03
Longitude	-88.08
Location T	itle you may change the weather display title
Schaumbu	rg, IL 🗳
	Save 🗸 Cancel 🗙

Specify the display width, latitude and longitude. You can also control the location title displayed on the widget. Click **Save** to save and place the widget at the cursor position, or **Cancel** to close the dialog without placing a widget.

The weather display looks like the following:



This weather widget works on the public and private sides of the website.

Insert Accordion

An accordion control has a heading and content below the heading that can be expanded or collapsed. It's often used to reduce the length of a page by hiding content that only some people may need to see.

Content Editor

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



Specify the title of the first panel. You can insert up to 5 panels at a time by clicking the **Add Another Panel** link. Width can be anything from 200px on up, with 600px as the default.

Normally, the panels will butt up against each other but you can also have the system insert a blank line between them by checking the appropriate box.

The other sections allow you to update the title font and size; the arrow style and whether the accordion should have a border; the background color of the title; and the text color. A preview section at the bottom allows you to see how this combination of colors and fonts will look.

Click **Save** to create the accordion in your editor session or **Cancel** to close the dialog without creating it. You will see a display like the following:

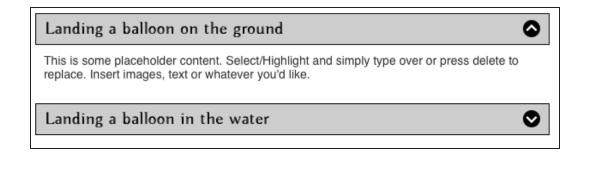
Accordion Widget			
Landing a Balloon on the Ground			
This is some placeholder content. Select/Highlight and simply type over or press delete to replace. Insert images, text or whatever you'd like.			
Accordion Widget			
Landing a Balloon in the Water			
This is some placeholder content. Select/Highlight and simply type over or press delete to replace. Insert images, text or whatever you'd like.			

The title can be edited directly. There is also placeholder text that should be replaced with the actual content of the accordion, which can be anything supported by the editor (including images, video, formatted text, links, other widgets, even other accordions!)

You can also right-click the widget title to edit the properties of the accordion.

When you save the page, an accordion is initially collapsed as shown below. Click the arrow to expand it and show the hidden content. Click the arrow again to re-hide it.

Landing a balloon on the ground	♥
Landing a balloon in the water	♥



Insert New/Renew Members

This option allows you to display a list of new or renewing members within the past X days. When you select this option, you will see the following dialog:



Specify whether you want a list of new or renewing members, how many days back the system should look, the title, width and font to use. Click **Save** to save your changes and insert the widget into the editor.

When you save the editor session, the widget generates a list of new or renewing members, sorted alphabetically by last name. The list is sensitive to the visibility settings in the member directory; if a new or recently renewed member has chosen not to be visible in the directory, he or she will not be in this list.

Also, please note that the list does not update in real time. A member who has just signed up and renewed will not be displayed in the list until the next morning, after the system resets overnight. To conserve resources, these lists are cached and the caches are only refreshed when the club is first accessed each day.

Insert Recent Blogs

See "Blogs" on page 607

This widget displays a list of recent blog posts from the Blogs module, on a custom web page or your home page. You will see the following dialog:



Specify the widget total and the number of days back to search (for example, all blog posts in the last 30 days.) The Width option controls how wide it should be on the page while the Max. Height option controls the maximum height before vertical scrollbars appear.

The widget can display items from all blogs or just selected ones.

Click **Save** to complete the operation and insert the widget on your page, or **Cancel** to close the dialog without inserting it.

Insert Submenu Sidebar

See "Menus" on page 351

This widget allows you to place a sub-menu on a page. The sub-menu you place on the page does not have to appear in the main or public menu. This allows you to quickly and consistently place a group of menu links in a page template.

Insert Submenu



This widget will place a submenu on the page where you insert it. The submenus in the dropdown list are populated from the submenus you've created in the Menu page in the Website tab of the control panel. The submenus you create do not have to appear in the main menu, and you can select them here to be inserted into the page. This widget is best placed in a 'sidebar' section of your website as the links will take up the full width of the container. You may wish to create a 25/75 page row and insert this widget into the 25% container.			
Choose Submenu			
< Select >			
Set Width Container Width / 100% Fixed Width px			
Save 🖌 Cancel 🗶			

- Select the submenu to be displayed.
- Select to either have the submenu take up 100% of the container width or set a fixed width (such as 250 px). The height is determined by the number of links in the menu.
- Click the Save button to save your changes or the Cancel button to exit without saving.

Insert Birthdays/Anniversaries Widget

See "People Options" on page 296

Use this screen to configure the Birthdays/Anniversaries Widget

Birthday	/ Anniversary Widget 28		
Use this dialog to insert a birthday or anniversary widget into the page content. Define a title, time period (upcoming days) width and max-height(optional). Using the radio buttons, select if you would like to display birthdays or anniversaries. You may also include secondary or tertiary members.			
Title	Upcoming Birthdays		
Time Period	60 days		
Width	300 px		
Max. Height	Optional: This is the maximum height of the widget before vertical scrollbars will appear		
Include Birtho	days? 💿 No 💿 Yes		
Include Anniv	ersaries? 💿 No 🔵 Yes		
Include Secor	ndary Members 💿 No 💮 Yes		
Include Tertiary Members? No Yes			
	Save 🖌 Cancel 🗙		

- Specify the Title for the widget.
- Specify the time period for how many days into the future to display birthdays and/or anniversaries
- Specify the widget width
- Specify the max height of the widget
- Specify whether you want to include:
 - Birthdays
 - Anniversaries
 - Secondary Members
 - Tertiary Members
- Click the Save button to save your changes or the Cancel button to exit without saving.

Linsert Jobs Board Widget

See "Jobs Board" on page 1169

The Jobs Board widget shows a list of active jobs. Clicking a link takes the user to the jobs board page with the information for that job expanded.

- Specify the Title for the widget.
- Specify the widget width
- Specify the max height of the widget
- Specify whether you want to include:
 - All job categories
 - A specific job category
- Click the Save button to save your changes or the Cancel button to exit without saving.

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.

Working with Tables

In the past, tables were often used as a formatting tool, to create complex layouts and columns within rows, with images aligned with text in sophisticated ways.

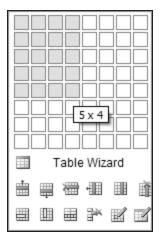
The problem with doing this is that your page will **NOT** be responsive to mobile devices. The table layout locked in specific widths and heights and did not allow your text and images to dynamically reconfigure themselves based on the device being used.

Note: Tables are no longer recommended for this purpose. Instead, for a responsive design, use the predefined row layout feature.

Tables are still available in the editor but they should be used for tabular data only!

Content Editor

To insert a table at the current cursor position or to format an existing table, click the Table icon on the bottom row of the toolbar. You will see the following popup window:



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:



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:

Table Wizard	X
Table Vitzard Table Design Table Properties Dimensions Height	Cell Properties Accessibility Border Border Color Colo
	OK Cancel

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 builder.

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.

÷ Insert Row Above # Insert Row Below Delete Row Insert Column to the Left Ħ Insert Column to the Right Ē Delete Column Merge Cells Horizontally Merge Cells Vertically -----Split Cell ⊞ Split Cell Horizontally ¥. Delete Cell R Cell Properties 1 Table Properties

Here is an explanation of the various functions:

lcon	Description	
	Insert a row above the current row	
轠	Insert a row below the current row	
*	Delete the current row	

lcon	n Description		
镾	Insert a column to the left of the current column		
	Insert a column to the right of the current column		
1 1 1	Delete the current column		
	Merge cells horizontally		
	Merge cells vertically		
圕	Split previously merged cells vertically		
Ħ	Split previously merged cells horizontally		
3*	Delete the current cell		
×	Display the cell properties dialog		
8	Display the table properties dialog		
Cell Properties			

When you select the Cell Properties option, the following dialog is displayed:

Table Wizard
Table Design Table Properties Cell Properties Accessibility
Preview Cell Properties
Height: 🗘 pixels, %
Content Alignment:
Background: 🕭 🗸
Style Builder 🚔
ld:
no text wrapping
OK Cancel

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.

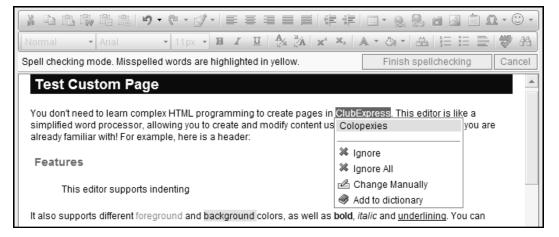
Select the Content Alignment option to control how text is aligned within the cell. Select Background to change the background color of the cell. Select the Style Builder option to display another dialog that provides control over the complete set of style options within the cell.

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 builder.

Spell Checking

Clicking the Spell Check toolbar button switches the editor into "Spell checking mode":



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.

Page Builder

Page Builder Canvas	
Page Tools	
Row Templates	
Row Tools	
Cell Tools	
Widgets	
Versioning	
Editing Text	

The Page Builder is an editing environment for creating and editing custom pages and your home page. The Page Builder includes:

- **Page Builder canvas** The canvas is the blank slate you will use to build and edit custom pages. Drag rows of cells to the canvas and insert widgets or content into the cells.
- **Page Builder toolbar** The toolbar includes all the editing tools you need to format rows and cells on your custom page. The toolbar also includes widgets you can add to your custom page.
- **Rows** Rows arrange content on your custom page in various width combinations. You can apply formatting to an entire row or to cells within a row. Widgets and content can be inserted into cells within a row.
- Widgets Widgets can be used to insert content found in enabled modules on your website (blogs, events, etc.). Widgets can also be used to insert original content like text or photos.
- Versioning system The versioning system allows you to create, edit and maintain multiple versions of the same page. Saving pages creates a new version of the page and will not overwrite the existing version. Versions can be set to active or disabled.

Page Builder Canvas

Administrators: Check out our step-by-step guide to creating a custom web page here.

When you are creating or editing a custom page or your home page, you will see a screen similar to the following:

	Home > Control Panel > Custom Page Manager > Versions Manager > Page Builder Custom Page Edit - About Us (Copy)			?	
	Editing version: SEH 7/13 (Not Active) Use the Page Builder canvas to create your page. Drag a row template or combination to the canvas to get started. After you've dragged and arranged your rows, drag widgets into the rows or cells. You can configure the widgets using the cell tools. Cick on a cell after you've inserted a widget to edit or reconfigure the contents. Set a tile for the version of this page so you can easily track it in the versions manager. Saving a 'version' of this page will not make it active. It will save a version that you can access later in the versions manager. "Save and make active' will save a version of this page, and make it automatically active. After saving may continue working and save additional versions or create another active version. The contents of this page will be stored temporarily so you can access it later, in case of power outage or network failure.				
8	ve New Version and Continue Save New Version and Exit Image: Content image: Cont		tent area. Click on the nd drag a widget into this	te X Cancel	
8	Birthdays / Anniversaries	Blogs Feed RECENT BLOGS Up In The Air Multiple Authors Ballooning and the Environment Jul 7, 2020	Cell Tools Actions Style	Row Tools	

The header of the screen will list the name of the page, the name of the version, and the status (active or not active).

The canvas is where you will build your page. At the top of the canvas you have the option to

- Save New Version and Continue Save the changes you have made to the version and continue editing the page. If a version name has been set using Page Tools, the version will be saved under that name.
- Save New Version and Exit Save the changes you have made as a new version and exit. If a version name has been set using Page Tools, the version will be saved under that name.
- Save, Make Active and Exit Save the changes you have made and make the page active. If the page is currently visible to users (on a menu) they will be able to see your changes.
- **Preview** Preview the page in a new tab.
- Maximize Maximize the editor to full screen.
- **Exit** Exit the editor and return to the previous page without saving a version. You will be prompted to confirm this action.

At the bottom of the canvas, in addition to the options at the top of the canvas, you have the option to:

• Cancel - Cancel your changes and exit the editor. You will be prompted to confirm this action.

To the right is the Page Builder Toolbar. The toolbar can be moved around your browser window to be ore accessible when editing a longer page.

Working With Canvas Elements

When you add a row to your canvas, you will see a screen similar to the following, depending on your selection:

(Custom Page Edit - Board Election 2020		?
Editing version: Board Election 2020 Version 2 (Active)			
	Use the Page Builder canvas to create your page. Drag a row template or combination to the canvas to get started. After you've dragged and arranged your rows, drag widgets into the rows or cells. You can configure widgets using the cell tools. Click on a cell after you've inserted a widget to edit or reconfigure the contents. Set a tille for the version of this page so you can easily track it in the versions manager. Saving a "version" of page will not make it active. It will save a version that you can access later in the versions manager. "Save and make active" will save a version that page and make it active. It will save a version that you can access later in the versions manager. "Save and make active" will save a version that page or relevant failure. The contents of this page will be stored temporarily so you can access it later, in case of power outage or network failure.		
¢	ධා Save New Version and Continue 🚽 නිave New Version and Exit 🔗 Save, Make Active a	nd Exit 💿 Preview 🖓 Maximize 🗙	Cancel
	No Content	No Content	
Ø	This is a content area. Click on the widgets icon and drag a widget into this	widgets icon and drag a widget into this	
	area to add content		G Tools

At the top of each cell you will see a description of the cell element. Cells may contain placeholder images or text until you replace the image or text.

The *dotted section* in the top left corner of the row is used to move the row up or down on the canvas. Select and hold the dotted section to move the row.

The *eyeball icon* on the left side of the row is used to quickly adjust the visibility of the row. The default visibility is **not visible**. Selecting the icon will cycle through the following options: Public Only, Members Only, Public and Members (everyone).

- **Public Only** The row is visible to the public. Upon logging into the website, members will no longer see the row.
- Members Only The row is only visible upon logging into the website.

- **Everyone** Both the public (non-members) and members can see the row.
- Hidden The row can only be seen within the Page Builder by administrators or coordinators.

Note: The default visibility is Everyone for each newly added row.

For more information on visibility, go here.

Page Tools

Select the Page Tools button on the Page Builder Toolbar to see the following:



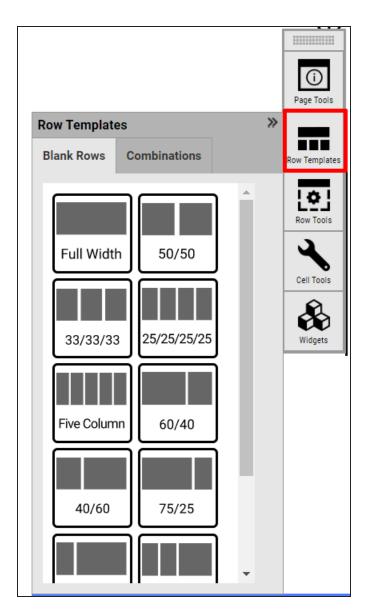
Enter in a name for the version of the page you are creating.

To save the version, click **Save New Version and Continue**, **Save New Version and Exit**, or **Save**, **Make Active and Exit**. Page versions are saved in the <u>Version Manager</u> screen where you can also edit the title.

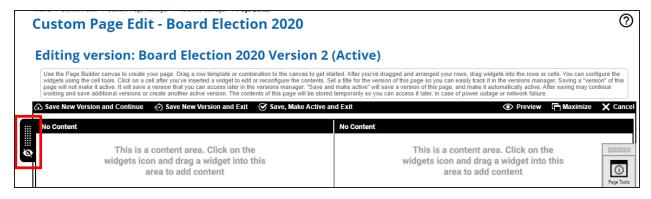
Row Templates

Custom pages and your home page are row-based. Each row contains one or more cells into which you add content to display on your pages.

Select Row Templates to see the following option:



The Row Templates option displays a pop-out screen with two tabs: Blank Rows and Combinations. To **add** a row to the canvas, select and drag the row to the canvas. If other rows are present on the canvas you can drag a new row between existing rows. Existing rows will automatically move down to accommodate the newly added row.



Page Builder

The dotted section in the top left corner of the row is used to move the row up or down on the canvas. Select and hold the dotted section to move the row.

The eyeball icon on the left side of the row is used to quickly adjust the visibility of the row.

Note: The default visibility is **not visible** for each newly added row.

For more information on visibility and other actions to take with rows, see "Row Visibility - Determine visibility settings for the selected row.Hidden - The row can only be seen within the Page Builder by administrators or coordinators. Everyone - Both non-members and logged-in members can see the row.Public Only - The row is visible to the public (non-members and members who have not logged in to your website). Upon logging in to the website, members will no longer see the row.Members Only - The row is only visible upon logging in to the website." on page 146.

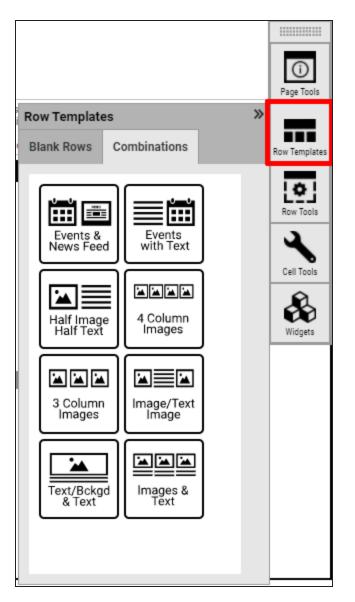
Blank Rows

Blank rows contain empty content boxes you add to your Page Builder Canvas to fill with and arrange widgets, text, photos and more. When a row is added, the following options are available:

- Full width One content box which spans the entire width of the page.
- **50/50** Two content boxes of equal width.
- **33/33/33** Three content boxes of equal width.
- 25/25/25/25 Four content boxes of equal width.
- Five Column Five content boxes of equal width.
- **60/40** Two content boxes: Left box spans 60% of the total width of the page, right box spans 40% of the total width of the page.
- **40/60** Two content boxes: Left box spans 40% of the total width of the page, right box spans 60% of the total width of the page.
- **75/25** -Two content boxes: Left box spans 75% of the total width of the page, right box spans 25% of the total width of the page.
- **25/75** Two content boxes: Left box spans 25% of the total width of the page, right box spans 75% of the total width of the page.
- **25/25/50** Three content boxes: Left box spans 25% of the total width of the page, center box spans 25% of the page, right box spans 50% of the total width of the page.
- **50/25/25** Three content boxes: Left box spans 50% of the total width of the page, center box spans 25% of the page, right box spans 25% of the total width of the page.

To use a blank row, select the row and drag it into the Page Builder Canvas.

Combinations



Combinations are pre-configured row layouts for commonly used content types. The following options are available:

- Events & News Feed Two content boxes: Left box includes the Upcoming Events widget, right box includes the News Feed widget.
- Events with Text Two content boxes: Left box is a text box, right box includes the Upcoming Events widget.
- Half Image Half Text Two content boxes: Left box is an image box, right box is a text box.
- 4 Column Images Four image boxes of equal width.
- 3 Column Images Three image boxes of equal width.
- Image/Text/Image Three content boxes of equal width: Left box is an image box, center box is a text box, right box is an image box.
- Hero & Text One content box spanning the full width of the page containing text and a background image.

• Images & Text - Six content boxes arranged in two rows: Top three boxes are image boxes, bottom three boxes are text boxes.

To use a combination, select the combination and drag it into the Page Builder Canvas.

Row Tools

Select Row Tools to see the following option:

	Page Tools Row Templates
Row Tools >>>	Ø
🔺 Move Up	Row Tools
▼ Move Down	₹.
Copy Row	Cell Tools
Delete Row	
🔅 Row Visibility	Widgets
Tuture Visibility	

The Row Tools option displays a pop-out screen with two tabs: Actions and Style.

Actions

Actions are applied to the selected row and any content in the row.

- Move Up Move the selected row up one row space. This option will not appear for the top-most row on your page.
- Move Down Move the selected row down one row space. This option will not appear for the bottommost row on your page.
- Copy Row Make and insert a copy of the selected row and its contents above the selected row.
- **Delete Row** Delete the selected row and its contents. You will be prompted to confirm this action.
- Row Visibility Determine visibility settings for the selected row.
 - Hidden The row can only be seen within the Page Builder by administrators or coordinators.
 - Everyone Both non-members and logged-in members can see the row.
 - Public Only The row is visible to the public (non-members and members who have not logged in to your website). Upon logging in to the website, members will no longer see the row.
 - Members Only The row is only visible upon logging in to the website.

Note: The default visibility is not visible for each newly added row.

• Future Visibility - Create a visibility setting to take effect at a certain time. Select a date and time, then Hidden, Everyone, Public Only, or Members Only.



	() Page Tools
	Row Templates
Row Tools >>>	
Actions Style	Row Tools
Make style changes to the row or cell you have selected. When you make a change it will automatically be changed in the content you are working on.	Cell Tools
Text Color Background Color #000000 S #ffffff	
Font Border Color < Select > ▼ #000000	Widgets
Text sizeBorder Thickness12pxNone	
Text Weight Margin Top < Select > 0px	
Alignment Margin Bottom < Select > 0px	
Line Height < Select > ✔	
CSS Class @	
Apply Class	

Style changes are applied to the selected row and any content in the row.

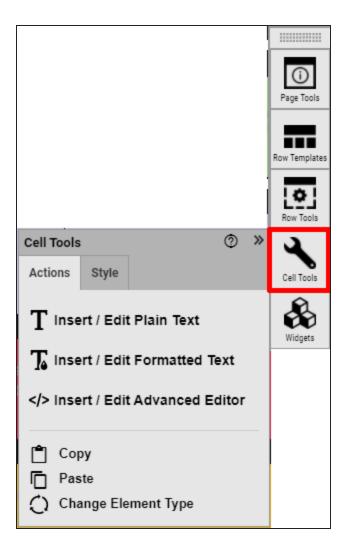
The following options are available:

- **Text Color** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Background Color (of the cells)** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- Font Choose a font from the drop down menu.
- Border Color (of the cells) Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Text Size** Select the text size.
- Border Thickness Select the size of the row border.
- **Text Weight** Select normal or bold.
- **Padding** Padding is the space between the content of the cells in the row (text, images, a widget) and the border. Select the padding size.
- Alignment Select the text alignment.
- Margin Top Margin is the space between the border and the edge of the cells in the row. Select the margin size for the top of the cells in the row.
- Line Height Select the space between lines of text.
- **Margin Bottom** Margin is the space between the border and the edge of the cells in the row. Select the margin size for the bottom of the cells in the row.
- CSS Class For developers, enter style classes to be used.

Concept Information

Cell Tools

Select Cell Tools to see the following option:



The Cell Tools option displays a pop-out screen with two tabs: Actions and Style.

Actions

Actions are applied to the selected cell and any content in the cell. The options available are determined by the content of the row or cell (text, image or widget).

The following are options for text:

- Insert/Edit Plain Text Use the plain text editor to edit the cell. See "Plain Text Editor" on page 197
- Insert/Edit Formatted Text Use the formatted text editor to edit the cell. See "Formatted Text Editor" on page 198
- Insert/ Edit Advanced Editor Use the advanced text editor to edit the cell. See "Advanced Text Editor" on page 200
- **Copy** If you select a cell with content, use the Copy function to copy the content of a cell. This option will not appear if the cell is empty.

- **Paste** If you have content copied to your clipboard from another cell, use the Paste function to paste the content in to the cell. This option will not appear if you have not copied cell content to your clipboard.
- Change Element Type Change the content or widget in the cell.
 - Empty (no content) A blank cell with no content.
 - Text (plain, formatted or advanced) A text cell with the ability to use the plain, formatted or advanced text editor.
 - Image An image cell. Add images from your photos, web graphics or hard drive. See "Photos" on page 321, "Web Graphics " on page 369.
 - *Text Over Background* An image which spans the full width of the page. Add images from your photos, web graphics or hard drive. See "Photos" on page 321, "Web Graphics " on page 369.
 - *Link* Insert links using the link builder.
 - *Media* Insert media files or embed codes.
 - *Poll* Link to a poll from the Survey module.
 - Slideshow Insert a photo slide show.
 - Upcoming Events Insert the Upcoming Events widget.
 - News Article Insert the News Article widget (a single article).
 - News Feed Insert the NewsFeed widget (from the News/Articles module).
 - Facebook Insert Facebook feed.
 - Twitter Insert Twitter feed.
 - Weather Insert the weather widget.
 - Accordion Insert accordion text (expanding an collapsing text).
 - New or Renewed Members Insert a list of new or newly renewed members.
 - Birthdays of Anniversaries Insert a list of upcoming member birthdays and anniversaries.
 - Blogs Insert Blog feed from the blogs module.
 - Sidebar Insert a sub-menu sidebar.
 - Horizontal Rule Insert a horizontal line.
 - *HTML Only* Edit the cell in HTML mode.
 - Floated Image or Text Image or text cell.

The following options are available for images:

- Insert/Change Image Browse your web graphics or photos, or upload a new image.
- Change Element Type Change the content or widget in the cell.
 - Empty (no content) A blank cell with no content.
 - Text (plain, formatted or advanced) A text cell with the ability to use the plain, formatted or advanced text editor.
 - *Image* An image cell. Add images from your photos, web graphics or hard drive. See "Photos" on page 321, "Web Graphics " on page 369.
 - *Text Over Background* An image which spans the full width of the page. Add images from your photos, web graphics or hard drive. See "Photos" on page 321, "Web Graphics " on page 369.
 - *Link* Insert links using the link builder.
 - Media Insert media files or embed codes.
 - *Poll* Link to a poll from the Survey module.
 - Slideshow Insert a photo slideshow.
 - Upcoming Events Insert the Upcoming Events widget.
 - News Article Insert the News Article widget (a single article).
 - News Feed Insert the NewsFeed widget (from the News/Articles module).
 - Facebook Insert Facebook feed.

- Twitter Insert Twitter feed.
- Weather Insert the weather widget.
- Accordion Insert accordion text (expanding an collapsing text).
- New or Renewed Members Insert a list of new or newly renewed members.
- Birthdays of Anniversaries Insert a list of upcoming member birthdays and anniversaries.
- Blogs Insert Blog feed from the blogs module.
- Sidebar Insert a sub-menu sidebar.
- Horizontal Rule Insert a horizontal line.
- *HTML Only* Edit the cell in HTML mode.
- Floated Image or Text Image or text cell.

The following options are available for most **widgets**. For more information on formatting widgets, see "Widgets" on page 155

- **Title** The title of the widget block.
- **Time Period** Enter the number of days (if applicable) for which the widget should display data.

Example: In the Upcoming Events widget, a time period of 90 days will show events happening in the next 90 days.

- Width Choose the width of the entire cell or a fixed width.
- Max. Height Set the maximum height of the widget.
- Categories Choose the categories of widget items that should display.

Example: In the Recent News widget, you might select only your Important Announcement category.

<u>Style</u>

	Page Tools Page Tools Row Templates Row Tools
Cell Tools »	→
Actions Style	Cell Tools
Make style changes to the row or cell you have selected. When you make a change it will automatically be changed in the content you are working on.	Widgets
Text Color Background Color #000000	
Font Border Color < Select > ✔ #000000 🥥	
Text sizeBorder Thickness12pxVNoneV	
Text Weight Padding < Select > < Select >	
Alignment Margin Top < Select > \u2272 0px \u2272	
Line Height Margin Bottom < Select > ♥ 0px ♥	
CSS Class	

Style changes are applied to the selected cell and any content in the cell. If a style has been applied to the row, any styles applied to an individual cell will override the row style. The options available are determined by the content of the row or cell (text or image).

The following options are available for text:

• **Text Color** - Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.

- **Background Color** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- Font Choose a font from the drop down menu.
- **Border Color** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Text Size** Select the text size.
- Border Thickness Select the size of the border.
- Text Weight Select normal or bold.
- **Padding** Padding is the space between the content of your cell (the text in your cell) and the border. Select the padding size.
- Alignment Select the text alignment.
- Margin Top Margin is the space between the border and the edge of the cell. Select the margin size for the top of the cell.
- Line Height Select the space between lines of text.
- Margin Bottom Margin is the space between the border and the edge of the cell. Select the margin size for the bottom of the cell.
- CSS Class For developers, enter style classes to be used.

) Page Tools
	Row Templates
	Row Tools
Cell Tools »	3
Actions Style	Cell Tools
Make style changes to the row or cell you have selected. When you make a change it will automatically be changed in the content you are working on.	Widgets
Background Color #ffffff	
Border Color #000000	
Border Thickness None V	
Padding 10px V	
Margin Top Opx V	
Margin Bottom	
CSS Class ③	
Apply Class	

The following options are available for images:

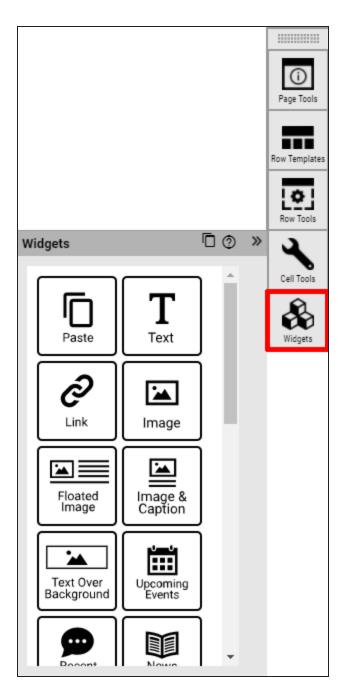
- **Background Color** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Border Color** Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- Border Thickness Select the size of the border.
- **Padding** Padding is the space between the content of your cell (the image in your cell) and the border. Select the padding size.

- Margin Top Margin is the space between the border and the edge of the cell. Select the margin size for the top of the cell.
- **Margin Bottom** Margin is the space between the border and the edge of the cell. Select the margin size for the bottom of the cell.
- **CSS Class** For developers, enter style classes to be used.

Widgets

Widgets are used to display content from other modules on either a custom page or your home page.

Select Widgets to see the following pop-out menu:



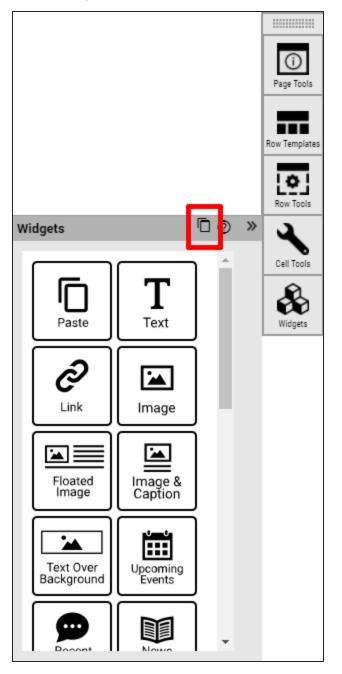
Widgets are inserted into cells and display content you add or create (text, images, links) or content from other modules on your website. To add a widget to a cell, select and drag the widget into the cell. If content or another widget is already in the cell, an alert displays confirming the existing content will be replaced.

The following widgets are available:



If you have copied content from one cell, the option to paste that content will appear as a widget in the Widgets menu. Drag the Paste widget into the cell to copy the content from your clipboard to the cell. If content already exists in the cell, you will be prompted to confirm replacing the existing content with the copied content.

Alternatively, select the Paste icon at the top of the Widgets menu to paste the content into the cell.





Text that can be edited using the plain, formatted or advanced text editor.

Cell Tools		»
Actions	Style	
	rmatt	xt ed Text ed Editor
Change Element Type		

Select the type of text you want to use for the cell to determine the text editor you will use: plain, formatted or advanced. Save your changes in any editor to apply the changes to the cell.

When editing previously inserted text, if the original text was edited using the Plain Text Editor, all three options (Plain, Formatted and Advanced Text Editors) will display. If the original text was edited using the Formatted Text Editor, only the Formatted and Advanced Editor options will display. If the text was edited using the Advanced Text Editor, only the Advanced Editor option will display.

For more information, see "Editing Text" on page 197.



Insert a link to another website or content on your website. Links available are based on modules enabled on your website.

Cell Tools			≫
Actions	Style		
Insert Link/Button			
Change Element Type			

Link Type and Address Link Type < Select > ✓ Link Properties .ink Display Type ⊘ Text ○ Button ○ Image Link Text Target Window ⓒ Same Window ○ New Window	your web site; to a web page. First, se selection you have specify the appear text, or select an in	I Address" panel allows you to create various types of links: to a page within n external web page; to an email address; or to an anchor within the current lect a link type. One or two additional choices will appear based on the made. Make your selection, then go to the "Link Properties" panel to ance of the link. A link may be displayed as text or an image. Enter the link tage, as appropriate. For web page links, you can specify whether the wear in a new window or in the current window.
Link Properties ink Display Type ⊘ Text ○ Button ○ Image Link Text	Link Type and Add	lress
ink Display Type ⊘ Text ○ Button ○ Image Link Text	Link Type	< Select > 🗸
	Link Tex	t

The link builder supports 16 types of links:

- 1. **Built-in Module** Link directly to any of the built-in modules (or extra cost modules, if enabled). The next field is a drop-down list of available modules.
- 2. **Custom Page** Link to any custom pages you have created. The next field is a drop-down list of custom pages.
- 3. **Photo Album** Link to a photo album. The next field is a drop-down list of categories; once you select a category, you can select a photo album within that category.
- 4. **Future Event** Link to an event. 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** –Link to a document stored in your documents module. The next field is a drop-down list of categories; once you select a category, you can select a document within that category.
- 6. **Donation** Link to any donation fund. The next field is a drop-down list of available funds.
- 7. Survey Link to any survey. The next field is a drop-down 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** The next field will prompt for the Email Address.
- 10. **Anchor** 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 Link to any blog. The next field is a drop-down list of available blogs.
- 13. **Quick Link** Link to external sites and some internal functions using a shortened url. To add external sites to the list of available links, see "Quick Links" on page 365
- 14. **Volunteering Opportunity** Link to any volunteering opportunity. The next field is a drop-down list of available opportunities.

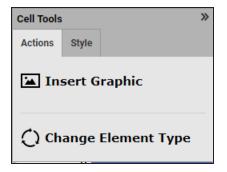
- 15. **Resource Scheduler** Link to any resource available for reservations. The next field is a drop-down list of available resources.
- 16. Ad Hoc Form Link to any ad hoc form. The next field is a drop-down list of available forms.
- 17. **Storefront** Link to any active product in your website's Storefront. Choose a category, then choose a product in that category.

Links can be represented in three ways, using text, a button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, the field is replaced by a button that displays the Image Selector pop-up window.

For linking to another ClubExpress module, a custom web page or a photo page, or an external website, 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.)



Images from Web Graphics, Photos or your local hard drive.



Select Insert Graphic to display the following image selector pop-up window:

Select a Web Graphic or a Photo	0
Click on a tab to show web graphics or photos. This dialog will initially only show some of the web graphics or photos. Se album. Select an image or photo by clicking on it, and then click "Save" to insert it into the widget or html.	arch for a particular photo or image in folder or
Show Web Graphics Show Photos	
File names start with and are in any folder Q Search Graphi	cs Upload New Graphic
	Selected File Details
	URL
	Alt Text
Save 🖌 Cancel 🗶	

Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

To resize an image that has been inserted, select and drag the double arrow at the bottom right corner of the image. You can also resize the image using Cell Actions.



An image floated to a position you specify, with text that wraps the image.

Cell Tools	»	
Actions Style		
First select an image or replace an image float position (right or left). Click on edit wrap around the image.	ge that you want floated. Then select the text to create/modify the text that will	
	Add Image	
Select "Add Image" to add a new image	Image Position	
to this widget.	Left Right	Dage Tools
T Edit Text]	Row Templates
Apply C	Changes	Row Tools
C Change Element Type		Cell Tools
		Widgets

Select Add Image to display the image selector pop-up window:

Select a Web Graphic or a Photo	0
Click on a tab to show web graphics or photos. This dialog will initially only show some of the web graphics or photos. Sea album. Select an image or photo by clicking on it, and then click "Save" to insert it into the widget or html.	rch for a particular photo or image in folder or
Show Web Graphics Show Photos	
File names start with and are in any folder Q Search Graphic Search Graphic	s 🕒 Upload New Graphic
	Selected File Details
	URL
	Alt Text
Save 🖌 Cancel 🗙	

Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes. Select the Image Position.

Edit text using the Formatted Text Editor.. Select Apply Changes to save your changes.



An image with a text caption underneath.

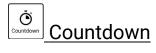
Cell Tools	»
Actions Style	
Image & Caption Widget	
First select an image or replace an image. Click on edit text to create/modify the text that will be placed beneath the image.	
Add Image	
Select "Add Image" to add a new image to this widget.	Page Tools
T Edit Text	Row Template
Apply Changes	Row Tools
Change Element Type	Cell Tools
	Widgets

Select Add Image to display the image selector pop-up window:

Select a Web Graphic or a Photo	0 8 Q
Click on a tab to show web graphics or photos. This dialog will initially only show some of the web graphics or photos. Sea album. Select an image or photo by clicking on it, and then click "Save" to insert it into the widget or html.	rch for a particular photo or image in folder or
Show Web Graphics Show Photos	
File names start with and are in any folder Q Search Graphic Search Graphic	s 🕒 Upload New Graphic
	Selected File Details
	URL
	Alt Text
Save 🖌 Cancel 🗙	

Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

Edit text using the Formatted Text Editor. Select Apply Changes to save your changes.



A countdown timer display.

		?	>>
Style			
own Widg	jet	C	?
		oply	
lown Option	IS		-
ountdown	Widget		
nter Type 5 3 17 Below Cou a Link	at 12 v : 00 v AM v		
	Style	Style Down Widget date from the date picker and then choose the style of counter. Click Apt to place the timer on the page. down Options down Options down Widget down Widget	Style Style Sty

Enter the title of the timer or what the timer is counting down to; this title will display above the countdown timer. Enter the target date and time, then select the style of the timer. Optionally, add a link to the timer using the Link Builder.



Text with an image as the background.

Page Builder

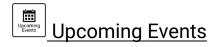
Cell Tools							0	»
Actions	Style							
Text Ov	er Back	cground Wi	dget				C	9
(center, ri image. B The back	ight or left ackground ground wi). Click on edit I image size wi	text to creat ill default at 4 ered (vertical	e/moo 400px ly and	e. Then select the dify the text that wi , and has a minim d horizontally), will ust the height.	II be placed o um height of	200px	
Image					Remove Imag	ge		
	NOTED.				Text Position Ueft Center Right	Image He 400	eight	
Path://s3	amazona	aws.com/Club	Expres	[≜]				
T Inse	ert / Edi	it Text						
			Apply Cl	hang	es			-
() Cha	ange Ele	ement Type						

Select Add Image to display the image selector pop-up window:

Select a Web Graphic or a Photo	0 8 Q
Click on a tab to show web graphics or photos. This dialog will initially only show some of the web graphics or photos. Sea album. Select an image or photo by clicking on it, and then click "Save" to insert it into the widget or html.	rch for a particular photo or image in folder or
Show Web Graphics Show Photos	
File names start with and are in any folder Q Search Graphic Search Graphic	s 🕒 Upload New Graphic
	Selected File Details
	URL
	Alt Text
Save 🖌 Cancel 🗙	

Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

Edit text using the Formatted Text Editor. Select Apply Changes to save your changes.



Insert a list of upcoming events.

Cell Tools			>>	
Actions	Style			
Upcomi	ng Eve	nts Widget		
		oming event for display on your website. Enter a title, the number of days in the future to include, e or more event categories.	and	
Title Up		Events		
Time F		days		Ó
		iner Width / 100% O Fixed Width 600 PX Max. Height p	X	Page Tools
Categor		nal. This is the maximum height of the widget before vertical scrollbars will appear		
	ude All ect Cate	Categories		Row Templates
				¢
		Apply Changes 🚀		Row Tools
C) Cha	ange Ele	ement Type		~
Cr on				Cell Tools
				Widgets

Enter a title to display at the top of the widget. Enter the number of days out to show upcoming events. Choose a width that spans the width of the cell, or a fixed width, and a maximum height. Choose to include all event categories, or only specific categories. Select Apply Changes to save your changes.

Recent Blogs

Insert a list of recent blog posts.

Cell Tool	s		≫	
Actions	Style			
Recent	Blogs \	Vidget		
Create a more blo		ent blogs for display on your website. Enter a title, the number of days , and optionally select one or		
Title R	ecent Bl	ogs		
Time	Period	days		
	_	iner Width / 100% ○ Fixed Width 600 ■ px Max. Height px nal. This is the maximum height of the widget before vertical scrollbars will appear		Page Tools
Inc	o Includ Iude All Iect Blog	Blogs		Row Templates
		Apply Changes 🚀		Row Tools
() Ch	ange Ele	ment Type		Cell Tools
				Widgets

Enter the title of the widget and the time period to display information. Enter the width of the widget, either the width of the content box or a specified width, and the maximum height of the widget. Determine if the widget will display all blogs or only select blogs. Select Apply Changes to save your changes.



Insert a single news article from the News & Articles module.

Cell Tools		»
Actions	Style	
In:	sert News Article	
() Ch	ange Element Ty	pe

Select Insert News Article to see the following Ir	nsert News Article pop-up window:
--	-----------------------------------

Insert Article text into	rticle he cell. Select a category, and then select an artic	cle.	
- Find News A	icle		
News Category	News 🗸		
Author			
Tags			
		Search 🗳	
	Apply Changes 🖋 Ca	ncel 🗙	

Search for the article by category, author or tags. Select Insert Selected Article to choose the article.



Insert a list of recent news articles posted in the News & Articles module.

Cell Tools			≫	
Actions	Style			
Recent	News \	Vidget		
		ent news articles for display on your website. Enter a title, the number of days back to search for e, and optionally select one or more news categories.		
Title	Recent	Articles		
Time F	Period	days		
		iner Width / 100% ○ Fixed Width 600 ♥ PX Max. Height px onal. This is the maximum height of the widget before vertical scrollbars will appear		Dage Tools
Categor Inclu		ews Categories		
OSele	ct Categ	ory		Row Templates
		Apply Changes 🖋		Row Tools
() Cha	ange El	ement Type		Cell Tools
				Widgets

Enter a title to display at the top of the widget. Enter the number of days past to show recently posted articles. Choose a width that spans the width of the cell, or a fixed width, and a maximum height. Choose to include all news article categories, or only one category. Select Apply Changes to save your changes.



Insert a list of members who have recently joined or renewed their membership.

ell Tools							0
actions Style							
lew and Renewe	ed Members Wid	get					(
include, specify wheth	renewed members for er you want to show m be displayed. Select a	nembers or non-r	nembers, and	l optionally se	elect the fo		
Display New Membe							
New Members Itile Welcome Mer		Time Pe	riod 60	days	Width	200	рх
				± duy5		200	P.A
lax. Height	px						
low Unight in antional	The second s	bainht of the wir	denat bafava un	utical sevellb	ve will an		
	I. This is the maximum	height of the wid	lget before ve	ertical scrollba	ars will ap	pear	
Max. Height is optional Display Font	The second s		lget before ve	ertical scrollba	ars will ap	pear	
Display Font Font	The second s	height of the wic	lget before ve	ertical scrollba	ars will ap _l	pear	
Display Font	I. This is the maximum			ertical scrollba	ars will ap,	pear	
Display Font Font Angillatatoo	I. This is the maximum Font Size	Ş			ars will ap	pear	
Display Font Font	I. This is the maximum Font Size	Ş			ars will ap	pear	
Display Font Font Angillatatoo	I. This is the maximum Font Size	Ş			ars will ap	pear	
Display Font Font Angillatatoo	I. This is the maximum Font Size	Ş	Update		ars will ap	pear	

For organizations where members join through their business lives, you'll see the option to display the business name instead of the individual member name.

II Tools								0
ctions Style								
ew and Rene	wed Mem	bers Wide	get					(
Create a list of new nclude, specify wh he member names	ether you wa	ant to show m	nembers or no	on-members, an	d optionally se	elect the fo		
isplay New Mer New Membe			ß					
ame Display								
Member Nar		isiness Nan	_					
		isiness Nan	_	Period 60	∎days	Width	200	рх
tle Welcome N	/lembers		_	Period 60	days	Width	200	рх
tle Welcome N ax. Height	/lembers	x	Time					рх
itle Welcome M lax. Height lax. Height is optic	Aembers p pnal. This is t	x	Time					рх
Member Nar itle Welcome N lax. Height fax. Height is optic Display Fon	Aembers p pnal. This is t	x	Time					рх
itle Welcome M lax. Height lax. Height is optic	Aembers p pnal. This is t	x	Time	e widget before v	rertical scrollba			рх
itle Welcome N lax. Height lax. Height is optic Display Fon	Aembers p pnal. This is t	x the maximum	Time	e widget before v				рх
itle Welcome M lax. Height lax. Height is optic Display Fon Font	Members p onal. This is t	x the maximum Font Size	Time	e widget before v	rertical scrollba			рх
itle Welcome N lax. Height lax. Height is optic Display Fon Font Arial	Members p onal. This is t t	x the maximum Font Size	Time	e widget before v	rertical scrollba			рх
itle Welcome M ax. Height ax. Height is optic Display Fon Font	Members p onal. This is t t	x the maximum Font Size	Time	e widget before v	rertical scrollba			рх
itle Welcome N ax. Height ax. Height is optic Display Fon Font Arial	Members p onal. This is t t	x the maximum Font Size	Time	e widget before v	rertical scrollba			рх
itle Welcome N lax. Height lax. Height is optic Display Fon Font Arial	Members p onal. This is t t	x the maximum Font Size	neight of the	e widget before v	rertical scrollba			px

Select the members to display, either new or renewed. Remember, if your members join through their business lives and you select "Member Name", you'll be prompted to confirm whether you want to show the business name or individual member name.

Enter the widget title to display, the time period and the width of the widget. Enter the font to be used for the member names. Select Save to save your changes.



Insert a list of upcoming member birthdays and anniversaries.

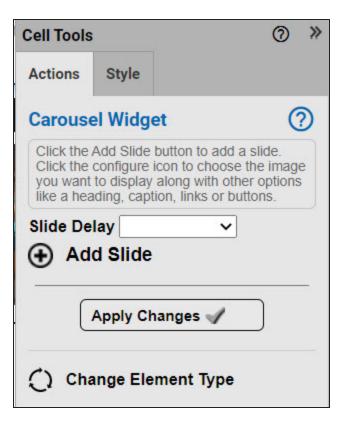
Page Builder

Cell Tools	»
Actions Style	
Birthday / Anniversary Widget	
Select Birthdays or Anniversaries, whether secondary or tertiary members should be shown, as well as a date range.	
Title	
Upcoming Birthdays Max. Height px	
Time Period 60 days Width Container Width / 100% Fixed Width 600	
Optional: This is the maximum height of the widget before vertical scrollbars will appear	
Include Birthdays? ONo OYes	(i)
Include Anniversaries? No O Yes	Page Tools
Include Secondary Members No Yes 	
Include Tertiary Members? No O Yes	Row Templates
Apply Changes 🚀	Row Tools
•	- .
Change Element Type	Cell Tools
	Â
	Widgets

Enter the title of the widget and the time period to display information. Enter the width of the widget, either the width of the content box or a specified width, and the maximum height of the widget. Determine if the widget will display birthdays, anniversaries, and for primary members only or to include secondary and tertiary members. Select Apply Changes to save your changes.



Display a carousel slideshow with a text overlay which can include a link. The individual images used will come from your Web Graphics library.



Select Add Slide to add a slide to the carousel, then select the Settings (gear) icon to configure the slide.

Next, you'll add an image by browsing your Web Graphics library. If you select the Include Overlay checkbox, you'll also be able to add and configure a text overlay and link.

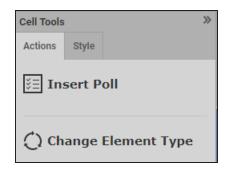
Carousel Configure		0 &	6
Create or modify the image and content	ts of this slide.		*
	× Remove Image	Include Overlay 🗹	
Slide Heading		Overlay Position	l
Jenny Cho		Left 🗸	
Jenny Cho has been the Trea lot to the table! 83 of 200 characters used Caption Font		//	
Font Arial V	Heading Color	White 🔼	l
Font Size 12 px 🗸	Caption Color		
Link Jenny's Bio X Remove link			
5	Save 🖌 Cancel	×	

The trash can icon deletes the panel. Click Apply Changes to save your changes.



Insert a poll created in the Surveys module.

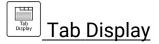
Page Builder



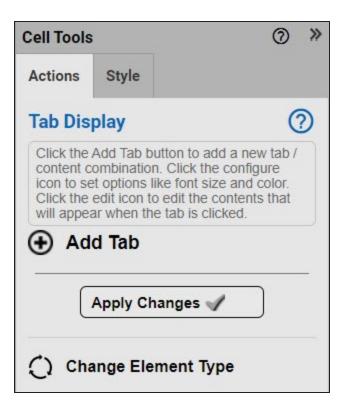
Select Insert Poll to show the following pop-up window:

Select	Poll			Ø
you are	poll from the list below an working on. You may also 'Create new Poll' to insert	click 'Edit' to modify		
	Active Polls			
	Favorite Balloon Color	🖋 Insert Poll	Ø	
	Create New Poll			

Select the green check mark to insert the poll. Select the edit icon to make changes to the poll.



Insert sections of text in a tabbed format, where users can select a tab to display different content within the same cell.



Select Add Tab to add a tab of text. A new set of icons will appear:

Cell Tools		() »
Actions	Style	
Tab Dis	play	0
content o icon to se Click the	ombination. et options likedit icon to	tton to add a new tab / Click the configure the font size and color. edit the contents that tab is clicked.
-	d Tab	
Tab 1		♀ょ□
	Apply Cha	inges 🚀
() Cha	ange Elen	nent Type

Select the settings icon to configure the panel settings:

heading. W	nodify the title of t /hen clicked, a se	ction will appear	anel. You can change the font, colors r beneath the heading containing you e text for the panel.	or title of the accordion r text. To modify the
ab Title	parier, cick save i	lere men euit m	•	
- Tab Font Font Font Size	Arial	✓ ⊃x ✓	Colors Tab Background Color 🥥 Tab Hover Color 🥥 Tab Text/Border Color 🥥	Copy Styles
- Preview	Title Preview		Update Preview For	nt Size
		Save	Cancel 🗙	

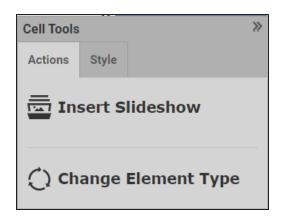
Enter the title of the tab. Select the font and size for the tab, as well as the background, hover and border colors.

Select the edit icon to add text to the panel. This is the text that will be visible when the user clicks the tab on the custom page. Use the Formatted Text Editor to edit the text.

The trash can icon deletes the panel. Click Apply Changes to save your changes.

Slideshow

Show a photo slideshow.



Select Insert Slideshow to show the Slideshow pop-up window.

Slideshow		8 8
Select Photo Alb	oum	Г
Category < S	Select > V	
Photo Album < S	Select Category > 🗸	
Slideshow Featu	ires	_
Width	рх	
Height	рх	
	Include Border, Navigation, d Caption Button	
0	Show Images Only	
	Save 🗸	

Choose the Photo Album category to browse for a photo album to use for the slideshow. Set the width and height of the slideshow, and choose to display a border and navigation buttons, or the images only. Select Save to save your changes.



Insert a list of recent Facebook posts.

	;	
Actions	Style	
Facebo	ok Wid	get
feed addi another F best view	ress will d Facebook ving, pleas	book site configured in your social networking options the efault to your site's URL. To insert a facebook feed for Page, please copy and paste the URL for that site. For se choose a height and width greater than 200px x 200px ebook Like Box / Feeds do not work with "Groups" on
propertie	es must b	ust use a Facebook Page link, and the publishing be configured so that everyone can view posts Options
		opuolo
Heig		
500		px
Widt	h	
300		рх
Face	book UF	RL enter the whole url including http(s)://
		facebook.com/ClubExpressSoftwa • Test
		Apply Changes 🖌

Choose a height and width for the widget, and enter a link to the Facebook page.



Insert a list of recent Twitter posts.

Cell Tools	;		»
Actions	Style		
Twitter	Widget		
address v Twitter Pa	will default age, please	page configured in your social networking options the feed to your Twitter user name. To insert a Twitter feed for another type in the User Name (e.g.: CNN, nytimes). For best viewing, ght and width greater than 200px x 200px	
Twitter	Feed Opt	ions	
Heig 50		рх	
Widt	h		
30	0	px	
Twitt	ter User N	lame	
clu	ubexpres	S Test	
		Save 🖌 Cancel 🗙	-
() Ch	ange I	Element Type	

Choose a height and width for the widget, and enter the Twitter username.



Display weather for a specific location.

Cell Tools						»
Actions	Style					
Weathe	r Widge	et				
location y automation blank, yo	ou want v cally filled u may wis	veather for. The form your clu	he latitude b's Geo-lo e the addre	y latitude / long and longitude cation. If the b ss portion of t	gitude of the will be elow fields and he "Name and	e t
Latitud	le					
42.04	85253					
Longit	udo					
-88.04						
Unit		Calaina				
U⊢a	renneit) Celsius				
Width						
🔘 Co	ntainer W	/idth / 100%	◯ Fixe	d Width 600) 🍨 px	
	on Title y change th	ne weather disp	olay title			
Schau	umburg					
						_
		vlgqA	Changes	1		
		(113				
() Ch	ande	Element	t Type			
	unge		- ype			

The coordinates and location which auto-fill correspond to the club location entered in the Club Tab. Select the temperature unit, width of the widget (either the width of the content box or a specified width) and the name of the location.



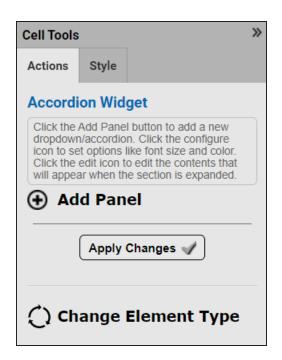
Insert a video using the media embed code. The video will display on your custom page.

Cell Tools			»
Actions	Style		
Media /	Embed	d Code	
YouTube	or Vimeo	d' code copied from a video site such as . When you click 'OK' the video will be litor at the current cursor position.	
			_
	(Apply Changes	
() Ch	ange	Element Type	

Paste the embed code from your video hosting site (such as YouTube or Vimeo) into the blank field. Select Apply Changes to apply the changes to the cell.



Insert expanding and collapsing text.



Select Add Panel to add a panel of text. A new set of icons will appear:

Cell Tools			»						
Actions	Style								
Accordi	on Wid	get							
dropdowr icon to se Click the	Click the Add Panel button to add a new dropdown/accordion. Click the configure icon to set options like font size and color. Click the edit icon to edit the contents that will appear when the section is expanded.								
🕀 🕁	d Pan	el							
Panel 1		♀ ∕ 亩							
	Apply Changes 🖋								
() Change Element Type									

Select the settings icon to configure the panel settings:

			title of the accordion heading. When clicked, a ne panel, click save here then edit the text for
ccordion	Panel Options		
le			
dth 300	px minimum width 200px		
Title Font -		Arrows / Border	r
Font	Arial 🗸	Arrow indicator	<< Select >> V
Font Size	12 px 🗸	Borders	● No OYes
Title Backg	round	Title Text Color	
Standard Co	olor: << Select >> V	Standard Color:	<< Select >> V
Custom Cold	or: White	Custom Color:	Black
ītle Bar Previ	ew		

Enter the title of the panel and the width. Select the font and size for the panel. Select the icon to be used to indicate further text is available (expand icon). Select the font color and background color for the title of the panel.

Select the edit icon to add text to the panel. This is the text that will be visible when the user clicks the "expand" icon on the custom page. Use the Formatted Text Editor to edit the text.

F	ormattee	d	Тех	t E	dit																			0	3
	If using a plat the Advanced	in d F	text se HTML e	ction, ditor,	type use	or pa any o	ste ii f the	n plain text various too	and clie	ck save. rmat yo	If using ur text o	the for use the	rmatte he "H	ed tex TML"	t edito mode	or, type to mo	e or p dify th	aste y ne htrr	our te 11. Clic	xt and k Sav	l use t ve to a	he vari dd this	rious tools to enhance the con s content to the page builder.	lent. If using	
	Heading 1	;	\$В	I	L	j ę	3	12px	¢	Aria		÷	<u>A</u>	A		≔	Œ	Ē	≡	Ð	1	<u>T</u> *			
	This is a He	ero	Bann	ier																					
												Save	1		Car	ncel	x								

The trash can icon deletes the panel. Click Apply Changes to save your changes.



Insert a sub-menu sidebar.

Cell Tools	x X
Actions	Style
Submer	nu Widget
the dropd in the We appear in This widg the full wi	get will place a submenu on the page where you insert it. The submenus in down list are populated from the submenus you've created in the Menu page ebsite tab of the control panel. The submenus you create do not have to in the main menu, and you can select them here to be inserted into the page. get is best placed in a 'sidebar' section of your website as the links will take up idth of the container. You may wish to create a 25/75 page row and insert this to the 25% container.
	e Submenu elect > v •
Set Wie	dth ontainer Width / 100% ○ Fixed Width
	Apply Changes 🖋
() C h	ange Element Type

Choose a menu to insert. Select the width, either the width of the content box or a specified width. Select Apply Changes to save your changes.



Insert the names and statuses of all active trails, if the Trail Status module is enabled.

Cell Tools	;		»
Actions	Style		
Trails S	tatus F	eed Widget	
status of	all active (et on your page. This widget will return the names and (open, closed, partially open) trails. Hidden trails will eed. Status will appear next to the trail name.	
Title			
Trails S	tatus		
Max. He	ight px This is the	dth / 100% ○ Fixed Width 600 ♥ px	
		Apply Changes 🖋	
() Ch	ange	Element Type	

Enter the title of the widget. Select the width, either the width of the content box or a specified width. Select Apply Changes to save your changes.

Jobs Board Jobs Board

Insert a list of recent job posts, if the Jobs Board module is enabled.

Cell Tools			»
Actions	Style		
Jobs Bo	oard Wi	dget	
title width	or height	enly posted jobs for display on your website. Enter a for the widget and optionally select one or more jobs will display active jobs in active categories.	
Title			
Recent	Jobs		
Max. He Optional: before ver Categor Inclu	ight px This is the tical scrol ies	dth / 100% ○ Fixed Width 600	
		Apply Changes 🖋	,

Enter the title of the widget. Select the width, either the width of the content box or a specified width. Choose to display all job categories or a selected category. Select Apply Changes to save your changes.



Insert a list of members currently checked in to your facility, linked to the Check-In Desk Module.

Cell Tools	() »						
Actions Style							
Check In Desk Widget	0						
Display the count of members checked in for the current day. Please enter a title.							
Title Current Occupancy							
Width	рх						
Max. Height is optional. This is the maximum height of the widget before vertical scrollbars will appear							
Apply Changes 🚀							
C) Change Element Type							

Enter a title to display at the top of the widget. Choose a width that spans the width of the cell, or a fixed width, and a maximum height. Select Apply Changes to save your changes.



Inserts a horizontal line spanning the width of the cell.

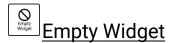
Edit content for this cell in HTML mode.

Cell Tools		×	>							
Actions Style										
In:	sert /	Edit HTML								
<u>()</u> Ch	() Change Element Type									

Select Insert/Edit HTML to view the HTML Edit popup:

н	ML Edit		0 & 0
	Create or edit your HTML here. Click Save to commit your change If your code contains errors, it may cause a failure of the page to	es, or Cancel to exit the editor. Please verify the load or a failure in the editing environment.	nat your HTML is properly formatted and contains no errors.
	1 <hr/>		
		Save 🗸 Cancel 🗙	

Edit the underlying HTML code. Select Save to save your changes.



Inserts an empty widget (no content) into the cell.

Versioning

Select the Manage Versions icon to view the Versions Manager screen for the selected custom page or home page.

Home > Control Panel > Custom Board Election	-		s Mana	ger						?
and can be enabled or disabled.	If you sele	ect a mobile version it will be	different from the	"normal" active vers	sion. Mobile versions a	are entirely o	optional	and may be use	publish these versions. Mobile versions are option to display separate or minimal information for mol e shown on this list and will be removed from the	nal bile
Q A Hide Search		lit Main ersion	Delete Old Versions							
Search For Versions										
Title										
Date Created From		То								
Date to be Deleted From		То								
Status 🔿 Versi	ons C	Deleted 🛛 All								
		Reset	Search 🛷							
Search Results (3 vers	sions(s) found)				<	Pag	e 1 of 1 🗸 🔪		
Version Title	Status	Page Type	Edited By	Date Created	Date to be Deleted	Maintain		1		
Board Election 2020 Version 2	Active	Main Mobile Custom Page	Martin Smith	08/05/2020 12:24		<i>i</i> 🧷 💿		P		
Board Election 2020 Version 2	Active	Main Custom Page	Martin Smith	08/05/2020 12:24		<i>i</i> 🧭	Þ			
Board Election 2020 Version 1	Version	Custom Page	Martin Smith	08/05/2020 12:24		ê 💿	0	b 🤌 🙀		

If you are viewing versions of your home page, the page types will be Home Page, Main Home Page, Main Mobile Home Page, Mobile Home Page. The searching and editing options are the same as for custom pages.

Note: If the page is a new page and no versions exist, select **Create Main Version** to open the Page Builder and create a new version of the page.

Select **Hide Search** to hide the search panel. Select **Edit Main Version** to edit the designated main version of the page in the Page Builder. Select **Create Mobile Version** to create and edit a mobile version of the custom page in the Page Builder.

Select **Delete Old Versions** to view the Delete Versions popup. The option to delete old page versions will only appear if more than one version has been saved.

Pick a "created" date to mark versions for earlier than the date you select here will will not be physically deleted until 30 mo versions will not be deleted.	be marked for deletion. They
ersions Created Before	•
Save 🗸 C	ancel 🗙

Enter a date to delete versions created before that date. The system will delete those versions after 30 days have passed.

Use the search panel to search by version title, date modified, date to be deleted (if old versions are scheduled to be deleted), or by status (versions, deleted or all). Click the **Search** button to initiate a search.

Search results display in a grid showing the :

- Version Title Edit the version title in page tools or using the configure icon.
- Reference ID The reference ID is generated automatically when a new version is created, beginning at Ref. ID 1.
- Status "Active" for the active version of the page, "Version" for non-active versions of the page, or "Deleted" for versions marked for deletion.
- Page Type -
 - Main Custom/Home Page The main/active version of this page.
 - Custom/Home Page A non-active version of this page.
 - Main Mobile Custom Page The main/active mobile version of this page.
 - *Mobile Custom Page* A non-active mobile version of this page.
- Date Created The date this version was created.
- Date to be Deleted If the version has been marked for deletion, the date the version will be deleted.

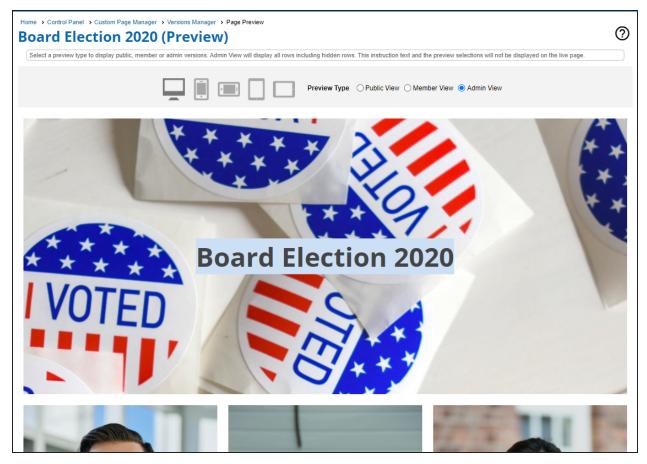
Icon	Description
🥟 (Edit)	Edit the content of the page using the <u>Page Builder Canvas</u> .
(View)	View a <u>preview</u> of this page.

lcon	Description									
☑ (Con- figure)	Activate this page as the main version. If no mobile version is active, this version will be the main desktop and mobile version.									
♥ (Share)	Activate this page as the mobile version.									
	Deactivate the mobile version of the page. This icon will only appear for the active mobile version of the page.									
(Con- figure)	Configure the title of this version. Enter a version title in the popup box. Select Save to save the title, or Cancel to exit without saving.									
🝺 (Delete)	Delete this version.									

Maintain Options

Page Previews

Select the preview icon to view the page from an administrator, member or public perspective, and in multiple outputs.



The following page visitor perspectives are available:

- Public View View the page as a non-member, or someone who is not logged in to your website.
- Member View View the page as a logged-in member.
- Admin View View the page as an administrator.

The following output types perspectives are available:

- Desktop
- Phone (portrait mode)
- Phone (landscape mode)
- Tablet (portrait mode)
- Tablet (landscape mode)

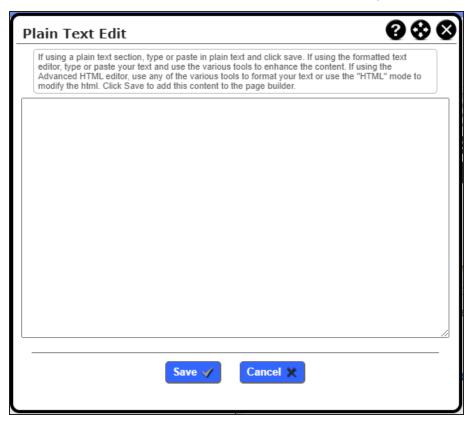
Select the output type and the user perspective to see a preview.

Editing Text

To edit text widgets in your custom pages or home page you have three options: plain text editor, formatted text editor, advanced text editor (content editor).

Plain Text Editor

Selecting Edit Text with using the Plain Text Editor displays the following pop-up screen:



The text entered will display in the style set by default in Cell Tools > Styles. Formatting for the cell can be changed further by editing the settings in Cell Styles (see "Cell Tools" on page 148).

Note: The style created in Cell Styles will be applied to all text in the cell. To format select portions of text, use the formatted or advanced text editor.

Formatted Text Editor

Editing text using the Formatted Text Editor displays the following pop-up screen:

F	ormatte	d 1	[ext	t Ed	lit																					8	8	⊗
	If using a platter the Advance	ain te ed H1	ext sec FML ec	tion, t ditor, u	ype or use an	r paste y of th	in plain text e various to	t and clic ols to for	ck save. I mat you	lf using r text o	g the foi or use th	rmatte ne "H"	ed tex TML"	t edito mode	r, type to mo	e or pa dify th	aste y ne htm	our te: II. Clic	xt and k Sav	use t e to a	he va dd thi	rious to s conter	ols to en nt to the	hance page k	the con builder.	itent. If u	sing	
	Heading 1	ŧ	в	I	U	S	12px	¢	Arial		ŧ	A	A	122	≣	<u>4</u>	<u>-</u>	=	Ø	1	<u></u> ×	٢						
											Save	\checkmark) (Can	ncel	×												
																												J

Note: If text is created using the Formatted Text Editor, only the Formatted Text Editor or the Advanced Text Editor may be used in future edits.

The following options are available in the Formatted Text Editor:

lcon	Description
Heading 1 🛊	Select the heading level. These are the heading styles you specified in Website Look & Feel.

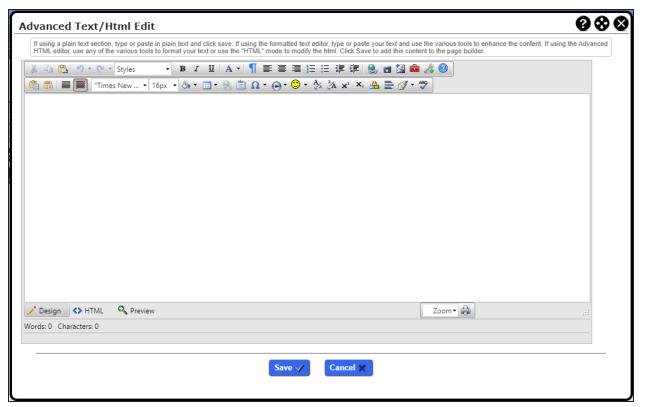
Icon	Description
В	[Ctrl + B] Bold selected text or begin typing in bold from the cursor position.
I	[Ctrl + I] Italicize selected text or begin typing in italics from the cursor position.
U	[Ctrl + U] Underline selected text or begin typing underlined text from the cursor position.
S	Strike through selected text or begin typing strike through text from the cursor position.
12px 🛊	Choose the text size for selected text or begin typing in the chosen size from the cursor position.
Arial 🛊	Choose the font style for the selected text or begin typing in the chosen style from the cursor position.
A	Choose the font color for the selected text or begin typing in the chosen color from the cursor position.
	Choose the background color for the selected text or begin typing with the chosen background color from the cursor position. This will be a background of just the text, not the cell.
1 2 3	Create a numbered list (beginning with "1") or apply numbering to existing lines of text.
=	Create a bullet list or apply bullets to existing lines of text.
E	Outdent (decrease the indent) a selected line of text or the line of text containing the cursor.
E	Indent a selected line of text or the line of text containing the cursor.
=	Set alignment for selected text or the line of text containing the cursor: left, centered, right, justified.
B	Insert a hyperlink at the cursor position using the link builder.
	Insert an image at the cursor position from web graphics, or upload an image from your local hard drive.
<u>T</u> _x	Removes any formatting previously applied and resets to the default cell styles.
©	Opens the emoji selector drop-down menu.

Icon Description										
	Note: Your browser may not support all available emoji.									
	Formatted Text Icons									

Select Save to save your changes, or Cancel to return to the Page Builder Canvas without saving.

Advanced Text Editor

Editing text using the Advanced Text Editor displays the Advanced Content Editor in the following pop-up screen:



For instructions, see "Content Editor" on page 103

Note: If text is created using the Advanced Text Editor, only the Advanced Text Editor may be used in future edits.

Question and Answer Types

Customized questions can be configured in a number of ClubExpress modules, including Ad Hoc Forms, Events, Collectibles and more. Questions are created based on the answer type (for example, multiple choice, a select list or a checkbox list).

Learn how to manage pages of questions: See "Question Configuration" below

Explore answer types: See "Answer Types" on page 665

Learn more about formatted text questions: See "Formatted Text Questions" on page 668

Learn more about scale questions: See "Scale Questions" on page 668

Question Configuration

Click the **Add Question** button to add a new question.

Select a question typ type cannot be changed																	
Page	Page Page 1																
Question Name	Balloo	on Co	olor						•								
Answer Type	Short	Text				¥											
Question Text	в	I	<u>U</u>	S	Default \$	Arial		ŧ	A	A		≣	Ŧ	F	1	<u>T</u> x	A BC
	Wha	at co	lor is	your	balloon? If y	our ball	oon is m	ultio	olo	red, j	oleas	e list	no r	nore	than	four ((4) colors.
	0 of 250 Votes (ii				ill appear unde	r the que:	stion text						A 3 C				
Default Answer																	
Max. Answer Length	125																
Response Required	Ye	s C) No														
Allow Comments	() Ye	s 🧿	No														
Member can edit	🔵 Ye	s C) No														
Searchable Question	🔵 Ye	s C) No														
Response Visibility	All			۷													
					Sav	re 🖌	Car	ncel	×	ן							

- Specify the **Page** on which the question should be placed. You can specify the Scratchpad, or any page you have defined.
- Question Name is used on the manager grid only; it is only shown to users in error messages.
- Select the **Answer Type** from the drop-down list. (Answer types are described in detail below.) The screen will refresh to show additional options.
- The Question field contains the actual text that will be shown to users. This is a miniature version of
 our advanced content editor, with options to control fonts, lists, and alignment, and to display photos
 or images. Line breaks are supported in this field. The actual question text can be of virtually unlimited length. (Note that a simple text box replaces this editor for a Scale question, where the question
 itself uses a different answer type.)
- The **Notes** field allows you to enter additional text that will be shown under the question and in a smaller font. It is usually used for prompts or hints on how to answer the question. There is a limit of 250 characters.

- Some answer types require that a list of options be specified, including allowable values or a range or text to be used. The prompt under the field will tell you what should be entered. If an item list must be specified, put each item on a separate line.
- Some answer types allow for a **Default Answer** that will be pre-filled in but which can be changed.
- Some answer types support **Minimum** and **Maximum Answer** values. Specify one or both values based on the answer type.
- Some answer types support a **Max Length**, to control how much text can be entered.
- Most answer types also support a **Response Required** option. Select "Yes" if an answer **must** be provided.
- Some answer 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.
- Some answer types support a **Comments** box. Select "Yes" to display this box, so that users can add comments beyond their main answer.
- The **Member can edit** option controls whether members can edit the response to this question or whether this is limited to admins only. Some item properties might be controlled at the club or association level and cannot be changed by members.
- The **Searchable Question** option controls whether this question can be used as a search criterion on the user and admin screens.
- **Response Visibility** controls who can see the response to this question: everyone, members only, or admins only.

Select **Save** to save your new question and return to the grid, or **Cancel** to return without saving.

Answer Types

The following answer types are available:

Note: To designate a **default** answer, add a ~ to the beginning of the line. To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.

Туре	Display Format	Additional Values	Options
Heading/ Instruction Text	Question text only, no response is allowed	Any formatted text, including images and photos	N/A
Short Text	Text field	Default answer, Max length	
Formatted Text	Text Field where the answer must be in a specified format	Answer format • Numbers only (plus space and hyphen) • Letters only (plus space and hyphen) • Numbers and Letters (plus space and hyphen)	Required: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options
		 Email Address Web Address (URL) US Phone Number US Zip Code Canada Post Code Australian Post Code UK Post Code UK Post Code Custom - Enter a Regular Expression and test the expression <u>Regular Expres</u>- <u>sions</u> are a powerful format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. 	
Long Text	Large text block	N/A	Max length required: yes/no
Date Year	Drop-down list showing 4-digit numbers	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Date Month	Drop-down list showing the months of the year	Default answer	Required: yes/no Allow comments: yes/no
Date Day	Drop-down list showing the numbers 1-31	Default answer	Required: yes/no Allow comments: yes/no
Date Full	Text field with a popup date- picker icon	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Day of Week	Drop-down list showing the days of the week	Default answer	Required: yes/no Allow comments: yes/no
Time of Day	Time selector	Earliest time, latest time	Required: yes/no Allow comments: yes/no
Integer	Text field	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Number	Text field	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Select List	Drop-down list showing the	Enter the items to be displayed in the list, each on a separate line. Press [Enter] to	Required: yes/no Allow other: yes/no

Туре	Display Format	Additional Values	Options	
	choices in the order entered	move to the next line as you're entering the items. A minimum of two (2) items must be specified.	Allow comments: yes/no	
Check box List	Vertical list of check boxes; any and all can be selected	Enter the items to be displayed in the list, each on a separate line.	Specify the minimum and maximum selec- tions that can be made. Allow other: yes/no Allow comments: yes/no	
Radio Buttons		Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is avail- able for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election)		
	Vertical list of radio buttons; only one can be selected	Note: To designate a correct answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.	Required: yes/no Allow other: yes/no Allow comments: yes/no To define an initial default answer, add a ~ to the beginning of that line	
		Note: When you add questions with a correct answer configured but enabled the "Other" option, and the user enters their response, the answer will be incorrect.		
True/False	Radio button	Specify "True" text Specify "False" text Select an initial default, or no default	Required: yes/no Allow comments: yes/no	
Multiple Text Boxes	Vertical list of text fields; any- thing can be entered into each field	Enter the number of text boxes to be dis- played. Specify the maximum length of each answer. Specify the minimum number of values that must be entered.	Allow comments: yes/no	
Scale	Horizontal list of radio buttons representing the "strength" of	Enter text to be displayed above each radio button, each entry on a separate line. The number of lines determines the number of radio buttons. A minimum of	Required: yes/no Store numbers: yes/no (If no is specified, val-	

Туре	Display Format	Additional Values	Options
	the respond- ent's opinion	two (2) items must be specified.	ues will be stored)

Question/Answer Types

Formatted Text Questions

When you select "Formatted Text" for the answer type, an additional option appears to define the answer format. The following predefined formats are available to select:

- Numbers Only (plus space and hyphen)
- Letters Only (plus space and hyphen)
- Numbers and Letters (plus space and hyphen)
- Email Address
- Web Address (URL)
- US Phone Number
- US Zip Code
- Canada Postal Code
- Australian Postcode
- UK Postcode
- Custom

When you select the "Custom" option, another field appears to allow you to define a custom format. This option uses a feature of many programming languages called a **Regular Expression**. With this feature, you define a format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. At runtime, this format string then defines what users can enter into the field.

Regular expression syntax is subtly different in different programming languages. ClubExpress uses the syntax defined by JavaScript.

Note: Regular Expressions are for experienced software developers only. They can be as simple or as complex as you want them to be, but there is a significant learning curve. ClubExpress cannot provide support for individual regular expressions that are not working as you might want them to work.

For more information about regular expressions, see the following websites:

Basic Reference: http://www.w3schools.com/jsref/jsref_obj_regexp.asp

A site with more detailed info, examples, and specifics of javascript support: <u>http://www.regular-expressions.info/</u>

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	\odot	\bigcirc	\odot	\bigcirc
Government regulation	\odot	\bigcirc	\odot	0
Education	\odot	\bigcirc	$^{\circ}$	\odot
Open skies	$^{\circ}$	\bigcirc	$^{\circ}$	0
Equipment	\circ	\odot	\circ	0

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.

Example: In the figure below, there is a typo in the value block for the last question ("Neutrall"), so it is separated out.

How important are the following factors in your enjoyment of ballooning?					
		Unimportant	Neutral	Somewhat Important	Very Important
:	Safety	\circ	\circ	0	\circ
Government regu	lation	\circ	\circ	0	\circ
Edu	cation	\circ	\circ	\circ	0
Open skies		\circ	\circ	0	0
	Unim	portant	Neutrall	Somewhat Important	Very Important
Equipment		0	\circ	0	\circ

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:

Add/Edit Ad Hoc Form Question
Select a question type, and the appropriate data fields will be displayed (note that if an existing question has been answered by any user, the type cannot be changed).
Question Name
Answer Type Scale
Question Text
B I U "Times New ▼ 16px ▼ A ▼ 3> ▼ 🗄 🗄 🛱 🛱 🚵 🥙 🕗
Question Prompts
0 of 4000 characters used
Enter question prompts, each on a separate line
Column Headings .
0 of 4000 characters used Enter the scale values (column headings), each on a separate line.
Response Required 💿 Yes 🔘 No
Store Numbers 💿 Yes 🔘 No
•

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/Instruction Text" 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 ad hoc form, 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 "Heading/Instruction Text" 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 heading.

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.

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 and Reporting 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.

Example: "Poor,Fair,Good,Excellent" will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.

Launching Your Website

After setup and/or trial mode, add your banking information and your site will go live. Once your site is live, complete a few remaining tasks to launch your site, including specifications for member and non-member data import

Going Live

When all items on the Setup 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 Setup Check List; it will disappear and your website will be activated **and the setup fee charged**. Your site is accessible using the subdomain format described above.

Example:

http://ChicagoCorvettes.clubexpress.com (Note that "www." is not required when this format is used.)

This feature allows you to keep your old website active using your main domain name, while you fully build-out your new ClubExpress site. Even after the Setup 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.)

Note: (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-only content.

Bank Information

Note that the **Bank Account** screen has two versions. When you initially select the screen, you will see a screen similar to the following:

Bank Information					
We also withdraw our monthly need to have details of your b small test transaction will be p the information requested and	ship fees and deposits them automatically in you fees directly from your bank account. In order to ank and account. When this information is provid erformed to ensure that we have the correct dat cick "Save" to return to the Finance and Account	o do this, we ed or updated, a a. Please enter			
Fields marked 🔶 require an e	antry.				
Descriptive Name	Descriptive Name Donations - First Bank				
Account For	Account For Northwestern Balloon Club				
QuickBooks® Account Name	NW Balloon Club				
Name on Account	NW Balloon Club	٠			
Bank Name	First Bank of Anywhere	٠			
Routing Number	122400779 • How do I find this?				
Account Number	122422333	•			
Account Type	💿 Checking 🔵 Savings 🛛 鱼				
Account Class	🔵 Business 💿 Personal 🛛 鱼				
Make Primary					
	Save 🖌 Cancel 🗶				

You are prompted to enter your organization's bank account, including the bank name, routing number and account number. Whenever an account is entered, verification is required using either a voided/cancelled check or a bank statement, which you upload. ClubExpress will verify the account and send an email once it has been verified.

If you are in Trial mode (see below) and you enter a bank account, this will tell us that you want to become a paying customer. You will be switched to Active mode and the \$150 one-time setup fee will be charged. Please be sure that you have sufficient funds in the bank account.

If your bank information ever changes, you can access this screen from the **Control Panel – Money – Setup** panel.

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 Setup Check List, you will be specifying just the primary or default account, but you can add other bank accounts later from the Control Panel.

After You Go Live

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 Member and Non-Member Databases

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 support@clubexpress.com, there are a number of data and formatting requirements that must be followed. When we receive the database, we will review it to make sure it follows these requirements and let you know if there are any problems. 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.

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.

Administrators: Learn more about the bulk load process and download the template files you'll use to submit your data. See "Bulk Loading Databases" on page 217

Switching your Internet Domain Name

See "Domain Names / Quick Links / Redirects" on page 358

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.

Purchasing an SSL Certificate

Google and other Internet experts encourage websites to display all pages using https:// (secure). Google is even forcing this in the current versions of Chrome (which is used for more than 60% of web traffic) by flagging website pages that are displayed using http:// with a "NOT SECURE" warning and downgrading them in the Google search results.

They are taking this action to protect users who may not fully understand Internet security (almost everyone!) and especially what they are looking at as they jump from website to website. This change also helps to protect users from "man-in-the-middle" attacks: someone intercepting your web traffic and using it to learn your vulnerabilities.

You have two options for SSL certificates with ClubExpress:

- 1. Use the ClubExpress.com SSL certificate. Your domain name will continue to point to your ClubExpress website. But when users arrive on the site, they will not see your domain in the address bar but instead, the URL will be in ShortName format (e.g. <u>https://MyClub.ClubExpress.com</u>.) There is also no charge for selecting this option.
- 2. You can purchase an SSL certificate through ClubExpress and have it installed on our system. Your domain name will continue to point to your ClubExpress website. The public side of the website will now be displayed using this domain and https:// and will be flagged as secure. An additional benefit is that when members login, they will continue to see your domain; the ShortName.clubexpress.com URL will not appear in the address bar, even on the members' side of your website. Also, this option should improve your position in search results.

If you choose this option, it must be done through ClubExpress, to ensure that only fully trusted certificates are installed on our servers and because this can be done in a completely automated process. Certificate prices vary widely on the Internet; decent 1-year certs that use at least a 2048-bit encryption key typically cost up to \$100 per year. However, we have worked out a deal with Sectigo (formerly Comodo), one of the largest and most respected certificate issuers, to provide SSL certificates to our customers at reduced rates: 1-year (\$45), 2-year (\$80), 3-year (\$110), 4-year (\$140), 5-year (\$160).

Note: Neither Google nor Apple accept SSL certificates with a duration greater than one year, however you are able to purchase multiple years up front, and we automatically renew your certificate for you each year.

Email Accounts

See "Email Accounts" on page 569

ClubExpress includes support for "forwarding" email accounts only.

Example: <u>President@MyClub.Org</u> can be configured to point to the president's personal email address and all email will be delivered to that address.

Alternatively, you may want to use another provider for email services, including POP3 accounts. If so:

- 1. Please provide us with the MX records for your current email server. There are usually two MX records, a primary and a backup.
- 2. Once you have domain forwarding established, all the traffic comes to us. We then keep the web traffic and use the MX records to send the email traffic to your email provider.
- 3. If there is a web interface for retrieving email, we may also need the CNAME records.

Note: If email is pointed to a different provider, you will NOT be able to use email-based discussion forums (listservers) without setting up a separate domain name just for forums.

Understanding Merchant Accounts

See "Collecting and Processing Payments" on page 471

ClubExpress includes a built-in merchant sub-account for each club or association. What appears on member statements is an abbreviated version of your club's or association's name, 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.

There is also a 3-business-day lag built into this process, to ensure that we actually have the funds before we send them to you (since this is also done using an ACH, which takes 2 business days.) So, for example, on the 20th of the month, we will send funds collected from the 8th through the 17th (ignoring weekends and public holidays.) These funds will then arrive in your bank account on the 22nd.

Some clubs and associations want their own merchant account and ClubExpress supports this. The funds flow directly into your bank account without first spending a few days in our account. 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 enable **fully automated membership billing**, where members are renewed automatically and their credit card on file is also charged automatically.
- If your club has a **restaurant or bar facility** and you need to process member "tabs" (food or drink charges.)
- If you need to regularly process large transactions by credit card in excess of \$1500. Note that the
 initial credit card limit is \$500 and we can only raise it on request and after a track record has been
 demonstrated. Note also that if it's raised above \$1000, American Express must be disabled. Note
 that ClubExpress still allows users to generate transactions in excess of \$500 (for example, for
 event registrations or sponsorships) but the credit card payment option will be disabled and the system will require users to print an invoice and mail a check.
- If **state law** prohibits your organization (such as a large public university) from giving us access to a bank account to deposit collected funds and collect merchant processing fees and our monthly hosting fee.
- Clubs or associations located in **Canada, the UK, and Australia** need their own merchant account in their local currency through Authorize.Net or Stripe. See their website for your country, for more information.

It's important to understand that ClubExpress is accepting the initial credit card risk associated with the built-in account. So working with our merchant processor, we have imposed the above restrictions in order to minimize this risk and allow the merchant account to work for the majority of our customers.

Note: Federal law requires that certain background checks be performed before your merchant subaccount can be set up. These are done automatically by our merchant processor but they take a couple of days. To perform these checks, we will send the name of a club officer (usually the club president) and an actual address (a P.O.Box is not allowed.)

When you set up your own merchant account, you can use any merchant processor, but the payment gateway must be Authorize.Net or Stripe, the gateway that ClubExpress has been written to work with. Configuring your own merchant account within ClubExpress takes 5 minutes, after which you will be asked to provide us with a PDF to verify your bank account (a bank statement, black check, etc.). Be sure not to leave the merchant account in "Test" mode on the Authorize.net website; switch it to "Active" mode to ensure that transactions are actually processed and cards are actually charged. If using Stripe, ensure you have provided Stripe with all the required information and that your account was approved in order to process credit card transactions on your website.

ClubExpress can help you set up a merchant account through a partnership with our merchant processor. Contact us for more information or view this page on our website: http://www.clubexpress.com/merchantaccount.

Once you have your own merchant account, none of the above restrictions apply, especially the \$500 limit on payments by credit card (unless you explicitly want this restriction to remain in place.)

Launching the Website to your Members

After all the above tasks are done, after you have finished defining functions, building out the website, 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.

This welcome email references you club's "President" and "Membership Director" so this information needs to be configured before it can be sent out. Here is how to configure this information:

- 1. Control Panel Club tab Setup panel Titles.
- 2. Enter a title for the "President". Be sure to check the matching box. Save.
- 3. Enter a title for the "Membership Director", check its box and save.
- 4. Control Panel Club tab Admin Functions panel Contacts.
- 5. Create a new contact. Specify the president title and assign someone. Select other options and save.
- 6. Create a new contact for the membership director, assign someone, select other options and save.

The welcome email is sent "from" the person designated as the club's membership director. After it has been sent, you will receive an email letting you know we have sent it out. This email will include an attachment with names, addresses, usernames and temporary passwords for members that do not have a valid email address so you can get their information to them via a mail merge.

After the Welcome Email is Sent

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.

Bulk Loading Databases

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 format or maximum length is shown in the middle column. Please check your values and shrink excessively long entries down to a size that can be imported, otherwise they will be truncated.

Administrators: Download the easy-to-use template here.

Note: ClubExpress does not support spaces in user names.

The following four columns are required:

Column	Required?	Format/Size	Notes
First_name	Yes	20 chars	
Last_name	Yes	35 chars	
Member_ type	Yes		
Date_ expired	Yes	MM/DD/YYYY (The default format may dif- fer based on your location)	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. Note that the last day of a membership is "inclusive". So if everyone renews on Jan 1st in your club or association, specify 12/31/YYYY for the expiration date. Please check that all rows use a valid date format. If you have hon- orary "life" 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.

Member Database Requirements

The remaining columns are optional:

Column	Required?	Format/Size	Notes
Member_number	No	Alpha - allows letters, dashes, and other non- numeric chars. If you are con- cerned about sorting, consider using leading zeros.	If your club or association does not have num- bers, 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. Be sure that the mem- ber numbers in the spreadsheet start after the member numbers already in your online data- base. If member numbers are not specified, we will add them as sequential numbers starting after the people already in the online database.
Address1	No	50 chars	
Address2	No	50 chars	
City	No	30 chars	
State/Province	No	5 chars	Use standard abbreviations
Zip/PostalCode	No	10 chars	
Country	No	3 chars	Use standard abbreviations
Email_address	No	100 chars	Not required but strongly recommended
Phone	No	24 chars	
Cell_phone	No	24 chars	
Fax	No	24 chars	
Website	No	100 chars	Personal or company website address
Date_joined	No	MM/DD/YYYY	
Date_of_birth	No	MM/DD/YYYY	Can be hidden, visible and optional, or visible and required.
Salutation	No	6 chars	Dr., Rev., etc.
Middle_initial	No	1 char	No period after the letter
Nickname	No	20 chars	Enable this field on the People Options screen
Gender	No	1 = male 2 = female 3 = other/non- binary	If this column is included, blank values are not allowed.
Spouse_first_ name	No	30 chars	Can be used when you have not set up spouses or partners as secondary or tertiary members. This is enabled on the People Options screen.
Spouse_last_ name	No	35 chars	
Spouse_date_of_ birth	No	MM/DD/YYYY	Can be configured to hide the year, even though a year must be provided for importing a

Column	Required?	Format/Size	Notes
			valid date.
Anniversary	No	MM/DD/YYYY	Can be configured to hide the year, even though a year must be provided for importing a valid date.
Printed_news- letter	No	Yes/No	See the People Options screen
Metro_area	No		If you are using this feature a member can be assigned to a single metro area.
Bio	No	250 chars	Remove embedded line and paragraph breaks
Directory_visibility	No	0-7	Corresponds to the values shown in the Profile - Membership Directory Visibility option (where 0 means "Not visible" and 7 means "Everything is shown"). See

Member Database Requirements

If the Alt_address columns are specified, be sure to enable this panel on the People Options screen.

Column	Format/Size	Notes
Alt_address1	50 chars	
Alt_address2	50 chars	
Alt_city	30 chars	
Alt_state/province	5 chars	Use standard abbreviations
Alt_zip/postalcode	10 chars	
Alt_country	3 chars	Use standard abbreviations
Alt_phone	24 chars	

Member Database Requirements - Alt Address

For clubs and associations that people join through their personal lives, you can enable a panel to collect a member's work information. For clubs and associations that people join through their business/professional lives, these fields appear by default.

Format/Size
100 chars
100 chars
24 chars
24 chars

Member Database Requirements -Work Information

If the Emergency Contact columns are specified, be sure to enable this panel on the People Options screen.

Column	Format/Size
Emergency_contact_name	55 chars
Emergency_contact_relationship	50 chars
Emergency_contact_phone	24 chars
Emergency_contact_email	100 chars

Member Database Requirements - Emergency Contact Info

Additional (but Important!) Notes

If any column is completely blank (no values for any members), it should be left out of the spreadsheet. Only include columns that have data.

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. If you have login names, you may provide them but if we detect duplicates, we won't be able to use them. Do not provide existing passwords; because of how they are encrypted in our system, new temporary passwords will always be generated. Members will be able to change both their login name and password when they first log in.

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 moved or removed. Also remove any extraneous words in these columns. The phone number column can contain extensions in the form "x.123". Phone numbers should also be consistently formatted with parentheses, hyphens, periods, etc.

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! If this is not done, you may end up with duplicates.

You should include members whose membership expired in the last 18-24 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 try to 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 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

See "Additional Member Data" on page 279

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 – People tab – Setup section – 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 exactly match the values entered for each question.

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!)

This is also true of Select List questions; the values in the spreadsheet must exactly match the list items defined online for them to show up in a member's Profile.

If you are using Check Box or Multi-Text Box questions, each value should be in a separate column of the spreadsheet.

Example: Assume a list of favorite colors and members can check more than one. These should be entered in the spreadsheet as follows:

Member	Color_1	Color_2	Color_3	Color_4	Color_5
Member	Color_1	Color_2	Color_3	Color_4	Color_5
John Smith	Red	Blue	Purple		
Mary Brown	Green	Red			
Dave Chen	Blue	Purple	Yellow	Green	White

Member Database Requirements - Miscellaneous Questions

Values can be in any order but must exactly match the allowable values defined for the Check Box or Multi-Text Box question. They should also fill each column from left to right.

It is important to predefine in the online database each Additional Member Data question referenced in the spreadsheet before you send it to us.

In general, if you define an additional member data question that matches a built-in column (for example, date_of_birth), we will use the built-in column unless we receive explicit instructions otherwise.

Interests, Chapters and Committees

See " Interests" on page 888, "Organization Data" on page 510, or "Committees" on page 672

If you track interest, chapter assignments or committee membership for members, this information can also be imported.

Use one column for each interest, chapter or committee, 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 or committee, put "Yes" in that column, otherwise leave the column blank.

Be sure to respect the chapter settings defined for your member types.

Example: If secondary and tertiary members must be in the same chapter as their primary member, this should be specified in the spreadsheet.

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. This column cannot be blank.
- Create another column called "Temp_Primary_Member_Number". 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	Temp_Primary_Member_Num- ber
Family	110	John	Smith	1	
Family	111	Mary	Smith	2	110
Family	112	Paul	Smith	3	110

Member Database Requirements - Family Memberships

Example: For corporate/business memberships:

Member Type	Member#	First_ Name	Last_ Name	Level	Temp_Primary_Member_Num- ber
Corporate	110	John	Smith	1	
Corporate	111	Mary	Jones	2	110
Corporate	112	Paul	Brown	2	110
Corporate	113	Alice	Chen	3	110

Member Database Requirements - Corporate Memberships

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 People 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.

Mailing List Categories

See "Mailing List Categories" on page 572

Members (and non-members) can be assigned to one or more mailing list categories (for example, Press; someone who attended a specific event; someone who donated into a specific fund; etc.)

To have these assignments imported, create a column for each mailing list category. Put "Yes" in the cell where the member will be assigned to that category; leave the cell blank if the member is not assigned to that category.

Business Directory

See "Business Directory" on page 621

If your association will activate the ClubExpress Business Directory module (to promote business members to the public), you can append the following columns to the spreadsheet for each member.

Many of these columns replicate information linked to the individual member but the Business Directory module allows each member to specify different information than what's stored with their personal account (for example, an "office" address rather than their home address.)

Column	Format/Size	Notes
Business_name	100 chars	
Contact_name	50 chars	
Text_description	250 chars	The system also supports a long and fully-formatted description but there is no way to import this. Members can create it when they login the first time.
Email_address	100 chars	
Address1	50 chars	
Address2	50 chars	
City	30 chars	
State	5 chars	Use standard abbreviations
Zip/PostalCode	10 chars	
Country	3 chars	Use standard abbreviations
Phone	24 chars	
Toll_free_phone	24 chars	
Fax	24 chars	
Website	100 chars	
Special_offers	250 chars	
Facebook_ address	100 chars	
LinkedIn_address	100 chars	
Twitter_address	100 chars	
Pinterest_address	100 chars	
YouTube_address	100 chars	
Instagram_ address	100 chars	

Business Directory Requirements

Import Non-Members

Use the template below to organize your non-member data.

Administrators: <u>Download a copy of the template</u> and remember that you can upload non-member data at any time through the People Manager. See "Import Non-Members" on page 247

Subgroups: If your club or association has subgroups, you can also select which region, district, or chapter these non-members should be imported into.

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.

Note: If you don't have data for a specific field leave that column blank. You do not need to enter false data to fill in the columns.

- Member Number
- First Name
- Last Name
- Address1
- Address2
- City
- State
- Zip
- Country
- Email Address
- Phone Number
- Mobile 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.



Our Control Panel is separated into six (6) tabs: People, Website, Money, Club, Communications and Support. Each tab contains databases, functions, modules and setup options. Use the links below to navigate to the online help for each tab.

- "Control Panel, Standard Dialogs and Functions" on page 86 Learn more about the Control Panel
- "People " on the next page Learn more about the People Tab, including using the People Manager and setting up Member Types
- "Website " on page 303 Learn more about the Website Tab, including creating custom web pages and setting up your website's template.
- "Money" on page 413 Learn more about the Money Tab, including searching for transactions and adding and managing Financial Accounts.
- "Club" on page 497 Learn more about the Club tab, including running data exports and configuring your club's main contacts.
- "Communications" on page 526 Learn about the Communications tab, including sending blast emails, setting up email accounts and using mailing list categories.

Note: This tab may be labeled differently depending on your organization type. Be on the lookout for a tab called "Association", "Sorority" or any number of organization types. To learn more about setting club labels and options, see "Club Options" on page 524.

• "Support " on page 587 - Learn about the options available for Support.

People	Website	Money	Club	Communications	Support	
						🕕 Show Notices 🎤 Configure
Admin F	unctions					
🍠 Peop	ole Manager			🥾 People Lookup		A User Data Removal Requests
🎎 Subg	group Member	Manager		🔱 New Member Signup)	Reports
Website	Modules (Vis	sibility: P=Public,	M=Members	, NA=Not Active)		●Switch to View Mode
🚫 Gift	Membership (P	°M)		👜 Check In Desk (M)		遶 Committees (PM)
💐 Stan	dard Member [Directory (PM)	🔶 Collectibles (M)		Interests (PM)
🥂 Volu	nteering (PM)					
Setup						
	iber Types			Enewal/Expiration	Settings	邉 Additional Member Data
Sec. Mem	iber Types itional Charges	5		Enewal/Expiration	-	🏖 Additional Member Data 🤣 Privacy Options

The Admin Functions panel in the People section is your interface to your club or association's member database, and to the non-member database of other people you need to keep track of. This panel contains functions to manage the member and non-member databases, including lookups, editing member contact information, adding members, changing member and non-member status, updating primary/secondary/tertiary relationships, processing payments and credits for members and non-members, and writing notes. The Website Modules panel contains the modules enabled for that section.

The Setup panel contains functions to configure member types, renewal and expiration settings, the membership wizard, additional questions to expand the database, additional charges, the member joining agreement and other "people" options.

Many of these choices will only be visited when you first setup your website and database in ClubExpress, or only rarely thereafter. This panel is normally collapsed; click the down-arrow icon to expand it, or, if expanded, click the up-arrow icon to collapse it.)

What would you like to do?	
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People Lookup	
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Automatic Renewal Options	
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Additional Charges	
Member Attachments	
Hi-Res Bio Photos	
Privacy Options	
People Options	
Reports/Exports	
Reports	
Exports	

What would you like to do?

- For help with modules in the People section, see " ClubExpress Modules " on page 588
- Learn about the People Manager, your member and non-member database; see "People Manager" below
- Learn how to use the People Lookup, a read-only version of the People Manager; see "People Lookup" on page 260
- Use the Subgroup People Manager to view members of chapters; see "Subgroup People Manager" on page 262
- Manage requests from members and non-members to be removed from the database; see "User Data Removal Requests" on page 264
- Configure the Membership Signup Wizard, used for new memberships and renewals; see "Membership Wizard Setup" on page 278
- Set up membership types and properties, including fees, duration, and visibility; see "Member Types" on page 265
- Set your membership renewal and expiration settings; see "Renewal / Expiration Settings" on page 274
- Create questions to gather additional member data; see "Additional Member Data" on page 279
- Define optional additional charges for members signing up or renewing; see "Additional Charges" on page 287
- Define files that can be attached to a member's profile; see "Member Attachments" on page 289
- Configure your privacy settings; see "Privacy Options" on page 294
- Configure the data collected for members; see "People Options" on page 296
- Enable hi-res photo uploads for member bios and download them; see "Hi-Res Bio Photos" on page 294
- Learn more about the reports available; see "Reports/Exports" on page 301

People Manager

Control Panel > People > Admin Functions

Select this choice to view and update information in your member and non-member database. The member database includes information on individual members a and edit information for existing members.

The non-member database is often used for prospects, local press and government officials, donors, etc. When non-members sign up for events, make donations, or volunteer, they are added to the non-member database. You also have an option to allow non-members to add themselves to your mailing list (Control Panel > Website Tab > Website Options)./

		ator to add a new member (perhaps som splayed will be those that meet the searc				se the "Search For People" panel to search for an controls to see additional pages.
Click the "Profile" link to link to jump directly into			quick view of all of their inform	ation. Click the "Status" link to cha	nge the status of a perso	n. If "Renew" appears by the member's name, click th
Hide Search			Add Member	Member Options	Non-member Options	
Search For People	Search For	⊘ Members ○ Non-men	nbers O Both			
Member Status	~	Active, Expired		• ×)	
Last Name	~			×	Add Filter	
	Sort By	Last Name, First Name	~			
				Res	et Search 🛷	

Searching the Database

The default search is set to show both active and expired members. Select either members, non-members or both to start your search.

The system allows you to build a search using multiple filters. The following search filters can be used:

Search Field	Control	Search Type	Notes
Last Name	Text Box	Starts with	
First Name	Text Box	Starts with	
Username	Text Box	Starts with	
Address1	Text Box	Anywhere in the field	
City	Text Box	Starts with	
Country	Drop-down		If a state filter has been specified, then the country cannot be changed since the state filter is dependent on the country.
State	Multi-select drop-down		Sensitive to the country selected and not available if the country has no states. If no country is specified, then it will default to the club's country.
Member Number	Text Box	Starts with (find everyone in a family or business membership; for clubs using ###-1, -2 as member numbers)	

Search Field	Control	Search Type	Notes
Company Name	Text Box	Anywhere in the field	
Email Address	Text Box	Anywhere in the field	
Metro Area	Multi-select drop-down		Available if metro areas have been defined
Subgroup	Subgroup selection tree		Available if subgroups have been defined
Member Status	Multi-select drop-down		
Member Type	Multi-select drop-down		
Member Level	Multi-select drop-down		
Category	Multi-select drop-down		
Interest Group	Multi-select drop-down		
Committee	Multi-select drop-down		
Recent Additions	Multi-select drop-down		
Renew Cycle	Yes/no	If present, those "in" or "not in" the cycle	
Pending Payment	Yes/no	If present, those "with" or "not with" a pending pay- ment	

People Manager Search Filters

To add additional search filters, select the **Add Filter** button.

Select the *sort option* from the drop-down menu below the search filters. The following sort options are available:

- Last Name, First Name
- First Name, Last Name
- Company Name, Last Name
- Member Number, Last Name

Member records are displayed in pages of 50 members at a time, sorted by the search field selected. Select 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 Results

The search results grid displays the following information:

earc	ch Results (11 people found)								<	Pa	age 1	of 1	~ >
#	Name	Membership	Level	Exp. Date	Maint	ain							Ē
5	Audrey Abanti (aabanti) AZ	Individual Member Active		7/6/2021	Ø	♣		Ō	.	•			
4	Leslie Bumgardner (Ibumgardner) Brooklyn, KY	Individual Member Active		7/6/2021	Ø	4		Ō	.	•			
10	Basket Case Colleen Carter (ccarter) Huntley, NY	Local Business Active		7/19/2021	6	*	H in T	Ō	.	•	*	S	
7	Daniel Cho (dcho) CT	Family Membership Active	Sec.	7/6/2021	Ø	♣	X :	Ō	.	8	:		
2	Réne Cho (jcho) Brooklyn, NY	Family Membership Active		7/6/2021	Ø	4	¥. ₽	Ō	.	•	쑳	-	
8	Sally Cho CT	Family Membership Active	Tert.	7/6/2021	Ø	.		Ō	_	2			
3	Manny Diaz (mdiaz) Brooklyn, AZ	Individual Member Active		7/6/2021	Ø	*		Ō	.	•			
9	Balloon Supplies R Us Samantha Elizabeth (selizabeth) Huntley, NY	Local Business Active		7/19/2021	Ø	4		Ō		◙	*		
N/A	Maritza Luchasz (selizabeth) CT	Non-Member			Ø	.	2						
6	Ben Richards (brichards) Brooklyn, CA	Individual Member Active		7/6/2021	Ø	.		Ō	.	•			
1	Martin Smith (msmith) Chicago, IL	Individual Member Active		N/A	Ø	4	¥	Ō	.	•			

#	Name	Membership	Level	Exp. Date	Maintain Options
Member Num- ber assigned by an admin or automatically by the system, quick member contact info and the option	First and Last Name. If the membership is a business membership, The business will be listed with the mem-	Member Type and Status. Select the Status to change or update the status for a member.	Primary, sec- ondary or ter- tiary, and using the keywords defined by your club or association	The mem- berships' expir- ation date.	See the detailed chart below.

#	Name	Membership	Level	Exp. Date	Maintain Options
to send an email to the member. N/A is used to indicate a non-member (without a mem- ber number).	ber name underneath.		for secondary and tertiary members.		

Search Results Grid

Maintain Options

Icon	Description
(Profile)*	Select this icon to view the Profile screen for this member, or to view a contact info pop-up screen for the non-member. See "Member Profile" on page 1307
(Mailing List Categories)*	Select this icon to assign this member or non-member to one or more mailing list categories. See "Mailing List Categories" on page 572
(Bio)	Select this icon to view the member's Bio page in the Membership Directory. See "Membership Directory" on page 921
or in the or (Notes)	Select this icon to write notes about this member. The first version is displayed when the note is blank; the second when a note exists. See "Reports/Exports" on page 301
Charge/Credit)*	Select this icon to enter a miscellaneous charge or credit for this member. See "Open Credits" on page 423
or O (Renew)	If the Renew icon is in red, the member is in the "renewal cycle" and will see a red Renew icon when they login. If the Renew icon is in black, the member is not in the "renewal 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 icon will appear for secondary and tertiary members. Clicking it takes you to the primary member's Profile screen.
(Secondary & Tertiary Members)	This icon 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.

lcon	Description
S (Payments)	If this icon appears, this member owes money. Click to go to the Pending pay- ments page.
(Reports)	Select this icon to run reports for this specific member. The standard report dia- log is displayed.
(More Options)	A drop-down menu of additional options for non-members, described below.

Maintain Options - *Appears for both members and non-members

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

Member Actions

Add Member

To add a new member, select the **Add Member** button to launch the admin version of the membership signup wizard. See "Member Signup / Renewal" on page 900. 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.)

Note that the admin version of the wizard 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 of the wizard, if money is owed, the user is taken to the Pending Payments screen, which allows you as an administrator to choose from multiple "payment" methods:

- Credit card processed through ClubExpress;
- PayPal (if configured by your club or association);
- Record check received;
- Record cash received;
- 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.

Write-off should only be used if the payment will be written off as a bad debt. **Note that member updates such as renewals are not processed with this option.** If you want such updates to be processed, use the "Comp" option instead.

(When members walk through the signup or renewal wizards, they may only see two choices:

- Credit card processed through this website;
- PayPal (if configured);

There is also a button to print an invoice and mail a check.

If no money is owed, the user is taken back to the People Manager and the membership is immediately activated.

Merging Members

While merging two member records is not possible at this time, you can follow a few simple steps to accomplish the same outcome using the non-member merge function.

Identify the two (or more) member records you want to merge together and choose one to remain the official and final member record. For the remaining member record(s) you wish to merge to the main record, update the Member Status to Dropped. Once the members have been dropped, return to the Member Status menu for the newly dropped members and select Convert to Non-Member.

Note: If the membership has expired, you can convert the member record to a non-member without needing to mark the member as Dropped first.

Note: Once you drop a member you may need to update the search filters in the People Manager to show Dropped members in the search results in order to find the newly dropped member and convert them to a non-member.

Finally, find the new non-member record by updating your search filter to include non-members. To complete the steps to merge a non-member record with a member record, see "Merge" on page 259.

Member Options

Member Level Changes

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

Primary / Secondary Changes 🛛 🖨 🏵
Specify the type of change you want to make, then the additional information required. When you click Save, it will be made in the membership database.
Promote a Secondary Member to Primary
Link a Solo Member to a Primary
 Unlink a Secondary Member into a Solo
Change a Secondary Member to Tertiary
Change a Tertiary Member to Secondary
Member Not Selected Select
Save 🖌 Cancel 🗶

This dialog provides five 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 ber 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 as a secondary member. 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.

This option supports changes to active, expired, trial, bulk loaded, pending, and prospective members.

Drop Expired Memberships

Select this option to convert members who have been expired for a while and will not rejoin to Dropped, so that they don't clutter the default view. You will see the following screen:

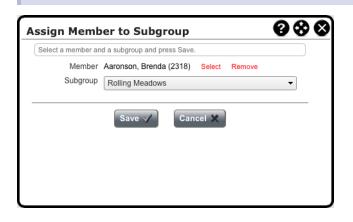
D	rop Expired Members
	Enter the membership expiration date of the members you wish to drop. When you press the "Go" button, the system will drop all members whose membership expired on or before that date.
Me	mbership Expiration Date 12/31/2016
-	Go Cancel 🗶

Specify a date and select **Go**. The system will convert all members with an expiration date less than or equal to the specified date to Dropped. Or select **Cancel** to close the dialog without making any changes.

For primary members, the Drop Reason will be "Old Expired Member". For secondary and/or tertiary members, the Drop Reason will be "Primary Dropped".

Assign Member to Subgroup

Subgroups: When subgroups (chapters, districts and regions) are configured, one option allows subgroup administrators to add members to their subgroups. If this option is enabled, the People Manager will display a new button: **Assign Member to Subgroup**. Clicking this button displays the following popup dialog:



Click the **Select** option to select a member using the standard screen. Then select a subgroup from the drop-down list. This list will only show the subgroups available to the current user.

Example: If the user is a district coordinator, only that district and the chapters under it will be shown.

Click **Save** to save this assignment and return to the People Manager, or **Cancel** to close the dialog and return without saving.

Note: This option is specifically designed for clubs and associations that use chapters as a different type of interest group. It ignores the member type configuration settings that may limit how many or which chapters a member can belong to.

Membership Status

In the search results grid, select 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. If any member types require board or administrator approval, the status of the membership should be changed from Prospective and either accepted or declined.

Member Status 🕞 😮	Q
This membership has expired. If the member has submitted his or her renewal without using the web site, you may activate it by selecting "Activate", entering an expiration date, and pressing "OK". You may also choose to "Freeze" or "Drop" the member if necessary. You may also convert an expired member back to a non-member.	
Bill Smith Current Status: Expired Exp. Date: 8/26/2011 Select Action	
Activate	
◯ Freeze	
• Drop	
Drop Reason < Select >	
Transactions Delete pending membership transactions Move all transactions to another member Do not change transactions 	
Convert to Non-Member	
Save 🖌 Cancel 🗶	

The options on this dialog vary depending on the current status and level of the member. The following status values are built into the system:

- 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 People 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 People 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. If the **Collectibles** module is enabled, when you drop a member you will be prompted to move collectibles to another member, or to simply leave the items unchanged.

Note: If the Drop Reason is "Removal Request", where a member has asked to be removed from the database, the status text is not a link and cannot be changed.

- **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.

For Expired, Prospective, and Dropped members, the system also provides an option to move them over to the non-member database, so that they will continue to receive blast emails from your organization.

Member Profile

Select the **Profile** icon to edit the information on an individual member. You will see the profile menu screen , 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 can only choose whether or not to store a credit card if the member type is configured for automatic renewal and payment. Otherwise, this decision is reserved for the members themselves.
- On the **Contact Info** page, club administrators can modify the Member Number and Mailing Name fields.
- On the **Privacy/Cancel/Remove** page, a club administrator can respond to the privacy questions on behalf of a member but we will track who has completed the form and when it was done.
- 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 **Pay**ment/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.
- On the **Member Type/Expiration/Join Date** screen, administrators can modify all information for a primary member. For secondary and tertiary members, only the Join Date can be modified; the Member Type and Expiration Date are permanently linked to those values for the primary member.

Mailing List Categories

Click this icon to see a popup dialog similar to the following:



Select one or more categories and click the **Save** button or click **Cancel** to close the dialog without saving. There are a number of system categories but you can also define your own by going to Control Panel – Communications – Setup – Mailing List Categories.

Viewing Related Members

For "solo" members (those who are not part of a membership which includes multiple people), there is nothing in the Maintain column.

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

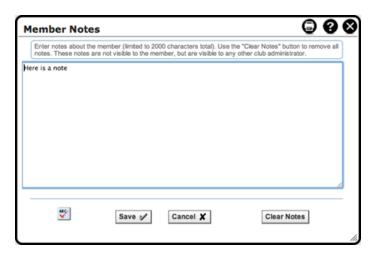
Primary members see an icon titled **Secondary & Tertiary Members** (but using the actual keywords defined by your club or association.) Clicking this icon displays a small popup window similar to the one below, showing the secondary and/or tertiary members managed by this primary member.

Family & Child Members	х
Joe Smith	
Click a name to see the detailed profile for that member	
Family Members Julie Smith	

Click a name to display the profile for that member.

<u>Notes</u>

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



Enter up to 2000 characters of text. Click **Save** to save your changes and return to the People 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 in the People Manager Search Results grid, 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:

Add Charge/Cr	edit For George Aaba	@ & &
Create	 Charge Credit 	
Date	12/30/2019	
Charge Type	Misc. Charge •	
Amount	\$	
Description		//
Tax Rate	< Select Tax Rate > •	
Account	< Select an Account > •	
QuickBooks Item Name		
	Save 🖌 Cancel 🗶	

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.

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 Control Panel Transaction Search Make Make Payment for Ben The list below shows outstanding payments due for it	Richards (2446)	to select which payments to make. The available payment options are in the "Payment Method" dropdown list. Make a
selection and follow the instructions.		
To make a partial payment on any of the items, click	🖉 to change amount.	
Renew Membership (9/3/2017 Ref # 3555)		Due 50.00 Pay 50.00 g
Membership (Individual Member - Active) Ben Richards - Chapter: Detroit	40.00 10.00 Transaction Total: 50.00	
Donation (3/20/2018 Ref # 3894)		Due 100.00 Pay 100.00 🖋
Fly-In Hosting	500.00 Transaction Total: 500.00	
	Total Selecte	ed For Payment \$ 0.00
Refund Policy		
All payments are final. We do not provide refunds for purchases, or other misc. charges. Please carefully		
The refund policy is set by Northwestern Balloon Cl - they cannot be handled by ClubExpress.	ub. If refunds are available, requests i	must be directed to Northwestern Balloon Club
	Print Invoice (Report)	Print This Page Submit Payment
		Pay Later 🗙

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.

Buttons at the bottom of the screen:

- **Submit Payment** will appear for credit card transactions. **Done** will appear for all other payment types when you are just recording a payment received.
- **Print Invoice (Report)** allows an admin to print an invoice as a report. When members or non-members view this screen, they will see **Print Invoice (PDF)**, a slightly different option that directly displays a PDF invoice.
- **Print this Page** generates a direct, printable version of the page.
- **Pay Later** is the equivalent of the "Cancel" function, allowing you to leave this page without making or recording a payment. Note that if one of the listed event registration transactions requires Immediate Payment (a special option available for events only), this button will not be displayed. A payment must be made or recorded.

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.
- **ReceivedCash.** 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. Note that pending member updates such as renewals are not processed with this option. 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. Pending member updates are processed with this option. 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 is flag the payment has 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.

If your club or association enabled **PayPal**, it will be available to members and non-members but not to administrators. There is no way for an administrator to make a pending payment using someone else's PayPal account!

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.

You will be asked to specify a drop "reason", and also how to handle any transactions and payments linked to the dropped member. There are three options:

- Move the transactions and payments to a different member (used most often if the dropped member was a duplicate or user error.) You will be asked to select the other member account.
- Delete the transactions and payments (used most often for tests, user errors or admin errors.)
- Leave the transactions and payments in place, still attached to the dropped member.

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.

Non-Member Actions

Add Non-Member

Select Add Non-Member to enter basic contact information for a non-member in a pop-out window.

/Edit No	n-Member ØQ
dd or edit inform on-Member Data	ation on this non-member database entry. Click "Save" to save your changes and return to the base Manager, or "Cancel" to return without saving.
ID	
First Name	•
Middle Initial	
Last Name	
Title	
Organization	
-	
Mailing Name	Enter the name of this individual as you would prefer it to appear on mailing labels, or leave it blank and the system will automatically
	provide a suggested default.
Category	
Show For	Northwestern Balloon Club
Country	United States of America Show All
Address 1	
Address 2	
City	
State	< Select >
Zip Code	
Timezone	< Select > Show All
Metro Area	< Select > C
Phone	
Cell Phone	
Fax	
Email Address	
Allow Emails	This setting does not affect system generated emails such as transaction confirmations
Website	

Subgroups: 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 People Manager. Click Cancel to return without saving.

Non-Member Options

How Did You Hear About Us

Customize the "How did you hear about us?" choices, when a non-member asks to be added to the mailing list and (optionally) when a member starts the signup process. There are a number of system choices and you can also add or remove your own. Click the **Add "How Heard" Method** button to add a selection. Click the standard **Edit** icon to edit a selection or the standard **Delete** icon to remove a selection.

On the *Control Panel – Website Options* screen, you can configure whether How Heard should also be shown to members who are signing up.

Import Non-Members

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:

lon-Mer	nber Data Import 🛛 🛛 😵 🔇
format with	ates to your non-member database. The import file must be in CSV a specific structure. <u>Click here</u> to download a sample file. View the s page for detailed information.
items: • En • Str • Ph	cords will only be saved if they have at least one of the following data nail Address eet Address (including city and state) one Number II Phone Number
Category	< Select >
Subgroup	Chicago Metro 🝷
Select File	Select
	Import File 🖋 Cancel 🗶

Use the template to organize your non-member data.

Administrators: Download a copy of the template

Select a file from your local computer. You can also specify the mailing list category that should be used for the imported records.

Subgroups: If your club or association has subgroups, you can also select which region, district, or chapter these non-members should be imported into.

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.

Note: If you don't have data for a specific field leave that column blank. You do not need to enter false data to fill in the columns.

- Member Number
- First Name
- Last Name
- Address1
- Address2
- City
- State
- Zip
- Country
- Email Address
- Phone Number
- Mobile 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.

Cleanup Tools

Select this option to clean up the non-member database, removing duplicates and entries with missing data, or deleting all entries in a specified category.

ClubExpress does not generally charge for the non-member database, as long as it's reasonably in proportion to the size of the active member database. Our standard is 5X the number of active members in your database.

Example: If you have 200 active primary members and up to 1000 entries in the non-member database, you will not be charged. But if you have 1100 entries in your non-member database, we will charge a small fee (currently \$0.02 per month) for the 100 entries above the threshold.

These cleanup tools help you to keep your non-member database at a reasonable size. When you click the button, you will see the following screen:

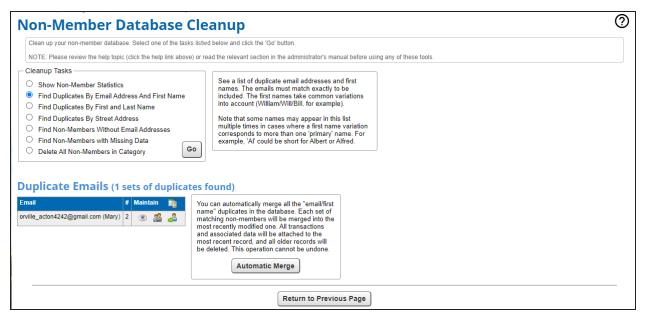
Non-Member Database Cle	•	
Cleanup Tasks Cleanup Tasks Find Duplicates By Email Address And First Name Find Duplicates By First and Last Name Find Duplicates By First Address Find Non-Members Without Email Addresses Find Non-Members with Missing Data Delete All Non-Members in Category Go	See your current count of members and non- members, and what (if any) fee will be charged.	
	Return to Previous Page	

Select Show Non-Member Statistics to see a screen similar to the following:

Non-Member Statistics	
Current Number of Non-Members	303
Non-Members Included in Your Account 5.00 x Number of Active Primary Members (111)	555
Overage (Billable)	N/A
Monthly Fee Overage x \$0.02 each	\$0

In the above case, the number of non-members is well below the 5X threshold and so there is no fee.

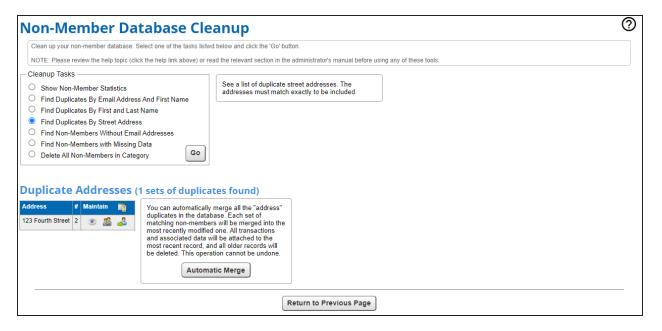
Find duplicates by email address and first name - locate entries in the non-member database where the email address appears more than once.



Find duplicates by first and last name - locate entries with similar first and last names. You will see screens based on the non-member's name. Note that this function is smart enough to find entries with similar names, such as William / Will / Bill.

Non-Member Database Cle	anup 🕐
Clean up your non-member database. Select one of the tasks listwo	d below and click the 'Go' button.
NOTE: Please review the help topic (click the help link above) or re	ad the relevant section in the administrator's manual before using any of these tools.
Cleanup Tasks Show Non-Member Statistics Find Duplicates By Email Address And First Name Find Duplicates By First and Last Name Find Duplicates By Street Address Find Non-Members Without Email Addresses Find Non-Members with Missing Data Delete All Non-Members in Category Go Duplicate Names (3 sets of duplicates for the set of the	See a list of duplicate names. The last names must match exactly to be included. The first names take common variations into account (WilliamWill/Bill, for example). Note that some names may appear in this list multiple times in cases where a first name variation corresponds to more than one primary' name. For example, 'Al' could be short for Albert or Alfred.
Name # Maintain Abanti, Audrey 2 3 2 Abanti, Mary 2 3 2 Smith, Mabel 2 3 2	Illy merge all the 'first pupicates in the database. g non-members will be st recently modified one. All isociated data will be at recent record, and all e deleted. This operation
	Return to Previous Page

Find duplicates by street address - locate entries with identical values in the Address1 field.



In each case, select the View Details icon to:

- Click the **Delete Selected Items** button to do just that. You will be prompted to confirm this action.
- Click the Merge Selected Items into Most Recent to combine records based on their Modification Date. In the above example, if you checked the first two entries and clicked this button, they would be merged into the third entry.
- Click the Edit icon to display the standard Add/Edit screen, perhaps to allow you to change the email address.
- Click the **Delete** icon to delete an individual entry. You will be prompted to confirm this action.

Select the Merge All icon to merge all entries to one entry. You will be prompted to confirm this action.

Select the **Merge All to Member** icon to select the member and merge the non-member entries to the member record.

The **Merge All to Member "XX"** icon will appear if a member by the same name exists. Select this icon to merge all entries to the identified member record.

Select **Automatic Merge** to merge each record with its duplicate. This will merge the older record into the most recently edited record among the duplicate entries.

Match Non-Member to Member by Email Address and First Name - locate entries in both the member and non-member databases where the email address and first name match.

Clean up your non-member database. Select one of the tasks listed	t balaw and aliak the ICal button		
NOTE: Please review the help topic (click the help link above) or rea	ad the relevant section in the administrator's manual before using any of these tools.		
Cleanup Tasks Show Non-Member Statistics Find Duplicates By Email Address And First Name Find Duplicates By First and Last Name Find Duplicates By Street Address Match Non-Member to Member By Email Address And	See a list of duplicate email addresses and first names. The emails must match exactly to be included. The first names take common variations into account (William/Will/Bill, for example). Note that some names may appear in this list multiple times in cases where a first name variation corresponds to more than one 'primary' name. For example, 'Al' could be short for Albert or Alfred.		
First Name Match Non-Member to Member By First and Last Name Match Non-Member to Member By Street Address Find Non-Members Without Email Addresses Find Non-Members with Missing Data Delete All Non-Members in Category Go Matched Emails (1 sets of duplicates fo			
Email # of Non-members # of Mex orville_acton4242@gmail.com (Orville) 1 1	mbers Maintain Image: Second Sec		

Match Non-Member to Member by First and Last Name - locate entries in both the member and nonmember databases where the first and last names match.

Clean up your	non-member databas	e. Select one of t	he tasks list	ed below	and c	click the 'Go' button.	
NOTE: Please	review the help topic	(click the help lin	k above) or	read the r	eleva	ant section in the administrator's manual before using any of these tools.	
Cleanup Task	S						
Find Dupli Find Dupli Find Dupli Find Dupli Match Noi First Name Match Noi Name Match Noi Find Non- Find Non- Find Non- Delete All	In-Member Statistics icates By Email Add icates By First and L icates By Street Add n-Member to Member n-Member to Member Members to Member Members Without E Members with Missi Non-Members in Ca	ast Name ress er By Email Add er By First and I er By Street Add mail Addresses ng Data ategory	ress And Last dress Go	mai con exa Not mul corr exa	ch ex mon mple e that tiple t respo mple	st of duplicate names. The last names must xactly to be included. The first names take n variations into account (William/Will/Bill, for s). It some names may appear in this list times in cases where a first name variation onds to more than one 'primary' name. For e, 'Al' could be short for Albert or Alfred.	
ame	# of Non-members	-		II.		You can automatically merge all the "first	
cton, Orville	1	1	۰ 🍇	2 🐋		name/last name" duplicates in the database. All transactions and associated non-member	
loria, Samantha	1	1	۰ 🍇	al 🍂	1	data will be attached to the appropriate record, and all other non-member records will be deleted. This operation cannot be undone.	
						Automatic Merge	

Match Non-Member to Member by Street Address - locate entries in both the member and non-member databases where the street address matches.

Non-Member Database Cleanup ⑦
Clean up your non-member database. Select one of the tasks listed below and click the 'Go' button.
NOTE: Please review the help topic (click the help link above) or read the relevant section in the administrator's manual before using any of these tools.
Cleanup Tasks
O Show Non-Member Statistics See a list of duplicate street addresses. The
 Show Non-Member Statistics Find Duplicates By Email Address And First Name addresses must match exactly to be included.
O Find Duplicates By First and Last Name
O Find Duplicates By Street Address
O Match Non-Member to Member By Email Address And
First Name
O Match Non-Member to Member By First and Last
Name
Match Non-Member to Member By Street Address
O Find Non-Members Without Email Addresses
• Find Non-Members with Missing Data
O Delete All Non-Members in Category
Matched Addresses of the transformer
Matched Addresses (3 sets of duplicates found)
Address # of Non-members # of Members Maintain 💼 You can automatically merge all the "address"
1051 Perimeter Dr 5 9 Image: Second s
123 Fourth Street 2 8 Image: Street S
This operation cannot be undone.
70 W Madison 1 Image: Madison 1 Image: Madison Automatic Merge

Search results will incllude the search criteria, number of non-members matching, number of members matching and maintain options. In each case, if there is only one matching member, you can view the member's profile and select the Merge icon to merge the non-member data with the member record. If more than one member appears in the cleanup result list, an icon will appear allowing you to navigate to the People Manager with the cleanup search criteria pre-filled (for example, a pre-filled search of an email address and last name). From there, you can review records individually.

Find non-members without email addresses - locate entries where the email address is blank, sorted by last modified date. You can edit or delete individual entries, or select one or more checkboxes and click the Delete Selected button.

Edit or drop individual records, or manage multiple records at once.									
	nissing ei	mail recor	ds f	ound (sorted	by las	t m	odifi	date)
	Name	Address	Email	Phone/Cell	Org. Level	Mod. Date	Maint	ain 📑	
	Emily Drake		N/A		Club	9/17/2020	Ø	î <mark>s</mark>	
	Lucy Richmond	Denver CO	N/A		Club	9/20/2020	Ø	î,	
	Trixie Wrone	Seattle WA	N/A		Club	9/20/2020	Ø	1	
	Mabel Smith	123 Fourth Street Anchorage AK	N/A		Club	9/20/2020	6	î,	
	Mabel Smith	123 Fourth Street Anchorage AR	N/A		Club	9/20/2020	ø	î,	
	Bill Smith	AP	N/A		Club	9/21/2020	Ø	î,	
	Mary Mayo		N/A		Club	12/8/2020	Ø	ī,	
	Audrey Abanti		N/A		Club	4/9/2021	Ø	1	

- Click the **Delete Selected Items** button to do just that. You will be prompted to confirm this action.
- Click the Edit icon to display the standard Add/Edit screen, perhaps to allow you to change the email address.
- Click the **Delete** icon to delete an individual entry. You will be prompted to confirm this action.

Find non-members with missing data - locate entries that may be missing a first name, last name, email address, any phone number, or street address. Note that the display is limited to 100 entries; there may be more entries in the non-member database with missing data but for efficiency, only the first 100 are shown. Once you have cleaned these up, more can be displayed by running this operation again.

E	dit or drop individual recor	ds, or manage mult	iple records at once.								
9	missing data	records f	ound (sorted by	last m	odified	date)					
	op Selected Items		,			,			ſ	-Drop all non-men	nbers wi
_								_		< Select >	~
	Name	Address	Email	Phone/Cell		Mod. Date			l		
	Emily Drake				Club	9/17/2020	63	1			
	Lucy Richmond	Denver CO			Club	9/20/2020	ø	î,			
	Trixie Wrone	Seattle WA			Club	9/20/2020	Ø	1			
	Maritza Cechasz	Wilton CT	maritzac@chichiboutique42		Club	9/20/2020	ø	1			
	Charles Tredding	Monroe IN	myemail_4242@gmail.com		Club	9/20/2020	63	î.			
	Donald Sponge III	Newark DE	myemail_4242@gmail.com		Club	9/20/2020	Ø	î.			
	Mabel Smith	123 Fourth Street Anchorage AK			Club	9/20/2020	Ø	î,			
	Mabel Smith	123 Fourth Street Anchorage AR			Club	9/20/2020	Ø	î <u>s</u>			
	Bill Smith	AP			Club	9/21/2020	Ø	1			
	Gene and Judy Touncer	Chicago IL	myemail_4242@gmail.com		Club	9/21/2020	Ø	1			
	Mary Mayo				Club	12/8/2020	Ø	1			
			john.smith@email.com		Club	12/31/2020	Ø	1			
			joey@email.com		Club	12/31/2020	Ø	i			
			Mark@email.com		Club	12/31/2020	Ø	î.			
	Audrey Abanti				Club	4/9/2021	Ø	1			
	Audrey Abanti		audreyabanti42@gmail.com		Club	5/20/2021	Ø	1			
	Orville Acton		orville_acton4242@gmail.com		Club	5/20/2021	Ø	1			
	Mary Abanti		orville_acton4242@gmail.com		Club	5/20/2021	ø	î.			
	Mary Abanti		orville_acton4242@gmail.com		Club	5/20/2021	Ø	1			

- Click the **Delete Selected Items** button to do just that. You will be prompted to confirm this action.
- Click the Edit icon to display the standard Add/Edit screen, perhaps to allow you to change the email address.
- Click the **Delete** icon to delete an individual entry. You will be prompted to confirm this action.

Delete all non-members in a category - remove everyone in a specified category. You will be prompted to enter the category; the numbers in parentheses are the number of non-members in that category. When you press **Go**, you will be prompted to confirm this action. *This operation does not delete the category itself, just the non-member records in it.*

Note: If any non-members are in multiple categories, they will not be deleted; instead, they will only be removed from the selected category.

Note: Deleting non-member records does **not** change transaction or payment history. These reports and exports will still run and will still be correct.

Non-Member Database Cleanup ⑦					
Cleanup Tasks Show Non-Member Statistics Find Duplicates By Email Address And First Name Find Duplicates By First and Last Name Find Duplicates By Street Address Find Duplicates By Street Address Find Duplicates Without Email Addresses	below and click the 'Go' button. It the relevant section in the administrator's manual before using any of these tools. Delete all the non-members in the selected category (the numbers in parentheses are the number of non-members in the category). Note that if any non-members are in multiple categories, they will not be deleted, they will only be removed from the selected category. This does not delete the category itself, only the records in it.				
Return to Previous Page					

Payments

If the user 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 > Control Panel > Transaction Search > Make F			
Make Payment for Ben	Richards (2446)		
inalite i ajinenti rei Berri			
The list below shows outstanding payments due for the selection and follow the instructions.	current member. Use the checkboxes to se	select which payments to make. The available payment options are in the "Payment Method" dropdown list. Mak	(e a
nbsp;			
To make a partial payment on any of the items, click 🖉	to change amount.		
Renew Membership			
(9/3/2017 Ref # 3555)		Due 50.00 Pay 50.00 🥖	
Membership (Individual Member - Active)	40.00		
Ben Richards - Chapter: Detroit	10.00		
	Transaction Total: 50.00		
Donation			
(3/20/2018 Ref # 3894)		Due 100.00 Pay 100.00 🧪	
Fly-In Hosting	500.00		
	Transaction Total: 500.00		
	Total Selected F	For Payment \$ 0.00	
Refund Policy			
All payments are final. We do not provide refunds for	membership signups and renewals, ever	ent registrations, donations, storefront	
purchases, or other misc. charges. Please carefully r	eview the charge(s) checked above and	l be sure you know what you are paying for.	
The refund policy is set by Northwestern Balloon Clu	b. If refunds are available, requests must	st be directed to Northwestern Balloon Club	
 they cannot be handled by ClubExpress. 			
	Print Invoice (Report)	Print This Page Submit Payment 🖋	
		Pay Later 🗶	

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.

Buttons at the bottom of the screen:

- **Submit Payment** will appear for credit card transactions. **Done** will appear for all other payment types when you are just recording a payment received.
- Print Invoice (Report) allows an admin to print an invoice as a report. When members or non-members view this screen, they will see Print Invoice (PDF), a slightly different option that directly displays a PDF invoice.
- **Print this Page** generates a direct, printable version of the page.

• **Pay Later** is the equivalent of the "Cancel" function, allowing you to leave this page without making or recording a payment. Note that if one of the listed event registration transactions requires Immediate Payment (a special option available for events only), this button will not be displayed. A payment must be made or recorded.

The following payment methods are available to administrators:

• **Credit Card**. 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.

- **ReceivedCash.** 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. Note that pending member updates such as renewals are not processed with this option. 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. Pending
 member updates are processed with this option. 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 is flag the payment has 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.

If your club or association enabled **PayPal**, it will be available to members and non-members but not to administrators. There is no way for an administrator to make a pending payment using someone else's PayPal account!

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.

Non-Member Maintain Options

Clicking the **More Options** icon displays a popup menu with the following options:

Transaction History
Payment History
Event History
Volunteering History
Reservation History
Convert to Member
Merge
Charge/Credit
Privacy Options
Delete

Select **Transaction History** to view the transaction history for this non-member. You will see the same screen as shown to members in their Profile screen.

Select **Payment History** to view the payment history for this non-member. You will see the same screen as shown to members in their Profile screen.

Select **Event History** to view the history of events this non-member has registered for. You will see the same screen as shown to members in their Profile screen.

Select **Volunteering History** to view a history of volunteering opportunities and slots for which this nonmember has signed up. You will see the same screen as shown to members in their Profile screen.

Select **Convert to Member** to change this non-member entry to a member.

Select Merge to merge two non-member entries into one, or a non-member record into a member record.

Select **Charge/Credit** to generate a one-time charge or credit for this non-member. You will see the standard Charge/Credit dialog. 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 all transactions and payments attached to this entry are retained, so reports and exports will still run and will still be correct.

Convert to Member

Select this option to see the following dialog:

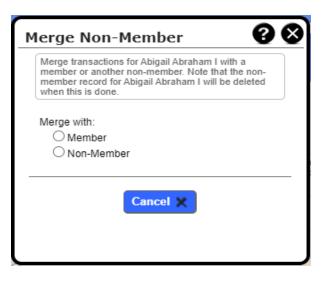
Convert No	n-Member 🛛 😯 🛠
expiration date, a expiration date an When saved, if a	ted non-member to a member. Specify the membership type, the nd the fee. When you select a membership type, the standard nd fee will be entered for you. You may change them if necessary. fee applies, the new member will be marked as 'Pending' and will be before becoming 'Active.' If there is no fee, the new member will be ely.
First Name	Abigail
Last Name	Abraham I 🔹
Email	john@anywhere.com
Member Number	1999
Membership Type	G Member Type#1 🗸
Org. Level	Chicagoland 🗸
Expiration Date	8/9/2021
Membership Fee	0.00
	OK V Cancel X

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. If the member type requires a chapter selection, select the appropriate chapter, 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.

<u>Merge</u>

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



Select Member or Non-Member then click the link to select the destination name into which this nonmember record will be merged. Click **Save** to complete the merge or **Cancel** to close the dialog without merging.

People Lookup

Control Panel > People > Admin Functions

This choice provides a read-only version of the People Manager. It is especially useful if you want to give someone limited coordinator rights to view membe rand non-member data but not to make changes. It's also faster and more efficient than using the People Manager. Clicking this choice displays the following screen:

People Lookup		?
People lookup is used to search for m	iembers and view their information. Additionally, you can also reset a member's password from this page.	
Q A Hide Search		
Search For People		
Search For	⊗ Members O Non-members O Both	
Member Status	Active, Expired	
Last Name 🗸	X Add Filter	
Sort By	Last Name, First Name	
	Reset Search 🗲	

The default search is set to show both active and expired members. Select either members, non-members or both to start your search.

The system allows you to build a search using multiple filters. The following search filters can be used:

Search Field	Control	Search Type	Notes
Last Name	Text Box	Starts with	
First Name	Text Box	Starts with	
Username	Text Box	Starts with	
Address1	Text Box	Anywhere in the field	
City	Text Box	Starts with	
Country	Drop-down		
State	Multi-select drop-down		
Member Number	Text Box	Starts with (find everyone in a family or busi- ness membership; for clubs using ###-1, -2 as member numbers)	
Company Name	Text Box	Starts with	
Email Address	Text Box	Anywhere in the field	
Metro Area	Multi-select drop-down		Available if metro areas have been defined
Subgroup	Subgroup selection tree		Available if sub- groups have been defined
Member Status	Multi-select drop-down		
Member Type	Multi-select drop-down		
Member Level	Multi-select drop-down		
Category	Multi-select drop-down		
Interest Group	Multi-select drop-down		
Committee	Multi-select drop-down		
Recent Additions	Multi-select drop-down		
Renew Cycle	Yes/no	If present, those "in" or "not in" the cycle	
Pending Payment	Yes/no	If present, those "with" or "not with" a pending payment People Manager Search Filters	

People Manager Search Filters

To add additional search filters, select the **Add Filter** button.

Select the *sort option* from the drop-down menu below the search filters. The following sort options are available:

- Last Name, First Name
- First Name, Last Name
- Company Name, Last Name
- Member Number, Last Name

Member records are displayed in pages of 30 members at a time, sorted by the search field selected. Select 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.

Unlike the People Manager, this screen does not allow changes to a member's status, profile, bio, pending charges or credits, or notes.

Subgroups: For multi-tier organizations using the Multiple Websites model, the People Lookup function will show all members from all linked clubs. Note that, in this model, the People Manager only shows members belonging to the top-level club, not the members of linked clubs. The reason is that, in this model, only administrators at the individual club level can modify member data, not administrators at the parent club level.

You also have the ability to see the chapter the non-member is associated with, as well as the mailing list category assigned at the top level only.

Note: For clubs which have enabled the Contact Log, an "Open Logs Entry" button will appear at the top next to the search box and a maintain column will be shown in the results with a link for the Contact Log.

Subgroup People Manager

Control Panel > People > Setup

Subgroups: This function allows administrators, Control Panel Coordinators, and subgroup administrators to see and maintain who is in their subgroups. It is only displayed in the Control Panel for clubs and associations with subgroups. When you select this option, you will see a screen similar to the following:

Subgroup Member Manager	?
This page allows you to view and control which members belong to your Chapters. Click on the member's name to see the member's basic contact information. If the member owes dues for the Chapter, there will be a \$ sign in the Maintain column. Click it to navigate to the Payment page.	
O View Subgroup Members View Pending Members Filler Member List Show Members For: Buffalo Grove	
Member Name Subgroup Name Maintain Arnie True Bufalo Grove 	
Return to Previous Page	

You must initially select a subgroup at the lowest level defined (i.e., if your club or association has 2 levels—District and Chapter—you can only view members at the chapter level since members cannot explicitly join at the district level.)

Administrators and Control Panel Coordinators will see every subgroup. Subgroup administrators will only see the subgroups for which they have rights. Once a subgroup has been selected, the screen will look like this:

Home > Control Pan	el > Subgroup Me	imber Manager				
Control P	Control Panel Administration					
This page allows y Chapter, there will	ou to view and con be a \$ sign in the N	trol which members belong to your Chapters. Click on the member's name to see the member's basic contact information. If the member owes dues for the antain column, Click it to navigate to the Payment page.				
Filter Member List						
Show Members Fo	or: Lake Michiga	in				
Add Member						
Name	Maintain 📑					
Kody Gorbold						
Josiah Marlowe	î.					
Orson Reeve	î.					
Perry Reeve	î.					
Robert Rosenthal	î.					
Ethan Shaw	î.					
Marlowe Shaw	î.					
Davy Timberlake						
Humphrey Traves						
		Return to Previous Page				

Clicking the **Add Member** button displays the standard member selector, to add any other club or association member to the subgroup. If the club only allows members to join only one chapter and the selected member is already in a chapter, an error message will be displayed.

If a fee is owed, a transaction will be generated and you will be taken to the Pending Payment page to complete payment. If the payment is not recorded immediately and you come back to this screen, a standard "\$" icon will be displayed in the Maintain column.

The standard Delete icon is only displayed if the member can be removed from the subgroup.

Example: If the member type requires members to be in one subgroup, they cannot be removed from the subgroup.

All other member type rules pertaining to subgroup membership are respected.

Example: If secondary and tertiary members must belong to the same subgroup as the primary, and a fee is charged for each, then the additional members are added automatically and the aggregate fees are charged.

Note that if a tertiary member is added, the transaction is created at the primary member's level.

If a member requires approval before joining a subgroup, administrators will be able to filter their search results by Pending members and approve or decline their subgroup requests.

User Data Removal Requests

Control Panel > People > Admin Functions

When members or non-members ask to be removed from the database, the user data removal request is recorded in a database table and an email is sent to your designated Data Protection Officer. See "Compliance" on page 38. This email contains a link to this screen on the People tab:

iome > Control Panel > User Data Removal Requests
Jser Data Removal Requests
This page shows a list of members who have requested that they be removed for your database. They have already been dropped. You can approve or decline these requests. To approve the removal, check one or more boxes, then click the 'Approve Checked that button. Approximately seven days after approval, all personally identifiable information will be removed from your database. (Transaction and payment records will be kept, but they will not be tied to an identifiable meter).
Please note that if you do not approve or decline a member request within 30 days, the removal will be processed as if you had approved.
If you decide to decline a member's removal request, click the 'Decline' icon, and provide a reason for this decision. The reason will be recorded in the database, and will be emailed to the member. Declines must be done one at a time, since a reason must be entered for each one.
Click the 'Reports' button to get a list of pending and recently approved member removals, or a list of declined removals. Please note that the list of pending and approved removals should be used only for short term reference, and should not be kept as a record of former members and/or non-members.
Important Note: After approving the removal of members and/or non-members, you should be sure to delete any hard copy or digital data you retain outside the ClubExpress system for these users.
Show: 📀 Pending Requests 🔿 Recent Approvals 🔿 Declined Removals
Member Name Member # Member? Exp. Date Request Date Maintain 📷 Reports
Member T 181 Yes 12/31/2020 11/24/2018
Approve Checked Items Return to Previous Page

Use the radio buttons to view pending requests, recent approvals (last 7 days only), or declined removals. Click the member's or non-member's name to see their contact information. Click the Edit (pencil) icon to jump to that member's Profile screen. Click the **Reports** button to run reports on Pending and Approved requests or Declined requests.

Pending requests have already been changed to a Dropped status but their information is still in the database. You have the option to accept their pending request and have all personally identifiable information deleted, or to decline the pending request with a specified reason, if you need to keep their information.

To approve individual pending requests, click the check box(es) on the left edge of the grid, or click the check box in the header to check all pending requests, then click the **Approve Checked Items** button. Within 7 days, that user's information will be deleted (where possible) or anonymized (where data integrity must be retained, such as for financial reports.)

To decline a pending request, click the Decline Removal Request icon, specify a reason and click OK. The reason will also be recorded in the database and will be emailed to the member. Declines must be done one a time since a reason must be entered for each one.

If you don't act on Pending requests within 30 days, the system is required by law to treat them as "Approved".

You can reverse a recent approval within 7 days from the Recent Approvals screen. You can reverse a declined removal at any time from the Declined Removals screen.

Click Return to Previous Page to return to the Control Panel.

Member Types

Control Panel > People > Setup

Clicking this choice displays a screen similar to the following:

Home Control Panel Member Type Adm Member Type Admi					
This screen allows you to define different m be selected if there are no members of that					
Add Member Type Member Type Sequ	ience				
Name	Dues (USD)	Duration	Availability	Maintain 📪	1
	Dues (USD) 35.00		Availability Admin Only - Not Publicly Available	Maintain 📷	
Active - 6 month	35.00	6 Month			
Name Active - 6 month Alumnus Family approval regid	35.00	6 Month 12 Month	Admin Only - Not Publicly Available	0	

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.

Click the **Edit** icon to edit properties for a member type. Click the **Delete** icon to delete a member type. This icon will only appear if the member type is not being used in the database.

When you first setup your ClubExpress website and database, we create a single member type called "Member". You can change the name and any properties of this type. You can also create as many other member types as you need.

Click the **Display Sequence** button to customize the sequence in which member types appear in the Member Signup/Renewal wizard. You will see the standard ClubExpress display sequence dialog.

To add a new type, click the Add Member Type button. The following screen is displayed:



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.

Availability

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

- New Members and Renewals New and renewing members can select this type.
- New Members Only Only new members signing up can select this type. This type can be used if your organization charges a new member initiation fee.
- Renewals Only Only members renewing can select this type.
- Trial (New Members Only) Only new members can select this type. 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) Only members renewing with the same member type can select this
 member type. Alternatively, they can select any other member types you have configured. Members
 without this member type will not see this option. 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.

Automatic Renewal Options

Select **Automatic Renewal and Payment is Required** to renew and charge a member's saved credit card automatically, based on the duration of the membership. You can also select **Automatic Renewal**

and Payment is Optional to allow the member to decide if they want to enroll in automatic payments.

When this option is selected for a member type, members will sign up as normal and make their initial payment. If the member type requires automatic payment, or the member enrolls, a credit card is required and it must be saved securely within the system. When the specified duration has passed, the membership will be renewed automatically and the saved credit card will be charged. An email will be sent to the member letting them know their membership is set to renew and that their credit card will be charged. Once the credit card has been charged, the member will receive a second email containing payment confirmation.

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.

Administrators: If enrolling in automatic payments is optional, members won't be able to disable enrollment on their own. Members will need to contact an administrator to disable the option through the member's profile.

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.

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.

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.

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.

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.

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 a non-archived 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 – People Options screen, you can configure a global default whether membership must be approved. But this default can be overridden for each membership type.

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 application (which changes the status to **Dropped**, sending a "regrets" email.)

Business Membership

Organizations have the option to create business memberships. This setting is different from members joining through their professional lives, where the membership belongs to the person and their work information is collected by the club. In a business membership, the business is the member, a primary member of the business manages the membership (as the main contact), and other employees are secondary and/or tertiary members. Business memberships can be configured to either allow others to add themselves to the membership using a unique code (provided to them), or to only allow the primary member or a club administrator to add people to the membership.

Example: In a cycling club, a local bike repair shop would have a business membership. The primary member (main contact) would be the owner, and several employees would be secondary members.

To configure a membership as a business membership, select **Yes**.

In the new field, **determine how people will add themselves to the membership**. If you allow people to add themselves, a special code is generated and given to the primary member. The primary member is then responsible for providing that code to other employees in his/her company. When a new user signs up, they are able to enter in the code and add themselves to the membership. The primary member or an administrator will still need to approve or decline the new member.

Information collected during the signup process will focus on the company, but will include space for the primary member (main contact) to enter in their member contact information.

Printed Newsletter

On the **Control Panel – People – Setup – People 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.

Stop Notices

Use this option to prevent members using this member type from receiving renewal and/or expiration notices. For example, if you use a different service to send specific member types renewal notices. To apply this option to a chapter selection, go here.

Create Channel

border-bottom-style: none;border-bottom-width: ;border-bottom-color: ;" class="icon" alt="Mobile App Icon" />If your club or association has activated the mobile app, you will see a **Create Channel** option, allowing you to automatically create a mobile channel based around this member type. Members who choose this member type will automatically be added to the channel.

Secondary Members
Does this membership include additional secondary members Ores Include additional second
Tertiary Members
Does this membership include additional tertiary members? Ores Ores No These members will not be able to log in to the web site.
Fees
Club Level Fees
Primary Member Fee \$ 200.00
District Level Fees
Fee Control No fee 🗸
No fees charged at this level
Club Level Fees
Fee Control No fee No fees charged at this level
Chapter Level Fees
Fee Control Chapter level 🗸
Fees charged are controlled at the local level, starting with the default values below
Primary Member Fee \$ 12.00

<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.

Note: The default maximum for secondary and tertiary members is 5. Contact us if you need this limit raised.

<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.

Note: The default maximum for secondary and tertiary members is 5. Contact us if you need this limit raised.

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.

Additional Member Data Questions

ClubExpress allows you to expand your member database with additional questions. One of the options with this feature is the ability to show different questions to each member type. When a question is created, you can check off which member types will see this question.

If you add a member type **after** your questions have been defined, be sure to visit the **Additional Member Data** screen, then click **Member Types** for each question that should be enabled for the new member type. Check the appropriate box and click **Save.**

Renewal / Expiration Settings

Home > Control Panel > Renewal/Expiration Settings
Renewal/Expiration Settings ⑦
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
Ves
Do you want to enforce continuous membership (i.e. expired members must pay for missed periods)?
® No
Yes (be sure to create member types with multi-year durations)
Renewal Notices
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.
Please note that there is a small additional fee for the regular mail option selected below, to cover our costs to print, fold, envelope, and mail these printed renewal notices.
NOTE: These settings do not affect automatic renewals and/or automatic payments when specified for a member type.
How should the system handle renewal notices? Send three renewal notices
Send first notice days before expiration by Email, or regular mail if no email specified 🔻
Send second notice days before expiration by Email, or regular mail if no email specified v
Send third notice 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 No
Ves - On Expiration
Ves - With Delay
Can expired members login to renew?
O No, member must contact an administrator to renew.
Yes, expired members can login but only to renew their membership.
Save 🖌 Cancel 🗙

This screen governs various options for handling membership renewals and expirations.

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.

When you select this choice, a new option will appear to control expiration dates when a member renews and pays:

When do members renew their memberships?
 Rolling renewals based on join date
How should the system handle expiration dates when a member renews and pays?
 New expiration date is based on the date of renewal
New expiration date is based on the date of payment
New expiration date is based on the old expiration date
 Everyone renews on the same date

Note: These choices only apply if the membership has expired when the member pays. If the membership is still active when the member pays, the new expiration date will be the old expiration date PLUS the duration. There are three choices:

- Select the first choice if the new expiration date should be based on the date when the member renewed, even if he or she paid later. This has been the traditional ClubExpress behavior.
- Select the second choice if the new expiration date should be based on the date when the member paid. If this is the same date as the renewal, it behaves as the first choice. If it's a later date, the expiration date will be that date plus the duration. With this option, members may "lose" a few days or months between when their membership expired and when it was renewed.
- Select the third choice if the new expiration date should be based on the old expiration date plus the duration, even if the member renewed and/or paid some time later. With this option, members cannot advance their expiration date by stretching when they renew and pay; it will always be their original signup date plus the duration.

Note that these options also apply to new memberships. If the second option is chosen, the new member expiration date will be their date of payment plus duration; otherwise it will be their date of signup plus duration.

If "same date" is selected, a different set of 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.

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 (for example, 14 months; 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 10.

Note that "same-date" renewals don't work with durations that are not a factor of 12 (1, 2, 3, 4, 6, 12, 24, etc.)

Example: ClubExpress will not correctly calculate an expiration date for a member type with duration of 5 months.

For "same-date" renewals and durations of less than 12 months, ClubExpress divides the year into periods of 12 divided by the duration.

Example: If a member type has a 4-month duration, the year is divided into three segments (Jan-Apr, May-Aug, and Sep-Dec.) If a member renews at any time in May, June, July or August, his or her new expiration date will be August 31st.

Do you want to enforce continuous membership (i.e. expired members must pay for missed periods)?

Yes (be sure to create member types with multi-year durations)

When everyone renews on the same date, you also have an additional option to enforce continuous membership. This is similar to the option described on the previous page for membership based on the join date.

When this option is set to Yes, expired members who try to renew will only see member types that put their new expiration date in the future.

Example: Assume a club with a calendar based membership year and it's now May 2013. Someone whose membership expired on 12/31/2012 will see 12 and 24 month member types but someone whose membership expired on 12/31/2011 will only see the 24 month (or longer) member types (since a 12 month member type would leave them still as an expired member.)

Finally, if all members renew on the same date, you can enable proration. Select Yes to apply a prorated fee to calculate a prorated fee for new members based on the date they sign up. For group memberships, proration applies to each member individually, not to the total. Additional Charges (for example, an additional donation added, a club coffee mug, etc.) are not reduced in price.

Renewal Notices

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 40¢ to cover printing, folding, enveloping, sealing and delivery.)
- Select **Émail 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 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 40¢.) 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. Renewal notices are sent using the From: email address defined on the **Control Panel – Club tab – Setup section – Name and Description**.

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. However, the system will not send a renewal notice to an expired member so the expiration lag period must be greater than the negative number of days otherwise these expired members will never receive their third notice.)
- 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.



Renewal notices are sent Mondays, Wednesday and Fridays. The date the notice is sent is based on the date specified in your club's settings.

Example: A membership will expire February 14 and the first renewal notice is configured to be sent 30 days prior on a Tuesday. The notice will be sent Wednesday.

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 People 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.

Can expired members login to renew?

- No, member must contact an administrator to renew.
- Yes, expired members can login but only to renew their membership.

An additional option allows you to control whether expired members can actually login to the website. When this option is set to **Yes**, the system allows expired members to login; it detects that they are expired and takes them to the first page of the Renewal wizard, from which point they can take one of two paths: renew or logout. Any other choice will take them back to the same place with the same options.

When this option is set to **No**, expired members cannot even login. They will see an error message. Only an administrator can renew them.

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

Membership Wizard Setup

Control Panel > People > Admin Functions

Select **Membership Wizard Setup** to customize which screens are displayed in the New Member Signup wizard and the Membership Renewal Wizard. See "Member Signup / Renewal" on page 900. You will see the following screen.



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.

Example: Checking the "Joining Agreement" screen won't display that screen unless a joining agreement has also been defined.

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

If the Member Interests page has been enabled for new members signing themselves up, the system will ensure that this function is enabled and visible to any website visitor.

Additional Member Data

Control Panel > People > Setup

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. They can also be hidden from the member, visible to admins only, or visible to the member but editable by admins only.

Selecting Additional Member Data displays the following screen:

		nal Member Data							
Additional	Member	Data							
and the member modify an existin	's answers are ng question an y Sequence al	e shown on the m d the Delete link lows you to chan	to remove ge the orde	dditional M a questior er of quest	Member D: n. (Note th tions.)ata p	age.	Click A	and on their member profiles. The questions dd Question to add a question, the Edit link to question, all answers to that question are als
	Displa	ay Sequence	Expo	ort Ansv	vers				
	Ans. Type	visibility	Edit	ort Ansv M. App.		n		Ē	
Question Name					Maintain	n	_		
Question Name	Ans. Type	Visibility	Edit Admin	M. App.	Maintain	~	<u>a</u> (

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:



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; it will only be shown to users in error messages. Then specify the question text itself. This field uses a limited version of our advanced content editor, with full control over fonts, colors, lists and indenting, and the ability to insert a photo or image.

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.

Use the buttons to allow "Other" as a response, or user comments.

By default, new questions apply to all member types. Selecting **"Applies to Selected Types Only"** will show the Member Types icon in the Maintain column of the Additional member Data screen. Use the Member Types option to select the member types to which the question should apply.

Select the **visibility** setting for the answers submitted by members: Public will display answers in the Standard Member Directory, Member will display answers within the Member Profile, and Admin will display answers to Administrators only (through the Member Profile).

Determine who can answer the question: Member will allow members to answer the question and edit the response through the Member Profile, Admin Only will configure the question to display for Administrators only (through the Member Profile) and only an Administrator will be able to answer or edit the answer.

Questions can be configured to **display in the Membership Signup Wizard**, or only through the Member Profile. Under Membership App., select N/A to show the question in the Member Profile only, not in the

Membership Signup Wizard. Select Optional to display the question in the Membership Signup Wizard, but make it optional for users to respond. Select Required to display the question in the Membership Signup Wizard and make a response required.

Finally, **determine which members are asked the question**: primary, secondary, tertiary, or any combination.

Note: The answers to additional member data questions are not encrypted in the database. You should not use additional member data questions to store information that needs to be secure, such as social security numbers.

Answer Types

The following answer types are available:

Note: To designate a **default** answer, add a ~ to the beginning of the line. To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.

Туре	Display Format	Additional Values	Options
Heading/ Instruction Text	Question text only, no response is allowed	Any formatted text, including images and photos	N/A
Short Text	Text field	Default answer, Max length	
Formatted Text	Text Field where the answer must be in a spe- cified format	Answer format • Numbers only (plus space and hyphen) • Letters only (plus space and hyphen) • Numbers and Letters (plus space and hyphen) • Email Address • Web Address (URL) • US Phone Number • US Zip Code • Canada Post Code • Canada Post Code • UK Post Code • Custom – Enter a Regular Expression and test the expression <u>Regular Expres</u> - <u>sions</u> are a powerful format string using dot characters, alternation, group-	Required: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options
		ing, character classes, quantifiers, word boundaries, anchors, and lookaheads.	
Long Text	Large text block	N/A	Max length required: yes/no
Date Year	Drop-down list showing 4-digit numbers	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Date Month	Drop-down list showing the months of the year	Default answer	Required: yes/no Allow comments: yes/no
Date Day	Drop-down list showing the numbers 1-31	Default answer	Required: yes/no Allow comments: yes/no
Date Full	Text field with a popup date- picker icon	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Day of Week	Drop-down list showing the days of the week	Default answer	Required: yes/no Allow comments: yes/no
Time of Day	Time selector	Earliest time, latest time	Required: yes/no Allow comments: yes/no
Integer	Text field	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Number	Text field	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
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 [Enter] to move to the next line as you're entering the items. A minimum of two (2) items must be specified.	Required: yes/no Allow other: yes/no Allow comments: yes/no
Check box List	Vertical list of check boxes; any and all can be selected	Enter the items to be displayed in the list, each on a separate line.	Specify the minimum and maximum selec- tions that can be made. Allow other: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options
Radio Buttons	Vertical list of radio buttons; only one can be	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter some- thing different (i.e. a write-in candidate for an election)	Required: yes/no Allow other: yes/no Allow comments: yes/no To define an initial
	selected	Note: To designate a correct answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.	default answer, add a ~ to the beginning of that line
True/False	Radio button	Specify "True" text Specify "False" text Select an initial default, or no default	Required: yes/no Allow comments: yes/no
Multiple Text Boxes	Vertical list of text fields; any- thing can be entered into each field	Enter the number of text boxes to be displayed. Specify the maximum length of each answer. Specify the minimum number of values that must be entered.	Allow comments: yes/no
Scale	Horizontal list of radio but- tons rep- resenting the "strength" of the respond- ent's opinion	Enter text to be displayed above each radio button, each entry on a separate line. The number of lines determines the number of radio buttons. A min- imum of two (2) items must be spe- cified.	Required: yes/no Store numbers: yes/no (If no is specified, val- ues will be stored)

Question/Answer Types

More About Formatted Text Questions

When you select "Formatted Text" for the answer type, an additional option appears to define the answer format. The following predefined formats are available to select:

- Numbers Only (plus space and hyphen)
- Letters Only (plus space and hyphen)
- Numbers and Letters (plus space and hyphen)
- Email Address
- Web Address (URL)
- US Phone Number
- US Zip Code

- Canada Postal Code
- Australian Postcode
- UK Postcode
- Custom

When you select the "Custom" option, another field appears to allow you to define a custom format. This option uses a feature of many programming languages called a **Regular Expression**. With this feature, you define a format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. At runtime, this format string then defines what users can enter into the field.

Regular expression syntax is subtly different in different programming languages. ClubExpress uses the syntax defined by JavaScript.

Note: Regular Expressions are for experienced software developers only. They can be as simple or as complex as you want them to be, but there is a significant learning curve. ClubExpress cannot provide support for individual regular expressions that are not working as you might want them to work.

For more information about regular expressions, see the following websites:

Basic Reference: http://www.w3schools.com/jsref/jsref_obj_regexp.asp

A site with more detailed info, examples, and specifics of javascript support: <u>http://www.regular-expressions.info/</u>

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 followi	ing factors in you	r enjoyment of	ballooning?	
	Unimportant	Neutral	Somewhat Important	Very Important
Safety	\odot	\bigcirc	\odot	\odot
Government regulation	\odot	\bigcirc	\bigcirc	0
Education	\odot	\bigcirc	$^{\circ}$	\bigcirc
Open skies	\odot	\bigcirc	$^{\circ}$	$^{\circ}$
Equipment	0	\bigcirc	0	0

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.

Example: In the figure below, there is a typo in the value block for the last question ("Neutrall"), so it is separated out.

ow important are the	followi	ing factors in y	our enjoyment	of ballooning?	
		Unimportant	Neutral	Somewhat Important	Very Important
:	Safety	\circ	\circ	\circ	\circ
Government regu	lation	\circ	\circ	\circ	\circ
Edu	cation	\circ	\circ	\circ	\circ
Open	skies	\circ	\circ	\circ	\circ
	Unim	portant	Neutrall	Somewhat Important	Very Important
Equipment		0	\circ	\circ	\circ

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:

	pe, and the appropriate data fields will be displayed (note that if an existing question has been answe e cannot be changed).
Question Name	
Answer Type	
Question Text	
3 <i>Ι</i> <u>U</u> ⊓Tim	nes New 🔹 16px 👻 🔺 🔥 💌 🗄 🖽 🖽 🔛 👘 🙆 🥙
Question Prompts	0 of 4000 characters used Enter guestion prompts, each on a separate line
	0 of 4000 characters used Enter question prompts, each on a separate line
Question Prompts Column Headings	0 of 4000 characters used Enter question prompts, each on a separate line
	0 of 4000 characters used Enter question prompts, each on a separate line
-	0 of 4000 characters used Enter question prompts, each on a separate line
	0 of 4000 characters used Enter question prompts, each on a separate line
Column Headings	0 of 4000 characters used Enter question prompts, each on a separate line

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/Instruction Text" 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 ad hoc form, 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 "Heading/Instruction Text" 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 heading.

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.

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 and Reporting 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.

Example: "Poor,Fair,Good,Excellent" will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.

Additional Charges

Control Panel > People > Setup

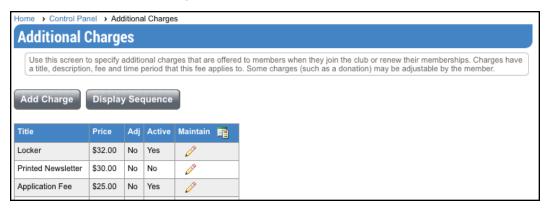
ClubExpress allows you to present a list of optional charges when members sign-up or renew their memberships. These can be one-time or periodic fees and are commonly used to sell club merchandise, or a printed newsletter, or fees for a national organization. You can also use this option to solicit a variable donation from a member. See "Member Signup / Renewal" on page 900

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 People Manager. See "People Manager" on page 229

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.

Note: Remember to select the option to charge for membership changes made through the profile through People Options. See "People Options" on page 296

Selecting this option displays the following screen:



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:

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 US\$ Max 10,000.00
Availability	New Members Optional Renewals Optional Recurring Charge
Quantity	N/A (always 1) Adjustable Min. Qty Max. Qty (Max 999)
Financial Account QuickBooks Item Name Charge Sales Tax?	< Select an Account >
	Save 🖌 Cancel 🗶

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 non-archived, detail or master account into which Additional Charges revenue should be stored. See "Financial Accounts" on page 466

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

Charge Sales Tax? determines whether a defined tax rate should be applied to this charge. You can select "No" or one of the active rates defined on the Control Panel – Money – Setup – Sales Tax Rates screen.

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

To edit a charge, click the standard **Edit** icon. 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.

Member Attachments

Control Panel > People > Setup

This function allows clubs and associations to define documents and images that can be attached to a member's Profile. You can define as many files as you want, and control who can upload each file, who can view the uploaded files, whether versioning is supported, and whether a file is required. Select this option to see a screen similar to the following:

Member Atta			0	and the damage	Variation attach	an and a last of				dissistant	he attachment is required or not, who can view or uplo
whether or not versioning is e							ispiay sequence.	rou can cha	ange ur	culspiay se	re attachment is required of not, who can view of uploa
Add Attachment	2 3 Di	splay juence	s Options								
Title	Status	Who can view	Who can upload	Format	Versioning	Required	Requires Appr.	Preserve	Maint	ain 💼	
Commercial Ballooning License	Active	Members and Admins	Members and Admins	Document	Yes	No	No	No	0	î,	
Flight Students	Active	Members and Admins	Members and Admins	Image	No	No	No	No	Ø	1	
Ballooning License	Active	Members and Admins	Members and Admins	Document	Yes	No	No	No	Ø	1	
Insurance Card Photo	Active	Members and Admins	Members and Admins	Image	Yes	No	Yes	No	0	î,	
Pilot's License	Active	Members and Admins	Members and Admins	Image	No	No	No	No	0	1	
Chase Vehicle Images	Active	Members and Admins	Members and Admins	Image	Yes	No	No	No	Ø	1	
	Active	Admin Only	Admin Only	Document	No	Yes	No	No	0	1	
Waiver		Members and Admins	Members and Admins	Document	No	No	No	No	Ø	1	

The grid lists each document or image that can be uploaded and attached to a member's Profile, and the properties defined for that file.

Click **Display Sequence** to control the sequence of documents as they appear in the member's Profile. You will see the standard ClubExpress display sequence dialog.

Click **Reports** to display the standard reports dialog, listing reports appropriate for this function.

Click **Options** to customize how this function works. The following screen is displayed:



Enable Profile Link controls whether the Member Attachments option appears on a member's Profile screen. If you define attachments, it will always appear on the Profile for an administrator; this option controls whether it also appears for members themselves.

You can also specify the keywords used for this function. Click **Save** to save your changes and return to the manager screen, or **Cancel** to return without saving.

Maintain

The following options are available in the Maintain column:

People

lcon	Description
/ (Edit)	Click this icon to edit the properties of this attachment.
is (Delete)	Click this icon to delete this attachment. You will be prompted to confirm this action. Any files that have previously been uploaded will also be deleted.

Maintain Options

Add Attachment

Click the Add Attachment button to create a new attachment. You will see the following popup dialog:

	to add or edit a attachment. Specify the title, description, if the disabled (hidden), who can upload, who can view, if versioning is ment is required.
Title	
Description	•
	0 of 500 characters used
Status	< Select > V
Who can view	< Select > V •
Who can upload	< Select > v •
Format	< Select > V
Versioning	🔿 Yes 💿 No
Required	🔿 Yes 🧿 No
Requires Approval	○ Yes
A preserve member, o	○ Yes ○ No d attachment can be uploaded but cannot be edited or deleted by a nly by an admin. If both Preserve and Expiration are set, then will be automatically enabled.
	Save 🖌 Cancel 🗶

For each attachment, specify the following properties:

- The attachment **Title**.
- A longer **Description** (up to 500 chars.) of what should be uploaded. **Status** is either Active or Disabled. Use Disabled if you no longer want to collect this information from members but don't want to lose the information already uploaded.

People

- Use **Who can view** to control who can see the uploaded files, either Admin Only or Members and Admins.
- Use Who can upload to control who can upload files, either Admin Only or Members and Admins.
- Use **Format** to control what should be uploaded, either a file (in any format such as PDF, Word, Excel, etc.) or an image (in any format such as JPEG, GIF, PNG, etc._ This setting controls how the upload gadget actually behaves and what it does with the uploaded file.
- Set Versioning to Yes to allow multiple versions of the same file to be uploaded. For example, if
 members need to provide an insurance certificate each year, you can retain a complete history of
 these files, and each new upload is added to the list. Set Versioning to No for each subsequent
 upload to replace the previous one.
- Set **Required** to Yes if an upload is required. This setting primarily affects how this page appears in the Member Signup/Renewal wizard. For a Required file, members cannot continue through the wizard until a file is uploaded. Note that this setting is ignored for admins.
- Set **Requires Approval** for uploads which require review and approval by an administrator. When you select this option, you'll enter the number of months the attachment is valid, or leave the field blank if the attachment won't expire.
- Select "Yes" to **Preserve** an attachment, and only allow other administrators to delete the attachment.

Note: If both Preserve and an Expiration have been set, Versioning will automatically be enabled.

Click **Save** to save the properties for this attachment and return to the Manager screen, or **Cancel** to return without saving.

Pending Attachments

	ng Attachments		ing Attachments		R	(² <
This screen	n allows you to view, appr	rove, and decline pendin	g attachments that members have uploaded.			
	e Attachment Name					
Larry Cho	Insurance Card Photo	0 11/29/2022	2 😫			
				Return to Previous Page		

Note: Pending Attachments will only appear if you have at least one attachment type which requires approval by an administrator.

Select Pending Attachments to view a list of member attachments which require approval. You'll see the member's name, the attachment type, and the date it was uploaded.

In the Maintain Column, you'll see the option to view the attachment, and approve or decline the attachment.

When you select the Approve icon, you'll be asked to confirm the expiration date. The expiration date that appears will be the date the document was uploaded, plus the expiration period you set when configuring the attachment type. You can edit the date by typing in the field, or selecting the calendar icon and choosing a new date.

When you select the Decline icon, you'll be asked to enter a reason for declining. Once you confirm your action the user's attachment is removed, and they'll receive an email noting their upload was declined and the reason you entered.

Hi-Res Bio Photos

Control Panel > People > Setup

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.

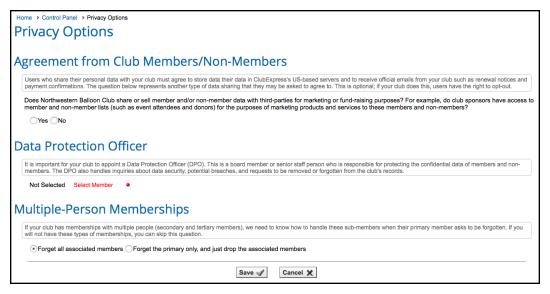
This Control Panel choice will only appear if you have asked us to enable a special feature that allows members to upload hi-res bio photos. Clicking this choice will download these photos in a single ZIP file, with each file in the zip named using the member name and number.

Hi-res bio photos can be used for a printed membership directory.

Privacy Options

Control Panel > People > Setup

This option allows you to configure the settings that ClubExpress needs to ensure compliance with new privacy regulations, such as the GDPR. You will see the following screen:



Some privacy issues cannot be configured.

Example: Members and non-members will always be asked to consent to storing their data in the US; to allowing ClubExpress to send transactional messages (for example, membership renewal notices and payment confirmation emails) on behalf of your club or association; and to allow ClubExpress to share your data with third parties for official club or association business (such as to process your credit card.) This consent is required. They will also be asked whether they want to receive general news and updates from your club and association; they may opt-out.

The first question on this screen controls whether your club or association shares member and nonmember data with third parties for marketing and/or fundraising purposes. If you answer Yes, members and non-members will see an additional question giving them the ability to opt-out of being included in these lists.

The second question requires you to define a Data Protection Officer ("DPO"). This is a board member or senior staff person who is responsible for protecting the confidential data of members and non-members. The DPO also handles inquiries about data security, potential breaches, and requests to be removed or forgotten from the organization's records.

The final question controls how ClubExpress should handle a "Forget Me" request for a membership that includes multiple people.

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

People Options

Membership Options

1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Members join through their	Personal lives Business/professional lives
Does membership require approval by the board of directors? This is a default setting only, and can be overridden	⊖Yes ⊙No
when defining membership types.	
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?	Do not track sponsor 🗸
Duplicate Signups Allowed?	⊖Yes
Capture Primary Member Gender?	● Yes ○ No
Capture Pronoun Preference?	● Yes ○ No
Capture Primary Member Birthday?	Birthday is optional 🗸
Show member's nickname?	🔾 Yes 💿 No
Show spouse's first/last name?	🔾 Yes 💿 No
Enable Emergency Contacts?	Show/Optional 🗸
Chapter selection in the member profile	Member And Admin 🖌
Notify Chapters on membership change?	● Yes ○ No
	Notify on: 🗹 Join 🗹 Renew 🗹 Leave 🗌 Expire/Drop
Charge for membership changes made through the profile?	● Yes ○ No
Charge Sales Tax on membership transactions?	No 🗸
Enable Member Achievements?	● Yes ○ No

Membership Options

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.

People

Note that the screen will refresh when this option is changed because other options on the page are dependent on this setting.

Example: The options available in the **Default visibility for new members** field will be different.

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 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. If you want members to be able to select "non-binary" as an option, contact our support team to have the feature turned on.

Capture Pronoun Preference

Select this option to display a drop-down menu on the contact information screen asking the member to choose their preferred pronouns. The options that will display are: No Preference, He/Him/His, She/Her/Hers, They/Them/Theirs, E/Em/Eir, Ze/Hir/Hir, Other-Ask Me. The pronouns will display in several places on your website, including member contact information, the membership directory, listing of interest members, committee members, and several member reports and exports.

Capture Primary Member Birthday

Do you need or want to capture the primary member's birthday? This option controls whether the Birthday field appears on the member Contact Info screen and whether it is required or not.

Chapter Selection in the Member Profile

This setting controls who can update a member's chapter assignments on their Profile screen. It has the following three options:

- None use this option if chapters cannot be changed during the membership term. Admins Only – use this option if members cannot change chapter assignments during the membership term 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 during the membership term.

Notify Chapters on Membership Change

When this option is set to Yes, the system will notify designated chapter coordinators when members join or leave chapters. This can happen in any of the following ways:

- When members signup or renew;
- When an admin makes changes to a member's status;
- · When members edit their chapters from their Profile screen;
- · When Prospective members are approved;

People

- · When a membership is activated after payment is received;
- · When a non-member is converted to a member;
- When a change is made by an automated process, such as membership expirations, dropping pending members, auto renewal and payment, status changes, and sending welcome emails to bulk loaded members.

Check off which actions will trigger this notification: Join, Renew, Leave, or Expire/Drop.

One email is sent nightly for each chapter and to each specified chapter admin, listing all changes which affect that chapter. If a chapter has no admin or an admin does not have a valid email address, no email is sent.

Charge for Membership Changes Made Through the Profile

Select "Yes" to have the system generate a mid-year change transaction when members add a chapter or a secondary/tertiary member in the middle of their membership year. Select "No" if you don't want a transaction generated.

Charge Sales Tax

Select this option if tax should be charged on membership signups and renewals. The options are "No", or one of the active rates defined on the Control Panel – Money – Setup – Sales Tax Rates.

Membership Achievements

Select this option to track member achievements. Administrators will see an **Achievements** option in the People Manager – Profile screen, allowing them to enter achievements for a member. This option is also visible to members on their Profile screen but it's read-only. These achievements will then appear on the member's Bio page. There are also a couple of reports listing achievements.

This option is especially valuable for community service clubs such as Rotary, Lions, Exchange, etc., where it's important to track a member's contributions to the organization over multiple years.

Members Can Renew Early

Select this option to allow members to renew their membership before their normal renewal window. This places a small panel in the Member Profile to allow the member to renew their membership early.

Secondary and Tertiary Members

Note: These terms may be labeled differently if your organization set separate titles. 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 Level
- 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 Secondary/Tertiary 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.

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.

People

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 displayed on the member's Contact Info page, allowing them to opt-out of receiving a printed newsletter. Note that this option appears for primary members only, not secondary or tertiary. The system assumes that clubs will only want to send one printed newsletter to a household.

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.

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.

Reports/Exports

Administrators: See "Reports" on page 93 for more information about running reports.

Reports

If available, selecting Reports displays the Report Group selector pop-up. Once you select a group, the system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Type	Description								
Member Contact Lists	View and print basic lists of members.								
Membership Info	View and print other reports showing member and related data.								
Mailing Labels	View and print various kinds of labels.								
Achievement Reports	View and print achievement reports (if the Achievements function has been enabled)								
Non-Member Database	View and print reports showing non-member data.								

Report Options

Website

People	Website	Money	Club	Communications	Support	
						🕕 Show Notices 🎤 Configu
Admin I	unctions					
👌 Cus	tom Pages			Photos		Reports
Website	Modules (Vis	ibility: P=Public,	M=Member	s, NA=Not Active)		⊙ Switch to View Mode
💼 Hon	1e (A)			Photo Albums (PM)	Document Library (PM)
				-		
15 Eve	nts (PM)			FAQ / Tech Library	(PM)	
	nts (PM)			(1) FAQ / Tech Library	(PM)	
Setup	nts (PM) site Look & Fea	el		FAQ / Tech Library FAQ / Tech Library	(PM)	🎼 Template/Theme
Setup		el			(PM)	🎲 Template/Theme 🍪 Domain Names/Quick Links/Redirects
Setup 😚 Wet	site Look & Fe	el		A Fonts	(PM)	

The Admin Functions panel in the Website section contains functions to manage the content of your website on a day-to-day basis.

This panel contains functions to update the home page and other static web pages of your website, as well as photos and photo albums. You can also quickly add a new custom page or photo album. The Website Modules panel contains the modules enabled for that section.

The Setup panel contains functions to customize the look and feel of your website, including special appearance options, the page header and other common content panels that appear on every page, menus, domain names and quick links, website graphics, how your website appears on smartphones and tablets, and other options.

Many of these choices will only be visited when you first setup your website and database in ClubExpress, or only rarely thereafter. This panel is normally collapsed; click the down-arrow icon to expand it, or, if expanded, click the up-arrow icon to collapse it.)

Favlcon

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. There is no fee for this option.

What would you like to do?	
Home Page and Custom Pages	
Photo Albums	
Editing A Photo Album	
Photos	
Legacy Website Look and Feel	
Fonts	
Common Content	
Menus	
Domain Names / Quick Links / Redirects	
Windows Users:	
Mac Users:	
Browser Support:	
Android Users:	
IOS Users:	
Linux/Unix/Other Users:	
Windows Configuration Instructions	
Web Graphics	
Tags	
Mobile Setup	
Mobile App Manager	
Website Options	
Custom Template Specifications	

Configuring Google Analytics	.396
Reports/Exports	.412
Reports	.412
Exports	.412

What would you like to do?

- For help with modules in the Website section, see " ClubExpress Modules " on page 588
- Edit your home page, or create and manage custom pages; see "Home Page and Custom Pages" below
- Maintain and edit photo libraries; see "Photos" on page 321
- Customize the look and feel of your site; see Website Look and Feel
- Add custom fonts to use on your home and custom pages; see "Fonts" on page 348
- Update the page header and any content boxes defined for your layout (if you are using our Legacy Look & Feel tools; see "Common Content " on page 349)
- Configure your site menus; see "Menus" on page 351
- Maintain the list of domain names used to access this website, as well as redirects; see "Domain Names / Quick Links / Redirects" on page 358
- Manage graphics and images used on your site; see "Web Graphics " on page 369
- Manage tags used in the Documents, Photos, and, FAQ, News/Articles and Blogs modules; see "Tags" on page 373
- Configure the page header, top content box, home page and bottom content box for mobile website users (if you are using our Legacy Look & Feel tools; see "Mobile Setup" on page 375)
- Enable and configure a mobile app for your club or association, and the Channels used by members; see "Mobile App Manager" on page 378
- Configure your website options; see "Website Options" on page 384
- Learn more about Custom Templates ((if you are using our Legacy Look & Feel tools; see "Custom Template Specifications" on page 389)
- Get help configuring Google Analytics; see "Configuring Google Analytics" on page 396
- Learn more about the reports available; see "Reports/Exports" on page 412

Home Page and Custom Pages

Each row on 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, and columns will be mobile responsive. You can also have content that is visible to members only or to non-members only, and content that is only made visible at selected times but which is otherwise invisible.

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 functions. 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. Like your home page, custom pages can include different layouts, will be mobile responsive. They can also have content that is visible to members only, non-members only, or both, and content visible at selected times but which is otherwise invisible.

When you select **Home** from the Control Panel, you will navigate to the Home Page Versions Manager:

Home > Control Panel > Versions Manager
Home Page Versions Manager (2)
Edit the Active version of the page or a version of the page. Click the view link to view a preview version of the page. Click the Activate for Main or Activate for mobile to publish these versions. Mobile versions are optional and can be enabled or disabled. If you select a mobile version it will be different from the "normal" active version. Mobile versions are entirely optional and may be used to display separate or minimal information for mobile verse. Click the delete icon to mark a version for deletion. When the delete link is clicked, the version will be marked for deletion in 30 days. The pages will no longer be shown on this list and will be removed from the system on the indicated date.
Q Image: Create Mobile Version Hide Search Edit Main Version
Search For Versions
Title
Date Modified From
Date to be Deleted From To III
Status ○ Versions ○ Deleted ⊘ All
Reset Search 🗲
Search Results (2 versions(s) found)
Title Status Page Type Date Modified Date to be Deleted Maintain
No Title Active Home Page 07/06/2020 13:05
No Title Version Home Page 07/06/2020 13:05 🧪 💿 🛇 🥾 🕵
Return to Previous Page
Return to Frevious Page

From here you can create and edit Home Page desktop and mobile versions using the Page Builder. See "Page Builder" on page 139.

When you select **Custom Pages** from the Control Panel, you will see a screen similar to the following:

Custom Pag	e Man	age	er										(?
	age" to create a	new pag	e. Click t	he "Configure" link to	change th	e confi	guratio	on of a	n existii	ng page,	inclu	ding its v	and external sites, and the formatting can be as simple or as elaborate as you visibility and name on the menus. Click "Edit Content" to update the page itself.
Q Hide Search		Add Cus Page		Categories									
Search For Custom P Show Pages All Custom F													
Category < All Category				•									
Page Name	ones -												
Status () Active Or	ly () Delete	ed ⊘A		Search 🞸									
Search Results													
Page Name	Category	Level	Active	Date to be deleted	Maintai	1						Ē	
A Custom Page Demo (210151)	Training	Club	V		0	<u>1</u>		Ь	8	þ 빌	0	Î,	
A New Page Demo (210157)	Training	Club	V		0	X 🖲		Ь	&	<u>ب</u>	3	î.	-

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. From here you can create and edit custom page desktop and mobile versions using the Page Builder.

Subgroups: 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

Select this option to manage the categories into which custom pages are organized. You will see a screen similar to the following:

		Itegory Administration
Custom pages can b the expected function	e organized int	o categories, especially useful for larger clubs. Click the "Add Custom Page Category" button to create a new category; "Edit" and "Delete" perform
Category	Maintain	Add Custom Page Category
Activities	Ø	
Ballooning	0	
Brandywine	0	
Clubs	1	
Clubs	🥟 🛱	
Compliance	0	
Education	6	
Fundraising	🥟 🟗	
Open-House	<i>6</i> 2	
Safety	1	
Subgroup Pages	ø	
Subgroup Template	0	
Video Trainings	Ø	
Videos	0	
Welcome	ø	
		Return to Previous Page

î 🙀

Select **Add Custom Page Category** to add a new category. For organizations with subgroups, where each subgroup has its own website, you'll see the option to share custom pages in the category with lower-level subgroups. Select the checkbox to share the pages in the category.

Select the pencil (Edit) icon to modify an existing category.

If the trash can (Delete) icon is displayed, the category is not assigned to any custom pages and can be deleted.

Select Return to Previous Page to go back to the main list of pages.

Adding Custom Pages

Select Add Custom Page and you will see a screen similar to the following:

Custom Page	Custom Page Configuration				
in a menu, if necess used on the website this page.	age a name. You may also assign different text to be displayed ary. You can assign this to a category, activate it so it can be and use the visibility option to specify who is allowed to see subgroups/chapters can also specify that this page belongs to a				
Page Name	Burner Maintenance Class Summary				
Menu Text	Burner Maintenance Class				
SEO / Browser Title	Burner Maintenance Class Summary 32 of 200 characters used				
Category	< Default Category > •				
Show For	Midwest region				
Visibility	Any Web Site Visitor •				
Quick Link Name					
Active	×.				
	Save Cancel X				

Enter the name to use for this page and the text if it's placed on a menu.

The SEO/Browser Title field allows you to control the title of the page when it's shown in your browser. Customizing this value can improve your visibility in search engines.

Select a category and visibility from the drop-down lists. Visibility has the following options:

- Any website visitor all users will be able to view this page. Note, even if the page is not on a public menu, if a link is shared with a non-member they will still be able to view the page.
- Members only only members who are logged in are able to view this page.
- Admins only use this option to add pages which are only available to club administrators.

Configure a Quick Link Name to create a shortened, shareable link for the page. Enter the text to be added to the end of the URL. For example, you might create a page including your club's history and enter History as the Quick Link text. The actual URL for the page will be your domain, plus the text (myclub.clubexpress.com/history OR myclub.org/history).

Optionally, select an image to use when the page is shared on social media. This can be an image you select from your computer or your web graphics library. When you select an image, a small preview will appear in the Custom Page Configuration window.

Click **Save** to create an empty page with these properties.

Subgroups: 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.

Maintain Options

lcon	Description
(Edit)	If a main version exists, select the Edit icon edit the main version of the page using the Page Builder. See "Page Builder" on page 139 If no main version exists, select the Edit icon to create a version using the Page Builder.
(View)	Select the View icon to display the custom web page.
(Edit MobileContent)	Select the Edit Mobile Content icon to edit the mobile version of your page. See below for more detail on creating and editing mobile versions of a page.

The following options are available in the Maintain column:

lcon	Description				
(View Mobile Content)	Select the View Mobile Content icon to view a preview of the mobile version of the page.				
(Manage Ver- sions)	Select the Manage Versions icon to go to the Custom Page Versions Manager screen.				
(Coordin- ators)	Select the Manage Coordinators icon to add one or more coordinators who have administrative rights over this page.				
Configure)	Select the Edit Configuration icon to display dialog allowing you to change name, menu text, category and visibility.				
📋 (Сору)	Select the Copy icon to make a copy of the page. You will see a version of the Cus tom Page Configuration screen, allowing you to specify a new name, the version you wish to copy, and other properties for the page.				
(Share)	Share this web page on your club's social networks, including Facebook and Twit- ter. (See below.) This icon will only appear if the custom web page is active. It does not need to be visible to everyone; it's only members can access it, clicking the social networking link will first require members to login.				
(Delete)	Click the Delete icon to drop the page. You will be asked to confirm this action. When you delete a custom page, the page is marked inactive, removed from any website menus, and flagged to be deleted in 30 days.				
(Undelete)	Select the Undelete icon to cancel the deletion of the page. This icon will only appear if a page was previously flagged for deletion. The date to be deleted is the date the page is scheduled to be removed permanently. Maintain Options				

Maintain Options

Edit Mobile Content

If your page has an active mobile version, clicking the Edit Mobile Content icon will take you to the Page Builder.

If your page has **desktop versions but no mobile version**, clicking the Edit Mobile Content icon will display the following popup window:

Create a Mobile Version	\otimes	
An active mobile version was not found for this page. Select a version to create an active mobile version with, or select an existing non-active mobile version to edit (if one exists), or start with a clean slate to create a new mobile version.		
Select A Destkop/Laptop Version To Create An Active Mobile Version < Select > Start From This Desktop version	l	
Or	L	
Start With A Clean Slate	L	
Start with a clean slate	L	
Cancel 🗙	•	

Select the desktop version from the drop-down menu that you would like to use as the mobile version or select Start with a Clean Slate to open a blank Page Builder Canvas.

If your page has **desktop versions and inactive mobile versions** (no active mobile version), clicking the Edit Mobile Content icon will display the following popup window:

Create a Mobile Version
An active mobile version was not found for this page. Select a version to create an active mobile version with, or select an existing non-active mobile version to edit (if one exists), or start with a clean slate to create a new mobile version.
Select A Destkop/Laptop Version To Create An Active Mobile Version
< Select > Start From This Desktop version
Or Edit An Existing Non-Active Mobile Version
Board Election 2020 Version 2 V Edit This Mobile Version
Or
Start With A Clean Slate
Start with a clean slate
Cancel 🗶

Select the desktop version from the drop-down menu that you would like to use as the mobile version, select Start with a Clean Slate to open a blank Page Builder Canvas, or select an existing mobile version to edit from the second drop down menu.

If your page has **no desktop versions and no mobile versions**, select Start with a Clean Slate to open a blank Page Builder Canvas.

Create a Mobile Version	8	8
There were no active versions or mobile versions found for this page. Try clicking on the versions manager to create a version first or click the "Start With A Clean Slate" button below to create new mobile content		
Start With A Clean Slate Start with a clean slate		
Cancel 🗙		Ŧ

Share this Custom Page

Click the **Share this Custom Page** icon to share a new or updated page on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:

Select the social network on which to post. You will see a new popup that allows you to connect to the social network, enter some text describing your post and, in some cases, specify where the post should be made.

Example: On Facebook, you can post to a group, your personal timeline, the timeline for another page you manage, and some other options.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Photo Albums

Control Panel > Website Tab > Website Modules

Photos are uploaded using the Photo Manager (see below) and organized using their tags (see "Photos" on page 321). When you want to display these photos, use Photo Albums. Photo albums can be created at both the club and member levels (see "Photo Albums" on page 1355).

When you select Control Panel - Photo Albums, you will see a screen similar to the following:

		Photo Album Manager M Manager					
club-level album.	Select '		e options app	lying to a		ased on its name, category and/or wh elect 'Photo Album Categories' to mar	
		Search				Photo Album Options	
Album Name						Photo Album Categories	
Category E	Balloon	ing 🛟				Add Photo Album	
Subgroup				•			
	Includ	e Member Photo Albums			Search 🔗		
Title		earch Results (4 p	Category	Status	Maintain	Page 1 of 1 🛟	
					maintain		
Balloons in Flight	Club	Club	Ballooning	Visible	0 🔍	🤌 🗎 S 🗊	
Best Club Photos	Club	Club	Ballooning	Visible	N 💿 😤	🥕 🗎 🔇 💼	
Launching	Club	Club	Ballooning	Visible	🧷 💿 😤	an 🔁 î 🖉	
NWBC Fly-In	Club	Club	Ballooning	Visible	0 🖉	al 🖉 💼	
			1		<	Page 1 of 1 🛟	
					Return to P	Previous Page	

The search panel allows you to limit the list of photo albums by page name (title) and/or category. You can optionally include member photo albums. Click the **Search** button to display a list of matching albums. 30 photo albums are shown at a time; use the standard paging controls to move through each screen of photo albums.

Note that the practical size limit for each photo album is 300 photos. If you have more photos you want to display, spread them across multiple albums.

Subgroups: If your club or association has subgroups, you can also filter by them. Administrators and module coordinators can view any photo album, including filtering by any subgroup. Subgroup administrators will only see photo albums belonging to the subgroup(s) they administer.

The following options are available in the right-side buttons:

Photo Album Options

Click this button to display the following dialog:

	o factoria	0.00	
220000			
Sector 2	ole Moures		
-	lations		
		22 1021	÷.,
	-	- 10, 10	

The following options can be set:

- Allow member photo albums controls whether members can create their own photo albums and upload photos into them. If this option is set to Yes, members will see a **Photo Albums** option in their Profile screen.
- Include the member's name in the photo album title set this option to No if you want to allow members to create photo albums but without their name in the title, perhaps for confidentiality or privacy reasons.
- **Display member photo albums on the photo album list** controls whether member photo albums are included in the Photo Album List module and, if so, whether they are placed at the top or the bottom.
- 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 photo album 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 Album Manager, or **Cancel** to return without saving.

This button does not appear for Subgroup Administrators.

Photo Album Categories

Click this button to maintain the list of photo album categories. You will see a screen similar to the following:

Photo Alb	unn c	Jacog		
				which can be updated from this screen. Click "Add Category" to add a new category. Click "Edit" to Sequence" to change the order in which categories are displayed. Click "Delete" to remove a
Add Category	Disp	olay Sec	quence	
	-			
Category	Pages	Status	Maintain	
Category Ballooning	Pages 3	Status Visible	Maintain	
Ballooning	3	Visible	Ø	

Click **Add Category** to add a new category. You will see a standard popup dialog. A **Visible** checkbox allows you to turn individual categories on or off.

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 pencil (Edit) icon to modify an existing category.

Î,

If the trash can (Delete) icon is displayed, the category has not been assigned to any photo albums, and it can be deleted.

Click Return to Previous Page to go back to the main list of pages.

This button does not appear for Subgroup Administrators.

Add Photo Album

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

Website

noto Album	688	
Edit the properties of	f your photo album.	
Album Name	Burner Maintenance Class	
Menu Text	Burner Maintenance	
Category	Misc •	
Availability	Any Web Site Visitor •	
Visible		
Quick Link Name		
Description		
	0 of 200 characters used	

Specify the album name and text that can be used if the album is placed on the menu (which is often shorter.) You can also specify whether the album will be available to all website visitors or whether it should only be visible to members.

The album 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 album visible.

You can also enter a short description.

Subgroups: If you belong to any subgroups, you have the option of linking this album and any photos added to it to one of those subgroups. If you do, only photos that are linked to the same subgroup can be added. If you don't, the album will be linked to your membership only, and any photos can be added.

Click Save or Cancel to return to the Photo Album Manager screen.

Maintaining Photo Albums

The following options are available in the Maintain column:

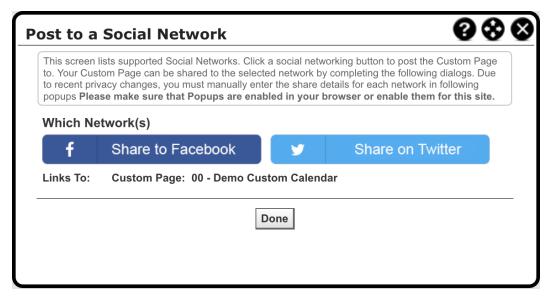
Icon	Description
(Edit)	Click the Edit Content icon to manage the photos placed on the album, as well as a detailed description of the album.

lcon	Description
(View)	Click the View icon to display the photo album, even if it's not on the menu.
(Coordin- ators)	Click the Manage Coordinators icon to add one or more coordinators who have administrative rights over this album. You will see the screen for built-in functions. This option is not available for subgroup administrators.
Configure)	Click the EditConfiguration icon to display dialog allowing you to change name, menu text, category and visibility.
Long (Long Desc.)	Click the Long Description icon to display a text editing tool, allowing you to create a more detailed description of the album. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.
(Share)	Share this new or updated photo album on your club's social networks, including Facebook and Twitter. (See below.) This icon will only appear if the photo album page is active. It does not need to be visible to everyone; it's only members can access it, clicking the social networking link will first require members to login. This option is not available for subgroup administrators.
(Delete)	Click the Delete icon to drop the album. You will be asked to confirm this action, which cannot be reversed; the album is completely deleted. Note however that any photos placed on the album are not deleted; they are still stored in your website and can be placed on other albums or pages.

Maintain Options

Share this Photo Album

Click the **Share this Photo Album** icon to share a new or updated album on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:



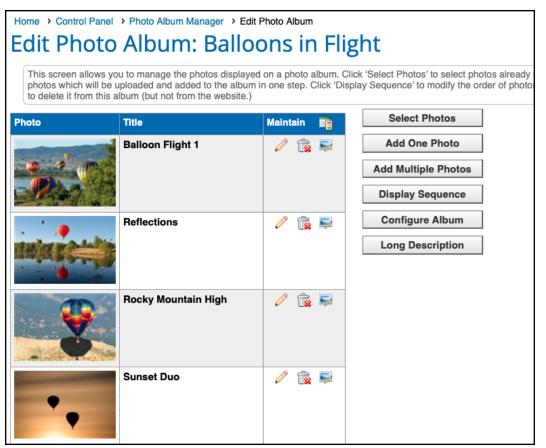
Select the social network on which to post. You will see a new popup that allows you to connect to the social network, enter some text describing your post and, in some cases, specify where the post should be made.

Example: On Facebook, you can post to a group, your personal timeline, the timeline for another page you manage, and some other options.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Editing A Photo Album

To edit the contents of a photo album, click the pencil (**Edit Content**) icon from the Photo Album Manager. You will see a screen similar to the following:



Select Photo(s)

Delete this text and replace it with your own content.

Click this button to add a photo to the album. The following screen will be displayed.

Title Tag(s) balloons X Show Photos Photos Photos Photos Photos Preview Preview Previe		oto d/or tille text and click 'Show Photos os from the list (using [Shift-Click] or		
Photos Preview Aerial Image And the Race is On! Preview Balloons over the Countryside bigstockphoto_air_Balloon_2571855.jpg bigstockphoto_Balloon_611149.jpg Day Trip Day Tripping Preview	Title			
Photos Preview	Tag(s)	balloons X		\diamond
Aerial Image And the Race is On! Balloons over the Countryside bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_Balloon6101485.jpg bigstockphoto_Balloon611149.jpg Day Trip Day Tripping				Show Photos 🔗
And the Race is On! Balloons over the Countryside bigstockphoto_Air_Balloon_165031.jpg bigstockphoto_Balloon615031.jpg bigstockphoto_Balloon611148.jpg bigstockphoto_Balloon611149.jpg Day Tripping			Preview	
	And the Race is Balloons over the bigstockphoto_A bigstockphoto_E bigstockphoto_E Day Trip Day Tripping	e Countryside ir_Balloon_165031.jpg ir_balloons_2571855.jpg ialloon611148.jpg		
Select 🖋 Cancel 🗶		Select 🖋	Cancel 🗶	

Enter text from the photo title and/or one or more tags, and click the Show Photos button to display a list of photos matching these criteria. 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 album, 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.

Subgroups: If a photo album is linked to a subgroup, only photos that are also linked to the subgroup can be selected.

Add Multiple Photos

Click this button to upload multiple photos to the website and add them to this album in one simple step. You will see the dialog described below which allows you to select multiple photos from your local hard disk or network.

Add One Photo

Click this button to upload one photo to the website and add it this album in one simple step. You will see the dialog described below which allows you to select a single photo from your local hard disk or network.

Note that if a photo album is linked to a subgroup, the added photo(s) will also be linked to that subgroup.

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.

Display Sequence

This button shows the standard ClubExpress sequence dialog, allowing you to reorder the photos on the album. Note that the first photo in the album is used as the "title" photo on the Photo Album Index screen.

Configure Album

Once a photo album is defined, click this button to modify the album properties.

Album Description

Click this button to display the advanced content editor, allowing you to create a more detailed description of the album. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.

Maintain Options

lcon	Description
(Edit)	Click this icon to edit photo properties. You will see a popup dialog allowing you to modify the data stored with this photo.
(Remove)	Remove the photo from this album. It remains in the photo manager to be used on other photo albums. You will be prompted to confirm this action.
(Image Editor)	Click this icon to modify the image, including rotating it, cropping it, changing the bright- ness, or changing the size.

Maintain Options

Photos

Control Panel > Website Tab > Website Modules

Select this option to manage photos used on your website. You can upload an unlimited number of hi-res digital photos and organize these photos using tags.

Note: You may add a maximum of five (5) tags to any single photo.

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

This screen allows yo Photo" to upload pho	ou to manage photos tos to the website. If y	uploaded by members and admins. Search f /ou are a module / Club admin, click "Manag	or photos alre e Tags" to ma	ady uploaded inage tags wh	l, then preview or ich can be applie	r edit them. d to photos	Click "A	dd Multiple	e Photos" or "Add	1
-Search Criteria-	(Add	One Photo					
Tag(s)			\bigcirc	Add Mu	ultiple Photos					
Photographer				Mai	nage Tags					
Date Taken	From	То			nage lags					
Subgroup	NWBC	•								
earch Results: (32 photo(s) fou		arch 🗲			(P	age 1 d	of 2 🗸	•	
	32 photo(s) fou			Date Taken	Photographer	K P Maintain	age 1 d	of 2 🗸 🔪	•	
itle	32 photo(s) fou	ind)		Date Taken	Photographer Marty	1-			•	
itle wesome-balloons	32 photo(s) fou	IND)	Club level	Date Taken		Maintain		1		
itle wesome-balloons alloon icon	32 photo(s) fou	Ind) File Name Awesome-balloons.png	Club level Club	Date Taken	Marty	Maintain		, 1		
itte wesome-balloons alloon icon alloon-burner	32 photo(s) fou	Ind) File Name Awesome-balloons.png balloon_icon.png	Club level Club Club	Date Taken	Marty Marty	Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintai				
earch Results: (itte wesome-balloons alloon icon alloon-burner alloon-field estival	32 photo(s) fou	File Name Awesome-balloons.png balloon_icon.png balloon-burner.jpg	Club level Club Club Club	Date Taken	Marty Marty Marty	Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain Maintain				

The initial display does not show the grid of photos. You can enter filter criteria for tags, photographer, title, and date taken range, 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.

Subgroups: If your club or association has subgroups, you can also filter by subgroup. Full administrators or module coordinators can select any subgroup; subgroup administrators can only filter by the subgroups they have access to.

When you upload photos to a ClubExpress website, we save those photos internally in three resolutions:

- The original hi-res image, unmodified.
- A "screen" size, suitable for placing on a web page. The default size (for the maximum dimension) is 450px but you can modify this value to make it larger or smaller.
- A "thumbnail" with a maximum dimension of 80px.

We will also attempt to read the orientation information from the photo file (JPEGs only) and rotate the saved image if necessary to preserve this orientation (landscape or portrait.) This is not a problem in Firefox and Chrome but it may be an issue with Internet Explorer. Note also that some camera and smartphones do not provide this information.

Maintain Options

Icon	Description
(Pre- view)	View this photo in a small popup window.
🧪 (Edit)	Click this icon to edit photo properties.
(Copy Image URL)	Copy a URL to clipboard that can later be used to download this photo from anywhere (another web page or website, or an email.)
(Delete)	Click the Delete icon to remove the photo. After confirming this action, the photo will be deleted from the website and any pages where it has been placed. In photo albums 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.
(Image Editor)	Click this icon to modify the image, including rotating it, cropping it, changing the bright- ness, or changing the size.
	Maintain Options

Edit Photo

Clicking the Edit icon displays the following dialog:



Use this dialog to modify the title, caption, photographer, date taken and tags.

The tag field allows you to enter multiple words or phrases. Press **[Enter]** to add each word or phrase as a tag. If it matches one or more master tags, you will see a drop-down list to select that tag. You can also click the drop-down arrow to see a list of master tags, and the "x" on each tag to remove it.

Subgroups: If your club or association has subgroups, you can also link a photo to any subgroup. Subgroup administrators can only link photos to the subgroups they have access to.

Click Save to save your changes and return to the Photo Manager, or Cancel to return without saving.

Add One Photo

Select this option to upload a single photo. You will see a similar dialog to the one shown immediately above.

Click the **Browse** or **Select** 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.

The tag field allows you to enter multiple words or phrases. Press **[Enter]** to add each word or phrase as a tag. If it matches one or more master tags, you will see a drop-down list to select that tag. You can also click the drop-down arrow to see a list of master tags, and the "x" on each tag to remove it.

When a photo is uploaded, the system checks its size. Large photos are saved 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.)

Subgroups: If your club or association has subgroups, you can also link a photo to any subgroup. Subgroup administrators can only link photos to the subgroups they have access to.

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

Add Multiple Photos

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

Add Mult	iple Photos			088
from a local [Ctrl-Click] to	hard disk directory or ne	hotos. Click the 'Select Files' etwork. Use [Shift-Click] to se al files. Then fill out the other	lect a contiguous	group of files or
Select Files		lect files, or drag and drop he	ere	
	FileName	Title	Status	
	36 Super Sports.jpg		Remove	
	80in the 70s.jpg		Remove	
	86PriceList.jpg		Remove	
	99iaap1.jpg		Remove	
	99iaap2.jpg		Remove	
	99iaap3.jpg		Remove	
Tags			Q	
Photographer				
Date Taken				
	Allow Download of	Hi-Res Version		
		Save 🖋 Cancel 🗙		

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]** (PC) or **[Command-Click]** (Mac) to select discontiguous photos. You can only upload photos from one folder at a time. You should not attempt to upload more than 100 photos at a time.

When you click the **Open** button you will see a list of selected photos, sorted by their original filename. 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 **Remove** link 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.

The tag field allows you to enter multiple words or phrases. Press **[Enter]** to add each word or phrase as a tag. If it matches one or more master tags, you will see a drop-down list to select that tag. You can also click the drop-down arrow to see a list of master tags, and the "x" on each tag to remove it.

Website

Once photos have been uploaded, you might want to edit each photo to further customize titles and captions.

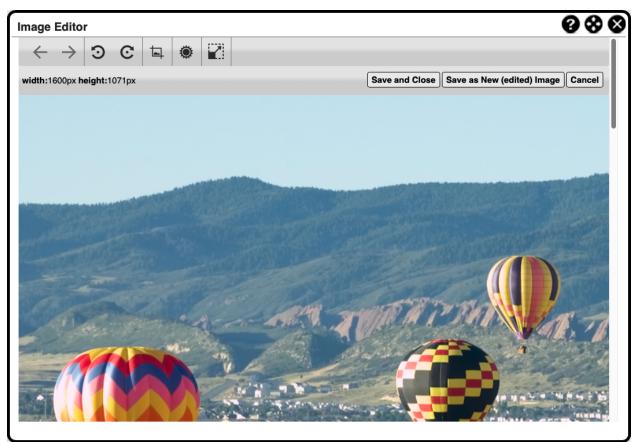
Subgroups: If your club or association has subgroups, you can also link a photo to any subgroup. Subgroup administrators can only link photos to the subgroups they have access to.

When you click **Save**, all the selected photos will be uploaded to the website. The screen will reposition to display a progress bar. Click **Cancel** to close the dialog without uploading.

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.

Image Editor

When you select the Image Editor icon, you will see a popup screen similar to the following:



Website

The photo is shown at its full resolution. Use the scroll bars on the right and along the bottom edge to adjust the view.

Icons at the top of the window provide the following functions:

- Undo last change
- Redo last change
- Rotate left
- Rotate right
- Crop
- Adjust Brightness
- Adjust Size

The current width and height are also shown.

When you enter "Crop" mode, you can drag out a rectangle, then adjust in any corner or the middle of any edge. Click the " \checkmark " icon to execute the crop or the "X" icon to cancel the crop.

When you enter "Adjust Brightness" mode, use the + and – icons to adjust the brightness. Click the " \checkmark " icon to save or the "X" icon to cancel.

When you enter "Adjust Size" mode, there are a number of options:

- Use the + and icons to adjust the size in 5% increments.
- Enter a scale value to adjust the size by a ratio. Numbers between .1 and < 1 will shrink the image. For example, .5 makes it half the size. Numbers greater than 1 grow the image. For example, 2 makes it double the size. The aspect ratio is retained.
- Enter a width or height number in pixels to adjust just that dimension. The aspect ratio is NOT retained.
- Click the " \checkmark " icon to save the new size or the "X" icon to cancel and retain the original size.

Click **Save and Close** to save your changes and return to the Photo Album Manager. Click **Save as New** (edited) Image to save your changes to a new file. You will be prompted to enter a filename. The original photo is unchanged. Click **Cancel** to close the dialog without saving any changes.

Note that photos that are modified and saved over the original image, and that are used on a web page somewhere on the website, may not reflect the changes immediately because the browser has cached the images. Those pages will need to be hard refreshed, or the browser cache cleared to see the changes. Alternatively, users can use the "save as new" to create a new photo and then replace any photos on the site with the newly saved image.

Also, the "Save as New (edited) Image" does not automatically add photos to an existing album. They must be added manually.

Legacy Website Look and Feel

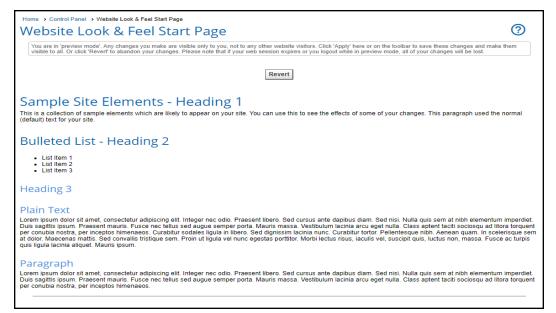
Control Panel > Website Tab > Setup

Select this option to customize the look and feel of your website.

Note: An existing club running under the old "Template/Theme" model will initially see a message which explains how to preview the new Look and Feel tools, how to revert to the old template, or how applying the changes will convert the website to the new Look and Feel tools.

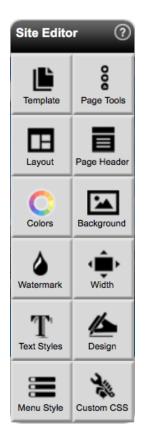
Administrators: These instructions apply to the legacy Look & Feel tools used to manage the template of your website. If you opted to convert to the new system and use the new Template Builder and Versioning tools, see Website Look and Feel.

A screen similar to the following is displayed:



This screen shows the various elements of the page, including headings, buttons, instruction text and normal text. The look and feel site editor is floating on the right side:

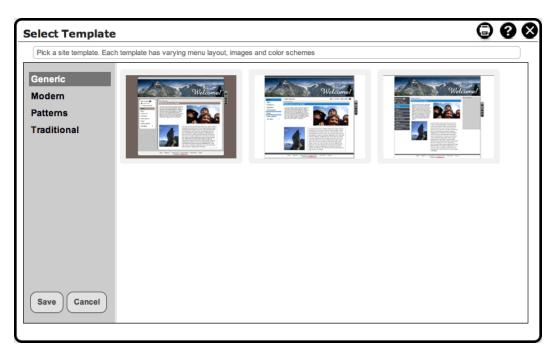
Website



<u>Template</u>

A template is a predefined collection of a layout, colors, design, and menu style. It is a starting point only; each of these elements can be individually customized.

Select **Template** to see the following dialog:



Remember that templates are simply a starting point, a way to pick an initial layout, design scheme, color scheme, and menu scheme. Once selected, you can change each of these elements individually.

Select a category from the options on the left and then click a template image to select it. Click **Save** to preview your website with that template or **Cancel** to close the dialog without saving.

Note that some templates use layouts with menus along the left side of the page while other layouts have the menu across the width of the page. The **Layout** option (described on the next page) will display different choices depending on which template you pick.

Page Tools

Click Page Tools to see the following dialog:

onvenient useful links. You m	ay also select "Hidden" to hide the	Is contain help, print, text size links, search bu page tools entirely from your site. If page tools den in preview mode. Apply settings to se	are hidden, Admin's must use the
		 Help Print This Page Tr Text Size Scroll To Top 	\bigcirc
	Floating	Sliding	Hidden
Save			

With this dialog, you can specify whether the Page Tools Widget should be:

- Floating on the right side of the website and visible at all times.
- Hidden in a small tab on the right edge of the website. When you hover over this tab, it slides out to reveal the tools.
- Hidden completely never visible! Note that if you select this option, some of the tools (Help, Print this Page, Text Size, Scroll to Top) will never be available.

Click **Save** to save your preference and return to the Look and Feel widget, or **Cancel** to return without saving.

Layout

Click Layout to see the following dialog:

Select Layout 🖨 🕄 🛇
Select Layou: Row These are limited to the same layout orientation (vertical vs. horizontal) as your current layout. For more options, set the membrane's button. Layout Elements Header Header Menu Roge Content Box Content Box Footar Content boxes appear on every page and can include as the total state of the same layout orient to edit orient to best and the same layout orient to edit orient to best and the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orient to edit orient boxes attractions orientation (vertical vs. horizontal) as your current layout. For more options, the same layout orientation (vertical vs. horizontal) as your current layout orientatio
Save Cancel

Layout options are based on the initial template pick, whether you selected a template with menu along the left side or across the width of the page. In the layout options above:

- Light blue is the page header;
- Dark blue represents the menu;
- Gray is the main content area, always in the center;
- · Yellow represents custom content boxes that appear on every page;
- The white box shows the position of the Login and Member Profile panel. The above example shows two similar layouts, one with the login panel at top right and the other with the panel above the left-side menu.

Note that most layouts also include content boxes above and below the page header and above the footer. These are not shown on the above diagrams but they are available on the **Common Content** option (described below.) Content boxes collapse to nothing when empty.

Select a layout image then click **Save** to preview your website with that layout or **Cancel** to close the dialog without saving.

Page Header - Simple Editor

Click **Page Header** to see the following screen:

			
Header Editor Tools			
Insert Element			
T Insert Text Box			
1.4.1			
🚤 Insert Image			
X Delete Selected Element (Text or Image)			
Header Settings			
Set Background Image Background Colo	r 🥥 Not Selected	X Set Explicit Height 261 px	
		Switch To Advanced Editor	Save Cancel
		Switch To Advanced Editor	Save Cancel

The top, blank panel shows the page header that you will build. Below this panel are tools you can use to build your header, including the ability to insert text boxes and images, and to select an element and delete it.

Below this panel are settings that apply to the whole header, including support for a background image or color and the ability to explicitly define the height.

Start by selecting a background image or specifying a background color.

When you click **Set Background Image**, you will see the standard web graphics selector that allows you to select an image already uploaded or to upload a new one. Once the image is uploaded and selected, you can specify **Tiling** that is most appropriate for the image. The image will immediately appear in the top-most area. A red "X" will also appear to allow you to remove the background image.

When you click **Background Color**, the standard color selector will appear, allowing to select a color in one of three ways: pick a web-safe color or one from your selected color scheme from the drop-down list; enter the hex code for any color; or select a color from the wheel. Once you have done so, the color name or hex code will appear in the box. You will also see a red "X" to remove the background color.

You can also specify an explicit height for your page header. If you uploaded an image, the height of the image is used; you can adjust it lower to crop the image or higher to allow room for other elements.

(At the bottom of the page header panel is a drag handle that allows you to make the panel taller or shorter. When you do this, the explicit height box will show the new height.)

When you click Insert Text Box, you will see the following options:

Header Editor Tools			
Insert Element	Text Tools		
T Insert Text Box	Text New Text Box	Link to Home	
🛌 Insert Image		Border	
X Delete Selected Element (Text or Image)	Font < Not Set > \$	ᄎ Move Forward 🛛 📥 Move Back	
	Size px	Class	
	Text Color 🥥 Use Default Color		
	Text Shadow		

A blank text box will appear in the top left corner of the page header.

Click inside the text box to drag it to the desired position. Click the drag handle in the lower right corner to make the text box bigger or smaller.

Then you can use the Text Tools to specify the actual text (including line breaks if necessary), the font in which it should be displayed (including any custom fonts added to your website), the size in pixels, the color, whether a shadow should be applied, whether the text box should be a link back to the home page, and whether a border should be displayed.

There is also a **Class** option to specify a custom style to be applied to this text. Custom styles are defined in the **Custom CSS** option of the Site Editor.

You can place as many text boxes as you want, in different positions and sizes. Each successive box will be placed "above" the previous one in "Z" axis order. Use the **Move Forward** and **Move Back** options to change the "Z" axis order for the selected text box.

Click **Insert Image** to insert an image into your page header. You will see the standard web graphics selector that allows you to select an image already uploaded or to upload a new one. The image will be placed in the header and can be dragged to the desired position.

To resize the image, click the drag handle in the lower right corner. By default, the aspect ratio is not maintained; X and Y dimensions will change at different rates depending on how you drag the handle. To maintain the aspect ratio, press and hold the **[Shift]** key on your keyboard as you drag the handle.

When you place an image, you will see the following options:

Header Editor Tools	~
Insert Element	Image Tools
T Insert Text Box	Alt. Text
Insert Image	Link to Home
X Delete Selected Element (Text or Image)	Border
	🕸 Move Forward 👌 Move Back
	Class

Specify Alt. Text for each image, to be displayed for users who have images turned off or for disabled users who access the website via a "reader" application. As with text boxes, you can also make the image a link to the Home page and can display a border or specify a class.

You can place as many images as you want, either tiled or overlapping. If images are saved with transparent sections, any image below (including the background image) will show through the transparent section. Images will appear "above" the background image and intermingled in "Z" axis order with text elements. Use the **Move Forward** and **Move Back** options to change "Z" axis order.

Page Header – Advanced Editor

Switch To Advanced Editor Save Cancel

For experienced website developers, the advanced content editor is also available. Click the **Switch to Advanced Editor** button to display the same editor that's used in other parts of your website. If you have added text boxes or images using the Simple Editor, these will be displayed in the Advanced Editor and their HTML code can be further modified.

The Advanced Editor includes the full set of design and formatting tools, as well as HTML and Preview modes.

In both editors, click **Save** to save your changes and hide the Header Editor tools, or **Cancel** to return without saving. Remember that you are still in Preview mode so your changes are only visible to you. To make them permanent, click **Apply**, or click **Revert** to abandon your changes and revert to the original design before you started making changes.

Note that if you switch back and forth between the simple and advanced editors, making changes in both, we may not be able to display some changes correctly. The best approach is to decide in advance which editor to use and then to stick with this decision.

Page Header for a Mobile Device

Note that ClubExpress allows you to create a separate page header that is shown when someone accesses your website using a mobile device (such as a smartphone or tablet.) We strongly encourage you

to create this separate page header, since the standard one will most likely not display optimally on a mobile device.

Color Scheme

Click **Colors** to see the following dialog:

Select Color Scheme		⊜ 0 ⊗
Pick a color scheme!!!		
Basic		
Complementary		
Cool colors		
Dark		
Earth Tones		
Monochrome		
Pastel		
Vibrant		
Save Cancel		

Color schemes are predefined collections of complimentary colors used for various elements of the website, including backgrounds, header backgrounds, header font colors, text colors, etc.

Select a category from the options on the left and then click a color scheme image to select it. Click **Save** to preview your website with that color scheme or **Cancel** to close the dialog without saving.

Page Background

Select **Background** to see the following dialog:

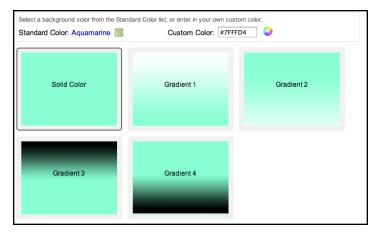
Select Page Backs	round	G	00
Specify the page background. This will be the color or image which appears behind your website.			
Background Type: None Default Color Image	Your site with backgr	Int this option [None]: ill have no background color or image - typically this mear ound will be plain white. If you wish to have a color or imag act another option.	
Save			

This dialog controls what color or image will appear outside the website layout, between the left and right edges of the website and the borders of your browser window. You can use any color or image to add life to your website.

Select **None** to have no background at all, effectively the same as White.

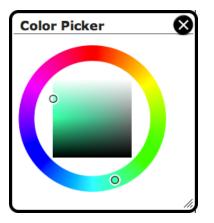
Select **Default** to use the background defined with your selected template. Some (but not all) templates have a background predefined.

Select **Color** to pick any color for the background and then to pick a gradient. You will see a panel similar to the following:



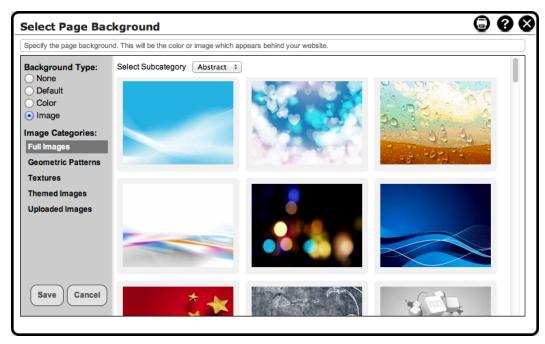
There are three ways to select a color:

- Click the color name or icon to the left, to see a drop-down list of the 216 "Web-safe" colors, shown by their standard names. Select a color and the RGB hex triplet is filled in.
- Enter an RGB hex triplet directly, including the # symbol.
- Click the Color Wheel to the right of the Custom Color box. The standard Color Picker will be displayed, allowing you to pick any basic color in the wheel and then a darkness shade from the box in the middle.



Once you have picked a color, select one of the available gradient options (if supported by your browser.)

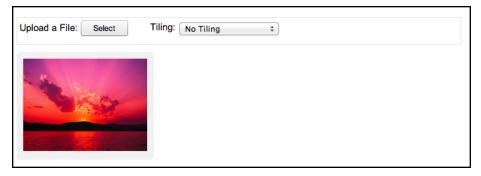
Select **Image** to use an image as the background for your website. You will see a dialog similar to the following:



Different types of images are available, including abstracts, geometric patterns, textures, and themed images. Once you select a category, select a subcategory from the drop-down list above the image samples. ClubExpress provides hundreds of images from which to choose, including themed images for specific types of clubs.

Full sized images will be positioned and scaled to fill the background of your browser window, without tiling. The system also includes geometric patterns and textures that are designed to tile seamlessly.

You also have the option of uploading your own image. Select the file from your local hard disk then specify how it should be tiled.



If you are uploading a full photo that will not be tiled, be sure it has sufficient resolution to not appear grainy or pixelated. You can also upload a small image designed to tile in one or both dimensions.

Example:

- A narrow (1-10 pixels) but very tall image file should tile left-to-right;
- A very wide but shallow (1-10 pixels) image should tile top-to-bottom;
- A small texture file, often square, should tile both ways.

Click **Save** to preview your website with that background image or **Cancel** to close the dialog without saving.

Watermark

Whereas the "Background" is displayed on your website **outside** the borders of the site, the "Watermark" is displayed on your website **inside** these borders. Watermarks are background for the content of your website.

When you click the Watermark button, the following dialog is displayed:



Plain White means that there is no watermark color or image. Content will appear over a white background.

Select **Default** to use the watermark defined with your selected template. Some (but not all) templates have a watermark predefined.

Select **Color/Transparency** to specify a color (selecting a web-safe color from the drop-down list, specifying an RGB hex triplet, or selecting a color from the popup color picker.)

Once you have selected a color, you can also specify its transparency, from 0% (not transparent) to 1	00%
(fully transparent), in 10% increments.	

Standard Color: Tomato	Custom Color: #FF63	47 🥥
Transparent Transparency	Solid	
Solid Color	Gradient 1	Gradient 2
Standard Color: Tomato	Custom Color: #FF63	47 🥥
Transparent Transparency	Solid	
Solid Color	Gradient 1	Gradient 2
Standard Color: Tomato	Custom Color: #FF63	47 🥥
Transparency	Solid	
Solid Color	Gradient 1	Gradient 2

Example: The screen shots below show "Tomato" at 0% transparency, then 60%, then 100%.

Note that some older browsers (IE7 and 8 in particular) do not properly recognize transparency settings.

Use the **Image** option to select or upload an image as your watermark.

Specify the page backgrou	und. This will be the color or image which	appears behind your website.	
Background Type: Plain White Default Color/ Transparency Image Categories: Full Images Geometric Patterns Textures Themed Images Uploaded Images	Select Subcategory Abstract		
Save Cancel)		

Watermark images must be **very** light and are usually gray or with minimal color, since the content of your website will be displayed on top of the watermark.

Different types of images are available, including abstracts, geometric patterns, textures, and themed images. Once you select a category, select a subcategory from the drop-down list above the image samples. ClubExpress provides dozens of images from which to choose, including themed images for specific types of clubs.

Full sized images will be positioned and scaled to fill the background of your browser window, without tiling. The system also includes geometric patterns and textures that are designed to tile seamlessly.

You also have the option of uploading your own image. Select the file from your local hard disk then specify how it should be tiled.

Click **Save** to preview your website with that watermark or **Cancel** to close the dialog without saving.

<u>Width</u>

Most ClubExpress layouts strictly enforce the width of your template. If you place content on a page or content box that is wider than what is allowed by the layout, it will be cut off. But you can also modify the width if you choose. When you select **Width**, the following panel is displayed at the top of your screen:

200px	760px	_
(Min 100)	(Min 580)	
		Save
Drag the small boxes above to change the width of your website	and the width of each column Total Width: 960px	Save

This panel provides sliders for each website element that can be dragged to make them wider or narrower. The website will adjust dynamically based on the position of the slider. Click **Save** to save the new width and close the panel, or **Cancel** to close without saving.

If your current layout has a left menu or just left content boxes, you will see a separate slider for the "column" in which these elements appear. If your current layout has right content boxes, you will see another slider on the right for the "column" in which these elements appear. The space in the middle is for the main content panel. Be sure not to make it too narrow since this is where your home page content, custom web pages, special function pages (calendar, forums, committees, etc.) and all admin pages appear.

In general, layouts with left and/or right columns may need to be wider than layouts without these columns, to allow enough room for the main content area in the middle.

You should also be cognizant of the overall width and how your website will display for members with smaller screens. Nowadays, almost everyone has a screen with at least 1024px across; many have 1280px, 1366px, 1440px or more of horizontal resolution. But if your member demographic skews older, they might have older and less capable computers, or they might have increased the zoom factor to allow for impaired vision. Another consideration is that not everyone runs their browser window fully maximized; they may be viewing websites in a window that is not using the full resolution of the screen.

You should size your website so that it fits within the screen for most people without needing to scroll horizontally. (Of course, vertical scrolling is not a problem; your pages can be as long as you need them to be.) Then adjust your content so that it fits within the defined width.

Text Styles

This option allows you to customize the appearance of normal text and headings throughout your website. In the future, we may add other elements to this dialog.

When you select the **Text Styles** option, the following screen is displayed:

Customize Text	Styles	@ &
Customize the appearance of	of site elements.	
Normal Text	Sample Element	
Links (<a>)	C Font, Size & Style	
Heading 1 (<h1>)</h1>	Font Arial	
Heading 2 (<h2>)</h2>	Font Size 12 Dpdate Preview Font Size	
Heading 3 (<h3>)</h3>	Font Color 🔍 Not Selected	
Instruction Text	Bold Italic Underline	
Save Cancel		

On the left is a list of text elements that can be customized. Select an element to customize it. The main panel shows a sample and then the different customization options:

- · Font, including any custom fonts you have added to your website;
- Font size, which can be specified in px, em, or %;
- Font color, using a standard color, RGB hex triplet, or wheel;
- Bold, italic, and/or underline. (Note that some custom fonts may not have bold or italic variations.)
- Some elements also include the ability to specify background color.
- Instruction text displayed on your website (both member and admin-only pages) can be turned off by de-selecting **Show instruction text** under the Visibility settings.

Click **Save** to save your changes and close the dialog, or **Cancel** to close without saving.

Design Scheme

Select **Design** to see the following dialog:

Select Design Sc	heme		© 0 ©
Pick a design scheme.			
Generic Modern Patterns Traditional	Heading 1 Heading 2 Heading 3	Heading 1 Heading 2 Heading 3	Heading 1 Heading 2 Heading 3
Save Cancel			

Design schemes control the appearance of heading elements, including fonts, borders, backgrounds, padding and margins. Select a category on the left then a design scheme from the list of available choices.

Click **Save** to preview your website with that design scheme or **Cancel** to close the dialog without saving.

Menu Style

Select Menu Style to display the following dialog:

Select Menu		900
Pick a Menu from the option	ns below. Some menus will automatically change colors with your color scheme.	
Generic		
Modern		
Patterns	Home News Contact L Home News Contact L	
Traditional		
(Saura)		
Save		

The options available on this dialog will vary based on whether the chosen layout has menus across the website or down the left side. Select a category on the left and then one of the available menu styles.

Some styles include colored elements; the colors may or may not change dynamically based on the color scheme chosen. Menu styles without dynamic colors are usually available in multiple, pre-defined colors.

Click **Save** to preview your website with the chosen menu style or **Cancel** to close the dialog without saving.

Note that horizontal menus across the top of the website look much better if you can limit the number of menu choices to fit on one row. If you need more menu options, use sub-menus.

Custom

Select **Custom** to make personalized changes to the styles used by the system or to enter custom styles that you will use on custom pages or the home page. You will see a screen similar to the following:

This simple module allows you to style pages individually from the rest of the site. This custom CSS module allows you to override style element. Please do not enter <style> tags, or any HTML or javascript; only CSS.</td><td>s for a specific</td></tr><tr><td>This page if for experienced web designers only. ClubExpress is not responsible for any change that your custom CSS may generate, and we cannot provide support for any custom CSS.</td><td>es or errors</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td>//</td></tr><tr><td>Save</td><td></td></tr></tbody></table></style>	

Type (or copy and paste) your styles into this text box and click **Save** to save your changes, or **Cancel** to close the dialog without saving. Enter styles only; do not enter <style> tags or any HTML or JavaScript.

We recommend that you keep a local copy of your styles. Note that there is no validation performed; the contents of the box will be saved and applied to your site exactly as entered. To remove all custom styling, click inside the box, then press **[CrtI-A]** (or **[Command-A]** on a Mac) to highlight the complete contents, and press **[Delete]**. If you make a catastrophic error and cannot see anything on the website, call ClubExpress and we can delete your custom CSS.

Website

To see which elements of a typical page to modify, you can either view the source code of the page to find the <include> statements at the top, or use the element inspector of your browser.

Note: ClubExpress cannot provide support for custom CSS. This feature is for experienced website designers only.

Adding Custom Styles to the Editor

When you add custom CSS using the dialog above, you can designate styles to appear in the "Style" dropdown of the advanced content editor. To do so, mark these styles with a comment between the selector and the opening brace:

.class-name /* editor */ {

...

}

This will appear in the editor styles list as "class-name". To assign a user-friendly name to the class, use this format:

```
.class-name /* editor:"Nice Name" */ {
```

•••

}

This will appear in the editor styles list as "Nice Name". Note that the exact spacing between the data parts and the comment parts is not important. The braces and styles can be on the same line, or separate lines.

There are three kinds of styles available:

Inline Styles will attach a CSS class to the currently selected page element. If the selection is just text, the text will be wrapped in a with the class assigned. These styles can be applied just about anywhere. They should be used for assigning simple things like text fonts, colors, etc. They are always available, though they may not always have an effect (for example, assigning a style with a text color to an image won't do much.) The .class-name example above is an inline style

Element Styles are similar to inline styles, except they are only available for specified page elements. To create these, use the element tag as part of the selector:

a.orange-link /* editor:"Orange Link" */ {

color:orange;

Website

text-decoration:none;

}

In this example, "Orange Link" will only appear in the editor's styles list if a link (<a>) tag is currently selected in the editor.

Block Styles do two different things. You can define and use them just like element styles, except they are only available for block level page elements (, <div>, and <h1>, <h2>, etc. tags).

```
Example: p.orange-text /* editor:"Orange Text" */ { color:orange; text-decoration:none; }
```

This will insert into the editor. If any text is currently selected, it will be included inside the . Otherwise, an empty will be inserted.

You can also use block styles to insert block level elements (and <h1>, <h2>, etc.; <div> is not supported) into the page. These can be inserted with or without CSS classes.

```
h4 /* editor:"Heading 4" */ {
```

}

This will insert <h4></h4> into the editor. If any text is currently selected, it will be included inside the <h4>. Otherwise, an empty <h4> will be inserted. Note that it is not necessary to include any styling.

<h1>, <h2>, <h3>, and a .ce-button (ClubExpress's built-in button style) are automatically included in the list in all cases, even if there is no custom CSS.

Note on "selected text" - most of the tools apply to the current word or paragraph, even if nothing is "selected", or else to the selection if something is "selected".

To remove formatting, using the built-in Format Stripping tool. Note that this tool will strip formatting from the entire document unless something is selected. (If you make a mistake, use the **Undo** option to reverse it.)

Note: Important Note: ClubExpress cannot provide support for custom CSS. This feature is for experienced website designers only.

Applying or Reverting

When you are satisfied with your new design, click the **Apply** button to leave preview mode and replace the previous website design with the new one. You can come back at any time to make further changes.

Click the **Revert** button to leave preview mode without saving your new design. The original design is restored.

Fonts

Control Panel > Website Tab > Setup

ClubExpress provides a powerful feature to allow you to use custom fonts anywhere on your website. More than 80 web fonts are available to be used on the home page, custom web pages, event descriptions, emailings, and anywhere else that the advanced content editor is used.

Select Fonts to see a screen similar to the following:

Home > Control Panel > Select Fonts			
Select Fonts			
allow you to select multiple fonts at once. These fonts will be	availab	ft side and move them to the right side. [Shift-Click] and [Ctrl-Click] le wherever the advanced content editor is used. We recommend each font adds overhead and will slightly slow down your website.	
Available Fonts		Selected Fonts	
Abril Fatface	+ +	ACME	
Acidic		action man	
AC R egular		Anton	
Alfa Slab One		Brandywine	
Alice		Courgette	
Allan			
BANGERS			
Baumans			
View		View	
Save	1	Cancel X	

On the left is a list of available fonts. On the right are the fonts selected for your website. Click the left and right arrows to move fonts from one side to the other, or the double-arrow to "de-select" all selected fonts. Click **Save** to save your selections and return to the Control Panel, or **Cancel** to return without saving.

You can also click the **View** button to see a standard popup showing the full character and number set for the font, including different sizes. Note that not every font has bold and italic versions.

There is an overhead for loading special web fonts. Each font referenced on a page will add a little to the time it takes for that page to load. We recommend not adding more than 3-5 custom fonts to your website.

Common Content

Control Panel > Website Tab > Setup

This module allows you to edit content that is common to every page, including the Page Header and other content boxes. Some layouts contain more common content areas than others.

Administrators: If you are using the new Template Builder tools to create your website's template, Common Content has been replaced by rows and sections. See Website Look and Feel.

Selecting this option displays the following screen:

Home > Control Panel > Common Content		_		
Common Content				
This screen allows you to update the various content areas content to an empty content panel. Click "Activate" to active You can use this feature for example to add seasonal content NOTE: The page header is no longer edited from this page	ate a content p ent to your pag	anel, ma es. "Edit"	king it vi and "De	sible; click "De-activate" to hide a content panel. elete" perform the expected functions.
the "Page Header" button on the Site Editor toolbar.				
Content Box	Status	Maintai	n 📑	
Above web site Width: Spans the full width of the browser window Height: Can be any height, but should be fairly small to avoid pushing the web site down too far	Not Active	Ø	2 🗊	
Above Header Width: Full width of web site Height: Can be any height, but should be fairly small to avoid pushing the site content down too far	Not Active	Ø	2 🗊	
Below Header Width: Full width of web site Height: Can be any height, but should be fairly small to avoid pushing the site content down too far	Not Active	0	2 🗊	
Under Menu Width: Should be kept fairly narrow to allow enough room for the site's main content Height: Can be any height	Active	0	8 🗊	
Under Left #1 Width: Should be kept fairly narrow to allow enough room for the site's main content Height: Can be any height	Not Defined	Ž		
Above Footer Width: Full width of site Height: Can be any height	Not Defined	Ž		
Right side of site This content box is not used in your current layout.	Not In Use	🧷 ໂ	Î.	
	Done	e		

Website Layouts may be defined with one or more additional content boxes.

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.

Maintain Options

The following options are available in the Maintain column:

Icom	Description
<i>w</i>	Click Create to define content for a content box that is "Not Defined". The standard 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.
(Create)	Example: The area under a left-side menu should have content that is narrow so that the menu is not pushed too wide on the page.
🥖 (Edit)	Click the Edit icon to edit the existing content in a content box.
(Activ- ate)	When content is first defined, it is de-activated. Click the Activate icon to make the content visible on your template.
(Deactiv- ate)	Click the De-activate icon to hide currently showing content. This feature is especially suitable for seasonal content.
(Delete)	Click the Delete icon to remove the contents of the content box completely. The status will change to "Not Defined".
(Manage Ads)	Note: Banner Advertising has moved from Common Content to Website Tab > Admin Functions. See "Banner Advertising" on page 1092.

Maintain Options

Common Content on Mobile Devices

These content boxes will not be displayed if the user is accessing your website using a smartphone or tablet.

Instead, ClubExpress allows you to create two special content boxes, one at the top of the screen and the other at the bottom, specifically for mobile devices. These panels are shown using an "accordion" control, which is tapped to expand and display the content.

Menus

Control Panel > Website Tab > Setup

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 (see "Member Types" on page 265). 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.

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.

Note that horizontal menus across the top of the website look much better if you can limit the number of menu choices to fit on one row. If you need more menu options, use sub-menus.

Users on a mobile device will see the same menus as users of the full website (both the public menu and the members menu after they login), but displayed in a different format that's more suitable to the device.

Click Menus to display a screen similar to the following:

Home > Cor	trol Panel > Menus	
Menus		
ClubExpr "Edit" to o	ess supports different change the menu for t	t navigation menus for visitors to the site and for members. Select a category from the table below and click hat group of users.
Menus		
Add Men	u l	
Menu Name		Maintain 📳
	Public Member	
Member	 ✓ 	
Public Menu	 ✓ 	Ø
Add Sub- Menu Name All About Ba Members my page Photo Album	Maintain Ioons	
Externa	Menu Links	
Link Name	Menu Text	Maintain 📭
EBC Rides	EBC Rides & Events	
Google	Google	
		Return to Previous Page

<u>Menus</u>

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 sites.

Click the standard Edit icon for the Public or Member menu to display a popup window similar to the following:

Left Arrow" or "Ctrl-Rig	Double click an iter ant Arrow" keys to n or press the "Ctrl-U	n, click the nove items	ide, while items appearing on the a arrow buttons between the lists, o between the lists. Click the "Move r "Ctrl-Down Arrow" keys to chang	or press the "Ctrl- Up" and "Move
Menu Name	Member		•	•
Defaults			ult menu for all site visitors fault menu for all members	
Filter By < View All I 0000 - Demo Custom F 0001 - Demo Poll Page 0002hold-a 0004 - Demo Photos 2015 Metro Seniors Lea 2017 Best Weekly 2017 Best Weekly 2017 June Stag At Brae About FANW About our Work About the Friends About the Briends About Us Backup - DO About VC 99s ACE ACE - K ace-3b	Page Ingue In Pla mar	•	Home About Us Calendar Photo Albums Members Only (sub-menu) Donations Contact Us	▲ ♥ ₩
ace-hold-c	Sa	ive 🖌	Cancel	

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 can include any of the following options:

- Built-in modules, including the Home Page
- Custom web pages
- Photo albums
- Member photo albums
- External menu links
- Submenus

In each instance, only active modules, page or albums are shown. Use the Filter By drop-down list to select one of these options or select "<View All Items>" to see the while list. (For a club with many pages or photo albums, filtering the list will make it much easier to use!

The actual menu you are building is on the right side. Use the right and left arrow buttons to move entries between lists. You can also double-click the mouse or press [Ctrl-LeftArrow] and [Ctrl-RightArrow] to accomplish the same tasks.

Website

To change the sequence of selected entries, click on a name in the right-side list then use the up and down arrows to change its position. You can also select a 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.)

To clear the menu list on the right and start over, click the Reset / Start Over link.

Click Save or Cancel to close the window and return to the main menus page.

Sub-Menus and Mega Menus

Submenus are attached to a choice on the main menu. When you specify a sub-menu, you will give it a name and this name is what appears on the main menu. So the submenu is created first and then it is added to the main menu.

Submenus can also be placed on the home page or a custom web page, using the Submenu Widget in the Advanced Content Editor (see "Widgets" on page 155). This feature allows you to create a "sub-website" within the main website, with its own local navigation.

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.) The **Menu Name** of your submenu becomes the text that's used on the main menu.

Then, when you are building a top-level menu, the available submenus will appear in the list of available menu items.

Click the standard **Edit** icon to modify the submenu and the standard **Delete** icon to remove a submenu from the system.

Mega-menus are a type of sub-menu, where multiple sub-menus are combined into a single sub-menu, and arranged horizontally. For example, instead of having one long menu for member options, you can organize all the sub-menu items into shorter sub-menus and arrange them in a mega-menu.



To create a mega-menu, you'll first need to create the sub-menus you'll add to the mega-menu, or you can begin by using existing submenus. When you add a new sub-menu, check the box that says "Display as Mega Menu".

Available pages and modules are listed on the left side, while ite are listed on the right. Double click an item, click the arrow butto Left Arrow" or "Ctrl-Right Arrow" keys to move items between the Down" arrow buttons, or press the "Ctrl-Up Arrow" or "Ctrl-Down of selected menu items. Menu Name Display as Mega Menu Available Menu Items Selecte Filter By <view all="" items=""> 2021 Argentina Ballooning A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Reporting Auction Goodies Balloon Programs Ballooning for Kids!</view>	ns between the lists, or press the "Ctrl- e lists. Click the "Move Up" and "Move
□ Display as Mega Menu Available Menu Items Selecte Filter By < View All Items > ✓ 2021 Argentina Ballooning ✓ A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Reporting ✓ Auction Goodies ✓ Balloon Programs ✓	e d Menu Items
Available Menu Items Selecter Filter By < View All Items > 2021 Argentina Ballooning A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Reporting Auction Goodies Balloon Programs	d Menu Items
Filter By < View All Items > 2021 Argentina Ballooning A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Reporting Auction Goodies Balloon Programs	d Menu Items
2021 Argentina Ballooning A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Forms Ad Hoc Reporting Auction Goodies Balloon Programs	*
A Custom Page Demo 1 A Page Builder Tips Demo A webinar page demo About Us Accessibility Demo Ad Hoc Forms Ad Hoc Reporting Auction Goodies Balloon Programs	
Ballooning for Kids! (Cop Benefits Blogs Board Election Board Election 2020 Business Directory Calendar	▲ ▼ Teset / Start Over

The menu builder popup will automatically display all sub-menus you've created. Select the sub-menus you want to add to the mega-menu using the same controls as for building a sub-menu or full website menu.

Remember to add the mega-menu or sub-menu to your website's full menu!

Note: When implementing a mega-menu on your website for the first time, you may notice a change in the sub-menu colors you selected as part of your website's look and feel. You can modify and update those colors at any time using the tools in your website's Template Builder. See Using the Template Builder.

Mobile App Menu

Administrators: This option is only available to clubs who have purchased the Mobile App.

Use this section to configure a special, additional menu for your club's mobile app. The mobile app menu appears as a list of featured functions above your full website menu in the mobile app. You can only have one (1) mobile app menu. This section allows you to add and remove individual functions on the menu.

Select Edit App Menu/ Change Links to add links to your mobile app menu using the standard Menu Builder, and save your changes when you're finished.

Note: Submenus, mega menus, and menu separators cannot be added to your mobile app menu. You are only able to add modules, custom pages, and photo albums.

The grid lists all links currently in the menu, along with the custom icon selected for the function. The Edit (pencil) icon allows you to select a new icon for the link.

Mobile App Menu Edit App Menu / Change Links				
Custom Icon	Maintain 📑			
:	Ø			
ā	Ø			
dı	Ø			
Ä	Ø			
	Menu / Chan Custom Icon			

External Menu Links

ClubExpress includes the ability to add items to a menu that link to an external website. Click the **Add External Link** button. You will see the following dialog:

Add/Edit Externa	I Link 🛛 🖓 🗞
	link or edit the existing external link, then click "Save" or "Cancel". The web le the protocol prefix ("http://", etc).
Name	Google
Menu Text	Google
Address	https://www.google.com
	Include the protocol prefix in the address ("http://", etc)
Open in same window	

Enter the name, menu text and address (including the http:// or https://). You can also specify whether the external link should appear in the same window or browser tab. If this box is not checked, a new tab will be opened.

Click Save, or click Cancel to close this dialog without saving.

The following options appear in the Maintain column:

lcon	Description				
/ (Edit)	Click the Edit icon to modify the properties of the external menu item.				
(View)	Click the View icon to jump to the website or page referenced by the external menu item. It will appear in a new browser tab.				
(Delete)	Click the Delete icon to remove this external menu item. It will be removed from any menus or submenus to which it has been added.				

Maintain Options

This feature can also be used to provide access to ClubExpress pages that do not normally appear.

Example: If you build a special menu for administrators, you might want to give them one-click access to the People 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 opening in the same window, which then allows you to put it on the menu.

Domain Names / Quick Links / Redirects

Control Panel > Website Tab > Setup

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
- club

although many 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.

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.

QuickLinks allow you to define a shortcut to jump to a specific page or module or even an individual event or survey. They are described in more detail below.

301 Redirects as used by clubs when they first switch over to ClubExpress. They allow you to specify a URL from your old website and map that to a location on the new ClubExpress site. When users click a old link, perhaps one found in search engine results or one that they saved as a bookmark, the new version of that page will be correctly displayed.

Configuring Domain Names

To configure the system to recognize a domain name, send an email to <u>support@clubexpress.com</u> 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 another provider (an "ESP" – Email Service 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 we have added your domain name to the system, you can configure which page on the website it points to. Selecting **Domain Names / Quick Links** displays the following screen:

Home > Control Panel > Domain Names/Quick Links							
Domain Names/Quick Links							
Domain Names							
If your club 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 at 1-866-ILP-CLUB (47-2582 - outside the US, +1847-2552-010).							
Note that you do not need a domain name to access your web site; visitors and members can also use http://democlub.clubexpress.com.							
Domain Name	Links To	Primary	Maintain 💼				
demoforums.org Email for this domain is handled by ClubExpress		Home Page	No	Ø			
www.demoforums.org		Home Page	No	Ø			
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)						

The Domain Names section shows one or more domains configured to point to your website. Domains will be shown without the "www." prefix but that version of the domain will also work.

Example: ChicagoCorvettes.org or www.ChicagoCorvettes.org

The grid will show if ClubExpress is handling email for each 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.

About SSL Certificates

Google and other Internet experts encourage websites to display all pages using https:// (secure). Google is even forcing this in the current versions of Chrome (which is used for more than 60% of web traffic) by flagging website pages that are displayed using http:// with a "NOT SECURE" warning and downgrading them in the Google search results.

They are taking this action to protect users who may not fully understand Internet security (almost everyone!) and especially what they are looking at as they jump from website to website. This change also

helps to protect users from "man-in-the-middle" attacks: someone intercepting your web traffic and using it to learn your vulnerabilities.

You have two options for SSL certificates with ClubExpress:

- 1. Use the ClubExpress.com SSL certificate. Your domain name will continue to point to your ClubExpress website. But when users arrive on the site, they will not see your domain in the address bar but instead, the URL will be in ShortName format (e.g. https://MyClub.ClubExpress.com.) There is also no charge for selecting this option.
- 2. You can purchase an SSL certificate through ClubExpress and have it installed on our system. Your domain name will continue to point to your ClubExpress website. The public side of the website will now be displayed using this domain and https:// and will be flagged as secure. An additional benefit is that when members login, they will continue to see your domain; the ShortName.clubexpress.com URL will not appear in the address bar, even on the members' side of your website. Also, this option should improve your position in search results.

If you choose this option, it must be done through ClubExpress, to ensure that only fully trusted certificates are installed on our servers and because this can be done in a completely automated process. Certificate prices vary widely on the Internet; decent 1-year certs that use at least a 2048-bit encryption key typically cost up to \$100 per year. However, we have worked out a deal with Sectigo (formerly Comodo), one of the largest and most respected certificate issuers, to provide SSL certificates to our customers at reduced rates: 1-year (\$45), 2-year (\$80), 3-year (\$110), 4-year (\$140), 5-year (\$160).

Note: Neither Google nor Apple accept SSL certificates with a duration greater than one year, however you are able to purchase multiple years up front, and we automatically renew your certificate for you each year. To learn more about this, see "SSL Certificate" on page 364.

When you click the Enable 'Always Secure' Site button, you will see the following screen:



Click the **Enable 'Always Secure' Site** button at the bottom or **Cancel** to close the dialog without switching to 'Always Secure' mode.

For the domain names list, the following options appear in the Maintain column:

lcon	Description
(Edit)	Click the Edit icon to modify the properties of a domain.
(SSL Certificate)	Purchase an SSL Certificate for this domain or update the settings for this certificate. This option is only available you have switched your website to "Always Secure" mode.

Domain Options

When you click the **Edit** icon, the following popup window is displayed:

	omain name links to the home page. To link a domain to a different Special" and click the "Select Domain Destination" to select the page.
You may set t	his domain (the plain or the 'www.' version) to be your primary domain.
Domain Nar	ne club-express.biz
Domain Ty	pe 🖸 Standard (Home Page)
	Special
Prima	ary 🔍 Not Primary
	Club-express.biz
	⊂www.club-express.biz
	Save 🖋 Cancel 🗶

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:

Build a Link 🕞 😮
This page allows you to specify a link for your special domain name. Select a link type. One or two additonal choices will appear based on the selection you have made. Make your selections, and click "Save".
Link Type and Address
Link Type Built-in Module ≑
Built-in Module Calendar ÷
Save 🖋 Cancel 🗶

Specify the link type and select the specific link from among available options. Select **Save** to save your selection, or **Cancel** to return without saving.

Check the appropriate radio button for the primary domain and select **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: 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.

SSL Certificate

The **Certificate** icon only appears if "Always Secure" mode has been enabled. When you click it, the following screen is displayed:



The dialog will show which domain name (including the www. version) the certificate will apply to, the request status, and the following options:

- One-year \$45.00 (US)
- Two-year \$80.00 (US)
- Three-year \$111.00 (US)
- Four-year \$140.00 (US)
- Five-year \$160.00 (US)

Neither Google nor Apple accept certificates with a duration greater than one year. We allow you to purchase multiple years up front and we automatically renew the certificate each year (a "subscription").

Example: If you purchase a three-year certificate August 1, 2020, you are charged \$110.00 on that date and have a three-year subscription. Your certificate is valid until August 1, 2021, at which time we will automatically renew your certificate for year two. The process repeats for year three.

Check the "Auto Renew and Charge" option to automatically renew your "subscription". You will be charged the same amount at the end of your subscription and have us continue to renew your certificate

automatically and we can use HTTP Strick Transport Security (HSTS) to ensure the best security for your site users.

Note: For technical info on HSTS, see <u>Wikipedia</u> and <u>Mozilla</u>.

For an extra measure of security, if you have selected auto-renewal, you can submit your site for HSTS preloading. Go to https://hstspreload.org and enter your domain name. Please refer to the links above and to the preload site for more info.

Example: Continuing from the previous instance if you checked the box to Auto Renew and Charge, you will be charged \$110.00 August 1, 2023. You will have a three-year subscription. The same process repeats, where we automatically renew your certificate each year for three years.

Click **Request Certificate** to initiate the process, or **Cancel** to close the dialog without requesting an SSL Certificate.

Certificates must be purchased from ClubExpress; we cannot install certificates that you have obtained from other vendors. When you request a certificate, we will submit the request to our vendor who will run basic background checks on the domain name. These checks may take a couple of hours. Once the request has been approved, the certificate is issued to us and we automatically install it on our hosting environment.

If you checked "Auto Renew and Charge", your certificate will be renewed 30 days before it's due to expire. **If you did not check this option**, you will receive an email 7 days before the certificate is due to expire and you will have to login to renew it manually. If an SSL certificate expires, your website will still be displayed in "Always Secure" mode but your domain name will not appear in the address bar. Instead, we will display the website using the subdomain format: https://YourClub.clubexpress.com.

With an active SSL certificate, you will see the following grid listing your certificate(s):

Domain Name	Links To	Primary	Current Certificate	Certificate Subscription	Maintain 📑
club-express.biz	Home Page	No	Active 1/1/2021	Until 1/1/2024	i 🖉 🍰

Under Current Certificate you can see when your active certificate expires. Under Certificate Subscription you can see when your total number of purchased certificates will end (depending on the number of years you purchased at once). ClubExpress will automatically renew your certificate each year covered by your subscription until your subscription expires. If you also have your subscription set to auto-renew, we will continue to renew your certificates and your subscription until you cancel the auto-renewal of your subscription.

Quick Links

Quick Links allow you to define a simplified URL which points directly to an event or a special page on the website.

Example: You can define a link such as: www.ChicagoCorvettes.org/Auction

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:

Add/Ec	lit Quick Link 🛛 🛛 😵	8
except th	quick link name (text only - no spaces or punctuation e underscore character). Click the "Select Quick Link on" to select the target page for this quick link.	
Quick Link Links To	Donate Donations <u>Select Quick Link Destination</u>	
	Save 🗸 Cancel 🗙	

Specify the name of the Quick Link. Click the **Select Quick Link Destination** option to display the Build a Link dialog.

Click the standard **Edit** icon to edit an existing link or the standard **Delete** icon to delete a link. Once it's deleted, it can no longer be used.

301 (Permanent) Redirects

Clubs and associations often move to ClubExpress from another website. This website will have pages and special functions that members may have saved as browser bookmarks. When they click these links, the browser attempts to open these pages on their new ClubExpress website but of course, the links won't work since every vendor uses a different format for URLs.

The Internet provides a standard method, called a 301 Redirect, for mapping an old URL to a new one. When you click the **Add Redirect** button, you will see the following popup dialog:

Original URL NOTE: Do not include the 'http://' or the domain (host) name. Include only the name, and query string (if needed). Do not include the leading slash. Redirects To Not Selected Select Redirect Destination	
name, and query string (if needed). Do not include the leading slash. Redirects To Not Selected	
	e path, fil
Save 🖋 Cancel 🗶	

Specify the original URL from your old website. Do not include the "http://" or the domain name, or the leading slash immediately after the domain name. Include everything after this slash. Then click **Select Redirect Destination** and follow the prompts to specify the page or module that performs the same function on the new ClubExpress website.

Click **Save** to save this redirect and return to the main page, or **Cancel** to close the dialog without saving.

Security Upgrade

When you access a secure website, your browser will typically display a padlock icon, or some other indicator that the site is secure. All communication between your browser and the site is encrypted, so that important personal information is protected from those who would try to listen in on your connection and steal it.

To keep up with the bad guys, we must strengthen the encryption we use for secure connections. (For the techies reading this, we will no longer accept connections using the TLS 1.0 and 1.1 protocols; only connections using TLS 1.2 will be accepted.)

Most websites (such as Amazon and Facebook) are making the same changes in the near future. We are required by credit card processing companies to make this change so that we can continue to accept credit card payments on behalf of your organization (aka PCI Compliance.)

This means that some users with older computers/devices and browsers will no longer be able to access secure parts of the website. If you have one of these old computers or browsers, we suggest you upgrade as soon as possible, both to allow you to access these sites, and to improve your protection against threats such as viruses and other malware on any website you visit.

All modern browsers can handle this change. Just be sure you keep your browser and operating system updated. There are some restrictions based on the operating system of your computer/device.

Windows Users:

You must have Windows 7 or newer to access the website (Windows XP and Vista will not work). In some cases, your browser might not be configured to use the strongest security. Follow the instructions below if you have a problem.

Mac Users:

You must have OSX 10.9 (Mavericks) or newer.

Browser Support:

- Google Chrome version 30 or higher
- Mozilla Firefox version 27 or higher
- Microsoft Internet Explorer version 11 or higher If you are using IE 8, 9 or 10, TLS 1.2 may be available, but not enabled by default. Follow the instructions below.
- Microsoft Edge all versions Apple Safari version 7 or higher

Android Users:

Version 5.0 ("Lollipop") or newer will work. Versions 4.x may be able to access secure areas, but we cannot tell for your individual device.

IOS Users:

You must have version 5.0 or newer.

Linux/Unix/Other Users:

We do not have enough info to determine your ability to access the site. We assume that most of you keep your systems up-to-date, and will never see this message.

Windows Configuration Instructions

- 1. To enable TLS 1.2 on your Windows computer, follow these steps:
- 2. Open Internet Explorer

- 3. From the menu, select Tools -> Internet Options Click on the 'Advanced' tab
- 4. Scroll down to the 'Security' section Uncheck the boxes that say 'Use SSL 2.0' and 'Use SSL 3.0' (these are unsafe and should never be used)
- 5. Check the box which says 'Use TLS 1.2' (you may check or uncheck the '1.0' and '1.1' boxes as you see fit some sites may still require these earlier protocols)
- 6. Click OK until each dialog closes.

Note that if you do not see 'Use TLS 1.2' in the list, you will not be able to access the secure areas of the site on that computer.

Web Graphics

Control Panel > Website Tab > Setup

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 boxes around the layout (for example, under the menu or above the footer.) Note that photos are managed separately, in the Photo Manager. Photos are stored in multiple resolutions whereas web graphics are stored only as uploaded.

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

Home Control Panel Web Graphics Manager			
Web Graphics Manager			
This screen allows you to maintain the web graphics files used on your site. Note that deleting a file which is bein	ng used on one of your p	ages will leave a '	'broken' image
Show files Show files Show files to the file names to start with to and are in any to folder Show Files Search Results (293 files found)	Add Web Graphic Manage Folders		
		Page 1 c	of 6 💠 >
File Name (Title)	Folder	Maintain	E
012.jpg (<no title="">)</no>	How Balloons Work	۱ 🖉 💿	🙀 🔛
034-630x472.jpg (<no title="">)</no>	Default Folder	۱ 🖉 💿	💼 🔛
0406081925.jpg (<no title="">)</no>	Default Folder	۱ 🖉 💿	📬 🔛

Many clubs and associations have hundreds of graphics used around their website. If you just click **Show Files** without any selection criteria, all files will be listed, in pages of 50 files each. Use the standard page navigation tools to move between pages.

Filtering criteria can be based on file names or titles. Use "file names contain" to search for extensions such as JPG or GIF. You can also filter by specific folders. Use the "are anything" option to display files in one folder only.

If you search by title, the first grid column will show "Title (file name)". If you search by file name, the first grid column wil show "File name (Title)". If there is no title specified, we will show "<no title>". These files are not returned in a title search unless you do not specify any criteria.

Note also that when a file is uploaded, we will modify the file name internally to avoid accidentally overwriting a file if a duplicate name was used. So when you place a web graphic on a page using the editor, the HTML code will use the internal file name rather than the one you originally uploaded.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(View)	View this graphic in a small popup window.
(Edit)	Edit properties for this graphic. You will see the Add/Edit screen described below.
Copy (Copy URL)	Copy a URL to clipboard that can later be used to download this web graphic from any- where (another web page or website, or an email.)
(Delete)	Delete this graphic. You will be prompted to confirm this action. Note that any references to this file around the website will need to be removed or edited to point to a new file.
(Image Editor)	Click this icon to modify the image, including rotating it, cropping it, changing the bright- ness, or changing the size.

Maintain Options

Add Web Graphic

Click Add Web Graphic to upload a new graphic. You will see a screen similar to the following:

Upload Web Graphic	0 & 0
This screen allows you to upload and edit web graphic files for use on your site.	
Select File 🥥 Bubbling Brook SML.jpg	
× Remove	
Title (Optional)	
Folder Default Folder +	
Save 🗸 Cancel 🗶	

Browse to the file on your local hard disk or network. The filename will appear, together with a **Remove** option if you selected the wrong file. Specify an optional title and folder, then click **Save** to upload the image or **Cancel** to return without uploading.

When you edit a file, a slightly different version of this dialog appears, allowing you to replace the file, change the title, or move it to a different folder.

Manage Folders

Click Manage Folders to see a screen similar to the following:

Home > Control Panel	> Web Gra	phics Man	iager 🕻	Web Graphic Folder Manager
Web Graphic	Folder	Manag	ger	
				cially useful for larger websites with a lot of graphic elements. Click the "Add Folder" button orm the expected functions.
Add Folder				
Folder	# of Files	Maintain		
Default Folder	66			
How Balloons Work	0	🧷 Í	2	
Logos	0	P 🖞	2	
				Return to Previous Page

This is a standard ClubExpress admin screen, showing a list of folder and the number of graphics in each folder.

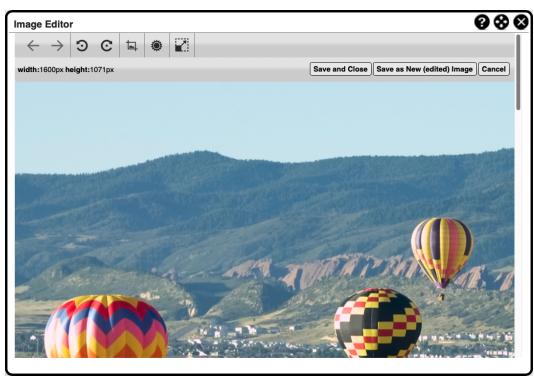
Click the **Add Folder** button to create a folder. You will see a small popup to specify the folder name. Spaces are allowed but duplicate folder names are not.

Click the standard **Edit** icon to modify a folder name, and the standard **Delete** icon to remove a folder. You can only do so when there are no graphic files in that folder.

Click **Return to Previous Page** to return to the Web Graphics Manager.

Image Editor

When you select the Image Editor icon, you will see a popup screen similar to the following:



The photo is shown at its full resolution. Use the scroll bars on the right and along the bottom edge to adjust the view.

Icons at the top of the window provide the following functions:

- Undo last change
- Redo last change
- Rotate left
- Rotate right
- Crop
- Adjust Brightness
- Adjust Size

The current width and height are also shown.

When you enter "Crop" mode, you can drag out a rectangle, then adjust in any corner or the middle of any edge. Click the " \checkmark " icon to execute the crop or the "X" icon to cancel the crop.

When you enter "Adjust Brightness" mode, use the + and – icons to adjust the brightness. Click the " \checkmark " icon to save or the "X" icon to cancel.

When you enter "Adjust Size" mode, there are a number of options:

- Use the + and icons to adjust the size in 5% increments.
- Enter a scale value to adjust the size by a ratio. Numbers between .1 and < 1 will shrink the image. For example, .5 makes it half the size. Numbers greater than 1 grow the image. For example, 2 makes it double the size. The aspect ratio is retained.
- Enter a width or height number in pixels to adjust just that dimension. The aspect ratio is NOT retained.
- Click the " \checkmark " icon to save the new size or the "X" icon to cancel and retain the original size.

Click **Save and Close** to save your changes and return to the Photo Album Manager. Click **Save as New** (edited) Image to save your changes to a new file. You will be prompted to enter a filename. The original photo is unchanged. Click **Cancel** to close the dialog without saving any changes.

Note that photos that are modified and saved over the original image, and that are used on a web page somewhere on the website, may not reflect the changes immediately because the browser has cached the images. Those pages will need to be hard refreshed, or the browser cache cleared to see the changes. Alternatively, users can use the "save as new" to create a new photo and then replace any photos on the site with the newly saved image.

Also, the "Save as New (edited) Image" does not automatically add photos to an existing album. They must be added manually.

Tags

Control Panel > Website Tab > Setup

ClubExpress includes a centralized Tag system that allows you to define key words and phrases and attach them to documents, photos, blogs, and news articles (for now; tagging will be added to other parts of the system in the future.) Tags can be used for searching.

Active clubs and associations might have dozens or hundreds of tags, including **Master** tags that are defined on this screen and other tags added by admins or module coordinators for a specific document, photo, blog, FAQ item, or article. This screen allows you to clean up and manage these tags.

Note: You may add a maximum of five (5) tags to any single item (document, photo, etc.)

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

ag Ma	nagor													
	master tags which can	be used ir	n various	areas	of the web	ite. Click "Add Tag"	' to add a r	new tag. Cl	lick "Edit"	to change a	an existing ta	g. Click "Delet	e" to remov	ve a tag (this
Hide Search						Add Master Tag								
Search Crit	eria													
Contains 1														
	om ○ All Tags Ø By Ø Tag Name		-	ly ⊂	Custom	Tags Only Search								
	Module	Module Usage	Total Usage	Maint	ain 💼									
sory ter Tag)	Blogs	0	13	Ø	> 🝺	1								
ster Tag)	Documents	12			-									
	FAQ / Tech Library	0												
	News	1												
	Photo Manager	0												
er Tag)	Blogs	1	14	Ø	> 🝺]								
tor ray)	Documents	2												
	FAQ / Tech Library	0												
	News	6												
	Photo Manager	5												
o ns er Tag)	Blogs	2	45	Ø	> 🝺									
57	Documents	10												
	FAQ / Tech Library	0												
	News	5												
	Photo Manager	28												

The search panel allows you to filter the tag list by text and type and to sort the results in two different ways. The grid shows each tag, with an indication of the Master Tags. It also shows the three modules where tags are currently used the usage for each.

Maintain Options

lcon	Description
<pre>// (Edit)</pre>	Click the Edit icon to edit the tag. You can also designate it as a Master Tag or remove this designation.
Merge)	Click the Merge icon to merge this tag into another tag. Note that this icon does not appear for tags that are not currently used.
is (Delete)	Click the Delete icon to delete this tag completely. It will be removed from all objects where it is currently defined. You will be prompted to confirm this action.
·	Maintain Options

When you click the **Merge** icon, the following dialog is displayed:

Replace Tag: award	8
Replace the original tag with the new selection, and delete the original.	
Select From 💿 Master Tags Only i 🔿 All Tags	
Replace With Misc 🔷 🔦	
Save 🖋 Cancel 🗶	

The Replace With list can be defined from Master Tags only or from all tags. Select a tag from the list and click **Save** and all instances of the original tag will be replaced with the selected tag.

Mobile Setup

Select this option to customize how your website appears on mobile devices such as smartphones and tablets. You will see the following screen:

Home > Control Panel > Mobile Setup					
Mobile Website Setup					
Select an area of the mobile platform to work on. Your mobile website has 2 content boxes. One above and one below the page content. Click on the pencil icon to edit the content boxes, and you may turn them on or off by clicking the activate/deactivate links next to their names.					
Header 🖉					
Top Content Box 🧷 💽					
Home Page 🖉					
Bottom Content Box 🖉 💽					
Return to Previous Page					

This screen has four panels that will be displayed only on mobile devices:

- A custom page header designed specifically for narrower screens. If you do not create a mobile page header the standard one will be displayed instead.
- A content box for the top of the website. This appears as an accordion panel; initially collapsed, a click or tap expands it to show its content.
- A custom home page for mobile devices. If you do not create a home page for mobile devices, the standard one will be displayed instead.
- A content box for the website bottom. Like the top one, it appears initially as an accordion panel, collapsed but expandable with a click or tap.

<u>Header</u>

Click the Edit (pencil) icon to display the mobile home page editor. You will see the following screen:

You are editing your mobile site page header. Click	the help link for additional inf	D.			
Mobile devices have smaller screens than a regular	computer, so use the pixel r	ler as a guide for the siz	e of your header.		
100 200	300 400 iPhone 5 Samsung S3		600	700 800 iPad & Small Tablets 10"	
	Prone 5 Samsung 53	-so whatadadadadadadadadadadada	ունակակակակակակակակակական		
Mobile Header Editor Tools		•			
Insert Element	Image Tools				
T Insert Text Box	Alt. Text				
Insert Image	Link to Home				
X Delete Selected Element (Text or Image)	Border				
	🏠 Move Forward	Move Back			
	Class				
Mobile Header Settings					
Set Background Image Background C	olor 🥥	#C1E0FA 🗡	Set Explicit Height	144 px	
			Swi	itch To Advanced Editor	Save

Mobile screens generally have fewer pixels than desktop or notebook computers, especially when the device is used in portrait mode. But the screen now includes a ruler with suggested guidelines for different types of devices.

A mobile header will generally have very limited content, perhaps just the club's or association's logo and name. But you can add any number of text boxes and images and control their properties. You can also add a background image or set a background color.

You also have the option of switching to the Advanced Editor for more experienced website designers. The pixel ruler is also shown in this view.

Click **Save** to save your changes and return to the Mobile Website Setup screen, or **Cancel** to return without saving.

Top Content Box, Home Page, and Bottom Content Box

When you select any of these options, you will see a standard popup window displaying the advanced content editor. It allows you to add content appropriate for either content box or the home page.

Content boxes defined as part of the website do not appear when a mobile device accesses the website. Instead, you can create top and bottom content boxes that are specific to the mobile display.

Be sure to click the **Activate** icon to activate each of these content boxes.

For an active content box, click the **Deactivate** icon to turn off that content box.

The home page uses the same editor. If you don't specify a mobile home page, the standard one will be displayed.

Mobile App Manager

Administrators: While the mobile app is pending, clicking **Mobile App Setup** from the Control Panel displays the Mobile App Setup screen. Once the app has been submitted, clicking this option displays the Channel Manager instead. For more information on setting up your app, see "Purchasing and Setting Up Your Mobile App" on page 1204

Channels are used to group members together based on member type, interest, subgroup, and more. Using Channels, you can take advantage of these app-only features:

- · Real-time Chat among members of the channel only;
- Meets, to meet up with other channel members;
- Channel-based events;
- Channel Member Directory;
- Polls among members of the channel only.

The search panel at the top of the screen allows you to search through previously created channels by status, type and name. The search results grid includes a list of all channels matching your search. In the Maintain column, you have options to edit the channel (see Adding), edit the members of the channel (see Channel), and delete the channel.

Home > Control Panel > Channel Manager Channel Manager							
Q • Hide Search	Add Channel	Repor) rts		obile App Options		
	Channels						
Channel Status < All Statuses > 🗸							
Channel Ty	pe < All Types >		~				
Channel Name Search 🗲							
Search Result	s 3 item(s) found						
Channel Name	Туре	Status	Mainta	ain	 		
All Members	All Active Members (0)	Active	Ø	2	i		
Event Committee	Committee Members (0)	Active	Ø	<u> </u>	1		
Newbies in Flight	Member Opt-in (0)	Active	Ø	4	1		

Maintain Options

The following options are available in the Maintain column:

lcon	Description
🥟 (Edit)	Click the Edit icon to edit the existing the properties of a channel.
(Mem- bers)	Manage the status of channel members.
🝺 (Delete)	Click the Delete icon to remove a channel completely. You will be prompted to confirm this action. All channel members and history (including chat history) will be deleted.

Maintain Options

Adding a Channel

A channel is a dedicated space for specific conversations, similar to a forum. Members can only view or participate in a channel's chat if they are a member of that channel.

Select Add Channel to add a new channel. Using the pop-up window, name your channel. This name will be visible to you and your members. Select a channel status; to start, your channel should be Active. If you need to remove a channel later, you'll return to this screen to change the status to Disabled.

Determine the membership of the channel from the drop-down menu of options. Selecting some options may prompt you for additional details. For example, if you select Committee, you'll choose a specific committee to add to the channel.

- All Active Members
- Member Opt-In
- Administrator Defined
- Based on an Interest Group
- Based on a Committee
- Based on a Member Type
- Based on a Subgroup (Chapter, District or Region)
- Based on the Answer to a Member Additional Data Question

Finally, enter a channel description, and an optional image to associate with the channel. This image will appear in the app next to the channel name.

Add/Edit Channel	ଡ ଡ	8
for mobile app functions. The visible/active or hidden from u drop down list. Members that	el. This name will appear on chats, meets, and will provide filtering status dropdown indicates whether the channel should be users. You can also select the membership for this channel from the are part of a particular interest groups, membership type or be added to specifically created channels	*
Channel Name	All Members	
Status	Active 🗸	
Membership	All Active Members	
Channel Description	A space for all active members to communicate.	l
	46 of 250 characters used	l
App Image 👔	X Remove Image	ļ
	Select Image	Ŧ

Note: Channel membership is not maintained in real time. The process to update the members of a channel runs approximately every 30 minutes. So when you create a new channel, it will not be visible to members until this process runs.

Managing Channel Members

Select the Channel Members icon to manage the members of any channel you create, including assigning them as the moderator for the channel, banning them from the channel, sending chat notifications, or removing the member from the channel. You can filter the results by Last Name.

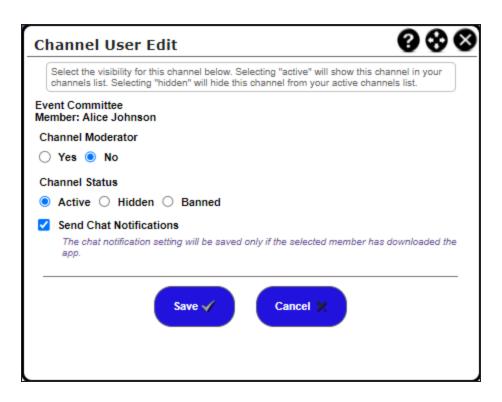
Select the Edit (pencil) icon to manage the member's status within the channel.

Determine if the member should be the moderator of the channel. The moderator has the ability to manage the status of other members in the channel (including banning members), assign other members as a moderator, and to manage reported messages.

Select the channel status for this member.

- Active the channel appears in the list of channels for the member in the mobile app
- Hidden the member is a member of the channel, however the channel has been hidden from their view. This is a setting commonly used when a member cannot opt out of a channel (for example, if the channel is for all members, or all members of a specific type).
- Banned blocked from accessing channel functions

Choose whether or not the member is to receive chat notifications for this channel. Remember, to receive notifications, the member must have downloaded and logged into the mobile app.



Click the **Delete** icon to remove a member completely from the channel. They won't be able to participate in or view channel conversations.

Mobile App Options

If your mobile app is activated, you can edit the name of the app (which appears underneath the app icon on the device) and the logo image used for the app.

The **Meets** function within the app allows channel members to optionally choose to find other members within a defined radius and time frame who are interested in meeting each other. You can specify which time spans and radius choices will be shown to members when they use this function. Individual members each can control when their location is visible to other members, how long they are visible and how far out (radius).

Managing Reported Messages

Members using the Chat feature have the ability to flag and report messages for inappropriate content. When a member reports a message, the message is removed immediately from the chat thread.

When a message is flagged and reported, you will see a message at the top of the *Channel Manager* screen.

Home · Control Panel · Channel M Channel Mana			(?
On this page you can search fo active members. Click on the e	r existing channels th dit icon to edit the ch	at you have created. annel details, click on	You can search by status, type and channel name. Click the search box to display search results. Channels are listed along with their status and number of the channel members icon to display the Channel Member Manager page, or click the delete icon to remove the channel.	
There are reported Cha	at Messages.Cli	ck Here to Mana	ige Them	
Q Add Hide Add Search Channels	Reports	Mobile App Options		
Channel Status < All Status	es > 🕶			
Channel Type < All Types	> •			
Channel Name		Search 🗳		
			Return to Previous Page	

Select the message to navigate to the Chat Reported Messages screen.

Chat Repor	ted Mes	sages					(
This page shows chat	nessages that mem	bers have reported. You can approve the message to	remove it from th	ne list, delete	or modify t	he message.	
Q A Hide Search							
Search Criteria Select Channel	< Select >	~					
Posted By (Member) Reported By (Member)		elect Member elect Member					
Message Status	< Select >	•					
Post Date Range	Any Time	~					
		Reset Search 🗲					
Author	Channel	Message	Post Date	Report Date	Status	Maintain 💼	
Monica Tribble	All Active Members	My gift shop is having a sale! Email me for details!	11/11/2016	1/17/2022	Reported	Ø	
Reported By: Aaron Williams	I don't like it.						

The search panel at the top of the screen can be used to filter reported messages by channel, posting or reporting member, message status and post date range. Each message reported will list in the Results grid including the author, the reporting member, channel, post and report dates, original message and reporting reason.

Select the **Edit** icon to manage the reported message.

dit / Review	w Reported Message
the chat channel,	ted chat message below. You can either edit and restore this message to or opt to keep the message hidden (accept the report). Leaving "Reported" ill leave the message in reported status without change.
Message Status 🤇	Reported 🔘 Active / Edited 🔘 Hidden (Accept Report)
Driginal Message	My gift shop is having a sale! Email me for details!
	Save 🖌 Cancel 💥

- Reported This option will be selected by default. Leave this option selected and click Save to leave the message status set to Reported and the message in the list of reported messages without any change.
- Active/Edited Select this option to edit the message content. When you're satisfied with your changes, click Save. This will restore the edited message to the chat channel.
- Hidden (Accept Report) Select this option to accept the report by the member and leave the message hidden from the chat channel.

Website Options

Control Panel > Website Tab > Setup

Select this choice to modify options related to the website. Your options may differ based on the Look & Feel tools you are using.

If you are using the new Template Builder tools to manage the Look & Feel of your website, you'll see the following options:

Website Options	0
This screen lists other configuration options for your websit	6. ()
General	
Show "Tell a Friend" link	© Yes O No
Show "How did you hear about us?" on the member signup wizard	○ Yes ⊘ No
Show "My Directory Listing" link	© Yes ○ No
	Directory Link Text My Directory Listing •
Show member sign-up link in Benefits	○ Yes ⊗ No
vCard Visibility	© Everyone ○ Admins Only ○ Off
vCalendar Visibility	⊘ Everyone ○ Admins Only ○ Off
Use Slide Out Page Tools?	© Yes ○ No
Login / Logout	
Require Strong Password	
Show Pending Payment notice on log in	
Show Renew Now notice on log in	
Trial Members can access website	
Redirect to different site on log out	http:// Leave blank to redirect to home page
	acorte source or names a parge
Search Engine Optimizat	ion
Website Keywords	
Google Site Verification ID Note: Enter only the	Goggie ID, not the entire «meta» tag that Google specifies.
Google Analytics 4 Measurement ID	
Note: If you have a G	Songle Analytics 4 property defined, enter measurement ID here to track and measure traffic on your website.

General Options

Show "Tell a Friend" link

Allow members to email their friends a short message about your club.

Show "How did you hear about us?"

When non-members ask to be added to your mailing list, they specify how they heard about your club or association. Changing this setting to "Yes" also adds this option to the opening screen of the member sign-up wizard.

The select list is customized on the **Control Panel – People Manager** screen, by clicking the How Heard button.

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.

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".

If you don't see this option, make sure the Benefits module has been enabled from the Club tab.

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.

Use Slide Out Page Tools

Allow the slide-out page tools widget to appear on your website. The page tools widget will appear for anyone signed in, including members. However the widget will only include the option to navigate to the back-end of modules and pages for administrators and coordinators (where appropriate).

Add me Link

If you are using the Legacy Look & Feel tools to manage the Look & Feel of your website, you'll see an additional option to show the **Add Me** mailing list link for website visitors. 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.

Displaying the Add-Me Screen from your own Link

Some clubs turn off the built-in "Add Me to your Mailing List" link and put it somewhere else on their website. To do this, use the following HTML code:

TEXT

Where NUM is your club's internal ID (can be found on many URLs) and TEXT is the text to display as part of the link.

Login/ Logout

Require Strong Password, Two-Factor Authentication

Select this option to require members to create a strong password when signing up for a membership, or when changing their password. Additional fields will appear to allow you to configure the password requirements.

- Minimum length only: enter a minimum number of characters; the password must meet the minimum number of characters
- Minimum length and diverse characters: enter a minimum number of characters; the password must meet the minimum number of characters AND must have at least one each of a
 - Lowercase letter
 - Uppercase letter
 - Number
 - Symbol

Choose whether or not to require members to periodically change their password, and enter a number of days. Finally, choose whether to require two-factor authentication (2FA). If you require 2FA, **all members will be required to have an email address** (or if your organization has enabled text messaging, a cell phone number) listed in their member profile. When the member signs in, a 6-digitauthentication code is sent to the member either via email only, or via text message. The member is then prompted to enter the code in to complete their sign-in process.

Note: If your club has enabled text messaging, members do not need to agree to receive text messages in order to receive their authentication code via text message. They will only be able to receive 2FA codes, however, and will continue to be excluded from blast text messages sent by your organization. Additionally, if your organization turns off text messaging, members who opted to receive a texted authentication code will be required to reaffirm their email address for future authentication codes.

Note: If your organization requires 2FA and a member does not have an email address or cell phone number, they will no longer be able to log into the website.

Note: If your organization enabled 2FA, all members will be required to reaffirm their email address the next time they log in to your website.

Show Pending Payment notice on log in

When members have a pending payment, you can optionally display a popup notice when they log in. This notice includes a button to jump to the Payments page. The default setting is Yes.

Show Renew Now notice on log in

When it's time for a member to renew, you can optionally display a popup notice when they log in. This notice includes a button to jump to the first page of the Membership Renewal wizard. The default setting is Yes.

Trial Members Accessing the Website

By default, trial members can log into the website and are treated as regular members. This option allows you to block trial members from logging into the website.

Redirect to Different Site on Log Out

Some clubs and associations have a separate public website and use ClubExpress only as the "members and admin" website. In this case, when members or admins logout of your ClubExpress website, you might want to redirect them immediately to your public site. In this case, enter the URL of the other website in this field. If you leave it blank, members will be taken to the home page of this website when they logout.

Search Engine Optimization Section

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.

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.

Google Analytics needs to be properly configured to work with ClubExpress.

Note that only traffic to public and member screens will be recorded. The system does not report visits to admin pages to Google.

Note also that Google does not report Analytics data in real-time. There is a 24-hour delay. Once you configure Google Analytics in your ClubExpress website, you will need to wait until the next day before you will start to see traffic data.

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

Through Google Analytics, ClubExpress also has the ability to track outbound links on the website (i.e. links that go to external websites.) There is no user interface for this feature; please notify Support if you want to activate it. For more information on configuring your Google Analytics account and custom reports, see "Configuring Google Analytics" on page 396.

Custom Template Specifications

ClubExpress supports custom templates to create a unique look and feel for your website. A custom template generally consists of a layout file (HTML with server-side commands) and a custom CSS file to override as many of the built-in CSS styles as necessary. **This feature is for experienced website developers only.**

Activation: We charge a one-time fee of \$1800 to take a custom template built using the specifications described, review it and make any necessary changes, and then install it in the system.

Custom Layout File Specifications

Deliverable template/layout files are not required to have <head><body> or <html> tags. Delivered HTML will be inserted into an ASCX control, and rendered through a master page.

The following elements or place markers for elements with clear indication must be included. HTML for individual pages must not include <body>,<head>, <html> tags, but HTML5 tags for <nav><footer><header> etc. are encouraged.

ASCX Control	Rendered as:
<club:addmelink id="add_me" runat="server"></club:addmelink>	.add-me-link
<club:controlpanellink <="" id="control_panel_link" runat="server" td=""><td>.horizontal.control-panel-link or</td></club:controlpanellink>	.horizontal.control-panel-link or
cssclass="control-panel-link horizontal" />	.vertical.control-panel-link
<club:checklistlink <="" id="checklist_link" runat="server" td=""><td>.checklist-link</td></club:checklistlink>	.checklist-link
cssclass="checklist-link horizontal" />	
<layout:user_panel id="user_panel" runat="server"></layout:user_panel>	#user_panel
<club:socialpanel id="social_panel" runat="server"></club:socialpanel>	.social-network-panel
<div id="header_cell" runat="server"></div>	#header_cell
#layout_wrapper (can surround portions or entire site, used to	#layout_wrapper (.layout-
position "page tools")	wrapper will also inherit width)
<layout:menu <="" id="menu" menuorientation="Horizontal" td=""><td>ul.horizontal.site-menu or</td></layout:menu>	ul.horizontal.site-menu or
runat="server" /> or <layout:menu <="" id="menu" td=""><td></td></layout:menu>	
menuOrientation="Vertical" runat="server" />	ul.vertical.site-menu
<pre><div <="" class="crumb-trail-container" id="crumb_trail_container" pre=""></div></pre>	.crumb-trail-container
runat="server" />	
<pre><div id="content_column"></div></pre>	#content_column (should wrap
	page content)
<pre>div id="left column"></pre>	#left_column (typically wraps
	left content boxes)

ASCX Control	Rendered as:
<div id="right_column"></div>	<pre>#right_column (typically wraps right content boxes)</pre>
<pre><div clientidmode="static" id="page_content" runat="server"></div></pre>	#page_content
<layout:footer id="footer" runat="server"></layout:footer> (our standard footer with logo)	.footer-container
The "Powered by ClubExpress" text/logo must appear in the template. Designers may also include a logo/link to their own firm.	The "Powered by" logo is rendered by default in the .footer container.

Custom Layout File Specifications

JavaScript

Any JavaScript necessary for customer functions (slideshows, parallax scrolling, sass, etc.) must be present in the ASCX file either by linking to an external library, or including the source directly in the ASCX.

jQuery and jQuery-UI are in scope and do not need to be included. jQuery functions can be called directly either within custom pages within a <script></script> block, or from the template/ASCX itself. We include the latest version by default, do not include an older version or any other version of the jQuery library to avoid conflicts.

The following JavaScript variables are available on all content pages:

- memberNumber
- userLoggedIn
- isMobileDevice if we detect that the user is using a smartphone or tablet
- isApp if we detect that user is running the ClubExpress mobile app

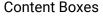
Content Boxes (optional)

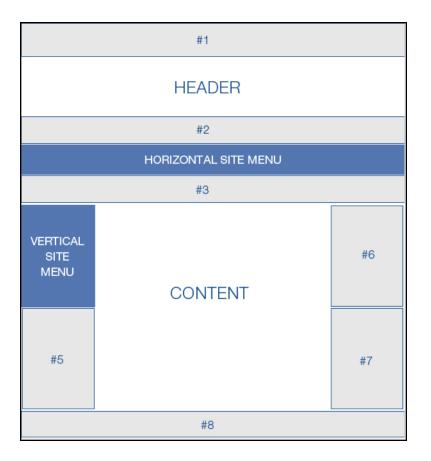
Content boxes contain information that is constant from page to page. They can be used for sponsor listings, upcoming events, etc. They should be placed in various locations within the layout to give the club maximum flexibility:

- Top of the site
- Above the page header
- Below the page header but above a horizontal menu
- Below a horizontal menu
- On the left or right side, one or two panels arranged vertically
- Above the page footer

Content boxes collapse fully when empty or disabled.

Α	В
<club:contentbox boxnumber="1" id="box_1" runat="server"></club:contentbox>	.cb-1
<club:contentbox boxnumber="2" id="box_2" runat="server"></club:contentbox>	.cb-2
<club:contentbox boxnumber="3" id="box_3" runat="server"></club:contentbox>	.cb-3
<club:contentbox boxnumber="4" id="box_4" runat="server"></club:contentbox>	.cb-4
<club:contentbox boxnumber="5" id="box_5" runat="server"></club:contentbox>	.cb-5
<club:contentbox boxnumber="6" id="box_6" runat="server"></club:contentbox>	.cb-6
<club:contentbox boxnumber="7" id="box_7" runat="server"></club:contentbox>	.cb-7
<club:contentbox boxnumber="8" id="box_8" runat="server"></club:contentbox>	.cb-8





Note that a layout file should include a horizontal menu or a vertical menu but not both. The left and right edges can include none, one, or two content boxes. Box #8 appears above the standard page footer, which is always at the very bottom.

Restrictions

<form> and <input> elements are strictly prohibited. They will not function when placed inside customer generated content and will in most cases prevent the page from loading.

Some module pages have no way to target elements, or have no easily altered content. The membership signup wizard, payment screen, etc. Most elements can be altered with stylesheets through creative targeting or inspection.

Sample HTML

<div class="layout-wrapper">

<club:AddMeLink id="add_me" runat="server" />

<club:ControlPanelLink runat="server" id="control_panel_link" cssclass="control-panel-link horizontal" />

<club:CheckListLink runat="server" id="checklist_link" cssclass="checklist-link horizontal" />

</div>

<div class="clear"></div>

<div class="layout-wrapper">

<club:contentbox id="box_1" boxnumber="1" runat="server" />

<div class="clear"></div>

</div>

<header >

<div id="header_cell" runat="server" />

</header>

```
<div class="clear"></div>
```

<nav >

<div class="layout-wrapper">

```
<club:contentbox id="box_3" boxnumber="3" runat="server" />
```

</div>

```
<div id="layout_wrapper" class="watermark">
```

<div id="content_column" >

```
<div id="crumb_trail_container" class="crumb-trail-container" runat="server" />
```

<div id="page_content" clientidmode="static" runat="server" />

<div class="clear"></div>

</div>

</div>

```
<div class="layout-wrapper">
```

```
<club:contentbox id="box_8" boxnumber="8" runat="server" />
```

</div>

<footer>

<div class="layout-wrapper">

```
<layout:footer ID="footer" runat="server" />
```

</div>

</footer>

Note: Layout wrappers are not necessary, and are a convenience for the "resizing" tool in the site-editor. Elements wrapped in #layout_wrapper or .layout-wrapper will respond to the sizing tool.

<u>Menus</u>

Menus are dynamically generated by the system and should not be included in the html. <nav> tags surrounding the menu are encouraged. Styles can be targeted using the following HTML example:

<nav>

class='selected-menu-item'>Menu Text

Menu Text

```
span><a href="">Menu Text</a></span>
```

class='sub-parent'>Menu Text</par>

span>Menu Text

```
span><a href="">Menu Text</a></span>
```

```
span><a href="">Menu Text</a></span>
```

Menu Text

<div class="clear"></div>

</nav>

Menu styles are inherited from several levels of CSS, and some colors are forced with !important. It may be necessary to use !important after some custom menu declarations to ensure display.

Example: The following changes the menu text color and font-family on hover:

ul.horizontal.site-menu li span a:hover {

color:#272727 !important; font-family:'Noto Sans', sans-serif !important;

}

General Styling

Most aspects of the site can be targeted with custom user style sheets. Most modules have their own individual CSS files which can be overridden with CSS placed in the custom CSS portion of the site builder (or from an externally linked CSS file).

Customer CSS should be placed in a single style sheet (or multiple style sheets) which can be linked or imported into the template ASCX. Additional CSS can be placed in the custom CSS tool in the site builder.

CSS Hierarchy

The CSS files listed below are loaded in order, with rules that override previous declarations.

View the source of your club's page, and click the links provided in the source code to view the CSS styles. You may also replace [your url] with your actual club's URL in the below paths to view the stylesheets.

[your url]/css/common_ui.css

[your url]/css/widget.css

[your url]/clubs/[your club id]/css/fonts.css

[your url]/css/layout/[your layout #]/layout.css

[your url]/css/menu/[your layout #]/menu.css

[your url]/css/design/[your design scheme #]/design.css

[your url]/css/color/[your layout #]/color.css

[your url]/css/color/[your color palette #]/layout/[your layout #]/layout_color.css

[your url]/css/color/[your color palette #]/menu/[your menu #]/menu_color.css

[your url]/css/color/[your color palette #]/design/[your design scheme #]/design_color.css

[your url]/clubs/[your color palette #]/css/club.css

[your url]/clubs/[your color palette #]/css/custom.css

	Rule
common_	Framework/master styles. Default styles for all elements are contained in this
ui.css	stylesheet.
widget.css	Contains styles only for widgets. Upcoming events, slideshows, etc.
fonts.css	When fonts are saved in the Control Panel – Website tab – Setup section – Fonts option.Links to the font stylesheets are saved in this file.
layout.css	Structural CSS for the particular layout. May contain default colors.
menu.css	Basic colors, font-sizes, margins, line height and other menu related styles.
design.css	Site headings, basic fonts, line heights.
color.css	Body background colors, accent colors, menu colors and other colors taken from the color palette in the site editor tool.
layout_col- or.css	Loaded only if needed, and may contain special colors for a layout.
menu_col- or.css	Loaded only if needed. Colors chosen from the color palette which are applied to par- ticular menu.
design_col-	Loaded only if needed. Related to color.css, colors from color.css are applied to spe-
or.css	cially selected elements.
club.css	Selections made from the site editor toolbar are saved in this file.
custom.css	Any custom styles pasted into the site editor on the Website Look and Feel screen are saved in this file.

CSS Hierarchy

Configuring Google Analytics

Control Panel > Website Tab > Setup > Website Options

Legacy Google Analytics (Universal Analytics)

If you already configured Google Analytics using the legacy version (Universal Analytics, using UA identification numbers), you will see the option to continue using the legacy version or to switch to GA4, the more recent version of Google Analytics.

Use Legacy Analytics?	Yes ONo Note: If you select "No" this indicates that you want to use the newer GA4 analytics. You must update the analytics account ID to your new measurement ID. Don't know what this means? Ask us for help
Google Analytics Account ID	Note: If you have a Google Analytics account ID, enter it here to track and measure traffic on your website.

By default, Yes is selected while you are using the legacy version of Google Analytics. To switch to using GA4, select No. The field asking for your Google Analytics Account ID will now ask you for the Google Analytics 4 Property ID.

Administrators: For instructions on how to set up dimensions using the legacy version of Google Analytics, see "Legacy Google Analytics (Universal Analytics)" on page 404. Universal Analytics will stop processing data from your website beginning July 1, 2023. To continue processing data, you must set up your dimensions in GA4. You should also export your historical data before July 1, 2023. For help exporting your data and other helpful GA guides, see "Google Analytics Help" on page 411.

Setting Up Google Analytics

To set up Google Analytics, you'll need a Google account. Once you've signed in to your Google Account, navigate to <u>analytics.google.com</u>

.1 Analytics	
Welcome to Google Analytics Google Analytics gives you the free tools you need to analyze data for your business in one place, so you can make smarter decisions. Start measuring	
Complete information Understand your site and app users to better check the performance of your marketing, content, products, and more.	
Get insights only Google can give Access Google's unique insights and machine learning capabilities to make the most of your data.	
Connect your insights to results Analytics works with Google's advertising and publisher products, so you can use your insights to deliver business results. Learn more about Google Analytics	
© 2022 Google Analytics home Terms of Service Privacy Policy 🗇 Send feedback	

Enter the name of your account. Your account will likely be the name of your organization. Next, configure your data sharing settings based on your needs. Consult the help built into Google Analytics for guidance. Next, set up a property. Your property will likely be the name of your website.

.1 Analytics	# 2
Account setup	
Property setup	
Property details A property regressents a business's web and/or app data. An account can contain one or more properties. Learn more "New/gate to your Friebase account if you want to create a new property for an existing Friebase project.	
Create a Google Analytics 4 property to measure your web and/or app data. Property name My Website	
Reporting time zone United States • (GMT-05:00) Chicago Time •	
Currency US Dollar (USD §) •	
You can edit these property details later in Admin Show advanced options	
Next Previous	
About your business	
© 2022 Google Analytics home Terms of Service Privacy Policy 12 Send feedback	

In the next section, add details about your organization, like type and size. Then, choose how you intend to use the data you collect. Identifying your needs helps Google Analytics show you the most relevant data collections on your dashboard and helps them improve their insights and predictions.

Agree to the terms and conditions, then you'll set up your website as the platform from which you want to collect data.

	Analyti	CS All accounts > My Website My Website ▼	Q Try searching "where did my users come from"			II 0 : 😩
n.	ADM	MIN USER				
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	÷	Property <u>+ Crasta Property</u> My Vesser (332702954) Setup Assistant Property Settings 		Start collecting data choose from where you will be collecting data (the tructions for adding a data collection tag to that s Learn more about data collection [2]		
		Data Streams	Choose a platform			
		Data Settings	(iii) Web	Android app	iOS app	
		1 Data Import				
		Reporting Identity	-			
		2 Attribution Settings				
		Property Change History	-			
		Dd Data Deletion Requests	-			
		PRODUCT LINKS	-			
		Google Ads Links				
		🍫 Ad Manager Links				
		BigQuery Links				
		Display & Video 360 Links				
		Merchant Center				
		Google Play Links				
		Q Search Ads 360 Links				
0			© 2022 Google Analytics home Terms	s of Service Privacy Policy 💷 Send feedback		

Next, enter the URL of your website and name the data stream (this can be your organization name).

	Analyti	All accounts > My Website My Website	c 🗙 Set up	data str	am	
A	AD	MIN USER				
		Property + Create Property		Set up you	web stream	
0		My Website (332702954)		Website U		
R	+	Setup Assistant		https://	 myClubExpressClub.com 	
		Property Settings		+:	Enhanced measurement	
		Property Access Management			Automatically measure interactions and content on your sites in addition to standard page view measurement. Data from on page dements such as links and embedded videos may be collected with relevant events. You must ensure that no personally-identifiable information will be sent to Google. Learn more	
		Data Streams				
		Data Settings			Measuring: 💿 Page views 🔞 Scrolis 😮 Outbound clicks + 3 more	۲
		1 Data Import		Create	stream	
		Reporting Identity				
		2. Attribution Settings				
		Property Change History				
		Dd Data Deletion Requests				
		PRODUCT LINKS Google Ads Links				
		Ad Manager Links				
		BigQuery Links				
		Display & Video 360 Links				
		Merchant Center				
		Google Play Links				
0		Q Search Ads 360 Links				

On the last page, you'll see your Measurement ID. This is the ID you'll add to the Google Analytics 4 Measurement ID field in Website Options.

.1	Analytic	All accounts > My Website My Website -	c 🗙 Web stream	n details				:
A	ADMI	N USER	<u> </u>	Data collection isn't active for y	our website. If you installed tags more than 48 hours ago, make sure th	ey are set up correctly.	View tag instruction	5
0	÷	My Website (332702954)	Str	eam details				/
G H		Property Settings		REAM NAME YClubExpressClub	STREAM URL https://myClubExpressClub.com	STREAM ID 4076111195	MEASUREMENT ID G-2CS1MMNWRH	
		Property Access Management					-	-
		Data Streams	Eve	ents				
		Data Settings	+	Enhanced measurement			-	
		土 Data Import			is and content on your sites in addition to standard page view measurement. as links and embedded videos may be collected with relevant events. You must e	insure that no personally-identifiable information	will be sent to Google. Learn more	·
		Reporting Identity		Measuring: 💿 Page views	Scrolls (B) Outbound clicks + 3 more		\$	\$
		2, Attribution Settings	-					
		Property Change History	8	Modify events Modify incoming events and param	neters. <u>Learn more</u>			>
		Dd Data Deletion Requests	iii (iii)	Create custom events Create new events from existing e	vents. Learn more			>
		PRODUCT LINKS Google Ads Links	େ	Measurement Protocol API se Create an API secret to enable add	tecrets litional events to be sent into this stream through the Measurement Protocol. <u>Lea</u>	im more		>
		🍫 Ad Manager Links	Go	ogle tag				
		BigQuery Links	Ô	Configure tag settings Configure your Google tag behavio	or, including cross-domain linking and internal traffic. <u>Learn more</u>			>
		Display & Video 360 Links	<··>	Manage connected site tags Load tags for additional properties	s or products using this stream's on-page Google tag. <u>Learn more</u>		0 connected	>
		Google Play Links	Ō	View tag instructions Get instructions for how to implem	nent your Google Tag for this data stream. Learn more		No data received	>
0		Q Search Ads 360 Links						

Setting Up Dimensions

Dimensions are the qualitative data (data that represents a category) you use to organize your metrics (quantitative data, or data which represents an amount).

ClubExpress sends three dimensions:

- ModuleName (dimension1)
- PageName (dimension2)
- DetailName (dimension3)

You will need to create custom dimensions and can name them whatever you want, but the name should be somewhat indicative of the dimension data. The order we send them is important and you cannot reorder the dimensions or the way data is received by Google Analytics.

Log into your console at <u>https://analytics.google.com/analytics/web/</u> and select "**Configure**", the last option on the left-hand menu.

.1	Analytics	All accounts >
11	Reports	
\odot	Explore	
G	Advertising	^
Ħ	Configure Configure	
		^

Note: If you have multiple analytics projects, make sure your ClubExpress project is currently selected by selecting All Website Data at the top of the screen and confirming the correct Analytics Account is selected.

On the next page, select Custom definitions. On the Custom definitions page, select Create custom dimensions to create a new dimension.

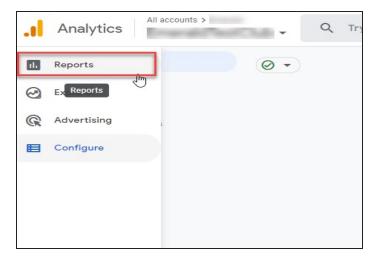
.ıl	Analytics	C Try searching "trend of conversions from c	organic last month"			0	:
	Events Conversions	Custom definitions				Quota infor	mation
8 8	Audiences Custom definitions	Custom dimensions Custom metrics				Create custom dimen	sions
	DebugView	Dimension name 🛧	Description	Scope	User Property/Parameter	Last changed	
		dimension1	Module Name	Event	entrances	Jan 19, 2022	:
		dimension2	Page Name	Event	engagement_time_msec	Jan 19, 2022	:
					Items per page: 25 💌	1 = 2 of 2 < <	> >1
			© 2022 Google Analytics home Terms of Service Privacy Pc	licy 🔝 Send feedbac	k		

You'll use this screen to create the three (3) custom dimensions required for your ClubExpress website. Enter the following data into the fields:

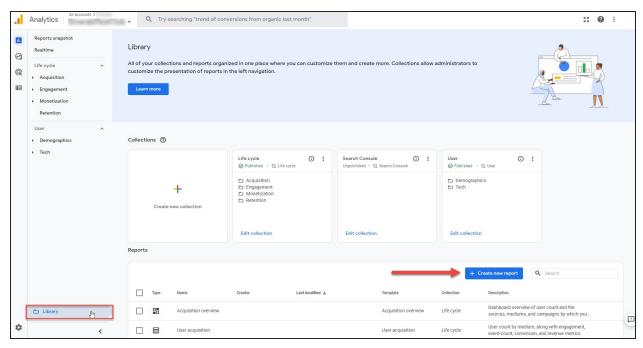
Dimension Name Scope		Description	Event Parameter	
dimension1	Event	Module Name	entrances	
dimension2	Event	Page Name	engagement_time_msec	
dimension3	Event	Page Title (SEO Title)	page_title	
GA Custom Dimension Data				

Creating Reports

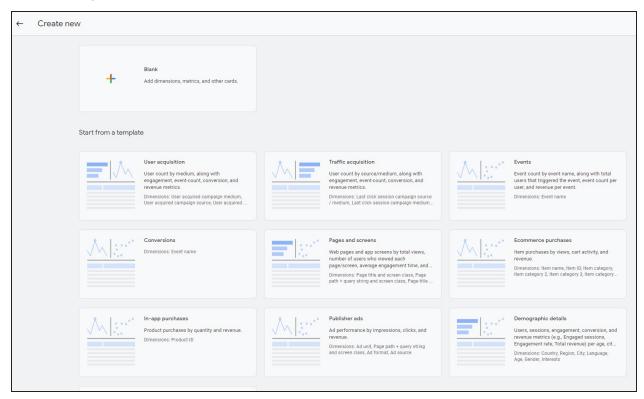
After you have defined your dimensions (and have started collecting statistics), you can then click on the **Reports** icon on the left-hand menu to create a new custom report using the dimensions that you have defined.



Select Library, then select the **+ Create New Report** button, then **Create Detail Report** to begin building a new report.



You'll start by choosing a template:



On the report screen, you can choose to add custom dimensions and metrics using the right-hand menu:

				Customize report	
Last 28 days	Dec 23, 2021 - Jan 19, 2	022 📑 Save.	REPOR	Γ DATA	
			Dim	ensions	>
			Met	rics	>
		8	CHART	S	
		5	0	🚦 Bar Chart	>
		6	0	🗱 Line Chart	>
				T TEMPLATE	
		4	User a	cquisition	83
		2		ARY CARDS	
		0	E F	lew users by irst user medium	:
09	1	6		lew users by irst user medium	:
	Rows per page: 10	▼ 1-1 of 1			
event count	Conversions	Total revenue	+ 0	reate new card	
All events 🔻	All events -				
511 100% of total	0.00	\$0.00			
511	0.00	\$0.00			

Legacy Google Analytics (Universal Analytics)

Before you can begin working with statistics sent from your ClubExpress website using Google Analytics, you must first set up "custom dimensions" on the Google Analytics console. If you've enabled Analytics on your ClubExpress site we are already sending statistics, but you must first set up the dimensions in order to run any reports or see statistics.

ClubExpress had previously been sending "Custom Variables" (Key1, Key2, Key3) to your Analytics account. These variables have been deprecated by Google and are no longer being sent. If you had been relying on custom variables in your reporting, you will have to update Analytics to now use dimensions.

Dimensions

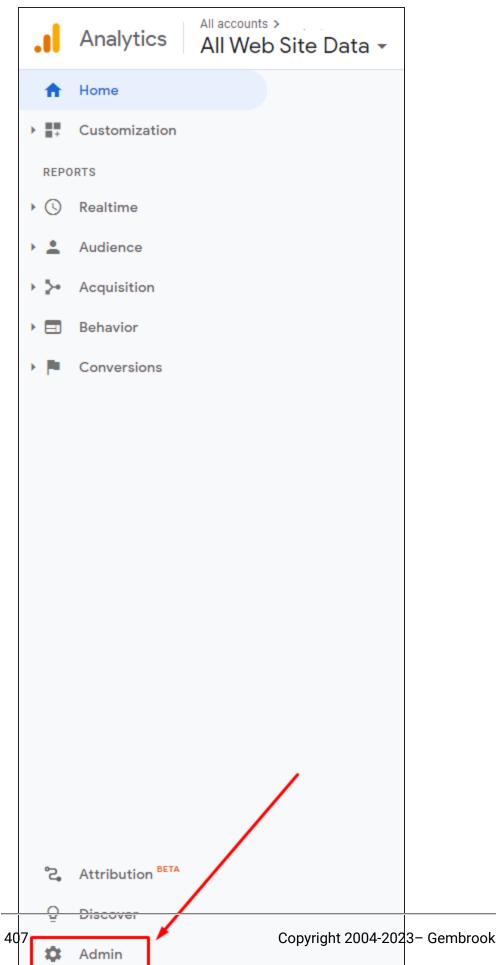
ClubExpress sends three dimensions:

- ModuleName (dimension1)
- PageName (dimension2)
- DetailName (dimension3)

You will need to create custom dimensions and can name them whatever you want, but the name should be somewhat indicative of the dimension data. The order we send them is important and you cannot reorder the dimensions or the way data is received by Google Analytics.

Log into your Google Analytics console

Log into your console at <u>https://analytics.google.com/analytics/web/</u> and select "**Admin**", the last option on the left-hand menu.



Note: If you have multiple analytics projects, make sure your ClubExpress project is currently selected by selecting All Website Data at the top of the screen and confirming the correct Analytics Account is selected.

In the center column of the Admin page labeled "**Property**" scroll down to "**Custom Definitions**" and click on the option to expand the section. Now click on "**Custom Dimensions**"

Y	Audience Definitions
Dd	Custom Definitions പ്രപ്ന
	Custom Dimensions
	Custom Metrics
Dd	Data Import

Create Custom Dimension

Click on the red + New Custom Dimension button to begin creating a new dimension.

On the following screen create a custom dimension named ModuleName. Repeat again for PageName and DetailName. Again, you may name these whatever you want, but the order which we send them is ModuleName, PageName and DetailName and your names should be recognizable.



After creating each dimension, Google Analytics will supply you with several versions of code. Disregard the example code, as the code which handles analytics has already been integrated into your ClubExpress site. You don't need to do any programming.

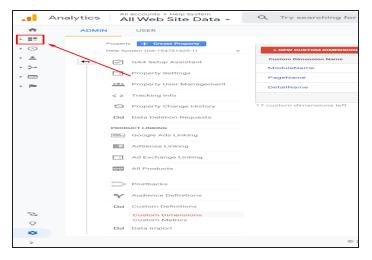
Example Codes for This Dimension
Copy the following code snippet for your platform. DO NOT FORGET to replace
JavaScript (Only works for Universal Analytics properties)
var dimensionValue = 'SOME_DIMENSION_VALUE'; ga('set', 'dimension4', dimensionValue);
Android SDK
String dimensionValue = "SOME_DIMENSION_VALUE"; tracker.set(Fields.customDimension(4), dimensionValue);
IOS SDK
NSString *dimensionValue = @*SOME_DIMENSION_VALUE*; [tracker set:[GAIFields customDimensionForIndex:4] value:dimensionValue];

After you have completed creating your 3 custom dimensions, you should have a table that resembles the following:

+ NEW CUSTOM DIMENSION		
Custom Dimension Name	Index +	Scope
ModuleName	1	Hit
PageName	2	Hit
DetailName	3	Hit

Using Custom Dimensions

After you have defined your dimensions (and have started collecting statistics), you can then click on the **Customization** icon on the left-hand menu to create a new custom report using the dimensions that you have defined.



Select Custom Reports to view the Custom Reports Screen, then select the **+ New Custom Report** button to begin building a new report.

	Analytics All accounts > He All Web Si		content"		
	Home Customization Dashboards Custom Reports Saved Reports Custom Alerts	Data Studio Unlock the power of your data with Data Studio: Ornenet to all your data Oreate interactive reports Share your insights Learn more	Audiences Overview	Image Analytics Angusting Converse Image Analytics Angusting Converse	Behaviors Overview
REP(→ (S) → ▲ → →		Custom Reports • New Custom Report • New Category Import from Gall Title • New Category Import from Gall	ery	There is no data for this view.	Creation Date
> P	Conversions		© 2021 Google	Analytics Home Terms of Service Privacy F	olicy Send Feedback

Give your report a title, and name the current tab.

Create Custom Rep	ort	
General Information		
Title	New Custom Report	
Report Content		
Report Tab × + ac	Id report tab	
Name	Report Tab	Duplicate this tab
Туре	Explorer Plat Table Map Overlay	
Metric Groups	Metric Group	0
	+ add metric	
	+ Add metric group	
Dimension Drilldowns	+ add dimension	
Filters - optional		
	+ add filter -	
Views - optional		
0	All views associated with this account	
۲	1 view selected 💌	
	Save Cancel	

Metric Groups

Metrics are quantitative measurements. The tables in most analytic reports organize dimension values into rows, and metrics into columns. There are many advanced ways to format your report, such as adding secondary dimensions to the dimensions which ClubExpress supplies. You may wish to consult the Google Analytics documentation on which metrics might be important to your website.

Clicking on the **+ add metric** button in the Metric Groups section will display a dropdown loaded with metrics you can select.

Create Custom Repo	ort	
General Information		
	New Custom Report	
Report Content		
-	d report tab	
Name	Report Tab	Duplicate this tab
Туре	Explorer Flat Table Map Overlay	
Metric Groups	Metric Group	0
	+ add metric	
Dimension Drilldowns	Commonly used More dimensions Acquisition Ad Exchange	
Filters - optional	▶ Advertising	
Views - optional	Behavior Ecommerce Roal Conversions Display as alphabetical list	
•	1 view selected v	
[Save Cancel	

After you have selected your metrics, you may now add the dimensions to the report which we have created earlier.

Click the **+ add dimension** button in the "Dimension Drilldowns" group to add dimensions. You may add a single dimension (row), or create new tabs for each of your dimensions. Please consult the Google Analytics documentation for best uses and case scenarios.

Edit Custom Report				
General Information				
Title	My Custom Report			
Report Content 'Funnel' type disabled. You o	can't mix funnel and non-funnel tabs.			
Report Tab Repor	t Tab × + add report tab			
Name	Report Tab			
Туре	Acquisition			
Metric Groups Dimension Drilldowns	 Advertising Behavior Custom Dimensions DetailName ModuleName PageName Custom Variables Display as alphabetical list + add dimension 			
Filters - optional				

Google Analytics Help

• Learn how to use Universal Analytics

Analytics Academy

• Migrating from Universal Analytics to GA4

Make the switch to Google Analytics 4

• Exporting your Universal Analytics data

Exporting Data

• Google Analytics Report Templates

Google Data Studio Report Gallery

• Bite-Sized Guides

Google Analytics Mini Guides

• Connecting Google Ads to GA4

Link Google Ads and Analytics

Google Support

Google Analytics Online Help

Reports/Exports

Administrators: See "Reports" on page 93 for more information about running reports.

Reports

If available, selecting Reports displays the Report Group selector pop-up. Once you select a group, the system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Type	Description
Website Traffic	View and print reports showing who is visiting the website.
Website Security	View and print security reports by module and member.
Tell a Friend Referrals	View and print all referrals sent.
Tell a Friend Successful	View and print referrals sent by member, who recommended the most
Referrals	people and their success rate.

Website Tab Reports

eople	Website	Money	Club	Communications	Support	
						🕕 Show Notices 🥜 Config
dmin	Functions					
📆 Trai	nsaction Search	n		5 Open Credits		🚨 Multiple Misc. Charges/Credits
Ban	k Account Activ	vity		Jiscount Coupons		Reports
Nebsite	e Modules (Vis	ibility: P=Public	, M=Member	s, NA=Not Active)		⊙Switch to View Mo
💼 Dor	ations (PM)					
Setup						
542.	k Accounts			音 Financial Accounts		ClubExpress Rates
🎭 Ban						

The Admin Functions panel on the Money panel contains functions to manage your club's finances on a daily basis. The Website Modules panel contains the modules enabled for that section.

This panel contains functions to process pending payments and credits, view bank account activity, and export transactions and payments to QuickBooks® (if enabled.)

The Setup panel on the Money panel contains functions to configure bank accounts and financial accounts, to view ClubExpress rates, and to configure tax rates and money-related options.

Many of these choices will only be visited when you first setup your website and database in ClubExpress, or only rarely thereafter. This panel is normally collapsed; click the down-arrow icon to expand it, or, if expanded, click the up-arrow icon to collapse it.)

This panel also provides access to special functions related to club finances; these functions are explained in other chapters of this manual:

Note that Bank Account Activity only appears for customers based in US or with a US bank account. Clubs based outside the US will see a separate ClubExpress Charges option.

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Open Credits	

Credit Card Refunds	
Multiple Misc. Charges/Credits	
Bank Account Activity	
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Gift Discount Coupons	
Create Gift Discount Coupons	
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What would you like to do?

- For help with modules in the Money section, see " ClubExpress Modules " on page 588
- Search transactions and process payments; see "Transaction Search" on the next page
- Manage member credits which have not been applied; see "Open Credits" on page 423
- Refund credit card transactions; see "Credit Card Refunds" on page 425
- Enter a miscellaneous charge for multiple members at once; see "Multiple Misc. Charges/Credits" on page 431
- View club-level transactions initiated by ClubExpress against your bank accounts; see "Bank Account Activity" on page 432
- Learn more about integration for QuickBooks® Desktop and QuickBooks® Online; see "Quick-Books® Desktop" on page 433 or "QuickBooks® Online" on page 442
- Create discount coupons for memberships, events, storefront purchases, etc. and learn about gift discount coupons; see "Discount Coupons" on page 454
- For clubs outside the U.S., see charges applied to your saved credit card; see Billing Credit Card
- Maintain the list of bank accounts used by your club or association; see "Bank Accounts" on page 463
- Maintain the list of financial accounts, which are used for reporting and also for connecting transactions to bank accounts; see "Financial Accounts" on page 466
- View the ClubExpress rates configured for your club; see "ClubExpress Rates" on page 469
- Configure taxes such as sales tax, VAT, or GST; see "Sales Tax Rates" on page 470
- Configure your money options; see "Money Options" on page 487
- Learn more about your payment processing options; see "Collecting and Processing Payments" on page 471

- Learn about chargebacks and how they affect your club; see "Chargeback" on page 494
- Learn more about the reports available; see "Reports/Exports" on page 495

Transaction Search

Control Panel > Money > Admin Functions

Use the Transaction Search tool to view paid and unpaid transactions from members and non-members.

Clicking this choice displays a screen similar to the following:

Home > Control Pane	on Search	?
Search for transacti Payments' option.	ons and/or payments, using the search criteria in the 'Search Filter' box. You may also handle payments which cover multiple members by selecting the 'Bulk	
	 Transaction/Payment Search Bulk Payments All Transactions Paid Only Unpaid Only (includes partial) Scheduled Partial (excludes fully paid) Overdue Partial 	
User Type Last Name Company Member #		
Invoice (Ref) # Transaction Date Sort Results By	Any Date	

This screen has two primary functions, defined by the first set of radio buttons:

- Search for transactions and payments
- Record bulk payments (that apply to multiple pending transactions)

Transaction/Payment Search

When you select **Transaction/Payment Search**, use the options below to filter your search in multiple ways. You can enter criteria into more than one field and the system will find transactions that match all entered values.

Example: The above screen show shows unpaid transactions from members only and entered this year. The results can be sorted in different ways using the last option.

Each transaction is shown separately, including the person's name and whether they are a member or not, the transaction type, date and reference number, the amount and status. Individuals with more than one

transaction will be listed multiple times (transactions are not aggregated.) 30 transactions are shown at a time and paging is enabled.

Subgroups: 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.

Maintain Options

The following options are available in the Maintain column:

lcon	Description
(Receipt)	Display a receipt for this transaction in a popup window. The receipt will show the details of the transaction, including individual transaction items, and any payments made against the transaction.
(Make Payment)	This icon only appears for unpaid and partially paid transactions. Clicking it jumps the user to the Pending Payment screen to record a payment for this transaction.
(Invoice)	Clicking this icon displays the standard report dialog. 4 Invoice reports are available, two for this transaction and two for all transactions for this member or non-member. One of each is formatted for a standard #9 window envelope and one of each for a standard #10 window envelope.

Maintain Options

Make Payment

When the **Make Payment** icon is clicked, a screen similar to the following is displayed:

Make Payment for Audrey Abanti (5)				?
The list below shows outstanding payments due for the current member. Use the checkboxes selection and follow the instructions.	s to select which payments	to make. The available payment	options are in the "Payment Method" dropdown list. Make	a
To make a partial payment on any of the items, click \mathscr{I} to change amount. Note that you cannot make partial payments on transactions that require immediate payment	L			
Misc. Charge (9/20/2020 Ref # 1014)	Due 25.00	Pay 25.00 🥖		
High speed internet access 25.00 Transaction Total: 25.00				
Total Selec	ted For Payment	US\$ 25.00		
Have a coupon? Enter the o	code: Apply			
Payment Method < Select Payment Method >				
Payment Details Review the payments due, and select the items you wish to pay for now. Then, select a provided.	payment type and follow	the instructions		
Refund Policy				
All payments are final. We do not provide refunds for membership signups and renewal purchases, or other misc. charges. Please carefully review the charge(s) checked above a				
The refund policy is set by demotestclub. If refunds are available, requests must be directer ClubExpress.	ed to demotestclub - they	cannot be handled by		
Print Invoice (Report		e Submit Payment 🖋		
	Pay Later 🗙	J		

This screen shows one or more payments pending, including the detail for each. If there is only one payment shown, it will be checked. If multiple payments are shown, none of them will be checked; you must check at least one to pay.

Individual payments can be checked or unchecked to adjust the total being paid.

Select the **Payment Method** from the drop-down menu:

- *Credit Card* If your organization allows members to pay with a credit card, administrators can apply a credit card payment on behalf of a member. An email will be sent to the user confirming payment.
- *Received Check* When members send in a check, select this option and optionally enter the check number, date and any relevant notes. An email will be sent to the user confirming payment.
- *Received Cash* When members send in cash, select this option and optionally enter the date and any relevant notes. An email will be sent to the user confirming payment.
- Write-off (Bad Debt) If a payment must be written off as a bad debt, select this option. No email will be sent to the user.

Note: Member updates like renewals will not be processed if the renewal payment is written off. To process the payment and renew the membership, select Comp.

- *Comp (Forgiven)* Select this option if the member is not required to pay for the charge. Optionally, check the confirmation box to send an email to the user confirming payment.
- Processed by a Separate System Select this option if the member paid using an outside format (Venmo, Zelle, etc.). Optionally, check the confirmation box to send an email to the user confirming payment.

 Payment Received from Chapter - This option is only available to organizations with subgroups (chapters, districts, regions). Select this option to mark an item as paid from funds received by a chapter. In the new fields Amount Received by Chapter and Amount Retained by Chapter, the appropriate amounts will be filled in, however you can adjust the amounts.

Example: A membership payment of \$100 was received by a local chapter. The local chapter's portion of membership dues is \$20 per member. The local chapter sends a check to the national level for \$80. The field Amount Received from Chapter will show \$100, and the field Amount Retained by Chapter will show \$20.

Buttons at the bottom of the screen:

- **Submit Payment** will appear for credit card transactions. **Done** will appear for all other payment types when you are just recording a payment received.
- **Print Invoice (Report)** allows an admin to print an invoice as a report. When members or non-members view this screen, they will see **Print Invoice (PDF)**, a slightly different option that directly displays a PDF invoice.
- **Print this Page** generates a direct, printable version of the page.
- **Pay Later** is the equivalent of the "Cancel" function, allowing you to leave this page without making or recording a payment. Note that if one of the listed event registration transactions requires Immediate Payment (a special option available for events only), this button will not be displayed. A payment must be made or recorded.

If your club or association enabled **PayPal**, it will be available to members and non-members but not to administrators. There is no way for an administrator to make a pending payment using someone else's PayPal account!

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

Credits

If the user has any pending credits, they will be automatically applied, up to the amount of the pending payment. Any additional amount is available to be used for a future transaction.

Discount Coupons

Discount coupons can also be applied on the Payments page. If there are published coupons that apply to the transaction(s) on the page, users will see a field to enter their coupon code:

Total Selected For Payment	\$ 50.00
Have a coupon? Enter the code: Appl	У

Once the code has been entered, the screen changes as follows:

Total Selected For Payment	\$ 50.00
Any event Coupon Applied	\$ 5.00
Net Payment	\$ 45.00

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

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.
- **ReceivedCash.** 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. Note that pending member updates such as renewals are not processed with this option. 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. Pending
 member updates are processed with this option. 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 is flag the payment has 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.

Bulk Payments

When the **Bulk Payments** radio button is selected, the search changes as follows:

Home	Home Control Panel Transaction Search									
Bul	Bulk Payments									
	Search for pending payments using the search criteria in the 'Search Filter' box. Use the checkboxes to select the transactions to be included. Click the 'Invoice' button to print invoices for the selected transactions. Click the 'Bulk Payment' button to record a payment covering all the selected transactions.									
Inv Trans Sor Search	Search Filter Function Transaction/Payment Search Bulk Payments User Type Everyone Members Only Last Name Member # Invoice (Ref) # Transaction Date Any Date Search Results By Name Search Constraints Search Search									
Select	Name Member?	Trans. Type	Trans. Date Ref. Number	Amount (\$) Status	Selected 3 Items Total: 105.00					
	abc, abc Non-member	Sign Up	3/19/2019 4365	60.00 Unpaid	Bulk Payments					
	abc, dch Member # 2830	Event Registration	3/15/2019 4357	40.00 Unpaid	Invoices					
	abc, dch Member # 2830	Sign Up	3/19/2019 4361	30.00 Unpaid	invoices					
	abd, dfg Member # 2852	Sign Up	4/3/2019 4412	15.00 Unpaid						
	abd, dfg Member # 2852	Event Registration	4/5/2019 4419	10.00 Unpaid						

This screen shows just unpaid and partially paid transactions. There may be multiple transactions from one member or non-member, or multiple transactions from a single company that are being paid with one check.

Each transaction has a check box on the left side, to allow you to check one or more transactions. A running count and total are maintained to the right of the grid. When the amount reaches the amount of the payment to be recorded, click the **Bulk Payments** button. You will see a screen similar to the one below:

Bulk Payment	08	8
Enter the payment inf	ormation which will be applied to all selected transactions	
You have selected 3 t	ransactions totalling 120.00	
Payment Type	Check •	
Payment Date	10/16/2019	
Total Due	120.00	
Cash/Check Discount	(2.40)	
Net Amount Due	117.60	
Check Number		
Notes		
	Apply Payment 🖋 Cancel 🗶	

Select a payment method and enter any other information as appropriate. If a cash/check discount applies, the discounted amount will appear in the **Cash/Check Discount** field and the **Net Amount Due** will reflect the new payment amount.

Click **Apply Payment** to record your payment against all of the selected transactions.

Note that the credit card option is not available for bulk payments. Also, all selected transactions will be marked as paid in full and these transactions will be removed from the bulk payments screen.

You can also click the **Invoices** button to print an invoice for all checked transactions. Three invoice reports are available:

- Formatted for a standard #9 double window envelope. Each checked transaction will be printed on a separate page, suitable for individual mailing.
- Formatted for a standard #10 double window envelope. Each checked transaction will be printed on a separate page, suitable for individual mailing.
- A grouped invoice. Checked transactions are combined and totaled into a single invoice that is mailed or emailed to a single address. This option is suitable for multiple transactions belonging to a family or company.

When this option is used, checked transactions are **not** removed from the unpaid transactions list, since payment has not yet been received or recorded.

Open Credits

Control Panel > Money > Admin Functions

When you select this option, you will see a screen similar to the following, with some variations depending on whether or not your organization is configured to issue refunds to a member or non-member credit card.

Alert: (Jan 2023) To customers using the built-in ClubExpress Merchant Account

As part of our change to a new merchant processor, the credit card refund process is temporarily changing, as each processor requires its own refund account. If you have switched to the new merchant account and you need to refund charges made prior to your account change date and time, you'll use the existing refund account ("Account A"). For charges after the change date and time, you will need to use the new "Account B". Refunds for transactions using the previous merchant account will be available for a few months, at which time we will refund any remaining balance in "Account A". On the Credit Card Refund Account Details popup, you'll see two separate lists of refund requests, and two separate buttons to request additional funds (one for each refund account).

If your organization has not yet switched to the new merchant account, you will not see the new refund account details. If you have your own merchant account (through Stripe or Authorize.net), this change does not affect you.

Hint: You can find your account change date and time on the Open Credits page (Control Panel > Money Tab > Admin Functions > Open Credits.

Note: For information related to credit card refunds, see "Credit Card Refunds" on page 425. Clubs with their own merchant account will not see the option to manage their Refund Account.

Ope	en Cre	edits					
		ndinimaeth canna a' par sin. Chù be Cali bù h nil, miant, anns, a an sao analainice ann anns. Eigile cuult-bear a capacht miant b			a he man in		
() Ant Cost	isteri koort	Enable Carel Refund Info (3) This is not prearch taken a preficured taken account, both taken account baken to percented					
Gene	Restar.	Ewild for	-	inner[6]	Reinworfd		
8.94200	Section:	Carotin hansalan. 181221113 artifeptinka	(inter-	10.7	10.7	1	
202,000	THEY ADAM	Connectoration receipt that fault the	-				
	CaniCillab	Central Installer, 18132873 Serifregades	Partiel		20101		

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.

Edit Credit		
Name	Griffen, Peter(2158) Select Member	
Date	4/25/2013	
Amount \$	20	
Credit Type	Overpayment ‡	
Description	Event registration	
		1. 0
Account	Master Event Registrations 💲 🧕	
QuickBooks Item Name	Events	
	Save 🖌 Cancel 🗶	
		1.

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 standard **Edit** icon to modify an existing credit. You will see a screen similar to the following:

Edit Credit		0	Ø	8
Credit Issued To: Todd Status: Available Amount \$ 40.00 Balance				
Select Action	Edit ‡			
Date	3/14/2008			
Amount \$	40.00			
Credit Type	Discount ‡			
Description	In return for printing services provided to the club			
Account	Master Service Fees		_//	٠
QuickBooks Item Name				
	Save 🖌 Cancel 🗶			-

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.

Subgroups: If your club or association has subgroups, subgroup administrators can access open credits but will only see credits for their members.

Credit Card Refunds

Control Panel > Money > Admin Functions > Open Credits

Refunds can be issued to members and non-members paying by credit card for event registrations, additional club charges, resource reservations, etc. **up to 180 days** from the payment date. See "Open Credits" on page 423

Alert: (Jan 2023) To customers using the built-in ClubExpress Merchant Account

As part of our change to a new merchant processor, the credit card refund process is temporarily changing, as each processor requires its own refund account. If you have switched to the new merchant account and you need to refund charges made prior to your account change date and time, you'll use the existing refund account ("Account A"). For charges after the change date and time, you will need to use the new "Account B". Refunds for transactions using the previous merchant account will be available for a few months, at which time we will refund any remaining balance in "Account A". On the Credit Card Refund Account Details popup, you'll see two separate lists of refund requests, and two separate buttons to request additional funds (one for each refund account).

If your organization has not yet switched to the new merchant account, you will not see the new refund account details. If you have your own merchant account (through Stripe or Authorize.net), this change does not affect you.

Hint: You can find your account change date and time on the Open Credits page (Control Panel > Money Tab > Admin Functions > Open Credits.

Note: For clubs with their own merchant account, your account may have a shorter time limit than 180 days. In the event you attempt to refund a user outside of the time limit, the refund will fail.

If you are using the ClubExpress merchant account, in order to provide refunds you must have a separate account set up with ClubExpress (Refund Account) which is used only to hold funds to provide refunds to site users. Once this account has been set up, all credit card refunds are processed by ClubExpress using the funds in the Refund Account. You may request to periodically add funds to the account, at which time we will perform an ACH request to your bank to retrieve the funds.

Note: Clubs with their own merchant account will not see the option to manage a Refund Account at the top of their screen.

When you visit the Open Credits page, if you have not yet requested a Refund Account, you will see a screen similar to the following:

	ntrol Panel > Open C Credits	redits						?
This page shows all open credits issued to users of your site. Click the Edit link to edit, refund, waive, or cancel.								
		now available for payments made with a credit card with n this page for more info.	in the last 1	180 days, when	e the credit ha	as not already beer	n applied to other transactions. Eligible credits have a separate	
Q Hide Search	Add Credit	Refund Account	edit card re		t.			
Filter C								
Credit D	ate From	То						
	Show Refu	nds Only Reset Search 🞸						
Search	Search Results (15 open credit(s) found)							
Date	Member	Credit For	Status	Amount (\$)	Balance (\$)	Maintain 💼		
6/12/2020	George Aaba	Birthday credit	Available	20.00	20.00	Ø		
4/30/2020	Alice Able	Membership	Available	20.00	20.00	Ø		

To request a refund account, click the Refund Account button.

Credit Card Refund	Account 🛛 🖗 🗞	×				
You have not yet started a refund account. Enter a dollar amount below and click the 'Add To Account' button.						
Additional Amount \$	Add To Account					
	Done					

To get started, you must request to add funds to your Refund Account. You may enter any amount between 10 and 5,000. Once you click "Add", the account status will list as Pending. After the request is received, we will perform an ACH request to retrieve the funds from your bank account. **This process may take several days.**

Do not add funds for each individual refund you want to issue, rather you can add one large amount intended to process many refunds.

Example: You may wish to add \$100 to process five (5) separate refunds of \$20 each. You would **not** add \$20 five separate times to your account.

Once you have funds in your **Refund Account**, you will see a new option next to member and non-member open credits to issue a credit card refund. You will also see your account status:

- Pending you have requested to have funds added to your Refund Account (either for the first time, or after the Refund Account has been activated), but the funds have not yet been received and approved.
- Active we have received and approved the funds, and you can now issue refunds.
- Depleted all funds in your Refund Account have been used, and you have not requested that any further funds be added to the Refund Account.

Ope	en Cr	edits						0		
This page	shows all open c	redits issued to users of your site. Click the Edit link to e	dit, refund,	waive, or can	el.					
NOTE: Cr	NOTE: Credit card refunds are now available in some cases. Eligible credits have a separate refund link. See the help topic on this page for more info.									
Q Hide Search	Hide Add Credit Refund Your current refund account balance is \$ 2,554.50.									
Filter C	redits									
Credit Dat	e From	То								
	□ Show R	efunds Only Reset Search 🔗								
Search	Results (27	7 open credit(s) found)			Pa	ge 1 of 6 🔹 🔪				
Date	Member	Credit For	Status	Amount (\$)	Balance (\$)	Maintain 📑				
11/14/2019	New Admin	Canceled transaction - 11/14/2019 Event Registration	Available	962.77	962.77	Ø				
3/25/2020	George Admino	Canceled transaction - 02/24/2020 Event Registration	Available	90.88	90.88	Ø				
4/29/2020	Carol C Brady	Carol paid this Misc already	Available	52.50	52.50	Ø				
4/29/2020	Greg Brady	Carol paid this Misc charge twice for Greg	Available	52.50	52.50	Ø				
4/29/2020	Greg Brady	Canceled transaction - 02/05/2020 Misc. Charge	Available	52.50	52.50	<i>i</i> i i i i i i i i i i i i i i i i i i				
	Credits Total 1,211.15 1,211.15									
	< Page 1 of 6									

Click the **Refund Account** button to view all additional fund requests. To add funds to your account, enter any amount between 10 and 5,000. Once you click "Add", the account status will list as Pending.

page lists the dear amount below	etails of your credit c and click the 'Add To	ard refund account. T o Account' button.	o add addite	onal funds, enter a
Request Date	Request Amount	Available Balance	Status	Requested By
4/23/2020	400.00	0	Refunded	George Admino
4/23/2020	100.00	0	Refunded	George Admino
4/27/2020	1,000.00	740.00	Available	George Admino
4/27/2020	400.00	400.00	Available	George Admino
4/27/2020	1,000.00	N/A	Pending	George Admino
4/27/2020	400.00	N/A	Pending	George Admino
4/28/2020	50.00	N/A	Pending	Michelle True
Totals	\$ 3,350.00	\$ 1,140.00		
ional Amoun	t \$	Add To Account		
		Done		

There are a few important notes regarding credit card refunds:

• Transactions paid for with two (or more) credit card payments will be refunded separately.

Example: If a \$100 transaction was paid in two \$50 credit card payments, the user will receive two \$50 refunds.

• Transactions paid with both a credit card and another form of payment (check, cash, applied credit, etc.) will only have a credit card refund processed to cover the amount paid by credit card.

Example: If a \$100 transaction was paid as a \$60 credit card payment and a \$40 check, we will only issue a refund of \$60 to the credit card used. The remaining amount will remain as a credit on the user's account.

• If prior to issuing a refund the user has used some of the credit balance, the resulting refund amount will be the remaining balance.

Example: If the user receives a \$100 credit and uses \$20, we will only issue a refund of \$80.

• If a payment covers more than one transaction, the refund issued will only apply to the part of the payment attached to the credit.

Example: If the user makes a \$100 payment to cover a \$60 event registration and a \$40 donation and the event is canceled, only \$60 of the original \$100 payment is refunded.

• Refunds will only be issued for payments made in the last 120 days.

Example: If an event registration uses a payment schedule and the event is canceled, a refund will only be issued for payments made in the last 120 days. The remaining amount will remain as a credit on the user's account.

- Partial refunds may be provided in the following ways:
 - Hold Back Fixed Amount we will deduct a fixed amount from the refund and keep it in your refund account
 - Hold Back Percentage we will deduct a percentage from the refund and keep it in your refund account
- Refunds cannot be performed on the same day a payment was made. You must wait at least 24 hours to request a refund after payment has been made.

To issue a refund to a user, click the 🗳 icon in the maintain column. You will see the following popup:

Refund Credit Card
You can refund the lesser of the credit balance and the amount of the credit which had been paid with a credit card. Only credit card payments within the past 120 days are eligible. You may elect to refund the entire eligible amount, or specify an amount or percentage to hold back as non-refundable. Click the 'Process Refund' button when ready. See the help topic on this page for more info.
CREDIT INFO
User Name: Greg Brady Credit For: Canceled transaction - 02/05/2020 Misc. C Credit Balance: 52.50 Paid by Credit Card: 52.50 Eligible for Refund: 52.50
REFUND
Refund Amount \$ 52.50
Refund Options \odot Refund Full Amount \bigcirc Hold Back Fixed Amount \bigcirc Hold Back Percentage
□ Use these settings as the default for subsequent refunds?
PAYMENT INFO
Date: 4/29/2020 Amount 52.50 Refund Amount 52.50
Process Refund Cancel

Entering in any amount in either the Fixed or Percentage fields will automatically adjust the amount to be refunded (in red). Entering in a percentage will display the dollar amount next to the field.

Note: The actual amount held back in the case of a Percentage hold-back may differ from the estimate displayed in the popup.

Check the box **Use these settings as the default for subsequent refunds?** to use the same hold-back amounts (fixed or percentage) in future refunds.

The amount refunded is deducted from the Refund Account (not any hold-back amount). The amount refunded and the hold-back amount are both deducted from the user's credit balance.

Example: If a user makes a \$100 payment and you elect to refund with a fixed hold-back of \$3, \$97 will be removed from your Refund Account. The user's credit will be reduced by \$100 (\$97, plus the \$3 fee).

In cases where a payment was made with multiple credit card payments, refunds are processed in date order and the hold-back amount is deducted beginning from the first payment refund. If the hold-back amount is greater than the amount of the first payment, the remaining hold-back amount will be deducted from the refund of the second payment.

Example: A user has a \$100 credit made with two payments: \$10, then \$90. You elect a fixed hold-back of \$20. We do not refund the first payment of \$10 and instead count that towards the \$20 hold-back. The remaining \$10 of the hold-back amount is withheld from the second refund, making the second refund amount \$80.

Total Payment: \$100; Fixed Hold Back: \$20

Payment 1: \$10; Refund 1: \$0: Hold Back Remaining: \$10

Payment 2: \$90; Refund 2: \$80: Hold Back Remaining: \$0

Click the 📕 link to view the payment receipt. Click "Refund" to issue a refund to the user.

Multiple Misc. Charges/Credits

Control Panel > Money > Admin Functions

This option allows you to apply a single miscellaneous charge or credit to multiple members. You will see the following screen:

be made, and the finance	to enter miscellaneous charges or credits for a group of members. Enter an appropriate description of the charge or credit, the cial account. Click on a member name, then click the arrow to select the members who should receive the charge. You can op isplayed members. You may use the filter to search for last name.	
Туре	Charge O Credit	
Description	•	
Fee		
Tax Rate		
Financial Account		
QuickBooks Item Name		
Name		
Chapter Select of	a group -	
Member Type < Sele	ect > V	
Member Level Prima	ary & Secondary Members 🗸	
	Reset Search 🛷	
vailable Members	Selected Members	
A Myles, Jessica (1174)	·	
Abernathy, Angela (1016	6)	
Abrams, Jr., Lisa (100A)		
Alexander, Billie (2468)		
Alexander, Larry (100100		
Alexander, Lilith (1000)		
Alexander-O'Malley, Rich	hard (2902)	
Alheim, Kara (1943388)		
Arkansas, Annie (1026)	-	

Determine if the item will be a charge or credit. Enter the description, fee and a non-archived financial account.

To add members to the list of those being credited or charged, select the members from the list of active members sorted by last name. You can also narrow your search by name, member type and member level.

Subgroups: For organizations with subgroups, you will see a chapter selector you can use to filter your member list by chapter.

You can select multiple members at once by holding down the Control key. When you click **Save**, the miscellaneous charge or credit will be applied to each checked member. Use the paging controls to switch between pages.

Bank Account Activity

Control Panel > Money > Admin Functions

Note: This option does not appear for clubs and associations outside the US.

Clicking this choice displays the following screen:

Home > Co	ntrol Panel > Bank Acco	ount 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 A	All Accounts	\$									
Time I	Period: All	\$									
Transaction Type: All +											
Sort By: Date (Oldest at top), then Transaction Type 💠 Search 💋											
Date	Transaction Type	Bank Account	Amount	Details							
3/25/2004	Collect Fees	Club Account	(\$3.50)	1							
3/25/2004	Setup Fee	Club Account	(\$150.00)								

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** icon. One or more reports will be available to view the detailed line items that comprise this transaction.

Subgroups: 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).

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.

QuickBooks® Desktop

Control Panel > Money > Admin Functions

Note: To set up QuickBooks® integration, navigate to Control Panel > Money > Setup > Money Options

ClubExpress includes the ability to export financial data from your website in a format that can be imported into QuickBooks®. The QuickBooks® Desktop exports are in Intuit Interchange Format (.IIF), which is supported in QuickBooks® for Windows. For instructions on using QuickBooks® Online, see "QuickBooks® Online" on page 442.

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 have many 3rd party options for maintaining backup copies of your data, including ChronoBooks and Rewind Backups. **If you are switching from QuickBooks® Desktop to QuickBooks® Online you should perform the same backup.** Before your first export you must also configure the QuickBooks® account names for your bank accounts and financial accounts.

Activation: The one-time fee to activate this integration for your website is \$500.

Note: If you are in Setup or Trial mode, the activation fee will be charged when you go live.

QuickBooks® Desktop for Windows (QBD)

QuickBooks: If QuickBooks® is enabled on the **Control Panel – Money – Setup – Money Options** page, you will see QuickBooks® Export on the Control Panel. Select it and you will see a screen similar to the following:

	Home > Control Panel > QuickBooks Export QuickBooks® Export						
Specify filter range."	Specify filter parameters and click the "Search" button to display matching exports. Click the New Export button to generate a new QuickBooks export file of transactions, payments or credits, within a specified date range."						
Type of Expo Time	Period: All	oes > ✓	▼ Se	New Export			
Search K	esuits						
Date Exported	Export Type	From	Through				
11/20/2009	User Transactions	10/01/2009	10/31/2009				
11/20/2009	User Credits	01/01/2009	10/31/2009				
11/23/2009	User Transactions	01/01/2009	11/20/2009				
11/27/2009	Club Transactions	11/20/2009	11/26/2009				

To see previous exports, select the type and time period and click **Search.** You will see a list of matching exports.

New Export button. You will see the following popup window:

QuickBooks New Export						
	NOTE: This export does not stop you from downloading transactions that you have previously exported.					
Type of Export	Club Transactions					
From Date						
Through Date	•					
	Export 🖌 Cancel 🗶					

For a description of the types of QuickBooks® data, see "The Five Types of QuickBooks® Data" on the next page.

Select the type of export from one of the following choices:

- Club Transactions
- Members and Non-Members (QuickBooks® "Customers")
- User Credits
- User Payments (including discount coupons)
- User 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 the date and time that 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 by the user or administrator will be in the memo field.

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.

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, incur a miscellaneous charge, etc., 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		
Membership Dues			\$40.00		
Club T-shirt	Income		\$12.00		
Donation			\$5.00		
Accounts Receivable	Current Asset	\$57.00			
Liser Transactions					

User Transactions

The example membership sign-up 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 credits in the appropriate income accounts and debits 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 or a user transaction, both versions of QuickBooks® also generate an open Invoice for the 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.

Money

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		
User Credits					

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	

User Payments - Bank or Undeposited Funds

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.

Money

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 QBD 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.)

In QuickBooks®, 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.

Example:

Description	Account Type	Debit	Credit
Accounts Receivable	Current Asset		\$57.00
Bad Debts / Comps	Expense	\$57.00	

User Payments - Bad Debts

In ClubExpress, if a payment includes an applied credit, we record a deposit for the gross amount less the credit amount because it was separately exported.

Example:

Amount owed: \$57.00 Credit applied: \$10.00 – credit memo separately exported Amount actually paid: \$47.00

Description	Account Type	Debit	Credit
Accounts Receivable (AR)	Current Asset		\$57.00
Credit Memo applied to AR	Current Asset	\$10.00	
Payment	Asset	\$47.00	

User Payments - Credit Memo

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	

Club Transactions

ClubExpress allows you to specify your QuickBooks® account name for each category of expense, setup fees, monthly hosting fees, miscellaneous charges and credits, postage, etc.

Members and Non-Members

For QBD users, 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.

Note: QuickBooks® does not allow duplicate names in its various databases (Customer, Vendor, etc.) If you get a QuickBooks®error importing this file, it may be because one of your members or non-members is also listed in your Vendor database; you will need to change one of the names so that it's different. The same problem might occur if you import a transaction, payment, or credit file listing a customer who is not yet in the QuickBooks® Customer database but who is in the Vendor database. Again, change one of the names (usually the Vendor) so that it's different.

Configuration Notes

QuickBooks® Account Names

Money

QuickBooks® account names are updated in three places within ClubExpress. Be sure that all three are correctly filled out:

- Control Panel Money Setup Bank Accounts
- Control Panel Money Setup Financial Accounts
- Control Panel Money Setup Money Options

In QBD, 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.

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.

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.

Note: For financial accounts, you will need to add Account Names for both the financial accounts you've created as well as the master financial accounts.

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 QBD 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®.

QBD Item Names

ClubExpress will export QBD Item Names if they are defined. Whenever you specify a charge in ClubExpress and link it to a QuickBooks® account, you can also specify the Item Name.

For each type of transaction, ClubExpress gives you a place to define the QuickBooks® Item Name, and this can be an Item or Service. When the import takes place, we will match on the name itself.

If you have not defined these item names in your ClubExpress configuration, use the QuickBooks® default item name associated with the financial account linked to the transaction.

If you enter an item name at the transaction or item level and it does not match the QuickBooks® Item Name exactly, a new item will be created for you and you will need to manually correct it.

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 QBD:

- 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 "Use Class Tracking" on the Control Panel – Money 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, QBD 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.

Sales Tax

If your QuickBooks® company file is configured to enable sales tax, be sure to check the box "Company file is configured to use Sales Tax". This ensures the Sales Tax is passed into the exported file.

In QBD, 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.

Product Quantities and Cost Per Product

ClubExpress does not currently export QuickBooks®products (such as, in the Storefront.) The reason is that QuickBooks® does not provide a way to update just selected fields in a product 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 product would be lost because it has no analog in ClubExpress.

Export Customer Names

An undocumented option in ClubExpress allows the system to export customers using the company/organization name instead of the individual member name. **Contact us to enable this option.**

QuickBooks® Online

Control Panel > Money > Admin Functions

Note: To set up QuickBooks® integration, navigate to Control Panel > Money > Setup > Money Options

For QuickBooks® Online, data is transferred directly from ClubExpress into your online company.

Before you start transferring 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 have many 3rd party options for maintaining backup copies of your data, including ChronoBooks and Rewind Backups. **If you are switching from QuickBooks® Desktop to QuickBooks® Online you should perform the same backup**. Before your first transfer you must also configure the QuickBooks® account names for your bank accounts and financial accounts. See Configuration Notes at the end of this section.

Activation: The one-time fee to activate this integration for your website is \$500.

Note: If you are in Setup or Trial mode, the activation fee will be charged when you go live.

QuickBooks® Online (QBO)

QuickBooks: If QuickBooks® Online is enabled on the **Control Panel – Money – Setup – Money Options** page, you will see the same option on the Control Panel. Select it and you will see a screen similar to the following:

Home > Control Panel > QuickBooks Export QuickBooks® Online Interface			
	Click the Connect to QuickBooks Online button to sign into your QuickBooks Online (QBO) account, and authorize ClubExpress to interface with your QBO account. Note that this step will be skipped if you have recently connected to QBO.		
	Maintain Customer QBO Ids Connect to QuickBooks Online 🖋		
	Return to Previous Page		

Connecting to QuickBooks® Online

The first step is to log into QuickBooks® Online and give ClubExpress permission to access your account. This required process also tells the system that communications between ClubExpress and QBO are legitimate and approved.

When you click the **Connect to QuickBooks® Online** button, you will see an Intuit dialog box to enter your login name and password. Note that this authorization is valid for 100 days. If you export your data within

Money

that time, you will not be prompted to log in again. The authorization will be renewed for an additional 100 days from the new export date and time.

Once you have connected, you will see the following Intuit screen:



You may also receive a confirmation email from Intuit that you have connected to QBO from the ClubExpress "App".

q	dickbooks.
C	You've connected ClubExpress
Hi	Dan,
yo	e want to let you know that you've connected ClubExpress to ur QuickBooks Online company Gembrook Systems, LLC. You n manage this connection in <u>My Apps</u> .
	anks, e QuickBooks Team

When you have successfully connected your QBO account with ClubExpress, you will see the following screen:

Home > Control Panel > QuickBooks Export
QuickBooks® Online Interface
Click the Send QuickBooks Online data to ClubExpress button to load ClubExpress with internal identifiers for the customers, accounts, items, and classes (if applicable) that you have defined in Quickbooks Online (QBO). ClubExpress needs these identifiers in order to send Allen Band Booster Association's data to QBO. It is highly recommended that you do this the first time you interface between QuickBooks Online and ClubExpress.
Click the Send ClubExpress data to QuickBooks Online button to:
Update QBO with any of the following that has happened since the last time you sent ClubExpress data to QBO:
Maintain Customer QBO Ids History Reports
You are connected to your QuickBooks Online Account.
Send QuickBooks Online data to ClubExpress 🗸 Send ClubExpress data to QuickBooks Online
Return to Previous Page

Sending QuickBooks® Online Data to ClubExpress

When you click the **Send QuickBooks®Online data to ClubExpress** button, the system establishes a connection to QBO and downloads internal identifiers for the following information:

• Customer IDs - The system will identify the customers exist in your ClubExpress database (members and non-members) and compare the first and last names of your customers to your member and

non-member database. If a match is found, and we do not already an internal QBO ID for the customer in their ClubExpress data, we store the ID in ClubExpress. This ID is used going forward when we send the customer's financial activity data to QBO.

- Accounts in your Chart of Accounts We use these when we send activity from ClubExpress to QBO. Please make sure that the QB Names on the ClubExpress accounts exactly matches the spelling within your QBO system. See "Configuration Notes" on page 451 at the end of this section.
- Items These are Services or Products that are linked to an account in your Chart of Accounts. We
 use them when we send activity from ClubExpress to QBO. Please make sure that the QB Default
 Item Names for the ClubExpress accounts exactly matches the item spelling within your QBO system. See "Configuration Notes" on page 451 at the end of this section.
- Classes (if they have been enabled) If you are using classes, please ensure that they are spelled the same in QBO and ClubExpress. See "Configuration Notes" on page 451 at the end of this section.

It is important to do this *before* you run your first CE => QBO transfer and at any time *after* you add new accounts, items, or classes on the QBO side.

Customer IDs

Clicking **Maintain Customer QBO IDs** will open a window allowing you to search for and find members by first or last name, and to update or edit their QBO ID within ClubExpress to match the number in your QBO system. This is important to do if you have merged customer records in QBO, or if you have more than one member or non-member with the same first and last name in ClubExpress. We do not bring over any other information (for example, addresses or phone numbers) from QBO to ClubExpress. To find the QBO customer id, bring up the customer in QBO and look at the name_id in the URL line. This is the internal customer id that we store inside ClubExpress for that customer.

qbo.intuit.com/app/customerdetail?nameId=615

Note: Before you perform your first transfer, run a QBO to ClubExpress transfer (QBO => CE). We store QBO's internal IDs in our database to help expedite each data transfer you perform. When you run this QBO => CE transfer, it updates the QBO IDs for members, non-members, financial accounts, bank accounts, and service and product items in our database.

When you run a ClubExpress to QBO transfer (CE => QBO), if your website does not have the internal QBO ID for a member or non-member who had financial activity during a period you're processing, the ClubExpress system will attempt to find the customer on the QBO side. It matches the member/non-member to the QBO customer using the customer's Display Name in QBO. If the customer does not exist on QBO, the process creates the customer in QBO. Similarly, the system creates accounts, classes, and items on QBO if they do not already exist in QBO.

Note: When configuring QuickBooks® in Control Panel > Money Tab > Setup > Money Options, be sure to select the correct Customer/Job Name Format so ClubExpress can match to the correct customer name in QBO.

Sending ClubExpress Data to QuickBooks® Online

Note: It is strongly recommended that you back up your QBO data before every transfer.

When you click the **Send ClubExpress data to QuickBooks**® **Online** button, the system establishes a connection to QBO and automatically uploads the following information that has occurred *since the last time ClubExpress data was sent to QBO* (this date and time can be confirmed in the popup message that will appear when you click the **Send** button).

- User Transactions
- User Payments
- User Credits
- ClubExpress Fees
- Tax (if we are calculating it)
- "Customers" whose data has changed since you initially enabled QBO and who have financial activity in the transfer time-frame. If any of these customer's contact information was changed in ClubExpress, the system will update the corresponding information in QBO.

Note: Each time the button is clicked registers as a data transfer. If you click **Send ClubExpress data to QuickBooks® Online** once, then a second and third time minutes apart, the second and third transfers will not include transactions which were included in the first transfer.

For a description of the types of QuickBooks® data, see The Five Types of QuickBooks®Data.

When you first enable QBO, data for the first four items above will be uploaded starting with the date that QBO was first enabled. (If you want an earlier date, please contact ClubExpress Support and we can configure this for you internally.)

Please also note that the first time you send ClubExpress data to QBO may take a long time (many minutes.) Be patient.

Reports and Errors

If a transaction, payment, credit, etc. fails to transfer to QBO for any reason, the item is marked to be resent, and the system automatically attempts to resend the data the next time you perform a CE => QBO transfer, and so on, until the error is corrected and the item is processed in QBO.

A report is generated for each transfer you perform. Select **History** to view all data transfers between your website and QBO. You can search by date range on this page, and run a report by clicking the reports icon next to any CE => QBO transfer record. The report shows invoices, payments, etc. that were included in that transfer. If there were errors for any particular item, the QBO error information is shown below the item, together with information about what to look for to correct the error.

Note: If you fix the error manually on the QBO side, contact Customer Success to have us stop the transaction from attempting to re-import it in the next transfer you perform.

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, incur a miscellaneous charge, etc., 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 accounts. Here's an example:

Description	Account Type	Debit	Credit	
Membership Dues	Income		\$40.00	
Club T-shirt	Income		\$12.00	
Donation	Income		\$5.00	
Accounts Receivable	Current Asset	\$57.00		
User Transactions				

The example membership sign-up transaction actually represents revenue in three different 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 accounts for each type of item, 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 and set a default item to associate with the financial account.

Transferring user transactions to QuickBooks® generates credits to the appropriate item and debits 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 transfer a user transaction, an open invoice is generated for the customer.

User Credits

When users are credited either automatically if they cancel an event, or by an administrator for any reason (for example, for volunteering), they are given a User Credit.

User Credits represent a loss of revenue to the club and, more specifically, to an item. 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		
	User Credits				

When a membership credit of \$10.00 is issued, Membership Revenue 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 and item name when entering a credit.

User Credits are sent to QBO when they are issued or given to the user, not when they are used.

Example: A member receives a credit on June 5th for a canceled event but does not use that credit until August 20th. A transfer performed on June 15th would capture the credit.

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 transfer 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 transfer deleted credits since there is nothing to transfer. Instead, you need to create a transaction in QuickBooks® to reverse the deleted credit.
- Waived by the user. We transfer this as a reversal of the transaction above, crediting Membership Revenue and debiting Accounts Receivable. Effectively, the club recovered the "loss" of the credit.

Note: In QBO, credits are imported as Credit Memos.

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	
		•• • •	

User Payments - Bank or Undeposited Funds

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.

Transferring user payments generates Payment transactions, which credit balances in Accounts Receivable and debit balances in the appropriate bank accounts or in Undeposited Funds. The customer's open invoices are 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.)

In QuickBooks®, 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 transfer places the funds in Undeposited Funds, regardless of which option you selected on the Money Options page. When you actually make the deposit, you can generate a transaction, within QuickBooks, 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.

Example:

Description	Account Type	Debit	Credit				
Accounts Receivable	Current Asset		\$57.00				
Bad Debts / Comps	Expense	\$57.00					
Dad Debits / Comps Expense Dad Debta							

User Payments - Bad Debts

In ClubExpress, if a payment includes an applied credit, we record a deposit for the gross amount less the credit amount because it was transferred separately.

Example: Amount owed: \$57.00 Credit applied: \$10.00 – credit memo separately transferred Amount actually paid: \$47.00

Description	Account Type	Debit	Credit
Accounts Receivable (AR)	Current Asset		\$57.00
Credit Memo applied to AR	Current Asset	\$10.00	
Payment	Asset	\$47.00	

User Payments - Credit Memo

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 of the card number. 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.

Note: Transferring user payments to **QBO** usually generates Payments against Open Invoices, which will be flagged as paid for invoices created after you connected ClubExpress to QBO. The exceptions are payments made by discount coupon, Comp, Write-Off, or "Received by Subgroup", which are imported as Journal Entries. We do not link these to an invoice.

Club Transactions

When ClubExpress charges you 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			
Club Transactions						

Club Transactions

ClubExpress allows you to specify your QuickBooks® account name for each category of expense, for example: setup fees, monthly hosting fees, miscellaneous charges and credits, postage, etc. In **QBO**, club transactions are recorded as Journal Entries.

Configuration Notes

After you elect to use QBO on the Money Options page, you must spend time updating several areas of your website to include QBO account names, classes and items names. *Take care to record these names exactly as they appear in your QuickBooks® Online account.* If names are misspelled on the ClubExpress side, QBO will assume the account, item or class does not exist and will create the account, item or class for you.

It's also important to continue to refresh the data maintained by ClubExpress if you make any changes on the QBO side. This reduces the number of errors you may receive and decreases the likelihood of accounts, customers and items being created if they don't match at the time of a data transfer.

QuickBooks® Account Names

QuickBooks® account names are updated in three places within ClubExpress. Be sure that all three are correctly filled out:

- Control Panel Money Setup Bank Accounts
- Control Panel Money Setup Financial Accounts (2 grids, one for Master Accounts, and one for your organization-specific accounts)
- Control Panel Money Setup Money Options

When you are entering QuickBooks® account names into ClubExpress, be sure that the spelling is exactly the same as it is in QuickBooks®. If it's not, the system will create a new QuickBooks® account with the spelling you've used on your website 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.

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.

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. Do not create abbreviations on the ClubExpress side to fit the account name; remember, the names must match exactly.

Reports

In QBO, select the Reports button to view the QuickBooks® Item and Account Names report, showing the QBO item names that have been set up on the ClubExpress side. Make any edits necessary on either your website or in your **QBO** account to make sure the items are exactly the same in each place. Select Accounts that are Missing Required QBO Information to view a list of both Master Accounts and organization-specific accounts missing the QuickBooks® Default Item Name.

Financial Accounts

For financial accounts, you will need to add **Account Names** for both the financial accounts you've created as well as the master financial accounts. Each financial account will also ask for a QuickBooks® Default Item Name. The Default Item Name is used when a QuickBooks® Item Name is not defined at either the item or transaction level. For example, when setting up a Donation fund, you select the financial account (which already has a Default Item Name associated with it), and you can optionally add a specific QuickBooks® Item Name to the donation fund. If you skip this field when creating the fund, we will use the Default Item Name.

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 the ClubExpress Money Options Page and QuickBooks®, to ensure that imported transactions and payments are linked to the correct customer records.

If you have made changes to customer names on your ClubExpress website, the CE=>QBO transfer will update customer names, company name, address, phone numbers, website, and email address for each customer that had activity in the transfer period.

Note: If you make changes to names on the QBO side, those changes will not affect your ClubExpress database.

QBO Items and Services

In QBO, everything that can be "sold" to a customer is defined as either a product or a service. You have the option to define each transaction item as either, and ClubExpress will use your definitions. ClubExpress

refers to these products or services as items.

Example: You might define an event registration as a Service whereas an E-Commerce Storefront purchase would be a product.

For each type of transaction, ClubExpress gives you a place to define the QuickBooks® Item Name, and this can be a Product or Service. When the import takes place, we will match on the name itself.

If you enter an item name at the transaction level and it does not exactly match any of the products or services you have defined in QuickBooks the QuickBooks® Item Name, the system will create a new product or service within QBO and you will need to manually correct it there.

Note: If you disable then enable an Item on the QBO side, you will need to perform a QBO=>CE data transfer again to match the new ID.

QuickBooks® Classes

ClubExpress will transfer class information if you are using QuickBooks® classes. Classes are used to categorize income and expenses in different ways.

In ClubExpress, check "Enable class tracking" on the Control Panel – Money 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 transferred 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 transfer a class value for Accounts Receivable. The reason is that a user transaction or user credit might affect multiple 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 afterward.

Sales Tax

If QuickBooks® calculates Sales Tax, be sure to check the box "QBO calculates Sales Tax - Do not transfer tax". This ensures sales tax is not recorded twice. If the box is not checked and your organization calculates tax within ClubExpress, we will transfer sales tax with each transaction that is sent to QBO.

Product Quantities and Cost Per Product

ClubExpress does not currently transfer QuickBooks® products (such as, in the Storefront.) The reason is that QuickBooks® does not provide a way to update just selected fields in a product record. If we provided such a transfer and you then imported it into QuickBooks®, you would find that much of the data that QuickBooks® stores for each product would be lost because we do not have corresponding information in ClubExpress.

Export Customer Names

An undocumented option in ClubExpress allows the system to export customers using the company/organization name instead of the individual member name. **Contact us to enable this option**.

Discount Coupons

Control Panel > Money > Admin Functions

ClubExpress allows you to create discount coupons for memberships, events, storefront purchases, etc. (but not donations!) These coupons can then be distributed to members and the public as appropriate, encouraging them to sign up for club or association memberships or activities for a reduced fee. When you select this option, you will see a screen similar to the following:

Home > Control Panel > Disco	unt Coupon	Admin					
Discount Coup	oon A	dmi	n				
Specify filter parameters and click the "Search" button to display matching discount coupons, or select an administrative option from the buttons on the right.							
Category	< All Cate	gories > >	0			-	
Usage <	< Any Usa	ge > >	0		A	Add Discount Cou	pon
Status	< Any Stat	tus > >					
Coupon Code							
Include Archived Coupons			Se	arch 🔗			
Search Results							
Name	Status	Value	# codes X uses	# Used	Archived	Maintain 📑	
Discount Cruise	Closed	\$5.00	1 X no limit	0	No	Ø 🖪	
2017 Conference	Closed	\$85.00	3 X once each	0	No	🤌 🔝 🔳	
Assistant Teacher 3s to 6th grade	Closed	\$275.00	1 X no limit	0	No	Ø 🗈	
Big Band Concert	Closed	\$10.00	100 X once each	0	No	🤌 🖪 📖	

A search panel at the top allows you to filter coupon programs by category, usage, status, code and archived status.

Click the **Categories** button to add or update coupon categories (for example, "Membership promotions"). You will see a standard ClubExpress admin screen, with an **Add Category** button, as well as Edit and Delete icons.

The grid shows coupons already defined. Each coupon has a descriptive name and a status, one of the following values:

- Pending still being defined; will not be accepted
- Published valid coupons will be accepted
- Closed these coupons will no longer be accepted

Value is either a percentage or a fixed dollar amount.

If you have enabled Gift Discount Coupons, a third option "For Gifting" is available (see Gift Discount Coupons). Select this option to designate the coupon for purchase by members as a gifted discount coupon.

Note: Gift Discount Coupons can only be issued as a dollar amount, not as a percentage.

The "Codes and Uses" column describes the coupon, from one of three options:

- A single code that can be used unlimited times
- A single code that can be used a fixed number of times
- Multiple unique codes that can each only be used once

The **Archived** column tells you whether that coupon has been archived. Once coupons are no longer being used, you can archive them to keep the list manageable.

Click the **Add Discount Coupon** button to create a new coupon program. You will see a screen similar to the following:

Money

Add/Edit Disco	ount Coupon	ଡ⊗⊗
General Info		
Name		
Category	< Select Category > V	
Activation Date	•	
Expiration Date	Leave exp. date blank to create a coupon that does not expire.	
Status	Pending •	
Financial Account	< Select Account > •	
Archived?		
- Value		
	Dollar Amount Percentage Amount For Gifting \$ •	
_ Usage		
	< Select Usage > • •	
Coupon Type	 Single Code, Multiple Use Coupon Code The coupon code must be unique Unlimited Usage 	
	C Limited To Uses	
	Nultiple Code, Single Use	
	Save 🖌 Cancel 🗶	

Begin by specifying the coupon (campaign) name and category. Coupons have an activation date before which they are not yet available, and optionally, an expiration date after which they will no longer be accepted. If you leave the expiration date blank, the coupon is valid until it's manually closed (or, for limited use coupons, all available codes have been used.)

Next, specify the value, either a percentage or a fixed dollar amount. In the Usage section, specify who can use the coupon and the type of transaction it applies to:

- Any charge (except donations.) Be careful with this one!
- New memberships only
- Renewals only

- A new membership or renewal
- Event registration
- Storefront purchase

For event registrations and storefront purchases, you also have the option to limit the coupon to a specific event or a specific item being purchased.

Next specify the Coupon Type. As noted above, there are three basic types:

- A single code that can be used unlimited times. You will specify the complete coupon code (for example, "CycleWithUs")
- A single code that can be used a fixed number of times (for example, 50.) The system will track usage and once the limit is reached, the coupon can no longer be used. Again, you will specify the complete coupons code.
- Multiple unique codes that can each be used only once. You will specify a prefix (for example, "CYCLE") and the number of codes to generate. The system will generate that number of unique coupon codes with that prefix and a dash (for example, "CYCLE-91774"). These codes can be retrieved on the main admin screen.

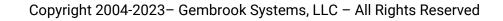
Click **Save** to save your new coupon, or **Cancel** to return without saving. If your coupon status is "Published", it is immediately active. If the status is "Pending", then the coupon is still being defined and will not be accepted.

Maintain Options

The following options are available in the Maintain column:

lcon	Description
(Edit)	Edit this discount coupon.
(Reports)	Run Reports on discount coupon usage. This option is only available for Published and Closed coupons.
(Delete)	Delete this coupon. This option is only available if the coupon status is still Pending.
(Codes)	For "Multiple Code, Single Use" coupons, the Codes icon allows you to view the list of valid codes.

Maintain Options



Highlight the table of codes and copy it to the clipboard. You can then paste it into Excel. From there, you can design an actual coupon in Word, InDesign, or a similar program, then use the mail merge features to add the actual coupon code to each coupon. Once they are printed and trimmed, you will have multiple single use coupons for distribution however you see fit.

If a coupon has not been used, it can be deleted. Once a coupon has been published and has started to be used, it can no longer be deleted, and the **Edit** option is significantly constrained:

- A published coupon can be closed early.
- A closed coupon can be republished.
- The Expiration date can be changed.
- For a Single Code Multiple Use coupon, the number of uses can be increased.
- The financial account can be changed.

Coupon Usage

Coupons are applied on the Payments page. If there are published coupons, users will see a field to enter their coupon code:

Total Selected For Payment	\$ 50.00
Have a coupon? Enter the code: Apply	у

Once the code has been entered, the screen changes as follows:

Total Selected For Payment	\$ 50.00
Any event Coupon Applied	\$ 5.00
Net Payment	\$ 45.00

Coupons and available credits can be used together. A credit will always be applied; the user has the option of entering a coupon. A coupon can only be used once for each payment, and if partial payments are being used, once for each underlying transaction.

If a coupon was applied, it will be shown on the receipt and in the payment history.

QuickBooks: It is also shown on Payment reports, and included in the Payment Exports for QuickBooks®users.

When a member has more than one pending transaction, a general-purpose discount coupon can only be used against one transaction at a time. If the value of the coupon is greater than the value of the checked transaction, the coupon will be flagged as partly used and the balance is available to use against another pending transaction for the same member.

Archiving Coupons

Use the **Archive** option on the Add/Edit Discount Coupon screen to archive a coupon that's no longer being used. This will help to keep the admin grid short and manageable.

The main search panel allows you to view archived coupons if you need to reset one of them.

Emailing Discount Coupons

Use this screen to send gift codes.

- Specify the email address.
- Type a personal message to the gift recipient.
- Click the Send Email button to send the code or the Cancel button to cancel.

Gift Discount Coupons

Financial/Historical Data

Transaction History Payment/Credit History Credit Card Event History Optional Additional Charges Donation History Reservation History Volunteering Gift/Membership Coupons

In the member profile, click Gift/Membership Coupons

Create Gift Discount Coupons

Home Member Profile Gift Discounts Gift Discounts This page shows you the Gift Coupons that icon in that coupon's row to go to the Payme maintenance page for that code. When you Add Gift Coupon Gift Coupons found	ent page to compl	ete the transaction	and generate coupo	n codes. Once	you have	paid for a c	ou have not yet paic oupon, you can clic	for a coupon, click the Pay the Codes icon to go to the
Name	Coupon Prefix	Date Purchased	Coupon Value (\$)	# Purchased	# Used	Status	Maintain 💼	
Event Gift Fly In MS6	MyGift-MS6	3/20/2020	\$50.00	1	0	Published	III 🙀	
Event Gift Fly In MS5	MyGift-MS5	1/28/2020	\$50.00	1	0	Published		
Event Gift Fly In MS4	MyGift-MS4	1/9/2020	\$10.00	5	0	Published	IIII 違	
Test coupon MS0	ABC-MS0	1/8/2020	\$15.00	2	0	Published		
Demonstrator Discount Flight Boot Camp MS2	DFBC-MS2	6/25/2019	\$10.00	2	0	Closed		
Test Gift Discount MS0	NWB-MS0	5/30/2019	\$25.00	5	0	Pending	S 🗊	
Referral New Membership Gift Discount MS2	REF19-MS2	4/22/2019	\$20.00	1	0	Published	III 違	
	REF19-MS0	4/16/2019	\$10.00	2	0	Published		
Referral New Membership Gift Discount MS0						Pending		

In the grid listing your gift coupons:

Click the Make Payment link to pay for gift coupons.

Click the Codes link to see the gift discount codes.

nt Gift F	ly In I	MS5						e	8	×
his is the list of a ursor to the left o ress [Ctrl-c] to co	of the first (code, holdii	ng the shift ke	count Coup ey down an	oon. Highlight all d then clicking ye	he codes our cursor	in the code to the right	e list by click of the last c	ing your code.	
le	Sent To	Status	Date Used	Used By	Maintain 📑					
/Gift-MS5-587406		Available								
				•						
				Don	e					

Email Gift Codes

EMail Gift C	ode 🛛 🖓 😵 🔇
	address for your discount code recipient. When you do this and click "Send Email", the an email to the recipient with the code and instructions on how to redeem it. Click "Cancel" to a dmin screen.
Email Address	•
Personal Message	0 of 500 characters used Your message will be included in the email that is sent to the email address you specified.
	Send Email 🖋 Cancel 🗶

Click the Send/Resend Email link to email the gift code to someone.

Click the Done button to exit the screen.

Add Gift Discount Coupon

Select a coupon.

Specify the number of codes to be generated.

Specify the coupon dollar value.

Click the Save button to save your changes or the Cancel button to exit without saving.

ClubExpress Charges

Control Panel > Money > Setup

Note: This option only appears for clubs and associations outside the US.

Select this option to see the following screen:

Home > Control Panel > ClubExpress Payments ClubExpress Charges					
Lists payments made to ClubExpress by credit card. Displays payments made in the current quarter by default. Modify the date range and click 'Search' to see a different list. NOTE: This list does not include credit card payments made before this new system was implemented, in May 2018					
Select Date Range Time Period: This Year C Search 5					
Return to Previous Page					

Specify a Time Period from the drop-down list and click the **Search** button to see a list of charges applied to the saved credit card. Note that this feature was added in May, 2018, so only charges posted from May 31st, 2018 onwards will be displayed.

Bank Accounts

Control Panel > Money > Setup

Clicking this choice displays the following screen:

Bank Acco	unts			0		
				s collected from members. One of these accounts must be designated as the primary account. count. The primary account may not be deleted.		
Add Bank Account						
Show closed bank accounts						
Account Name	QuickBooks Account Name	Status	Maintain 👖			
CE Yacht Club Bank Account	Main Bank Account	Active	0 🛛			
New CE Banking Acccount (Primary)	QBO	Active	Ø			

Money

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, verification is required using either a voided/cancelled check or a bank statement, which you upload. ClubExpress will verify the account and send an email to your Treasurer once it has been verified.

Also, whenever a bank account is added or modified, the system will send an email to the designated club President, Treasurer, and the user who made the change (if they are not the President or Treasurer) describing the change. This email protects the club against a malicious action by an administrator or coordinator with access to the Bank Account Administration screen. The same email is also sent to ClubExpress and retained by us as a record of all bank account changes. In order to activate your bank account, you must provide documentation to verify the account (a voided/cancelled check or a bank statement). If you did not upload the document when you added or changed the bank account information, you will be prompted to do so in the confirmation email you receive.

Accounts have various status codes and options in the Maintain column:

- Active This bank account can be used for transactions on your website.
- New A newly added bank account that can be used for transactions.
- Changed An existing account which requires documentation to activate.
- Closed This account is not active and cannot be used for any transactions.

lcon	Description
(Edit)	Active indicates an account that can be used for transactions. Click the Edit icon to modify the account, which changes its status to Changed .
(Close)	Close an active bank account.
(Reactiv- ate)	Closed indicates an existing account that is no longer in use. Click Re-Activate to reactivate the account.

Maintain Options

Click the Add Bank Account button to add a new account. The following screen is displayed:

Bank Information
Enter the details of your bank and account. When an account is added or updated, the new information will need to be verified by ClubExpress.
Descriptive Name Event Bank Account
QuickBooks® Acco
Name on Account NWBC
Bank Name Local Bank
Make Primary
Changes to any of the following requires verification by ClubExpress
Routing Number 062000019 • How do I find this?
Account Number
Account Type O Checking O Savings
Account Class 🔘 Business 🔘 Personal 🔎
Select File Select
NOTE: When adding or editing a bank account, please include a scan or an image of a voided/cancelled check, so ClubExpress can verify the account. This uploaded file will be deleted once your bank account information has been verified.
Save 🖌 Cancel 🗶

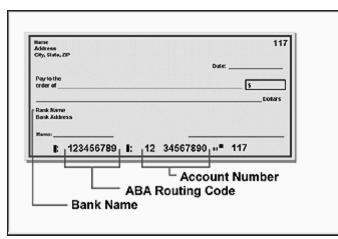
This screen gives us at ClubExpress the information we need to verify your account. The following information is required:

- Descriptive Name is your internal name for this account. It's used within ClubExpress only to distinguish one account from another.
- The name on the account
- Bank name
- Bank routing number
- Account number
- 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.
- · A voided or cancelled check, or bank statement

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.

Money

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.



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 **Save** link, to save your new account or changes.

<u>Close</u>

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 PDF uploads (a bank statement or canceled check) that must be verified before the account can be used.

Bank Accounts for Subgroups

Subgroups: If your club or association has subgroups with their own bank accounts and you want to distribute funds into these accounts, use the above screen to define these bank accounts. Then, the Financial Accounts screen is used to link a bank account to one or more subgroups. See "Financial Accounts" below

Financial Accounts

Control Panel > Money > Setup

When you select this option, a screen similar to the following is displayed:

Club Accounts				
			All should all should all should be an	
Americana Americana Distant Instantion	a here d	Add Assessed		
-	Annual Annual Annual	-	Balatinets Association	Acres 10
ten Herbeterie ber			Antoleon Association Alarci Periority Con	100
-	Access of Autom			
fere Harofanterio Sar	Annual Cale	Nate Percentular	Alexidentesialles	10

Master Accou	nts		
Click Edit to update the Qu	ickbooks A	ccount Name and Account Class	s for the correspon
Name	Туре	QuickBooks Account Name	Maintain 📑
Master Membership Dues	Income	Membership	Ø
Master Event Registrations	Income	Event Registrations	Ø
Master Donations	Income	Donations	Ø

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.) And for clubs that enable QuickBooks® integration, they allow you to link financial transactions to QuickBooks® accounts.

The Search panel allows you to filter the list by account name (anywhere in field) and whether or not to include archived financial accounts.

Select Add Account to see the following screen:

Add/Edit Financial A	@ & Ø	
This screen allows you to add cus	tom financial accounts for use in reporting.	
Name] •
Account Number		
Account Type	< Select > V	
Bank Account	< Use Primary Account > V	
QuickBooks® Account Name		•
QuickBooks® Account Class	•	
QuickBooks® Default Item Name		•
	Used when this account is used if a QB Item Name is not d use; for example if this account is used for a Member Type, Product	
	Save 🖌 Cancel 🗙	

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. Note that the bank account option does not appear for clubs and associations outside the US.

QuickBooks: If QuickBooks® integration is enabled, QuickBooks® account names will be shown in the list of financial accounts. You will also be asked to specify the QuickBooks® account name (and also the class name if QuickBooks® Classes are enabled.) The spelling of each name must be identical to

its spelling in QuickBooks® (excluding account numbers.) The QuickBooks® Default Item Name will be used when the financial account is selected for an item on your website (for example, an event) but no QuickBooks® Item Name for that item is entered.

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.

When a financial account is no longer needed, check the Archive Account option. It will no longer be shown in the grid (unless the "Include..." box is checked) and it will not appear in drop-down lists to select a financial account.

Click **Save** to save your changes and close the dialog, or **Cancel** to close without saving. Click the standard **Edit** icon to edit information on an existing financial account. The **Delete** icon is only available if the financial account is not in use.

Subgroups: For a multi-tier organization, you should define a financial account for each chapter, district, and region. This allows you to flow membership dues, event registrations and donations into separate bank accounts for each subgroup. But even if you don't have separate bank accounts, having separate financial accounts is useful for reporting purposes, to see how much revenue is generated for each subgroup.

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:

Add/Edit Financial Account	8			
This screen allows you to add a Quickbooks Name and, optionally, Account Class to be used when you run the QuickBooks export.	nt			
Account Name ClubExpress Processing Fees				
QuickBooks Account Name QB CE Processing				
Save 🖌 Cancel 🗶				

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.

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.

How Financial Accounts Are Used

Think of financial accounts as the glue that links different kinds of charges to one or more bank accounts. But they can also be used for reporting and analysis purposes, even if every financial account links to the same bank account.

- When you define Member Types, one of the options is the financial account into which basic membership dues should flow. Use this option to track total dues for each member type.
- When you define subgroups, one of the options is the financial account into which the subgroup portion of membership dues should flow. This option is used if your club or association charges dues at the chapter, district and/or region level.
- When you define optional additional charges, you have each charge aggregate into its own financial account.
- When you define an event, you can specify a financial account for that event into which registration fees will flow.
- When you define a donation fund, you can specify a financial account.
- When you define a product in the Storefront module, you can specify the financial account to track sales of that product.
- When you create a misc. charge or credit, you can specify the financial account into which that charge or credit will be aggregated.

ClubExpress Rates

Control Panel > Money > Setup

Clicking this choice displays the following screen:

	s Rat	es			(
Monthly Fee	25				
Fees charged by ClubE	Express each	month.			
ltem	Fee (US\$)	Notes			
Primary Membership Rate	0.40	(per member, per month)			
Sec. Membership Rate	0.20	(per member, per month)			
Minimum Monthly Fee	24.00				
Non-Member Rate	0.02	(per non-member, per mon See non-member cleanu			
	redit card pro	cessor. These fees are pass		vithod markup.	
Visa	0.20	2.9900 %	Yes		
Master Card	0.20	2.9900 %	Yes		
American Express	0.20	3.3000 %	Yes		
Misc. Proces	ssing	Looc			
Additional face charges					
Additional fees charged	d by ClubExp	ress.			
tem	d by ClubEx Fee (US\$)	ress. Notes	sasisfaans wiik sattiis	an an uar shik wali bafan uar anakashin felisisan	
tem nitial Setup Fee	d by ClubExp Fee (US\$) 150.00	ress. Notes One-time charge, covering :		ng up your chib and loading your membership ditabase. ees	
tem nitial Setup Fee Check Processing Fee	d by ClubExp Fee (US\$) 150.00 0.80	ress. Notes One-time charge, covering i For checks handled and dej A chargeback is a credit car	posited by ClubExpre Id transaction which is In their credit card state	ess is canceled by the user after being processed by the system. This hybrially happens when the user does not lement. This fee is charged to us by the creatil card processor, and is not refunded even if the user approves	
tem Initial Setup Fee Check Processing Fee Credit Card Chargeback	d by ClubExp Fee (US\$) 150.00 0.80	ress. Notes One-lime charge, covering For checks handled and de A chargeback is a credit car arceognice "ClubExpress" on and reinstales the charge. T	posited by ClubExpre rd transaction which is their credit card statu This fee is passed thro	ess is canceled by the user after being processed by the system. This hybrially happens when the user does not lement. This fee is charged to us by the creatil card processor, and is not refunded even if the user approves	
tem nitial Setup Fee Check Processing Fee Credit Card Chargeback Malings	Fee (US\$) 150.00 0.80 15.00	ress. Notes One-time charge, covering For checks handled and de A chargeback is a credit ca recognice "ClubExpress" on and reinstates the charge. T Built-in mailings, such as pr	posited by ClubExpre d transaction which is their credit card state This fee is passed thro inted renewal notices ig and/or producing pl	ess es cancilled by the user after being processed by the system. This typically happens when the user does not lement. This fee is charged to us by the creat card processor, and is not refunded even if the user approves rough at cost.	
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tern Itial Selup Fee Check Processing Fee Credit Card Chargeback Alalings .ogistics Fees Sank Fees Icon-Member Technology	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-time charge, covering For checks handled and dep A chargeback is a credit car recognice "ChubExpress" or and reinstates the charge. T Builti-mailings, such as pr Logistics fees cover handlin Other items will be quoted When an ACH fails, the ban This is the fee we charge t	posited by ClubExpre d transaction which is their credit card state This fee is passed thro inted renewal notices g and/or producing pl in request. k charges us this fee	ess is canceled by the user after being processed by the system. This typically happens when the user does not is cancelled by the creatificate processor, and is not refunded even if the user approves rough at cost. s, are charged at postage plus 4fc. charged at postage plus 4fc. charged at postage plus 4fc. endure approves in the creatificate processor, and is not refunded even if the user approves south at cost. endure approves the creatificate processor, and is not refunded even if the user approves to up at cost. endure pass it through to you. (This apples to customers with a US bank account only.) end we pass it through to you. (This apples to customers with a US bank account only.) end we pass at payment online by creatificated.	
tern Itial Selup Fee Check Processing Fee Credit Card Chargeback Alalings .ogistics Fees Sank Fees Icon-Member Technology	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-lime charge, covering : For checks handled and dej recognice "ClubExpress" or and reinstates the charge. T Buil-lin mailings, such as pri Logistics fees cover handling Umer Hens will be quoted When an ACH fails, the ban This is the fee we charge t Payment	posited by ClubExpre of transaction which ite their credit card state this fee is passed thro this denemal notices g and/or producing pl inted nenemal notices g and/or producing pl inted nenemal notices the charges us this fee to non-members where	ess is cancelled by the user after being processed by the system. This hysically happens when the user does not import This tes is charged to us by the credit card processor, and is not retunded even if the user approves torugh at cost. s, are charged at postage plus 40c. thysical materials (such as membership cands, newsletters, etc.) which you have contracted to ClubExpress. and we pass it through to you. (This applies to customers with a US bank account only.) in they make a payment online by credit cand. Fee	
tern Itial Selup Fee Check Processing Fee Credit Card Chargeback Alalings .ogistics Fees Sank Fees Icon-Member Technology	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-time charge, covering : For checks handled and dep A chargeback is a credit car recognice "OubExpress" or and reinstates the charge. T Built-In mains, such arg. Other items will be quoted of When an ACH fails, the ban This is the fee we charge t Payment Up to \$10.00	posiled by ClukExpre of hansection which is in their credit card stati- this fee is passed thro- inted renewal notices g and/or producing pl inted renewal notices g and/or producing pl inted renewal notices to charges us this fee to non-members when 0	ess is cancelled by the user after being processed by the system. This hysically happens when the user does not entern. This tee is charged to us by the credit card processor, and is not refunded even if the user approves using at cost. s, are charged at postage plus 4/c. thysical materials (such as membership cards, newsletters, etc.) which you have contracted to ClubExpress. and we pass it through to you. (This applies to customers with a US bank account only.) an they make a payment online by credit card. Fee S 1.00	
tern Itial Selup Fee Check Processing Fee Credit Card Chargeback Alalings .ogistics Fees Sank Fees Icon-Member Technology	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-line charge, covering For checks handled and de A chargeback is a credit car recognice "CubExpress" on and reinstates the charge. T Buit-lin mailings, such as pr Logistics fees cover handlin Other items will be quoted of When an ACH fails, the ban This is the fee we charge t Payment Up to \$10.00 \$10.01 to \$1	posited by ClubExpre of transaction which is their credit cat addition their credit cat addition This fee is passed thre inted renewal notices og and/or producing pl inted renewal notices of a contract of the second second the charges us this fee of the second second second second the second second second second the second second second second second second the second second second second second second the second second second second second second second the second second second second second second second second the second second second second second second second second second second the second second second second second second second second second second the second secon	ess acceled by the user after being processed by the system. This typically happens when the user does not terment. This fee is charged to us by the creatic card processor, and is not refunded even if the user approves rough at cost. as are charged all postage plus 40c. The harged all postage plus 40c. The harged all postage plus 40c. The processor and is not refunded even if the user does not and we pass it through to you. (This apples to customers with a US bank account only.) In they make a payment online by credit cand. Fee \$ 100 \$ 2.00	
Initial Setup Fee Check Processing Fee Credit Card Chargeback Mailings Logistics Fees Bank Fees Non-Member Technology	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-lime charge, covering, For checks handled and de A chargeback is a credit car recognize "ClubExpress" on and reinstales the charge. T Built-im mailings, such as pr Logistics fees cover handlin Other items will be quoted o When an ACH fails, the ban This is the fee we charge t Payment Up to \$ 10.00 \$ 0.01 to \$; \$ 50.01 to \$;	posited by ClukExpre dr hansection which is their credit cat advices their credit cat advices This fee is passed thri his dre is passed thri his dre is passed thri an request. It charges us this fee the charges us this fee to non-members where to 50 00 250 00	ess is cancelled by the user after being processed by the system. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item. This typically happens when the user does not item to the soft and to soft and to soft and to soft and the observation of the user does not item. This typically happens is through to you. (This applies to customers with a US bank account only.) or item make a payment online by credit card. Fee for the soft and the	
Additional fees chargee Item Check Processing Fee Check Processing Fee Credit Card Chargeback Malings Logistics Fees Bank Fees Non-Member Technology Convenience Fee	d by ClubExp Fee (US\$) 150.00 0.80 15.00 TBD	ress. Notes One-line charge, covering For checks handled and de A chargeback is a credit car recognice "CubExpress" on and reinstates the charge. T Buit-lin mailings, such as pr Logistics fees cover handlin Other items will be quoted of When an ACH fails, the ban This is the fee we charge t Payment Up to \$10.00 \$10.01 to \$1	posited by CludExpre of transaction which is their credit card statist his fee is passed thr this fee is passed thr this fee is passed thr the granulation of the second of the second second second second of the second s	ess acceled by the user after being processed by the system. This typically happens when the user does not terment. This fee is charged to us by the creatic card processor, and is not refunded even if the user approves rough at cost. as are charged all postage plus 40c. The harged all postage plus 40c. The harged all postage plus 40c. The processor and is not refunded even if the user does not and we pass it through to you. (This apples to customers with a US bank account only.) In they make a payment online by credit cand. Fee \$ 100 \$ 2.00	

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.

Note: The rates shown on the above screen may not be current. Please check the actual screen on your site for the most up-to-date information for your club or association.

Sales Tax Rates

Control Panel > Money > Setup

ClubExpress fully supports applying different kinds of government taxes to transactions placed through the website. In the US, this is generally "Sales Tax"; in other countries, it may be "GST", "VAT" or something else entirely; we use the correct term based on the country where your club or association is based. When you select this option, you will see a screen similar to the following:

Home > Control Panel > Tax Rate Add/Edit			
Sales Ta	ales Tax Rates		
Specify the Sale	e Tay r	ates to be	applied to tra
		100 10 00	
Add Sales Tax R	late		
Name	Rate	Active	Maintain
Clothing	7.00%	Yes	🧷 🙀
Everything Else	3.50%	Yes	V 🙀
None	0.00%	Yes	🤌 🙀

Each rate has a name, percentage and status. Click Add Sales Tax Rate to see the following screen:

id/Edi	t Sales Tax Rate	68
Add or edit return to the	the tax rate name and rate. Click "In "Tax Pate list screen.	ever or "Cancel" 5
Name	Claring	•
Rate	780 % •	
Activo	0	

Specify the information requested and click **Save**, or click **Cancel** to close the dialog without saving.

Tax rates are handled slightly differently in the US vs other countries. In the US, Sales Tax is added to the listed price as a separate and visible item. In other countries, GST or VAT are included in a listed price, so they are not visible to members and non-members within ClubExpress. Special tax reports have been added to the Member / User Transactions report group to show tax collections.

Collecting and Processing Payments

Control Panel > Money > Setup

ClubExpress gives you several options for collecting payments on your website. Clubs and associations can use our built-in merchant account provided by Stripe, or have their own merchant account. If you have your own merchant account, instead of the funds flowing through us, the funds flow directly to your bank account.

In addition to being able to process check and cash payments, you can use:

- "Using the built-in merchant account" on the next page
- "Using Your Own Stripe Account" on page 477
- "Using Authorize.net" on page 479
- "Using PayPal" on page 482

Using the built-in merchant account

If you do not have your own merchant account you can apply to use the built-in ClubExpress merchant account provided by Stripe. (Note this option is for customers using the built-in Stripe account, as opposed to using their own Stripe account). The ClubExpress merchant account is available to non-profit organizations in the United States only, and can only be used if none of the following apply:

- If you are a membership-based business rather than a non-profit club or association.
- If your club has a restaurant or bar facility and you need to process member "tabs" (food or drink charges) through your ClubExpress website.
- If you need to regularly process large transactions (for example, over \$1500).
- If state law prohibits your organization (such as a large public university) from giving us access to a bank account to deposit collected funds and collect the merchant processing fees.
- If your club is located outside the US. ClubExpress supports Stripe as a payment gateway for clubs based in Canada, Australia, the UK and Europe. Our recommended payment gateway is Stripe, how-ever we can provide support for Authorize.net.

Note: If you do not qualify to use the built-in ClubExpress merchant account but need to process credit card payments on your website, see instructions on using Stripe or Authorize.net below.

Charges appear on user statements using a shortened version of your organization name, and the funds flow into our bank account. Three (3) times per month (the 10th, 20th, and last day of the month), we transfer the net amount of each charge directly into your bank account - the charge, minus the credit card processing fee and the non-member convenience fee, if paid by your club (more on that below). The cut-off for funds remitted during that time period includes a three-day lag to allow the bank to verify and receive the funds. For example, funds remitted on January 10 include all payments received through your website from January 1 - January 7.

If non-members pay using a credit card on your site (for an event, donation, etc.), we will add a small pertransaction fee to the charge (the "Non-Member Technology Convenience Fee"). This fee is never charged to members and not charged to non-members who pay by other means (cash or a check). The fee is also never charged if you are using your own merchant account.

Note: The built-in merchant account is provided as a courtesy to clubs. However, ClubExpress carries all the credit card risk for this account and we need to carefully manage risk as well as transaction volume/size in order to keep fees and reserves as low as possible.

The default limit for an individual credit card payment is \$500. For the vast majority of our customers, this will never be an issue. We know that some clubs do have memberships and events that cost more than this limit. In special circumstances and for long-time customers with a proven track record, we will consider raising this limit on request and on a case-by-case basis.

Please note that this change does not stop a club from recording memberships, event registrations, or

donations that are larger than the limit; however, as long as the club is using the ClubExpress merchant account, these transactions can only be paid by check or cash, not by credit card. And don't forget that ClubExpress fully supports clubs and associations having their own merchant account. With your own merchant account, all limits are removed because risk is moved from ClubExpress over to the club. So for organizations that need the ability to process large transactions by credit card, the best option is to set up your own merchant account. We can help you do this, via a partnership with our merchant processor. For more information, see this page on our website: http://www.clubexpress.com/merchantaccount

Credit card processors and the card brands are toughening up their risk management policies. This means that all ClubExpress customers who use the ClubExpress credit card account will need pass a background check and supply a tax id (FEIN). You will be receiving IRS Form 1099 each year for all funds collected though the credit card account.

Rates

Transaction Type	Rate
Visa, MasterCard and Discover	2.99% + \$0.20
American Express (contact us to disable)	3.30% + \$0.20
Chargebacks	\$15.00

ClubExpress Merchant Account Processing Fees

Transaction Amount	Fee
Up to \$10.00	\$1.00
\$10.01 - \$50.00	\$2.00
\$50.01 - \$250.00	\$3.00
\$250.01 - \$500.00	\$4.00
\$500.01 and Higher	\$5.00

Non-Member Technology Convenience Fee

How to Apply

Navigate to Control Panel > Money > Setup > Money Options to begin your merchant account application. Select Start Application to navigate to the application screen.

Credit Card Merchant Account			
If you wish to change or remove your merchant account, please contact ClubExpress support.			
Status: No Active Merchant Account			
ClubExpress Account Info			
Click the button to start the application process.			
Start Application			

In order to submit an application to our merchant processor, we need basic information about your club or association. We will pick up this information from other screens but you can edit it on this screen if you want to submit something other than your standard contact information.

Note: Editing information displayed on this screen changes the information for the application only and does not save to your club record.

	mation for clu	ibs and associa	tions wishin	g to process credit cards using the ClubExpres
o help the gove nd Stripe to obt formation colle erifications. Wh erified, Stripe w ne Stripe terms	ount (provided rrnment fight the tain, verify, and r cted below will b en you click the rill prompt you fo	by Stripe). funding of terrori ecord information be forwarded to S Submit button, you or the necessary of lick 'Submit' to be	sm and money n that identifies tripe so that th ou will be redir changes. Once	y laundering activities, federal law requires ClubExpress syour organization and a responsible leader. The tey can perform the required background checks and rected to Stripe. If anything is missing or cannot be the required information is complete, you can review ation process and return to this page. You will be
- Please	e check this t	oox to acknov	vledge that	you have read the above
			Con me - the interior	heck as described.
n <mark>en</mark> ts will appear	on credit card sta	tements as: newte	est	
x Info				
Tax ID (FEIN)		equired to use the	ClubExpress r	nerchant account
Tax Filing Name		required to use the	OEdbExproso (•
	Please be sure that			record exactly. This may or may not be the same as the legeleays in account approval, and may require that you submit
				y about this, so be careful to make the match exact.
ganizatio	n Data			
•		and facility	ution and a	
				x addresses will not be accepted. If your organization address of the 'Principal' member selected below. Valid
mail address ar	d US phone nur	nber are also requ	uired.	
				oplication, and will not be saved to your account record
his address will	also be used to	send a 1099-K IR	S tax form at t	he end of the year (via mail and email).
Address	512 Elm St		۰	
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Money

The last part of the application collects the information on a "responsible party", defined as the President or Treasurer of your club or association. **All fields are required by Federal law**, including the birthday and last four digits of your Social Security Number. This information is used to defend against money laundering and the funding of terrorists.

When you submit your application, we send your application to Stripe for approval. None of your information (**except for your Tax ID**) is retained in our database. You will be redirected to Stripe and prompted to enter any missing information, or correct anything which cannot be verified. You must also agree to Stripe's Terms of Service. When you click the Submit button on the Stripe website, you will be redirected back to your website. If more information is required, we may contact you. You'll receive an email once your account is approved.

	ou're almost ready to start exploring ClubExpre	
a	moment to review and confirm your informati	ion.
31	JSINESS DETAILS	
	newtest 10	1
	newtest10.clubexpress.com	
	512 Elm St Chicago, IL 60601 US	
	Other information provided	
	EIN, DBA, Phone, Industry	
1	ANAGEMENT AND OWNERSHIP	
	Martin Smith	1
	Account representative, Director, and Executive	
	ray.novak@gmail.com	
	Born on January 6, 1988	
	123 Main St	
	Chicago, IL 60601 US	
	Other information provided	
	SSN, Job title, Phone	
	Verifying This can take up to 1 minute.	
	clicking Agree & Submit, you agree to the Connected Accou greement.	int
	Agree & Submit	

If you need to modify the address where your 1099 will be sent, or change the representative you added in your application, you can return to the Money Options page. In the Credit Card Info panel, you'll see a button to navigate to Stripe to update your information.

Using Your Own Stripe Account

For organizations that wish to use their own Stripe merchant account to process credit card payments, ClubExpress provides support for Stripe as our recommended payment processor. Before you can configure your account you must contact us to enable Stripe on your website. If you already have a Stripe account, connect your existing account by granting permission to ClubExpress to access it. If you do not have your own Stripe account you can create one.

Note: If you are currently using Authorize.net or the ClubExpress merchant account and switch to using Stripe, your existing credit card processing account will not disconnect until the Stripe connection process is complete.

Charges appear on user statements using a shortened version of your organization name which you configure during the sign-up process with Stripe.

Rates

For more information and rates, visit the Stripe website.

Transaction Type	Rate
Visa, MasterCard, American Express, Discover, Maestro, JCB, Diners Club, China Union Pay	2.9% +
(we do not currently allow Apple or Google Pay on ClubExpress sites)	\$0.30
International Cards	+1%

Stripe Processing Fees

How to Set Up Stripe

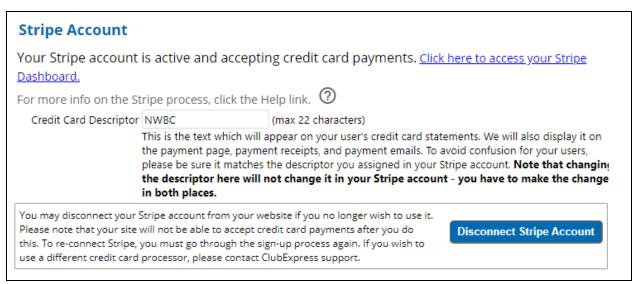
Select **Configure Stripe Account** in the Control Panel > Money > Money Options to navigate to the Stripe website. If you already have a Stripe account, log in and grant ClubExpress permission to access the account.

If you do not have a Stripe account, enter a username and password to begin the sign-up process. You will be taken to the ClubExpress/Stripe data entry form. Once you have filled out the required information you will be redirected to ClubExpress and shown the results of your Stripe Sign-up process.

- Your application was approved by Stripe. You can now process credit card payments on your website using your Stripe account.
- Your application with Stripe has not been completed, but your account has been connected to ClubExpress. If you are currently using another merchant account (either the ClubExpress merchant account or Authorize.net), credit card processing is still active on your website through the existing merchant account. If you are not currently using another merchant account you cannot process credit card payments until your Stripe account is complete. In each case, provide the appropriate information to Stripe to complete your account. Once your account is complete, we will be notified and switch your payment processor to Stripe.

Money

• An error occurs in the sign-up process. We will receive an email noting an error occurred in a new sign-up.



Once you have connected your Stripe account with ClubExpress, the Money Options page will show your **Stripe account status**, a link to your **Stripe Dashboard**, and a field to enter the **credit card descriptor** (the organization name which will appear on user statements) you assigned during the Stripe sign-up process. Enter the same descriptor you entered on the Stripe website. This information is displayed on the payment page to notify the member of what they will see on their credit card statements.

Select the Disconnect Stripe Account button to remove the link between your ClubExpress website and your Stripe account. You will no longer be able to accept credit cards on your website until you contact us to use another method. To reconnect your Stripe account, select the Configure Stripe Account button and begin the process at the start of this section to connect your account.

Note: If you disconnect from ClubExpress using your Stripe Dashboard, we receive a notification and turn off credit card processing on your website.

Using Authorize.net

For organizations that wish to use their own merchant account to process credit card payments, ClubExpress provides support for Authorize.net.

Charges appear on user statements using a shortened version of your organization name which you configure in Control Panel > Money > Setup > Money Options.

Rates

For more information and rates, visit the Authorize.net website.

Transaction Type	Rate
Visa, MasterCard, American Express, Discover	2.9% + \$0.30
Authorize.net Processing Fees	

How to Set Up Authorize.net

Configure your account in ClubExpress

Create an account on the Authorize.net website. Once you have your own account, we require three (3) pieces of information from you. The information can be found on the Authorize.net website, under **Settings** > **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.

We also require a PDF to verify your back account information (a bank statement or canceled check).

- API Login
- Transaction Key
- Name as if appears on cardholder statements (up to 22 characters). We will display this information on the payment page, so users know what to look for on credit card statements.

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

Administrators: ClubExpress does not support the "Authorize and Hold for Review" option; you may use only "Allow" or Decline".

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.

Money

We recommend the following settings id Card Code value:

- Decline N (Does NOT Match)
- Allow P (Is NOT Processed)
- Allow **S** (Should be on card, but is not indicated)
- Allow U (Issuer is not certified or has not provided encryption key)

Click **Submit** to save your changes.

AVS Settings

Administrators: ClubExpress does not support the "Authorize and Hold for Review" option; you may use only "Allow" or Decline".

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:

- Decline **B** (Transaction was submitted without a billing address)
- Decline E (AVS data provided is invalid or AVS is not allowed for the card type that was used)
- Decline **R** (The AVS system was unavailable at the time of processing)
- Allow G (The card issuing bank is of non-US origin and does not support AVS)
- Allow U (The address information for the cardholder is unavailable)
- Allow **S** (the U.S. card issuing bank does not support AVS)

In the Address and ZIP Code Responses section, we recommend the following settings:

- Decline N (None of the address components match)
- Allow A
- Allow Z
- Allow W
- Allow Y

Click **Submit** to save your changes.

Test Mode

When your account is first set up, it will be in test mode, allowing you to run tests to ensure that everything is working correctly. In test mode, it looks as though transactions are completed but in actuality, cards are not charged.

Money

When you give us the API Login and Transaction Key, and we install these for your website, we are assuming from that point forward that this is your merchant account.

So it is essential that you switch the account from Test Mode into Active Mode before providing this information to us.

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 occurs at a time that you designate; 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. You can also search by First Name and Last Name.

Once

Using PayPal

Note: The PayPal account you connect must be a business account, not a personal account. You also must be the **primary** user in order to authorize ClubExpress.

ClubExpress allows you to configure PayPal as a payment method for member and non-member transactions.

When this option is available, users will select PayPal as their payment method. They will then see a PayPal popup window to allow them to login to their PayPal account. They can then pick the source of funds (a bank account, a credit card, or even a PayPal balance.) The funds then flow into your club's or association's PayPal account. Once the transaction is complete, users are returned to your ClubExpress website and to the payment summary page.

Note: Users do NOT need a PayPal account in order to pay using PayPal. They can pay with a credit card as a "guest".

Administrators: PayPal is not available as a payment method for administrators to use to apply payments on behalf of a member. Only users can choose to make a payment using their personal PayPal account.

If your club or association has formal **non-profit status** with the IRS or your state Treasury department, be sure to let PayPal know when you create your account. Their per-transaction rates should be lower for non-profits.

How to Set Up PayPal

To setup PayPal as an available payment method, your club or association must have its own PayPal account. The setup process involves authorizing ClubExpress to allow members and non-members to initiate transfers from their PayPal accounts into your organization's PayPal account.

Navigate to the Control Panel > Money > Setup > Money Options and select **PayPal Configuration**. You will see the following screen:

Home > Control Panel > Money Options > Configure PayPal Account PayPal Account Configuration			
You do not have a PayPal account linked to your ClubExpress website.			
Click the button to create a new PayPal account, or attach an existing one to your website. This will take you to the PayPal website, where you will provide some information. You will then be sent back to this page to complete the process. Start PayPal Process			
Return to Previous Page			

Click the **Start PayPal Process** button to begin the setup process. You will be taken over to the PayPal website where you can login to an existing PayPal account or create a new one.

	Get started
	inter an email address to sign up or log in
	martin@clubexpress.com
s	United States
l	United States
	Next

Enter the **email address** linked to the PayPal account and your country. Click **Next** then enter your password on the next screen.

You will next see a screen asking if you want to connect your website to your PayPal account. Click **Agree** and connect.

If everything is in order, the next screen will confirm that you've successfully authorized your club's website on ClubExpress to use that PayPal account. Click the **Go back...** button to return to your ClubExpress website.

The PayPal Account Confirmation screen will now look as follows:

Home > Money Options > Configure PayPal Account PayPal Account Configuration
Your PayPal account is not yet linked to your ClubExpress website.
Click the button to finish connecting your PayPal account to your website and make it available to users. You may also elect to cancel the process. NOTE: If you have created a new PayPal account, you will need to log in to PayPal and configure your bank account. Activate PayPal Account Cancel PayPal Account
Return to Previous Page

Click **Activate PayPal Account** to activate PayPal as an available payment method. Click **Cancel PayPal Account** to cancel the process and remove PayPal from your website. You will be prompted to confirm this action.

When you activate PayPal, the screen will change as follows:

our	PayPal account is active and available to users on your ClubExpress website.
PayPa	al Account ID: WGVX6LKSXBSVE
	the appropriate button to deactivate, remove, or change your PayPal account. Note that changing your account repeats the process you used originally to sign our existing PayPal account will be disconected from your website, and you will be taken to the PayPal site to start the process over.
Te	mporarily Deactivate PayPal Account Remove PayPal Account Change PayPal Account

Click the **Temporarily Deactivate PayPal Account** button to leave the configuration and link in place but temporarily block this as a payment method. If you select this option, the button changes to **Reactivate...**

Click the **Remove PayPal Account** to stop accepting PayPal and remove the configuration completely. You will be prompted to confirm this operation. Once this is done, you can easily reactivate the previously-configured PayPal Account, or restart the linking process to configure a new PayPal Account.

Click the **Change PayPal Account** to start using a different account. This restarts the linking process by taking you back to the PayPal site.

How to Use PayPal

Administrators: PayPal is not available as a payment method for administrators to use to apply payments on behalf of a member. Only users can choose to make a payment using their personal PayPal account.

When PayPal has been enabled, users will see PayPal as an available option on the Pending Payment page.

Event Registration (7/24/2017 Ref # 3505) 7/18/2017 - Beer Tasting In San Diego		Due \$ 2,500.00	Pay \$ 2,500.00 🥖
Rocky Beach - Beer Tasting In San Diego	2,500.00 Transaction Total: 2,500.00		
	Total	Selected For Payment	\$ 2,500.00
	e a coupon? Enter the o	code:	
Select Payment Method PayPal		•	
	PayPal Checkout The safer, easier way to pay		

Clicking the **PayPal Checkout** button displays a popup form to login to your PayPal account:

PayPal	
Pay with PayPal	
martin@clubexpress.com	
••••••	Show
Stay logged in for faster checkout ?	
Log In	
Having trouble logging in?	
Or	
Pay with Debit or Credit Card	

Once you have logged in, you are taken to a page where you can pick the source of funds:

PayPal	፵ \$1.00 USD ∨
Hi, Dan!	
Ship to	Change >
Dan Ehrmann	
Pay with	Manage >
PayPal Balance	
Make PayPal Balance my preferred way	to pay
DPMORGAN CHASE BANK,	
NA	
VISA Visa	
+ Add a debit or credit card	

In the above example, the use as a PayPal Balance, a bank account, and a Visa credit card all configured. Select one option, then scroll down to click the **Pay Now** button at the bottom of the dialog.

The funds will be transferred and the dialog will close. You will be returned to your ClubExpress website.

PayPal will send you a receipt to show that the funds have arrived in your PayPal account.

Money Options

Control Panel > Money > Setup

When you select this option, you will see the following screens. Click on the screen sections below to learn more.

Money Opt	tions	0
		credit cards your club accepts, If your club accepts payment by check, specify whether members should send checks to , you will see further instructions about the information needed for the exports.
General		
Fiscal Year Start	January 🔻	
Charge Sales Tax?	Sales Tax will be charged for all transa	clion items where it is enabled, and the calculated total will be added to the transaction. To actually charge taxes, e of transaction. For memberships, go to the People Options page and the Additional Charges page. For other pages.
Tax Account	Master Sales Tax	T
Federal Tax ID (FEIN)	The tax id is optional - if provided, it wil	I be included on printed invoices. for your ClubExpress merchant account. Once your account is approved, it is no longer needed for that purpose.
Payment O	otions	
Credit Cards Accepted:		✓ Visa ✓ MC ✓ AmEx ✓ Discover To change your credit card acceptance options, please contact ClubExpress
Credit Card Fees		 Charge all credit card fees to the Primary Bank Account Charge credit card fees to the same Bank Account into which funds were deposited
Non-member Convenier	nce Fee:	Charge to User Charge to Club
Checks:		Mail to Club Mail to ClubExpress (an additional processing fee applies for checks mailed to ClubExpress)
Offer Discount for Cash	/Check Payment	Yes No
Discount		3 % •
Handling Credits		 Credits are used only by the member who earned them Credits are shared by all members in the same account
Notify Treasurer When	Jser Makes Payment	Ves No
Days between Schedule	ed Payment Reminders	2 Enter a number between 1 and 7. This value is used to determine how often users will get email reminders about upcoming/overdue scheduled payments for
Other Payment Options		an event.

<u>General</u>

General			
Fiscal Year Start	January 🗸		
Charge Sales Tax?	Sales Tax will be charged for all transaction		al will be added to the transaction. To actually charge taxes, you must assign a tax xdditional Charges page. For other modules, go to their respective admin pages.
Tax Account	Master Sales Tax	~	
Federal Tax ID (FEIN)	The tax id is optional - if provided, it will be		ccount is approved, it is no longer needed for that purpose.

Fiscal Year Start

Select the month when your fiscal year begins. The default is January. Fiscal year is used on some reports to categorize transactions and payments.

Charge Sales Tax and Tax Account

In the US, select whether tax should be charged at all, for transactions in your home state only, or for all transactions. In other countries where GST or VAT are charged, the only options are Yes or No.

Also specify which financial account should be used for taxes. If you have approval from your state government for tax-exempt status, you will not need to charge tax.

Tax ID

If you have a tax ID, enter it here. This field is sensitive to the country of your organization; for clubs and associations in the US, it requires 2 numbers, a hyphen, then 7 more numbers. Outside the US, you can have as many as 20 characters.

This field is optional. If provided, it will be included on printed invoices. It will also be submitted as part of your application for a merchant account.

Payment Options



Handling 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 cashmanagement 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.

Offer Discount for Cash/Check Payment

Because clubs cannot charge extra fees in many states to cover credit card fees, we have enabled a feature allowing you to instead offer a discount to members or non-members paying by cash or check. Once you enable the option, you may specify a discount rate between 1% and 4%, and up to two decimal places.

Credit Cards Accepted

This option shows which credit cards are currently accepted. Please contact ClubExpress to make changes to these settings. If your club or association is using the built-in merchant account, the fee is the same for Visa and Discover, but higher for MasterCard and higher again for Amex. We can turn Amex off for you. If your club or association has its own merchant account, you may need a separate agreement with your merchant processor to accept Amex; let us know whether to enable or disable Amex support. For more information on setting up and using a merchant account, see "Collecting and Processing Payments" on page 471.

Note: If you are using Stripe as your payment processor you will not see this section. Accepted credit cards are managed on your Stripe account.

Credit Card Fee Distribution

When members pay online by credit card, a fee is charged by the credit card company. Choose to either charge the credit card fee to your designated Primary Bank Account, or to the Bank Account where the fees were incurred. For example, to a Bank Account for a specific chapter or region, or an account specifically for event registrations.

Note: If you are not using the ClubExpress Merchant Account you will not see this section.

Non-member Convenience 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 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

Non-Member Convenience Fee

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.

Note: If you are not using the ClubExpress Merchant Account you will not see this section.

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.

Money

Notify Treasurer When User Makes Payment

Select this option to have the system send an email to the designated club Treasurer whenever a payment is recorded.

Note that for a large and/or active association, this could be a lot of emails!

Days between Scheduled Payment Reminders

Determine how often users will be reminded they have an upcoming scheduled payment, or an overdue scheduled payment for an event. This applies when a payment schedule has been configured for an event cost.

Notify members and non-members of unpaid transactions

Select "Yes" to send automatic reminder emails for unpaid transactions to both members and nonmembers. When you select "Yes" you'll be prompted to determine when the reminders start and how many days between each reminder.

Other Payment Options

Enter instructions for members and non-members paying by check, or any other payment methods you support. Any text entered into this panel will be displayed on the payment page and on invoices.

Note: If this section is left blank, no instructions will be displayed.

Refund Policy

R	efund Policy	
	Your organization should have a refund policy, which will be displayed on the payment page. ClubExpress provides a default policy which you can use as is, or you can write your own.	
C	Use ClubExpress Default Policy OWrite Your Own Policy	
	All payments are final. We do not provide refunds for membership signups and renewals, event registrations, donations, storefront purchases, or other misc, charges. Please carefully review the charge(s) checked above and be sure you know what you are paying for.	

ClubExpress allows you to specify your own refund policy, which will appear on the payment page. A default refund policy is provided. When you click **Write Your Own Policy**, a text box is displayed to enter the desired text. You can also click the **Copy Default** button to copy the default refund policy as a starting point.

<u>Stripe</u>

Stripe Account			
Your Stripe account <u>Dashboard.</u>	is active and a	accepting credit card payments. <u>Clic</u>	k here to access your Stripe
For more info on the St	tripe process, cli	ick the Help link. ②	
Credit Card Descriptor	NWBC	(max 22 characters)	
	the payment pag please be sure it	hich will appear on your user's credit card sta le, payment receipts, and payment emails. To matches the descriptor you assigned in your ere will not change it in your Stripe account	avoid confusion for your users, Stripe account. Note that changing
Please note that your site	will not be able to	m your website if you no longer wish to use it. accept credit card payments after you do ugh the sign-up process again. If you wish to	Disconnect Stripe Account

For organizations that wish to use their own merchant account to process credit card payments, ClubExpress provides support for Stripe. If you already have a Stripe account, selecting the button Configure Stripe Account will take you to the Stripe website to log in and grant ClubExpress permission to access your account. If you do not currently have a Stripe account you will be asked to create one. For more information on setting up and using Stripe, see "Collecting and Processing Payments" on page 471.

PayPal Info

PayPal Info

Your PayPal account is active and available to users on your ClubExpress website. Click the button below to modify your settings. PavPal Account ID: WGVX6LKSXBSVE

PayPal Account Configuration

ClubExpress supports PayPal as a payment method. Members and non-members with a PayPal account can pay for their memberships, event registrations, donations, etc. using their PayPal account and the funds will flow into your club's PayPal account. You can then move them into a regular bank account.

Note: Users do NOT need a PayPal account in order to pay using PayPal. They can pay with a credit card as a "guest".

This panel will display different information depending on the status of your PayPal account. In the above example, PayPal has been linked and the club's PayPal Account ID is listed on the Money Options screen.

QuickBooks® Settings

QuickBooks Settings		
✓ Enable QuickBooks Exports		
The following information is needed for your QuickBooks Exports / Qui and Financial Accounts screens.	ckBooks Online transfers to function. In addition, you must enter Acc	count Names for your bank(s) and financial accounts on the Bank Accounts
QuickBooks Type	O Desktop 💿 Online	
Use Class Tracking		
Customer:Job name format	● First Last O Last, First 🔹	
Company file is configured to use Sales Tax		
Export payments processed by ClubExpress into:	Bank Account(s) O Undeposited Funds	
Account Names		
Accounts Receivable:	Accounts Receivable] •
Bad Debt:	Bad Debts] •
Comps:	Comps] •
Undeposited Funds:	Undeposited Funds] •
Subgroup Funds:	Retained by Subgroup] •
Default Income from Items	Items] •
Default Income from Services	Services] •
Item Names		
Sales Tax	Sales Tax]
Shipping and Handling	Shipping]

QuickBooks: Check the box to enable QuickBooks® data exports. Note that there is a separate \$500 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.

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 first option is to tell the system whether you are using QuickBooks® Desktop for Windows (QDW), or QuickBooks® Online (QBO). ClubExpress handles each product significantly differently. Note that if you are already using QDW, you can easily switch to QBO.

The following options can be configured:

• Check the box if you use QuickBooks® classes to categorize your revenue and expenses. The default is No (unchecked).

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 handle exports slightly differently if sales tax is 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.

Note: 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, if users pay with cash, checks directly to the club, or you process payments through a "separate system".

For customers **outside the US** that don't have a bank account already defined in the system, ClubExpress will create a "dummy" bank account called "Primary Bank Account".

- 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.
 - Note that the "Default Income from Items" and "Default Income from Services" only appear for users of QBO.
- Specify the item names used for Sales Tax and Shipping and Handling.

<u>Currency</u>



The default currency symbol is a "\$" and most people will understand that this means US\$. But for clubs and associations outside the US, you want to clearly tell people that their membership signups and renewals, event registrations, donations, etc. will be processed in their local currency. A simple "\$" may not be enough.

ClubExpress allows you to specify up to 4 characters for the currency symbol. So a club or association based in Australia might use "\$AUS" or "AUD" to tell people what currency is actually being used.

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

Chargeback

A chargeback listed on a financial report means that a member saw a charge from ClubExpress.com on his/her monthly credit card bill and did not recognize it, so they contacted their bank or credit card company and challeneged the charge. This generated a "chargeback" to us. The money was taken away from us (even though we had already forwarded it to the club) and we were assessed a \$15 fee, which we pass through to the club.

For smaller amounts, say under \$300, the chargeback cannot be reversed without incurring additional fees. We will notify you about the chargeback and debit the funds from your primary bank account. It will

then be your responsibility to pursue payment from the memebr or non-member. For amounts over \$300, we will attempt to work with the cardholder to have the chargeback reversed and the funds restored to us. If we are successful, that's the end of the issue! If we are not successful, we will notify you that the chargeback could not be reserved and the funds will be debited from your primary bank account. Note that the \$15 chargeback fee is never reversed, even if the chargeback itself is reversed.

Please also note that card issues accept "No Refund" policies enacted by your organization. In the event of a dispute, they will usually side with their cardholder over the merchant (ClubExpress and your club or association).

Reports/Exports

Administrators: See "Reports" on page 93 for more information about running reports.

Reports

If available, selecting Reports displays the Report Group selector pop-up. Once you select a group, the system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Type	Description	
Member Invoice	Print invoices of pending payments.	
Transactions / Pay- ments by Account	Financial reports organized by financial account.	
Member / User Transactions	Financial reports showing transactions (including memberships, event regis- trations, donations, storefront purchases, misc. charges, etc.)	
ClubExpress Trans-	Financial reports showing club-level fees and charges.	

Report Type	Description
actions	
User Payments /	Financial reports showing payments by credit card, check, cash, etc.; and
Credits	reports of credits.

Money Tab Report Options

Club

eople	Website	Money	Club	Communications Su	upport		
						Show Notices	🎤 Configu
	Eunctions Export			📩 Ad Hoc Reporting Confi	igure	📥 Ad Hoc Reporting	
Nebsite				rs, NA=Not Active) Contact Us (PM)		⊙ Switch	n to View Mod
Website	Modules (Vi	er (Test Mode			ators	● Switch	n to View Mod

The Admin Functions panel on the Club section contains functions to manage the club itself on a daily basis. The Website Modules panel contains the modules enabled for that section.

The Setup panel in the Club section contains functions to configure the club itself, including basic contact information, administrators and coordinators, metro areas, the ClubExpress Subscription Agreement, Organization Data (chapters, districts and regions, if enabled), titles and other club options.

Many of these choices will only be visited when you first setup your website and database in ClubExpress, or only rarely thereafter.

What would you like to do?

- For help with modules in the Club section, see " ClubExpress Modules " on page 588
- Get help exporting data to CSV files for importing into a local spreadsheet or database; see "Data Export" on page 499
- Update the basic information about your club or association; see "Name & Description" on page 501
- Maintain your list of administrators and coordinators; see "Administrators/Coordinators" on page 503
- Configure your Favorites; see "Favorites" on page 508
- For regional or national clubs, define metro areas in which events are held; see "Metro Areas" on page 509
- For hierarchical clubs, define the chapters, districts and regions; "Organization Data" on page 510
- Define the titles used by your club; see "Organization Titles" on page 520

- Upload a logo to be used in the header of all reports; see "Upload Your Club Logo" on page 521
- Create your member joining agreement; see "Member Joining Agreement" on page 522
- Review your ClubExpress Subscription Agreement; see "ClubExpress Subscription Agreement" on page 524
- Configure your club options; see "Club Options" on page 524
- Learn more about the reports available; see "Reports/Exports" on page 525

Data Export

Control Panel > Club > Admin Functions

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:

Home > Control Panel > Data Export
Data Export
Export your club's data to CSV (comma-separated values) files. Select an export type.
Members (name, address, contact info, membership status, etc)
Active Members (name, address, contact info, membership status, etc)
Active Members (as above, plus sponsor, birthday, anniversary, and other fields)
Active Members with Secondaries and Tertiaries
All members, including expired and dropped
Members for Mailing Labels (name and address)
Active Members for Mailing Labels - Unique Addresses
Additional Member Data
Member Interests Interests Membership History
Interests Membership History, with primary member contact info
Committee Members
Club Financial Transactions
User Transactions
Member Additional Charges
Non-member Database
Non-member Database With Categories (one row per non-member / category combination)
Non-member Category Membership (one row per non-member)
Members and Non-members in a selected mailing list category
O Bad Member Email Addresses
Chapter Membership History
Chapter Membership History, with primary member contact info
Select Subgroup
Select what level within your organization on which to filter
Subgroup All Members
Export 🛷 Cancel 🗶

Select an option from the list and click the **Export** button. The results will either download automatically or you will be prompted to save them to a local file, depending on your web browser. 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.

Subgroups: If your club or association has subgroups, full admins can optionally filter the export based on any level of subgroup. Subgroup administrators will export only the members of their subgroup.

Se	elect Subgro	up		
	Select what level within your organization on which to filter			
	Subgroup	Illinois		

If you select one of the financial transaction options, an additional panel will appear to allow you to specify a date range:



If you select "Members and Non-Members in a selected mailing list category", an additional panel will appear to specify the category:

Select Mailing List	
Mailing List Category Press	

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.

Linking secondary and tertiary members to their primaries

The first three exports on the data export page as well as the **Export Answers** button on the Additional Member Data page include a special **primary_member_number** column. Clubs can use this field to group sub-members together with their primary. For a primary member, this field will be the same as the member_number field. For secondary and tertiary members, it will list the member_number from the primary member.

The fourth export in the list (Active Members with Secondaries and Tertiaries) will show each active membership on one line, with the primary member first, followed by up to 9 secondary and tertiary members, including the basic information for each member.

An Important Note About Privacy

As we've noted elsewhere in this manual, strict international regulations govern the security and confidentiality of personal data that is collected, stored, and processed online. ClubExpress fully observes the General Data Protection Regulations (GDPR) promulgated by the European Union (EU), and our Privacy Policy also binds your club or association to these regulations.

Club

When data is exported outside our platform, it moves outside our control and becomes the responsibility of your club or association. It is important to protect this offline data as carefully as we protect your online data.

And when members or non-members exercise their right to "be forgotten", and you approve this request, a person's data must also be deleted or anonymized from any offline records you may have created through data exports, for backup or analysis purposes.

Name & Description

Control Panel > Club > Setup

Click Name & Description to display the following screen:

Home > Control Panel > Nan	ne and Description		
Name and Description			
Update the club's official names, not-for-profit status and the description of the club's purpose.			
Basic Info			
Dusic IIIIO			
Public Name	Northwestern Balloon Club		
	The commonly used public name for your club.		
Short Name	democlub		
	NOTE: Changing this may cause bookmarks and links to break		
Year Founded	2004		
Purpose	Supporting and promoting the sport of hot air ballooning in the NW		
ABC .	region. And other stuff		
	0 of 200 characters used		
	Brief description of the club's purpose. This description will also help search engines to find your site.		
Official Addres	SS (shown on Contact Us page)		
Country	United States of America I Show All		
	1051 Perimeter Drive		
Address 2	Suite 350		
City	Schaumburg		
State	Illinois 🗘 🕈		
Zip Code	60173		
	Central Time (US & Canada) (UTC-06:00) NOTE: If you need to change your timezone, please contact ClubExpress		
Mailing Address for Page	yments (shown on Invoices) Copy Official Address		
Country	United States of America \Rightarrow Show All		
Address 1	1051 Perimeter Drive		
Address 2	Suite 350		
City	Schaumburg •		
State	(Illinois 🗘 🕈		
Zip Code	60173		

Geo Coding Address (used for mapping) Copy Official Address
Country	United States of America 😚 Show All
Address 1	1051 Perimeter Drive
Address 2	Suite 350
City	Schaumburg
State	Illinois 🗘 •
Zip Code	60173
Mapping	Show Google Maps link on Contact Us Page
Phone, Fax, &	Email
Enter the phone, fax, and/or	r email address for general inquiries.
Phone	847-255-0210
Fax	847-221-8046
Email	info@clubexpress.com •
Contact Person	Dan Ehrmann 🔶
Phone	847-255-0210
Email Address	dan@clubexpress.com •
Legal Info	
Legal Name	Northwestern Balloon Club
	If the legal name of your club is different from the commonly used club name, enter it here.
	Yes No Is this a not-for-profit organization? (according to section 501(c) of the IRS tax code)
FEIN	
	Federal Employer ID Number - Format nn-nnnnnn
	Save 🖌 Cancel 🗙
	Save V Cancer X

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 address
- Default contact person, phone and email address
- Legal name, state of incorporation and tax status, if appropriate.
- FEIN number, if appropriate. When this number is defined, it will be added to invoices and receipts.

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 Google Maps 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 Google Maps link.

Use the **Copy Address** buttons to replicate an address across all three panels.

Club

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, 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.

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.

Administrators/Coordinators

Control Panel > Club > Setup

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. See "Site Visitors" on page 47

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			
Administrators and coordinators			
Administrators			
Administrators specified in this section will have complete rights to access every area of the site and every administ	rative		
remove a member. The system will enforce at least one member in the list.			
Add Administrator			
Administrator Maintain 💼			
G Admin (1)			
Dan Ehrmann (31)			
Dan Minds (21)			
Martin Smith (30)			
Michelle True (3)			
Coordinators			
In this section, you can create administrative coordinators, who will have access to the set of functions you specify.			
Note: Clicking the "Remove" link will remove all administrative rights, including custom and photo pages. However administrator.	, it will		
administrator.			
Add Coordinator			
Coordinator Maintain			
Dave Dawson (9) 😰 🎽 🙀			
Gary Player (22) 😰 🎽 🙀			
Barry Woods (2) 😰 🎽 🙀			
Return to Previous Page	1		
Tetali to Frevious Fage			

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** icon 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:

		a checkbox) will not remove administrative rights	
ranted to specific custom pages,	pnoto pages, event, etc.		
nber: Brown, Jody(1203) Select		
People			
lain	Reports	Setup	
Member Manager	Member Contact Lists	Member Types	
Quick Member Lookup	Membership Info	Renewal/Expiration Settings	
Member Services	Mailing Labels	Membership Wizard Setup	
Non-Member Database	Achievement Reports	Additional Member Data	
	Non-Member Database	Additional Charges	
	Membership Directory	Download Bio Photos	
		People Options	
Check All Uncheck All			
0			
Communications			
Main	Reports	Setup	
Emailings	No reports in this group	Email Accounts	
Blogs			
Forums			
News			
Surveys			
Check All Uncheck All			

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 People 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.

Three options on this screen deserve special mention because they do not appear on the full administrator Control Panel:

Add New Custom Page allows you to give coordinators the ability to add new custom pages themselves. When this option is used, the current member is also automatically made a coordinator for the new page, so that he or she can edit it from his or her own coordinator control panel.

Add New Photo Album provides the same option for photo albums.

Edit Payments allows a coordinator to make changes to payments within a member's Profile – Payment/Credit History screen. Without this right, the **Edit** and **Delete** links are hidden.

The following options are available in the Maintain column:

lcon	Description
캳 (Func- tions)	Clicking the Functions icon displays the same screen in edit mode.
📁 (Сору)	Click the Copy icon to copy these coordinator rights to another member. This is a quick and simple way to replicate coordinator functions.
🝺 (Delete)	Remove this coordinator from the list, which also removes their coordinator rights.

Maintain Options

View By Function

Clicking the **View By Function** button changes from a Coordinator view to a Function view. The following screen is shown:

In this sec	tion, you can create administrati	ve coordinators, who	will have access to the set of functions you specify.
	cking the "Remove" link will rem act rights, or rights granted as a		rights, including custom and photo pages. However, it will not remove tor.
Category	Function	Maintain 📑	View By Member
		0 40	
People	Member Manager	<u>₽</u> 38	
People	Member Manager Quick Member Lookup	- 48 3% - 48 3%	
People			

This screen lists each function within the Control Panel categories. Click the **Members** icon to display members assigned to coordinate that function.

Click the **Remove** icon 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 function (for example, the event calendar, document library, committees, news, discussion forums, etc.) click the **Coordinators** icon beside that function in the Control Panel.

Example: Your newsletter editor might be a coordinator for the Document Library module so that he or she can upload new issues of the newsletter as they are published.

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.

Also, for discussion forums, this option grants coordinator rights to the whole function, 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 have moderator rights to that forum only.

Also, for blogs, this option grants coordinator rights to the whole function, including all blogs being published by the club or association. You can also specify a blog "author" who will have rights over just one blog.

To assign coordinator rights to a single static web page, select **Control Panel – Website – Admin Functions – CustomPages**. 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.

Example: If your association has a special page on student programs, the volunteer who manages these programs might be a coordinator for this page.

To assign coordinator rights to a single photo album, select **Control Panel – Website – Admin Functions – Photo Albums**. 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.

Subgroups: If your club or association supports chapters, districts and regions, you can assign administrators at any level. Go to **Control Panel – Club – Setup – Organization Data.** 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 to just the members in their subgroup:

- People Manager
- Non-Member Database

- Emailings
- Custom Page Index
- Reports
- Data Exports
- Committees
- Event Calendar

Favorites

Control Panel > Club > Setup

Only administrators and coordinators can use the Favorites feature to create a list of favorite pages for quick access. These pages can be shared or copied to other administrators and coordinators.

On Any Page

Upon logging in, a **Favorites** link will appear near the **Member Profile** link at the top of the page.

Hover over the link to see the dropdown menu with a list of favorite pages, if any, and an **Edit Favorites** link.

Use the selector screen to move pages from **Available Pages** to the **Selected Favorites** section to add them to your **Favorites**.

Note that for coordinators, only pages to which they have access will appear as Available Pages.

Click Save to save your changes, or Cancel to close the window without saving.

On the Administrators/Coordinators Page

In the Club Tab, Setup, Administrators/Coordinators, each named administrator or coordinator will have a star icon next to their name with a list of their Favorites.

Click the Favorites icon to configure Favorites using the selector screen.

To copy Favorites from another member, use the dropdown menu at the top of the selector screen and select the member. Click Get Favorites, then Save to save your changes.

To choose your own Favorites, use the selector screen to move pages from **Available Pages** to the **Selected Favorites** section to add them to your **Favorites**.

Note that for coordinators, only pages to which they have access will appear as Available Pages.

Click Save to save your changes, or Cancel to close the window without saving.

Club

Note: Copying coordinator functions to another member will also copy their Favorites.

Metro Areas

Control Panel > Club > Setup

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:

Home > Control Panel	 Metro 	Areas	
Metro Areas			
Metro areas are use	d by club	s which have a wid	ely dispersed membership.
Add Metro Area			
Metro Area	Active	Maintain 🔳	
New York Metro (2282)	1	🧷 🛱	
Seattle (1968)	V	V 🗟	
	-		Return to Previous Page

This screen lists the metro areas defined. Click **Add Metro Area** to define a new area. You will see the following screen:

A	dd/Edit M	etro	Area			0	Ø	8
				l whether or not it i o area list screen.	s availab	le for us	se Click)
м	etro Area Name					٠		
	Active							
		[Save 🖌	Cancel X				- //.

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.

Example: You might define "New York" as a metro area that encompasses events held in Manhattan, Long Island, New Jersey, Connecticut, etc.

Click the standard Edit icon to modify a metro area. Click the standard Delete icon to remove a metro area.

The ID numbers listed after each metro area can be used to preload the event calendar module with a specified area.

Organization Data

Control Panel > Club > Setup

Subgroups: If your organization has subgroups (chapters, districts, regions, etc.), this function allows you to define the hierarchy and properties of each subgroup. It also provides options for configuring the Chapter Finder module.

Within a parent club's website, ClubExpress supports up to three levels of subgroups; for example, "chapters" grouped into "districts" which in turn are grouped into "regions". You can change the keywords used at each level. All of these entities share the same website. Note that ClubExpress also supports multi-tier organizations where each club within the hierarchy has its own website, see "Organizations with Chapters" on page 33.

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

Home > Control Panel > Organization Data							
Organization Data							
This screen shows the sub-groups (chapters, districts, and regions) in your organization. If your organization has one website on ClubExpress, you can right-click at each level to add sub-groups or edit the properties of a sub-group. If your organization has multiple websites on ClubExpress, the hierarchy below is for information purposes only; properties of a sub-group are modified on its website. Click "Configure Organization" to change the name at each level. Click "Chapter Finder Options" to configure how this function should appear to members and non-members. Configure Organization Chapter Finder Options Midwest (4594858) Chicago Metro							
Schaumburg (Delete Edit Membership Fees							
Northeast (7498039) South (8188195) West (3605461)							
Return to Previou	us Page						

Note: For multi-tier organizations using the multiple websites module, an additional button "Chapters Not on ClubExpress" will appear. This button will allow you to manage chapters outside ClubExpress.

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.

The ID numbers after each subgroup name can be used to create custom event calendars.

Right click on a subgroup name for a list of options:

- Select Add <subgroup> to create a new subgroup.
- 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 Organization

Click the button to see the following configuration screen:

Home > Control Panel > Organization Data > Configure Organization Data	0
Your organization is set up with 4 levels. Use this page to select the name associated with each level, and to set a couple of security options.	
To change the number of levels, contact ClubExpress at 1-866-HLP-CLUB (457-2582)	
Level Names	
Club Level 1 (This may be changed on the "Control Panel - Club Options" page)	
Region Level 2 District Level 3	
Chapter V Level 4	
Subgroup Security Options	
Subgroup Admin Access in the People Manager	
Read-only Subgroup Admin Access to financial screens, reports and exports	
Yes	
O No	
Subgroup Admin can assign members to subgroup	
Yes	
○ No	
Subgroup Admin can see and approve prospective members	
Yes	
O No	
Subgroup Custom Page Options	
Copy subgroup menu and other pages from template	
O Yes	
● No	
Save Cancel Cancel	

The number of levels in your organization is preset. Contact ClubExpress to specify this number. Use this screen to define the keyword used for each level.

Subgroup Security Options

In the Subgroup Security Options panel, specify whether subgroup admins should be able to edit member information or whether they have read-only access (see "Site Visitors" on page 47). This option primarily affects the Control Panel – People 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, and whether subgroup admins can assign members to subgroups.

If the option to allow Subgroup Admins to **assign members to a subgroup** is enabled, chapter or district admins can add members to their chapter or district. This option is useful when chapters are used as a type of interest group. When this option is enabled, a new button appears in the People Manager to allow members to be assigned to a subgroup.

Finally, specify whether Subgroup Admins can **approve prospective members**. If member types are configured to require approval, when a member signs up their status is set to Prospective as they await approval by your Board. This status can be changed by selecting the status link for the member in the People Manager and approving or declining the member. If this option is not enabled for Subgroup Admins, the top level Administrators will be required to approve or deny memberships. Further, if Subgroup Admins cannot approve or decline members they will not see the **Add Member** and **Member Options** buttons within the People Manager.

Note: Can't find the Prospective member? Remember to select "Prospective" as the Status option when searching for members requiring approval within the People Manager.

Subgroup Custom Page Options

Note: Be sure that the template you select has an active version associated with it in order to generate custom pages for subgroups.

ClubExpress makes it easy to create a sub-website within the main site for each subgroup.

Example: A chapter in Chicago could have their own set of custom pages describing interesting information about the Chicago chapter.

This sub-website could also include:

- A link to the Event Calendar showing just events for that subgroup;
- A link to the Member Directory pre-filtered for chapter members;
- A link to the Business Directory pre-filtered for chapter members;
- A link to the Photo Albums Index module, pre-filtered to just photo albums belonging to that subgroup.

This function works off a template of pages that you create in a specific Custom Web Page category. So the first option on this panel is to specify with category holds the template pages. The second option is which page should be considered to be the landing page, or the "home" pages for the sub-website. And the final option specifies which destination Custom Web Page category any copied pages should be added to.

When a copy is initiated, the system performs the following tasks:

- 1. Makes a copy of each of the pages in the template, moving the copies from the template category to the destination category.
- 2. Updates the subgroup listing so that the designated landing page is the one directly linked to the sub-group entry in the Chapter Finder module.
- 3. Assigns the sub-group Administrator to be an admin for all copied pages.
- 4. Looks for any replaceable parameters (described below) on any pages and replaces them with their values for that subgroup.
- 5. Looks for any links to the four modules listed above and updates them with the appropriate options to point to a filtered version of that module. For example, a Member Directory link would be modified so that clicking the link pre-filters the directory to only show members of that chapter.

Template Page Tags

The system allows you to place replaceable tags on these pages. When the copy is performed, these tags are replaced with the values for that subgroup. The following tags are supported:

~~subgroup_number~~

~~subgroup_name~~

~~mailing_address~~

~~mailing_city~~

~~mailing_state~~

~~mailing_zip~~

~~mailing_county~~

~~contact_name~~

~~contact_title~~

Club

~~contact_phone~~

~~contact_fax~~

~~contact_email~~

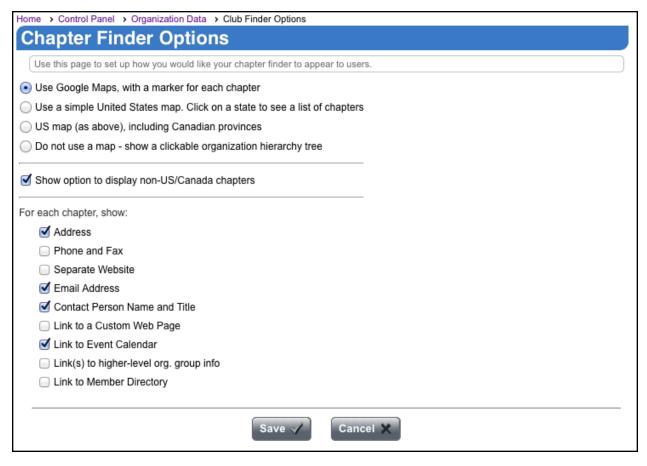
~~external_website~~

Click Save to save your changes and return to the previous screen, or Cancel to return without saving.

Chapter Finder Options

See "Chapter Finder" on page 632

Click this button to configure how the Chapter Finder module should behave. You will see the following screen:



The first setting defines whether a map should be displayed and the type of map:

- Use Google Maps. The system will display a dynamic Google map with a marker for each chapter. Clicking the marker displays more detailed information about the chapter and, optionally, its district and region. The map can be scrolled and zoomed.
- Use a standard US map. Clicking a state displays a list of the chapters in that state.
- Use a standard US and Canada map. Clicking a state or province displays a list of chapters in that state or province.
- Do not show a map at all. Instead, display the organization hierarchy as a tree. Use the [+] and [-] signs to expand or contract levels. Click a subgroup to display its properties.

For organizations with non-US and Canadian chapters, you can optionally display a button which, when clicked, will list these chapters.

Use the check boxes in the bottom part of the screen to control what information to show for each chapter, district, and region:

- · Address of the chapter meeting or where correspondence should be sent;
- Phone and fax (blank fields will not be displayed);
- Separate website
- Email address
- Contact person name and title
- Link to a custom web page on the main website (some clubs and associations give each chapter, district and region a place on the main website to promote that chapter, district or region.)
- Link to the Event Calendar (some chapters, districts and regions post their local events on the club's main calendar; this option displays the calendar pre-filtered for that subgroup.)
- Link(s) to a higher-level subgroup (for example, the district or region that the current chapter belongs to.)
- Link to the Member Directory (for the chapter's primary contact person.)

When the Google Maps option is chosen, the system will automatically geocode the chapter address to display an icon on the screen at the correct location. For US locations, geocoding is based on the full street address (P.O.Boxes are not accepted.) If an icon does not appear, try changing the address to a more standardized one. For locations in Canada, geocoding is based on the postal code only; the icon will appear at the centroid of the postal code.

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:

dd/Edit Chapt	er	68	(
General Info ——			-
Chapter Name	Chicago Metro	•	1
Chapter Number	1		I
Club			1
Region 8: Midwes	t Illinois 🗸 🗸		1
Status	Active 🗸 🗸		I
Main Committee	< None > 🗸		I
1	Chicago Metro:Membership Dues Vertication Structure Str		1
QuickBooks Item			
Create Channel?			
	Select committee members from this subgroup only This applies to all committees for this subgroup. Uncheck to any person in the organization to be on this subgroup's committee(s).	allow	
	Do Not Send Renewal or Expiration Notices Check this box to prevent members of this Chapter from ge renewal or expiration notices. Leave it unchecked to allow the system to process notices normally.		
- Address (Contest-			

This dialog allows you to specify the district name and number (if your organization uses numbers. If this subgroup is in the middle or bottom of the hierarchy, you will also specify it's immediate parent.

Four status options are available:

- Active visible and open to new members;
- Closing visible but no longer open to new members;
- Closed no longer visible;
- Pending being set up; not yet visible.

You can also define a main committee linked to this subgroup or have the system create a blank committee for you.

Financial Account is used for membership transactions only, including membership signups, renewals, and mid-year changes (if this option is available for your organization.) Specify a non-archived financial account or select "<Create Financial Account>" to have the system create one for you automatically.

If your club or association has activated the mobile app, you will see a Create Channel option, allowing you to automatically create a mobile channel based around this subgroup. Members who are assigned to the chapter, district, or region will automatically be added to the channel.

Committee Members: check the box is restrict committee members for committees linked to this subgroup, to subgroup members only. Uncheck the box if subgroup committee members can come from anywhere in the organization.

Stop Notices: select the box to prevent members of this chapter from receiving renewal or expiration notices, for example, if you process notices using a separate system.

The Add/Edit dialog continues below:

ALC: NOTE: N

The remainder of this dialog allows you to define the subgroup's address and primary contact, as well as a separate website or page within the main site. If the top level club is using the Chapter Finder, you can also define a directory entry that will appear when this subgroup is selected in the chapter finder.

If geocoding has been enabled, you will also see **Latitude** and **Longitude** fields in the address panel for the lowest level of subgroup, allowing you to enter or update the location of each chapter in the Chapter Finder module. The system will update these geocodes automatically based on the address (in the US and Canada only) but you can change them if necessary.

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

Managing Subgroups

Administrators

Select this option to define administrators for this subgroup. You will see a dialog similar to the following:

Region Administrators
Click "Add Administrator" to select a club member to be an administrator for this region. Click the "Remove" link to remove an administrator from the list. Click "Done" when finished.
Add Administrator
AdministratorMaintainJessica SmithRemove
Done

Click **Add Administrator** to select a member from the list. Click the **Remove** icon 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.

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 People Manager, all committees belonging to any of these chapters or the district, same for events, documents, custom web pages, etc.

Note that someone can be a Subgroup Administrator without actually being a member of that subgroup.

Delete

Select this option to delete a subgroup. This operation can only be completed if the subgroup in question has no subgroups below it.

Example: You cannot delete a district until the chapters within that district have been assigned to other districts. It also cannot have any members or administrators.

Generate Custom Pages

Select this option to copy custom pages from the template category for this chapter. This option is described in detail above, on the Configure Organization screen.

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:

Fee Customization									
Chapter: Chicago									
This screen allows you to set local fees for your member types.									
Member Type	pe Member Fee								
	Default	Local							
Honorary Member	No Fee	No Fee							
Individual	No Fee	0.00							
New Member-Racing	No Fee	No Fee							
Quarterly	No Fee	0.00							
Racing - Family	No Fee	0.00							
Racing - Individual	20.00	20.00							
Scout Family	No Fee	No Fee							
Social Member	No Fee	0.00							
Social Member-Family	No Fee	No Fee							
Trial Membership	No Fee	No Fee							
[Save 🖌	Cance	- X						
						//			

In the example above for the Chicago chapter, some member types can be customized while others cannot. You will 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.

Organization Titles

Control Panel > Club > Setup

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								
	which a	are highly	specifi	ic to the				e President, Financial Vice President, Data Protection Officer, etc. Some st. For each title, you can also specify whether it will be included on the Contact U
Add Title Display Seq	uence							
Title	Pres.	Memb. Dir.	Trea.	Web.	DPO	Email	Maintain 📑	
President	Yes	No	No	No	No	president@nwballoons.com	🧷 💼	
Vice President	No	No	No	No	No		V 💼	
Membership Chair	No	Yes	No	No	No	geoffrey@clubexpress.com	🧷 💼	

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:

available to non-me person who co-ordin	can specify whether it will be included on the club's Contact Us page, which is normally embers. You can also specify whether a title matches to the "head" of the club and to the inates memberships or serves as the treasurer. These titles are automatically placed in Jence to members, including renewal letters and emails.
Title	President
Email Address	president@nwballoons.com
	ng this title serves as the club president
The person holding The person holding The person holding	ng this title serves as the club president ng this title serves as the club membership director ng this title serves as the club treasurer or financial VP ng this title serves as the club webmaster ng this title serves as the Data Protection Officer (DPO)

Club

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 five specific positions, the group's:

- President
- Membership Director
- Treasurer or Financial VP
- Webmaster
- Data Protection Officer (DPO) a role defined by current privacy regulations, the person within your
 organization responsible for protecting the personal data of members and non-members. The DPO
 also handles inquiries about data security, potential breaches, and requests to be removed or forgotten from the club's records.

ClubExpress allows you to specify any "title" for a specific role.

Example: Sailing and yacht club use the title "Commodore" for their "president".

The system uses these official roles to put the correct name and title in various emails that it sends out.

Example: Renewal notices include the membership director's contact information and are "signed" by the person assigned to the president's role.

Titles and the people assigned to them can also be placed on the Contact Us page.

Click **Save** or **Cancel** to close the window and return to the Titles list.

Click the standard **Edit** icon to edit an existing title and the standard **Delete** icon to delete a title.

Click the **Display Sequence** button to change the order in which titles are listed.

Upload Your Club Logo

Control Panel > Club > Setup

The Club Logo is used in two places:

- All reports except mailing labels have space for the organization's logo in the top right corner.
- System emails also include the logo at the top of each email.

To upload a club logo, select this option. You will see the following popup screen:



Click the **Browse** button to select a file from your local hard disk. The filename will be shown on the right side. If you want to use this logo, click the **Save New Logo** button, or **Cancel** to close the dialog without saving.

If you don't want to use the new logo, you can also click the **Remove** link. Or click **Remove Current Logo** to do just that.

The system accepts any of the following image types: JPEG, GIF, PNG or BMP. (Note that BMP files are converted to JPEGs.) Any other file type will generate an error. The uploaded image will be reduced (if necessary) to be no more than 180 pixels wide by 120 pixels long

Member Joining Agreement

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:

Joining Ag	reen	nen	t														G	8	8
If your printed n be displayed au							ige that m	embers	must a <u>c</u>	ree to	before	they c	an join,	enter t	hat lar	iguage in	to this field	d. It will)
Heading 1	\$В	I	<u>U</u>	S	Default \$	Arial	\$	A A	Ξ	≣	Ē	E	- •) 🖬	<u></u> ×	A BC			
I understand property.	that th	he ho	ot air	ballo	on activitie	s are dange	erous, a	nd invo	olve th	e risl	k of in	jury c	or dea	th to r	nyse	lf, and (damage	to my	
(c) accident of understand th undeveloped assess my pl determine tha medical bene pay for any n	hat lar I, unim hysica at I an efits w	rge o nprov al or o n in g ill be	pen a ved, a emoti good prov	areas ind ir onal healt ided	are needen an unsafe condition. I th with no c to me durir	d for the ta condition. have cons onditions th ng these ba	ke-off an Lunders ulted my nat migh	nd land tand ti y perso t limit	ding of hat the onal pl my pa	the l pilo nysic rticipa	balloo t is no ian or ation i	on, an ot a m take in bal	id that iedical n wha loonin	t such I profe itever ig acti	area ession steps ivities	s may nal and s I deer s. I und	be cannot n necess erstand t	sary to	
l expressly, arising from preparation,	n my p	artic	cipati	on i	n hot air ba	alloon activ	vities w	ith <u>No</u>	rthWe	st B	allooi	n Clu	b whe	ether	durir				
						Sa	ve 🖋	Ca	ncel 🎗	t									

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 – People – Admin Functions– 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.

The system will store internally the date and time when the joining agreement was last "signed". A report allows you to view this information.

Related Tasks

Reference Materials

Club

Member Signup / Renewal...

ClubExpress Subscription Agreement

Control Panel > Club > Setup

Click Subscription Agreement to display the following screen:



This screen displays the Subscription Agreement governing your use of the ClubExpress platform. This includes information related to licensing, fees and banking information, data rights, and terms related to the content on your website.

Club Options

Control Panel > Club > Setup

Selecting this option displays the following screen:

Home Control Panel Association Options			0
Association Options			
This screen lists other configuration options for your organization	ation.		
Keyword for your organization	Association	*	
Keyword for member's organization (in contact information)	Company		۲
Keyword for a secondary member	Business Member	\checkmark	
Keyword for a tertiary member	Associate Member	\checkmark	
Track required attendance Number of meetings per year	Yes ○ No 13		
Save 🖌 Ca	ancel 🗶		

This screen has the following options:

900

- 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.

Reports/Exports

Administrators: See "Reports" on page 93 for more information about running reports.

Reports

If available, selecting Reports displays the Report Group selector pop-up. Once you select a group, the system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Group	Report	Description	Filter Options
Organization Data	Organization Hier- archy data	View and print reports showing the organization hierarchy for a multi-tier club.	N/A
	•	Club Tab Reports	•

Communications

had black firms	Od Semantative Super-	
		🔒 Baar Kataan 🧪 Cardigan
and other		
In the second	Telecowa .	(Trees
man have provide		Winners for the
County r.	Citer In	Contraction (1)
The rate of	E break /m	
550		
M Destingents	Witness (or Comprise	S had beening

The Admin Functions panel on the Communications section contains functions to manage your club's communications with members and non-members on a daily basis. The Website Modules panel contains the modules enabled for that section.

The Setup panel on the Communications section contains functions to configure email accounts and social networking for your club or association. It also allows you to modify more than 30 emails sent by the system as a result of various triggers.

Many of these choices will only be visited when you first setup your website and database in ClubExpress, or only rarely thereafter.

This panel also provides access to special functions related to communications with members and nonmembers.

What would you like to do?
Emailings
Configure Options
Text Messaging
Clicking the Configure button displays the following options in a drop-down menu
Add Message
Bad Emails
Email Accounts
Mailing List Categories
Social Networking
Posting to Social Networks
System Emails 578

Reports/Exports	
Reports	
Exports	

What would you like to do?

- For help with modules in the Communications section, see " ClubExpress Modules " on page 588
- Write and send custom emails to members and the mailing list; see "Emailings" below
- Write and send text messages to members and non-members; see "Text Messaging" on page 555
- Manage and correct undeliverable email addresses; see "Bad Emails" on page 567
- Manage email accounts associated with your club domain names; see "Email Accounts" on page 569
- Configure your mailing list categories; see "Mailing List Categories" on page 572
- Manage your club's social networking accounts and settings; see "Social Networking" on page 573
- View and modify the built-in emails sent out by the system; see "System Emails" on page 578
- Learn more about the reports available; see "Reports/Exports" on page 585

Emailings

Control Panel > Communications > Admin Functions

Note: If your domain is pointed to our nameservers (emails sent from an address hosted by ClubExpress) and you use blast emailing, the emails will come from your club's email address (for example, president@myclub.org) instead of mail2.clubexpress.com. This decreases the chances that your emails will end up in your members' spam folders. If you send the email from a private email address (such as myclub@gmail.com) the email will be sent from mail2.clubexpress.com. If your domain **is not** pointed to our servers and you want emails to come from your club's email address, you will need to provide us with an SPF record authorizing us to send emails on behalf of that domain.

ClubExpress provides powerful tools that allow administrators to communicate with members via email.

Clicking this option displays the following screen:

			ership or smaller groups of members sts to add, edit, or delete predefined				has no	t yet b	een se	nt. Ser	nt emails	cannot be edited but they can be copied. Click the Add
Search Foi	r Emaili	ngs						Conf	igure			
	Date	Finish	Date					Add	Email	ing		
	ubject egory < All	Categories > V										
Cat		clude Archived Emailings		Searc	h 🗳	1						
		-				1000		<	Page	e 1 of	1~	>
Status	From	Subject	То	Track Opens? / Resend Days	Maint	ain						
Draft (created 6/15/2021)	Martin Smith	July Newsletter	Active solo and primary member	Yes / None	03	đ	ä	۲	î,			
Sent on 4/2/2021 at 2:19 PM	Martin Smith			No	63	00	d	—		•	Þ 🝺	
Sent on 4/2/2021 at 2:19 PM	Martin Smith			No	63	()	đ	—		-		
Sent on 4/2/2021 at 2:19 PM	Martin Smith	yest	All members including expired	No	0	Ø	db			-	Þ 🙀	
Sent on 4/2/2021 at 2:19 PM	Martin Smith		Active solo and primary member	No	0	0	đ			-	0	
Sent on 12/30/2020 at 3:28 PM	Martin Smith	Testing email - bad email	Member: Martin Smith	No	63	đ	Ë		- <	•	2	
Draft (created 7/16/2020)	Martin Smith		Question: Do you want to offer	No	6	đ	-	۲	î,			
								<	Page	e 1 of	1~	>

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 (created on <date>) not yet sent
- Queued for Immediate Delivery
- Pending on <date> scheduled to be sent
- Sent on <date>

You can filter by date range, subject (anywhere in the field), category and optionally include archived emails. Click **Search** to show a list of matching emails.

Subgroups: Note that Subgroup Administrators will only see their own emails and those created by other administrators of the same subgroup.

Maintain Options

The following options appear in the Maintain column:

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

lcon	Description
(Res- ults)	Select Results to display the results of the email, including number attempted, number delivered, and various failure statistics.
📁 (Сору)	Click Copy if you want to make a copy of an emailing.
(View)	The View option allows you to view the email as a web page. This option is also avail- able in the email itself.
(Reports)	The Reports icon displays the standard reports dialog with reports showing who received each email and who did not because of a bad email address.
(Archive) /	The Archive option archives an emailing. It is still in the system but is not displayed unless the "Include Archived Emailings" box is checked. For an emailing that is already archived, the option will say Unarchive , which reverses the operation.
(Delete)	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.
	Maintain Options

Configure Options

Note that the **Configure** button is not available to Subgroup Administrators. These options can only be changed by full administrators or module coordinators.

Mass Email Archive

Mass Email Archive allows you to archive all emails from a selected category which were created **on and before** a specified date.

Clicking the option will open the following window:

Select the emailing before that date, the		nt date of emails to archive emails ' or "Cancel".
mailing Category	< Select >	T
Archive End Date		
F	Archive 🚀	Cancel 🗶

Select the category, then select the end date for the mass archive. All emails created in the selected category on and before the date will be archived.

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.)

Select **Configure – Categories** to see a standard ClubExpress category management screen. All options perform their expected functions. The Delete icon only appears for categories that have not been used.

Note: Adding a category in Emailings will also add the same category in Text Messaging, and vice versa. You may only edit or delete the category through the module that created it.

One of the options on the Categories Add/Edit screen allows you to control whether emailings in this category should be shown on the "View Emails" screen. Some categories may be for internal use only (for example, Board Announcements) while others should be shared with members or even the public (for example, a monthly note from the club's president.)

Subgroups: 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. You must create a category for each subgroup in order to be able to send emails to members and non-members of that subgroup.

Templates

ClubExpress allows you to create email templates that can be used over and over again, to ensure a consistent look and feel to your communications with members and non-members. When you select **Configure – Templates**, you will see a screen similar to the following:

Template Ad			C
Contrat The CONSTRAINED			

This screen includes system level templates as well as templates you create yourself. System templates can be copied and modified by clicking the standard **Copy** icon. You can also optionally hide them from the Options screen. Club-specific templates can be edited, copied and deleted using the standard **Edit**, **Copy**, and **Delete** icons.

Click the **Add Template** button to create a new template, where you will specify the name, type (HTML or Plain Text) and email body, using the Emailing system (described below.)

Once templates have been created, you can select them whenever you create an email. Templates do not need to be complete emailings. They can be as simple as a single panel that you place at the bottom of every emailing, or as complex as multiple panels with a standard layout for a monthly newsletter, when you go in each month to adjust the content only.

Saved Distribution Lists

Emails can be sent to complex distribution lists, such as "all active members of a specified type + members of two specified committees + non-members in the Press category + the following three individuals." You can also save these distribution lists for use at any time. ClubExpress will build the list dynamically when each email is about to be sent so it's always up-to-date. And the system will automatically remove duplicates so that each recipient only receives one email even if he or she is in multiple parts of the distribution list.

Note that distribution lists with multiple options act using "OR" conditions; each option is additive to the list.

Example: If you select "Members in a specified city" and enter "Chicago", then specify "Members of a specified type" and enter "Single", you will be emailing everyone in Chicago as well as everyone who's a Single member.

You can also exclude members or groups from your emailing list.

Example: All active members, excluding those from a selected committee.

Select **Configure – Saved Distribution Lists** to create, view and edit your saved lists. (Lists can also be created and saved when you are creating a new emailing. You will see a screen similar to the following:

Home > Emailing Administration > Distribution List Administration					
Distribution List Administration					
Click the "Add Distribution List" button to create a new distribution list; "Edit" and "Delete" perform the expected functions.					
Add Distribution List					
Name	Maintain 📑				
2 interests, 2 committees, + admins	🧷 違				
A couple of interests and the leadership	🤌 🛱				
All Active Members	🧷 違				

Click the Add Distribution List button to create a new list. You will see a screen similar to the following:

ation and the		
 	-1.6	
	21.1000	

Select an option from the **To** drop-down list. In some cases, a panel will appear underneath to configure additional settings.

Example: If you select **Members by selected Type** you will be asked to select one of your club's member types.

Click the **Add** button to add each **To** option to your distribution list. If you make a mistake, you can click the **Remove** (trashcan) icon to remove this option from your list. When you are done, specify a name for your list and click the **Save** button. Or lick **Cancel** to close the dialog without saving.

On the Distribution Lists main screen, click the **Edit** icon to modify an existing distribution list, or the **Delete** icon to remove a list.

Additional options may be added in the future. Note that the Emailings function is also available in the Event Calendar, where additional options are provided (such as the ability to email everyone registered for that event.)

Subgroups: For multi-tier organizations where each subgroup (region, district, chapter) has its own website, the top-level (parent) club can email members of a linked chapter, and members who joined a linked chapter since a specified date.

Options

Select **Configure – Options** to customize how the Emailings function behaves. You will see the following screen:

Home > Emailings > Emailing Administration > Emailing Options				
Emailing Options				
This screen allows you to configure default options which apply to Emailings. Click Save to save your changes, or Cancel to return without saving.				
From Email Address				
From Name				
Track Opens (This will only work with HTML emails, not plain text emails.)				
Include Social Networking Links				
Show System Templates				
How many days back do you want to allow members to view emailings? 300				
Save 🖌 Cancel 🗙				

On this screen, you can specify the default email address and name to be used as the "Sender". You can also specify whether you want to track who opens the email, whether to include a panel in each email showing links to the club's social networking feeds, and whether system templates should be shown or hidden by default.

The Emailings function also includes an option to view emailings online, available to club members and optionally, to non-members. From this screen, you can also specify how many days back should be shown on this screen.

Click **Save** to save your changes and return to the main Emailings screen, or **Cancel** to return without saving.

Email Default Styles

Select this option to configure the default styles that will be applied to each emailing you send out. You will see the following screen:

button will automatically format your headings and body styles to thos	dings, basic text and borders. You may also enter in custom css that may be included. Clicking the "Drop in N sed on you website. Elements such as heading colors, body background color, font colors and sizes will be c ized by most email recipients. Please select a different font from the list for each respective element.	
Click "Drop in Web Styles" to auto-format	Drop in Web Styles	
Email Headings	\odot	
Email Background and Page Border	\odot	
Email Body Text	\odot	
Email Links	\odot	
Email Buttons	${igodot}$	

Click the **Drop in Web Styles** button to start the configuration process with the same styles as your website.

Click the down arrow to expand each category. Each category allows you to configure options such as:

- For heading text:
 - Font
 - Text Color
 - Background Color
 - Text Size
 - Text Style
 - Text Weight
 - Alignment
- For backgrounds and borders
 - Background Color
 - Border Color
 - Border Weight
- For body text
 - Font
 - Text Size
 - Text Color
 - Line Height
 - Padding Top
 - Padding Bottom
- For links
 - Font
 - Link Size
 - Link Color
- For buttons
 - Font
 - Background Color
 - Text Color
 - Border Color

- Font Size
- Rounded Corners

The controls in each case are standard drop-down lists, color pickers that generate a hex triplet, or spinners. Note that only standard fonts are available in the font pickers. Custom fonts cannot be used because emails will be viewed through many different interfaces (Gmail, Yahoo, Hotmail, Outlook, etc.) which do not support custom fonts.

Click **Save** to save your choices and return to the Emailing Administration page or **Cancel** to return without saving.

Custom CSS

Select this option to override the built-in styles with your own code, or to create custom styles that you can reference within your emails.

Note: This option is for experienced web developers only. ClubExpress cannot debug or customize Custom CSS entries. Also, very elaborate CSS may be ignored by many popular email programs.

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

This page allows you to create custom CSS for use in emails. Please note th css text box allows you to copy and paste declarations into the custom css to	nat not all email clients support advanced CSS or certain selectors. The Global Email Styles Preview window to the right of the cus ext box for further refinement.
Custom Email CSS	Global Email Styles Preview
h1 { }	h1 { color:#FAEBD7; color:#FAEBD7; fort.fsmtyLuxid2 Console, Monaco, monospace, sans-serif; fort.align:counce; background-color:#1a1870; fort.size:32px; } h2 { fort.familyLucida Console, Monaco, monospace, sans-serif; text.align:counce; background-color:#1a1870; fort.size:26px; } h3 { color:#FAEBD7; fort.familyTimes New Roman, Times, serif; }

On the left is the editor panel where you can enter any valid CSS. On the right is a listing of the global email styles, defined using the previous option. You can easily cut and paste from the right panel to the left. Click **Reset CSS** to clear any changes on the left and start over. Click **Save** to save your changes and return to the Emailing Administration screen, or **Cancel** to return without saving.

New Emailing

Click Add Emailing to create a new emailing. The following screen is displayed:

Communications

me → Control Panel → Emailing Administration → Email Edit				
ew Emailing This screen allows you to create and send an email to your membership and website visitors. Click the pencil	icons to enter basic info or distribution	n list; enter content of	f your email on the lo	ower portion. Click "Read
Delivery" to save the email and send it immediately. Click "Save and Continue" to save the email without send	ing it yet; you can return to it later.			
Basic Information ~ Which email address is sending this email? Who is sending it? Other necessary information	Edit Basics			
To (Your Distribution List) ~ Who are you sending this email to?	Edit Distribution List	Preview	w	
	Maximize Editor 🔶	<u>ې</u>		
		Elements	Templates	Element Style
			nt to the canvas a dropped an elem arrange it.	rea to the left. ent on the canvas,
		1 Column Text	2 Column Text	3 Column Text
Drag elements to this area to arrange or edit them.		2 Column Text Right	2 Column Image/Text	2 Column Text Left
		Hero Section	Image	Image Group
		Divider	C Link/Button	f Social Media
			File	
Save and Continue Save and Close	Send Test(s) Ready for I	Delivery 🗳		

The Emailing screen has two panels at the top that are initially collapsed, each with a red check mark to indicate that they have not been completed. Below them is the "Builder" section where you create the emailing itself.

On the right, you will initially see a list of elements that can be dragged into the Builder panel. Two other tabs allow you to select a predefined template or to modify styles for the currently selected element.

There is also a **Maximize Editor** link that opens the editor in a separate, full-size window so that you have maximum real-estate for building your emailing. A **Preview** button allows you to see what the emailing will look like.

Action buttons are at the bottom. Each of these components is described in full detail below.

Edit Basic Information

Click the **Edit Basics** button to edit basic information about the emailing. You will see the following screen:

Basic Email I	nformation 🛛 😯 🛠 🔇
	ation regarding the emailing on this page. Click 'Save' when finished (note: you will one of the action buttons on the main emailing page to make these changes go into
Category	Alert: Cancellation
	Allowed on 'View Email' Page
From Email Address	support@clubexpress.com
From Name	Margie Rapput •
Send	O Now 💿 On This Date
	12:00 AM
Subject	Autumn Picnic
Content	HTML O Plain Text
Options	Set Urgent Flag
	Track Opens (This will only work with HTML emails, not plain text emails.)
	Personalization Allowed (Replacement tags can be placed in the content of the email.)
	Save 🖌 Cancel 🗙

First, select a category. If the selected category is configured to be displayed on the "View Emails" screen, you will see a new check box field to define whether **this** email should be shown.

Next, specify the "From" email address and name, and whether the email will be sent immediately or at a future date and time.

Note: When sending an email at a future time, the time the email will be sent at the selected time in your club's local time zone (specified in Control Panel > Club Tab > Setup > Name and Description).

Specify the Subject and whether the email should be formatted with full HTML or sent using plain text. You can also optionally set the Urgent flag.

The **Track Opens** option allows you to see who has opened the email (note that this option only works with HTML emails, not plain text).

Check the **Personalization Allowed** option if you want to personalize each email being sent. When this option is checked, the system will allow you to insert replaceable tags from an extensive list into the emailing master. Then, as each email is sent, the tags are replaced with their actual values (such as the member's first name, member type, expiration date, etc.)

When you are done, click **Save** to save your changes, or **Cancel** to close the dialog without saving. When you click Save, the screen will look like the following:

\bigcirc	Basic Information v	Edit Basics
	Which email address is sending this email? Who is sending it? Other necessary information	

The Basic Information panel icon has changed to a green check mark, indicating that this panel is complete. You can click the arrow immediately to the right of the title to expand or collapse this panel.

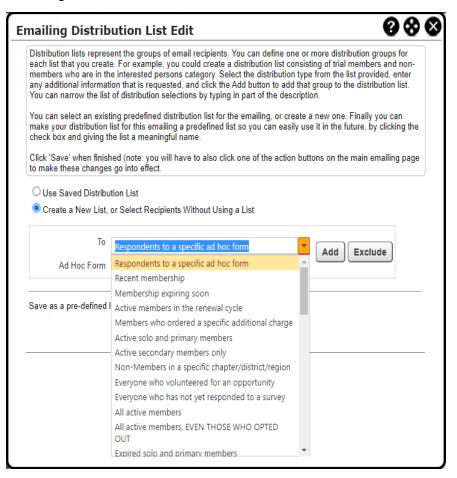
Edit Distribution List

Click the **Edit Distribution List b**utton to specify a complex distribution list to receive the email. An additional option allows you to reuse a previously saved distribution list. You will see the following dialog.



When **Use Saved Distribution** List is selected, click the drop-down to select a previously saved distribution list.

Click the **Create a New List...** radio button to create a new list. You will see a screen similar to the following:



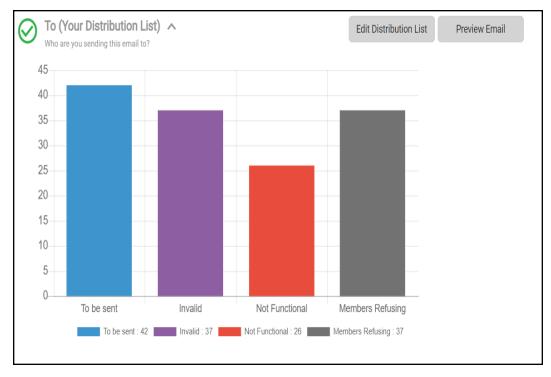
Start by clicking the drop-down to select one of the available options. Some options will then prompt for additional information. To find a list easily, begin typing in the To drop down menu to narrow down the list of distribution lists.

Example: If you select "Members by Selected Type", you will be asked to select one your club's defined member types. Once this is done, click the **Add** button to add this option to your distribution list. You can add as many options as you want, including multiple options of the same type (for example, more than one interest group.) Click the **Remove** icon to remove an option that was added in error.

Once your list is complete, you have the option to save it for future use, without needing to recreate it each time. You will be prompted for a distribution list name.

Click **Save** to save the distribution list and return to the main screen, or **Cancel** to return without saving. Once you save a distribution list, the "To (Your Distribution List)" icon will change to green, indicating that a distribution list has been defined. You can click the arrow beside the title to expand or collapse this panel.

The system will show the preliminary results of your distribution list in a graphical format, similar to the following:



The leftmost column displays an initial count of recipients for each component of the distribution list. Note that the actual number of emails sent may be lower if there are overlaps or duplicates. You will also see a count of users where the email address is flagged as invalid, not functional, or where the member has enabled their option to refuse general emails from the club. Keep in mind also that the actual list of email addresses is not built until the email is ready for delivery. So for emails to be sent in the future, these counts may change. Also, the system will automatically remove duplicates (for example, the same person in more than one interest group.) Once the email has been sent, an accurate count will be available.

The Content of your Emailing

The editor is visible below the Edit Basics and Distribution List panels. If you selected "Plain Text" on the Basic Info screen, you will see a simple text box with no formatting options. But if you selected "HTML" on the Basic Info screen, you will see a blank canvas on which the email can be created.

Available elements are displayed on the right and include the following options:

- 1 Column Text
- 2 Columns Text
- 3 Columns Text
- 2 Columns Text Right of Image
- 2 Columns Image above Text
- 2 Columns Text Left of Image
- "Hero" Section (photo above text)
- Image
- Image Group (2 images side by side)
- Divider
- Link or Button
- Social Media Links
- HTML
- File Attachment

When you use these elements (except for the HTML option), your email will be formatted to display correctly within email viewing programs such as Gmail, Hotmail, Yahoo, Outlook, etc., and on mobile devices such as iPhones, iPads and Android-based phones and tablets.

If you select the HTML option, just start typing in the editor window. But you are then responsible for formatting the email so that it correctly displays on the full range of devices.

Click on an element and drag it onto the canvas. You can drag elements in any order and drop them anywhere to create an emailing formatted exactly as you want. Not that we expect anyone to hit this, but there is a limit of 255 elements in an email.

The following screen shows an emailing with a number of elements in a specific sequence.

	Maximize Editor	÷		
One Column Text	🖍 🛱 💼	Elements	Templates	Element Style
This is a text block. Click the edit pencil in the toolbar to add or remove text. Two Column Image & Text		Drag an element to the canvas area to the left. Once you have dropped an element on the canvas, you can edit or arrange it.		
		1 Column Text	2 Column Text	3 Column Text
This is a placeholder image. Click the edit pencil to replace this image.	This is a placeholder image. Click the edit pencil to replace this image.			
,	/	2 Column Text Right	2 Column Image/Text	2 Column Text Left
This is a text block. Click the edit pencil in the toolbar to add or remove text.	This is a text block. Click the edit pencil in the toolbar to add or remove text.			
	× L w	Hero Section	Image	Image Group
Link / Button	▲ C) 亩		Ò	
C		Divider	Link/Button	Social Media
This is a link / button section. Click the ed	t pencil to add a link or button to this panel		File	

To drag an element to a different position, click and hold the "Drag" icon on the left side of the title bar, move the element to the new position and drop it (release the mouse button.) An element may contain multiple panels; they will all be moved.

To edit an element, click the pencil icon on the right side of the title bar. The various options you will see are described below.

To copy an element, click the Clipboard icon on the right side of the title bar. A copy of the current element will be created below.

To delete an element, click the trash can icon the right side of the title bar. You will be prompted to confirm this action. Once deleted, an element and its contents cannot be recovered.

Editing Text

When you edit a text block, you will see a simplified version of our advanced Content Editor, as shown below:

ain Text Edit	88
Enter your plain text here. When you click save, it will be inserted into the appropriate emailing element.	
styles 🔹 - webkit-stan 24px - 🐰 🖙 🐁 🤫 - 🤨 - 🖪 Z 🗵 🗛 - 🐎 - 📰 🇮 🗮 🗶 😓 巨 註 諱 諱 隆 🏂 🖄 🚍 👔	¥ •
Prez Sez	
Velcome to the June issue of the monthly email from our club President.	
Vords: 15 Characters: 81	
Save 🗸 Cancel 🗶	

It includes all the necessary functions to format text, including styles, font, size, emphasis (bold, italic, underline), font color and background color, alignment, lists, indenting, case, horizontal rules, and links. It does include functions that are now handled by other elements. Click **Save** to save your changes and return to the editing canvas, or **Cancel** to close the dialog without saving. You will be prompted to confirm this action.

Editing Images

When you edit an image block, you will initially see the following popup menu:

Insert Photo
insert Image

Within ClubExpress, images can come from two locations: photos (which are stored internally in multiple resolutions), and images (website graphics that are stored internally in a single resolution.)

Selecting Insert Photo displays the following dialog:



This is a standard dialog that allows you to search for a photo previously uploaded using various criteria.

Communications

Selecting Insert Image displays the following dialog:



This is a standard dialog that allows you to search for an image previously uploaded, based on filename, title, and/or folder. You can also upload a new image by clicking the **Upload New File** button.

When you select an image, it is inserted and resized automatically so that it fits reasonably within the emailing. You can make it smaller but you cannot make it larger than the specified size.

Once an image has been inserted, clicking the Edit icon displays the popup menu but now with a new **Properties** option:



Select Properties to see the following dialog:



This dialog allows you to control image alignment and top margin, as well as the size and color of any border. Click **Apply** to apply your changes, or **Cancel** to close the dialog without applying changes. The dialog will stay open to allow you to experiment with different options.

Editing Links

When you drag a Link/Button panel into the canvas and click the Edit icon, you will see the standard link builder dialog from the Advanced Content Editor.

within your web site; the current web page based on the selection Properties" panel to an image. Enter the	Address" panel allows you to create various types of links: to a page to an external web page; to an email address; or to an anchor within e. First, select a link type. One or two additonal choices will appear on you have made. Make your selection, then go to the "Link specify the appearance of the link. A link may be displayed as text or link text, or select an image, as appropriate. For web page links, you the destination will appear in a new window or in the current window.
Link Type and Add	ess
Link Type	< Select >
Link Properties — Link Display Type Link Text	Text Button Image Same Window New Window
larget window	
	Save 🖋 Cancel 🗶

Select the link type and additional options will appear. Select the link display type then specify text or an image as appropriate. Click **Save** to save your changes into the link element, or **Cancel** to close the dialog without saving.

Insert Social Media

When you insert a social media panel and click the Edit icon, you will see the following screen:



Specify the size and alignment of the links, then click **Apply** to apply your changes. The dialog will stay open to allow you to experiment with different options. Click **Cancel** when you want to close it.

Insert HTML Section

When you drag in an HTML section and click the Edit icon, you will see the full content editor with almost all of its options. (Only options not supported in emails have been removed.) You also have the ability to switch into HTML mode to build something as complex as you want.

Note: The HTML rendering engine in most email programs is significantly less powerful than in your browser. This is by design, to block an email in your Inbox from delivering a malicious package to your computer. When you use the other elements, we ensure that the content you create will render properly in an email viewer. When you use the HTML Section element, you can build a very complex page but it may not display properly when it's delivered to your recipients' inboxes. This is not something we can help with; solving problems in this element is beyond the scope of free support.

File Link

Use the File element to add an attachment to your email.

When you click the edit icon for a File element, you will see the following popup menu:

٩	Properties
Ľ	Attach New Document
=	Attach Existing Document

Note: Properties is only visible once a document has been attached.

When you select Attach New Document, you will see the following dialog from the Document Library module:

	ument to your web site, or edir an existing file. Most fields should be self-explanatory. Click the
"Select" button to	select the document., or you can drag-and-drop the file on this page
Folder	BOD committee folder
Title	June Board Meeting Minutes
Description	
ABC	
	0 of 1000 characters used
Tags	minutes ×
Author(s)	Board Secretary Jones
Create Date	6/10/2018 Revision Date
Visibility	Members Only
Select Document	Select • Max file size 100 MB
	Save 🖌 Cancel 🗶

Complete this dialog and click **Save** to upload it and create a link to that document in your emailing, or **Cancel** to cancel the operation without uploading and attaching a file.

When you select Attach Existing Document, you will see the following dialog:

Select a	Document 28
below the f	Ider from the folder list, and the documents within that folder will be displayed in a list olders. Select a document from the list, and then press the "Save" button to insert the Press the "Cancel" button to close this window.
Folder	BOD committee folder
Documents	village manual
	Save 🖌 Cancel 🗙

Select the Document Library folder and document then click **Save** to create a link to that document in your emailing, or **Cancel** to cancel the operation without attaching a file.

Note that the file is not physically attached to each email. Rather, we create a link to the file stored in your document repository. This makes each email smaller and more efficient for us to send (especially if we're

sending out thousands of them) and more efficient for recipients to download. Only those people who want to actually read the document need to download it and even then, it's still just one click.

Once a document is attached, select **Properties** to see the following dialog:

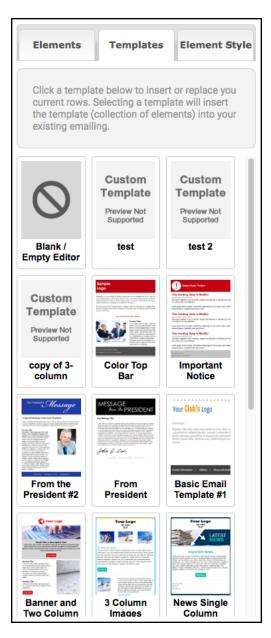
Edit File Link Properties
Modify these options to change how your file link will appear in the email. Change alignment and icon
Alignment
<pre>< Select > \$</pre>
Download Icon
Apply Close

Specify the alignment and icon used for the attachment link, and click **Apply**. Or click **Close** to close the dialog without making any changes.

Templates

Click the Templates tab on the right panel to view a list of built-in and custom templates. You will see a screen similar to the following.

Communications



A template is simply a collection of one or more predefined elements. When you drag a template onto the canvas, these elements will be inserted at the drop position, alongside the elements that were already there.

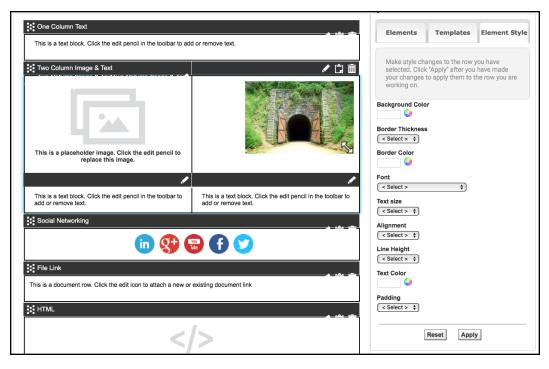
You can create your own templates from the Emailing Administration screen by clicking the **Configure** button and selecting Templates from the drop-down menu.

Templates are a powerful tool for creating either complete emailings that just need content, or standard components that you use over and over again, such as a heading or footer.

Element Style

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Clicking an element will highlight it with a blue border. Click the Element Style tab on the right panel to modify the appearance of the currently selected element on the canvas. You will see a screen similar to the following:



Notice the blue highlight around the element. (In the example above, the chosen element has 4 panels: 2 images and 2 text boxes below. All of them will be affected by any style changes.)

Change style as necessary and click **Apply** at the bottom of the panel to apply your changes, or **Reset** to reset styles back to their defaults.

Note that changes you make to styles at the element level do **not** override changes you make within a text block using the editor.

Example: If you center some text in the editor, then use the Element Style panel to change alignment to "Left", the text you entered and then centered will still be centered.

Personalization Tags

If you enabled **Personalization Tags** on the Basic Info dialog, when you edit a text element, you will see a new option in the popup editor window.

Pla	in Text Edit
	Enter your plain text here. When you click save, it
•	Select a tag from the list below, and click the Inser replaced when the email is sent. Do not modify or
<	Select Tag >
S	tyles 🔹 -webkit-stan 🔹 16px 🔹 🐰

Click the drop-down list to select a tag and click **Insert Tag** to insert a tag at the current cursor position. The following tags are available:

- Salutation
- First Name
- Last Name
- Work Title
- Work Company
- Member Type
- Join Date
- Expiration Date
- Address1
- Address2
- City
- State
- Zip
- Country
- Phone
- Spouse First Name
- Spouse Last Name
- Nickname
- Membership Status
- Mailing Name
- Sponsor Name
- Website
- Mobile Phone
- Work Phone
- · A member's answers to additional member data questions
- Member number
- President's name, title, phone, email address
- Membership Director's name, title, phone, email address
- Treasurer's name, title, phone, email address
- Webmaster's name, title, phone, email address
- Data Protection Officer's name, title, phone, email address

Tags add an extra step to the process of sending out blast emails, so this option should only be enabled when absolutely necessary. Tags are inserted using a special format:

~~first_name~~

so you should be careful not to modify this format. You cannot create new tags that are not in the above list. Also note that if you uncheck the option on the Basic Info page, the system will remove any tags previously placed in the email content.

Button Bar

Click **Save and Continue** to save your work but stay in the editing environment to continue making changes.

Click Save and Close to save your work and return to the Emailings Administration screen.

Click **Save as Template** to save the current layout and content as a template for future use. You will see the following dialog:

Enter a new template or Cancel.	or edit the e	xisting template	e, then press Save
Save As New Temp	ate		
Replace Existing Te	mplate		
ew Template Name			•
	Save 🖋	Cancel	

You can create a new template or replace an existing one. Click **Save** to confirm your decision or **Cancel** to close the dialog without saving.

Click **Send Test(s)** to send the email to yourself and, optionally, others, to see what it looks like. You will see the following popup window:

Send Test(s)	0
Your Email Address	
support@clubexpress.com	
Other Emails	
president@myclub.org membership@myclub.org treasurer@myclub.org	
Enter one email address per line that you want to send	
Send Test(s) 🗳 Cancel 🗙	t

Your email address appears at the top but can be changed. In the lower text box, enter one or more email addresses, one per line, to send the test email to other recipients. When you click **Send Test(s)**, the email is sent.

Note: Personalization tags will not work when sending the email to yourself as a test. If you want to test personalization tags, try sending the email to yourself by selecting "One member from the database" and adding yourself as the recipient of the email.

Click the **Ready for Delivery** button when everything is ready to be sent; it will not be available until then. You will be asked to confirm this action in case you clicked this button accidentally. Emailings are actually sent by an automated process that runs every 10 minutes or so and a large emailing may take a number of minutes to send, depending on what else the email servers are doing at the time. You can view the results of your emailing by clicking the **Results** option on the Emailings Administration page.

One of the options on the Basic Info panel allows you to send an emailing on a future date. So "Ready for Delivery" does not automatically mean "Send Now"; you may be queuing the email to be sent a couple of days or weeks in the future!

<u>Notes</u>

Emails sent using this function are compatible with the major emailing viewers such as Gmail, Hotmail, Yahoo, Outlook, Apple Mail, etc. They are also compatible with the email viewers built into smartphones and tablets. (The technically inclined can read the additional notes below.)

Emails sent using this function are also 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 – Privacy Options** page where they can opt out of 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 their email address completely from your non-member database. They also have the option to have their information removed completely from the database.

Individual emails are limited to 5MB in size, including embedded photos. Image elements automatically resize photos so they are suitable for emails. However, when inserting photos into an HTML element, large photos should be resized beforehand to make them smaller.

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 screen and report.

Additional Notes for the Technically Inclined

Responsive websites are built using <div> tags to control layout, and external style sheets to control the appearance of elements. But emailing viewers do not recognize these options. Instead, an emailing must be built using HTML tables to control layout and embedded styles to control the appearance of elements.

The tables inserted using the row builder tools have special CSS and HTML properties that allow them to flow differently in mobile email readers. Most left/right orientation design elements will flow vertically on small devices or viewers.

The design elements inserted via the row builder will display approximately 600px wide on desktop email clients. This width is standard and designed to fit well within most left/right pane email viewers.

Most email viewers will display buttons inserted in your emails using the ClubExpress Link Builder tool as proper buttons. However, Microsoft Outlook running on PCs will display buttons as links with the specified color background. This is due to poor HTML support.

Viewing Emailings on the Website

The **Emailings** function also has a user side that can be placed on the public or member's sides of your club or association website. Use the menu builder to add it to the public or member menus (for example, "Recent Emailings"), or the Insert Link function in the content editor to create a link on the home page or any detail page.

When users click this menu choice or link, they will see a page similar to the following:

nailings his is a list of emailing categories and the ema	illings within each category. Click on an emailing to view the contents.	
• Full Member em	ailings	
New Event Flyer Sent 4/21/2016		View E
Sent 4/21/2016		Vi

This screen will show only emailing categories that have been flagged to be visible on the page, and only emailings from the last X days, as configured on the Options page.

Each emailing is shown with the date sent and subject. Click the subject link or **View Email** icon to view the emailing in a popup window.

Note that this is the same window used when members or the public click the **View in your Browser** link at the top of the emailing itself.

Copy/Insert Customized Text

You can copy text from the old plain-text email system and paste it into the new email, or you can use the buttons to insert the entire text into the new email, or replace the new email with this text.

To replace the new email with the entire contents of this old customized version, click the **Replace Text in Editor** button.

To copy a section of this email into the new email, highlight it and click the **Insert Text in Editor** button. The highlighted text will be inserted in the new email.

If you elect to use this option, follow these steps:

- Return to the Email Edit screen.
- Place your cursor at the spot where you want this section to be inserted.
- Click the View Old Customized Email button to return to this screen.
- Highlight the text to copy.
- Click the Insert Text in Editor button.
- Click the Close button when you are done with this screen.

Concept Information

Committees	
Interests	

Related Tasks

Enabling and Disabling a Website Module	
Committees Manager	
Register for an Interest	
Manage Categories	
Interests Administration	
Interest Coordinator Special Functions	
Content Editor	
Photos	
Web Graphics	

Reference Materials

Mailing List Categories	
Bad Emails	

Text Messaging

Control Panel > Communications > Admin Functions

ClubExpress provides powerful tools that allow administrators to communicate with members and nonmembers via text message.

Clicking this option for the first time brings you to a new page to enable text messaging, and to accept the associated fees. Charges will be applied to sent messages, and your organization will be billed \$2 per month for the use of a toll free number (whether or not you send text messages). You can also find a list of fees in **Text Messaging Options**.

Note: Messaging rates apply only to messages that are successfully delivered.

After enabling text messaging, we will enable the feature and assign your club a phone number. At this time, you may modify text messaging options, categories, and create messages, however you will not be able to send messages until the feature has been enabled by ClubExpress administrators. In the meantime, you may see a warning messaging letting you know we are working on assigning your club or association a number.

he use of a toll free number (whether or no he recipient lives in. To see a list of rates that harged the rates that are applicable to ea on not abuse this communications platform apabilities if a review finds that these con-	ging. Charges will be applied to sent messages, and your organization will be t you send text messages.) The rate charged per text message differs depend y country click here. By checking the box below, you agree to enable text mess ch country. You also agree to the terms set forth by ClubExpress and our servi or use it for spam or marketing purposes. ClubExpress retains the right to de- litions have not been met.	ding on which country saging and to be ce provider, and agree activate text messaging
	Enable text messaging	
	Save 🖋 Cancel 🗙	

Once the module is enabled (even before you have been assigned a number), the Text Messaging Manager is available:

This module allows you to send text messages to the whole membership or small edited but they can be copied. Click the Add Message button to create a new text categories.		
Search For Text Messages	Configure 🔻	Quick Notify Request
Category < All Categories >	Bad Numbers	By default, your members are not allowing text messages to be sent to them. Click
Dates To	Users Report (Not Allowing)	the button below to send a request to all members who do not allow text messages.
Sender < All Senders > •	Add Message	An email will be sent with a link. After the member clicks on the link in the email.
Include Archived Text Messages Search 🞸		they will be taken to an options page where they can enable text messaging.
		Notify Members

Members and non-members must opt-in to receive text messages by visiting their member profile, under **Contact Info**. Non-members must opt-in when they click the **Add Me To Your Mailing List** link. Administrators cannot check this box on behalf of members or non-members. Administrators can send a **Quick Notify Request** to invite users to set their preference and receive text messages, or to opt-out. Clicking **Notify Members** sends members an email with a link to the **Text Messaging Preferences** page, where they will see one of two screens:

If the member has not opted-in,

?

or if the member has opted-in previously.

Text Messaging Preferences for Martin Smith	
Please update your text message preferences. Choose an option to receive text messages, or to opt out of receiving text messages.	
Your Mobile Phone Number 2245556348	
◉ I am currently accepting text messages from the Northwestern Balloon Club. I would like to keep receiving text messages	
\bigcirc I do not want to receive text messages from the Northwestern Balloon Club	

The **Text Messaging Manager** screen lists text messages previously created and sent. Each text message is shown with the title, sender, recipients, units incurred (for billing purposes) as well as the status:

- Draft (created on <date>) not yet sent
- Sent (<date>)

Note: Units listed before the text message has been sent may change when the text message is actually delivered. This is also true for double length text messages, as those are counted as two units each.

You can filter by category, date range, sender, and optionally include archived text messages. Click **Search** to show a list of matching text messages.

Maintain Options

The following options appear in the Maintain column:

Icon	Description
(Edit)	The Edit option allows you to modify text message. If the text message has not been sent, this option leads to the editor and a full set of options. If the text message has been sent, this option only allows you to change the category.
📁 (Сору)	Click Copy if you want to make a copy of a text message.
(View)	The View option allows you to view the text message.
(Archive)/	The Archive option archives a text message. It is still in the system but is not displayed unless the "Include Archived Texts" box is checked. For a text message that is already archived, the option will say Unarchive , which reverses the operation.

Communications

Icon	Description
(Unarchive)	
(Res- ults)	Select Results to display the results of the text message, including the number of mes- sages not allowed (delivered), and allowed. These results may be slightly delayed, as the carrier will contact us to report the results of each sent message.
(Reports)	The Reports icon displays the standard reports dialog with reports showing the results by status, failed delivery, and messages received including the cost.
	Share this text message on your club's social networks, including Facebook and Twit- ter.
Share)	Note: Facebook requires a link in order to post. If there is not a link within your text message, you will receive an error.
	Use the Delete option to completely remove a text message from the list if it has not been sent.
(Delete)	Note: This option should be used with caution since the deleted text message cannot be recovered.

Maintain Options

Clicking the **Configure** button displays the following options in a drop-down menu.

Note that the **Configure** button is not available to Subgroup Administrators. These options can only be changed by full administrators or module coordinators.

Categories

Text message categories allow you to organize and filter text messages in different ways (for example, prospective members, event registrants or committee members.)

Select **Configure – Categories** to see a standard ClubExpress category management screen. All options perform their expected functions. The Delete icon only appears for categories that have not been used.

Note: Adding a category in Text Messaging also adds the same category to Emailings, and vice versa. You may only edit or delete the category through the module that created it.

Subgroups: If your club or association has subgroups, you can create categories for use by subgroups, allowing subgroup text messages to be organized into their own categories. You must create a category for each subgroup in order to be able to send text messages to members and non-members of that subgroup.

Saved Distribution Lists

Text messages can be sent to complex distribution lists, such as "all active members of a specified type + members of two specified committees + non-members in the Press category + the following three individuals." You can also save these distribution lists for use at any time. ClubExpress builds the list dynamically when each text message is about to be sent so it's always up-to-date. The system automatically removes duplicates so that each recipient only receives one text message even if he or she is in multiple parts of the distribution list.

Note that distribution lists with multiple options act using "OR" conditions; each option is additive to the list.

Example: If you select "Members in a specified city" and enter "Chicago", then specify "Members of a specified type" and enter "Single", you will be sending a text message everyone in Chicago as well as everyone who's a Single member.

Select **Configure – Saved Distribution Lists** to create, view and edit your saved lists. (Lists can also be created and saved when you are creating a new text message. You will see a screen similar to the following:

Home > Control Panel > Text Messaging P		0
Click the "Add Distribution List" button to	reate a new text messaging specific distribution list; "Edit" and "Delete" perform the expected functions.	
Add Distribution List		
Name	Maintain 📷	
Active members, plus press and other clubs		
All active members		
CE-Presentation		
Expired members and active Singles		
Members and press		
Members, prospects, press		
President Says newsletter		
Prospective members and press		
Rules, BOD, Admins		
zText		
	Return to Previous Page	

Click the Add Distribution List button to create a new list. You will see a screen similar to the following:

Text Messaging Distribution List Edit 2 😵 🗞
Distribution lists represent the groups of SMS Text recipients. You can define one or more distribution groups for each list that you create. For example, you could create a distribution list consisting of trial members and non- members who are in the interested persons category. Select the distribution type from the list provided, enter any additional information that is requested, and click the Add button to add that group to the distribution list.
You can select an existing predefined distribution list for the SMS Text, or create a new one. Finally you can make your distribution list for this text a predefined list so you can easily use it in the future, by clicking the check box and giving the list a meaningful name.
Click 'Save' when finished (note: you will have to also click one of the action buttons on the text message popup to make these changes go into effect.
Use Saved Distribution List
Create a New List, or Select Recipients Without Using a List
To Not Selected Add Exclude
Save as a pre-defined list 🔲
Save 🖌 Cancel 🗶

Select an option from the **To** drop-down list. In some cases, a panel will appear underneath to configure additional settings.

Example: If you select **Members by selected Type** you will be asked to select one of your club's member types.

Click the **Add** button to add each **To** option to your distribution list. If you make a mistake, you can click the **Remove** (trashcan) icon to remove this option from your list. When you are done, specify a name for your list and click the **Save** button. Or lick **Cancel** to close the dialog without saving.

On the Distribution Lists main screen, click the **Edit** icon to modify an existing distribution list, or the **Delete** icon to remove a list.

Note: Adding a distribution list in Text Messaging also adds the same list to Emailings, and vice versa.

Options

Select **Configure – Options** to customize how the Text Messaging function behaves. You will see the following screen:



On this screen, you can specify the Message Prefix to be used as the "Sender". This defaults to your club short name, but can be modified to any name under 20 characters.

Enable double length text messages allows you to send text messages with a total of 286 characters (including the Message Prefix). Standard text messages are a total of 160 characters (including the Message Prefix).

Note: Sending double length text messages will be sent in and billed as two individual text messages.

You may also allow event coordinators to send text messages, or disable the feature.

Click **Save** to save your changes and return to the main Text Messaging screen, or **Cancel** to return without saving.

Bad Numbers

Home > Control Panel > Text Messaging Manager > Bad Phone Number List	
Bad Phone Number List	?
This page lists members and non-members who are having text message delivery problems. There are several possible causes	
 Invalid Number - the phone number is not capable of receiving text messages (land line), or is not a reachable phone number. Permantly Loavailable - the phone number has been removed from service and there is no indication of when it will become available again. Biocked - Owner of this number has 'opted out'. Opt-outs are typically received via text message replies with a opt-out keyword including 'STOP'. All messages to numb have opted out will becked unit the destination of so in the destination of so in a set of the destination of set of the destination of the destinatis destination of the destination of the destination of the d	
For "Blocked" or "Invalid Number" phone numbers, no text messages will be sent. For "Blocked" and "Invalid Number" phone numbers, changes will be applied on the next text r that is sent. For permanently unavailable, temporarily unavailable or invalid numbers, this page includes several options:	nessage
Review the phone number and make any changes necessary Clear temporary failures, and try another message Remove the phone number, or uncheck "allow text messages" on the users profile	
Failure Type <any failure=""> Clear Temporary Failures Exclude Expired Members Search \$</any>	
Name Members(s). No bal numbers found. Maintain	
Return to Previous Page	

This page lists members and non-members having text message delivery problems. There are several possible causes, and you may filter search results by each:

• **Invalid Number** - the phone number is not capable of receiving text messages (land line), or is not a reachable phone number.

- **Permanently Unavailable** the phone number has been removed from service and there is no indication of when it will become available again.
- **Blocked** the owner of this number has "opted out". Opt-outs are typically received via text message replies with an opt-out keyword including "STOP". All messages to numbers that have opted out will be blocked until the owner opts in.
- **Temporary Failure** This is a broad error code and often times, the carrier does not indicate the reason for the destination to be temporarily unavailable. Though, possible reasons could be due to the handset being turned off or out of coverage.

Note: In the case of Blocked or Invalid phone numbers, no text messages is sent. Changes are applied on the next text message that is sent.

For Permanently Unavailable, Temporary Unavailable or Invalid numbers, this page includes the following options:

- Review the phone number and make the necessary changes
- Clear temporary failures and try another message
- Remove the phone number, or uncheck "allow text messages" on the user's profile.

Users Report (Not Allowing)

Click this button to run a report showing all site users who have not opted in to receive text messages.

Add Message

Clicking Add Message will display the following screen:

Add/Edit Text Message	0 & 0
First, define a distribution list for this text message. Who are you sendii title (so you can maintain it easier) and select a category from the drop messages should be sent immediately, or at a later time. You may also characters for the link will be deducted from the total amount of charactext message). Type the message content, and then click save or ready	down list. Select if the choose a link (the ters you can send in the
Distribution List	Edit Distribution List
You do not have a distribution list defined. Click the "Edit Distribution who this text will be sent to.	on List" button to define
Title	•
Category < Select >	
Send Now On This Date	
Links To Click here to add a link 🕂	
Message Text 0 of 139 characters used Use double length message	•
Save Ready For Delivery ✔ Canc	el 🗶

Edit Distribution List

Click the **Edit Distribution List button** to specify a complex distribution list to receive the text message. An additional option allows you to reuse a previously saved distribution list. You will see the following dialog.

Text Distribution List Edit	X
Distribution lists represent the groups of SMS Text recipients. You can define one or more distribution groups for each list that you create. For example, you could create a distribution list consisting of trial members and non-members who are in the interested persons category. Select the distribution type from the list provided, enter any additional information that is requested, and click the Add button to add that group to the distribution list.	
You can select an existing predefined distribution list for the SMS Text, or create a new one. Finally you can make your distribution list for this text a predefined list so you can easily use it in the future, by clicking the check box and giving the list a meaningful name.	
Click 'Save' when finished (note: you will have to also click one of the action buttons on the text message popup to make these changes go into effect.	
• Use Saved Distribution List	
Active members, plus press and other clubs	
Create a New List, or Select Recipients Without Using a List	
Save 🖌 Cancel 🗶	

When **Use Saved Distribution** List is selected, click the drop-down to select a previously saved distribution list.

Note: The Text Messaging function is also available in the Event Calendar, where several additional options are provided, such as the ability to send a message to everyone registered for that event.

Click the **Create a New List...** radio button to create a new list. Start by clicking the drop-down to select one of the available options. Some options will then prompt for additional information.

Example: If you select "Members by Selected Type", you will be asked to select one of your club's defined member types. Once this is done, click the **Add** button to add this option to your distribution list. You can add as many options as you want, including multiple options of the same type (for example, more than one interest group.) Click the **Remove** icon to remove an option that was added in error.

Once your list is complete, you have the option to save it for future use, without needing to recreate it each time. You will be prompted for a distribution list name.

Click **Save** to save the distribution list and return to the main screen, or **Cancel** to return without saving. Once you save a distribution list, the "To (Your Distribution List)" icon will change to green, indicating that a distribution list has been defined. You can click the arrow beside the title to expand or collapse this panel.

The system will show the preliminary results of your distribution list in four columns, separated by distribution list selection:

Add/Edit Text Message		❷≎⊗
First, define a distribution list for this text message you can maintain it easier) and select a category of should be sent immediately, or at a later time. You will be deducted from the total amount of character message content, and then click save or ready for	from the dropdown list. S I may also choose a link ers you can send in the t	Select if the messages (the characters for the link
Oistribution List		Edit Distribution List
(Actual number of texts to be sent may be lower due to pos	ssible duplicates, bad phor	ne numbers, etc.)
Category: Press		
0 To be sent 8 Refusing / Not Allowed	0 Invalid	0 Bad / Not Functional
All active members		
6 To be sent 126 Refusing / Not Allowed	0 Invalid	0 Bad / Not Functional
Member Type: Friends of the Shiawassee River	Senior	
0 To be sent 0 Refusing / Not Allowed	0 Invalid	0 Bad / Not Functional
Title		•
Category < Select >	▼ ●	
Send Now On This Date		
Links To Click here to add a link 🕂		
Message Text		•
0 of 139 characters used		//
Use double length message	2	
Save Ready For De	livery 🖌 Canc	el 🗙

The leftmost column displays an initial count of recipients for each component of the distribution list. Note that the actual number of text messages sent may be lower if there are overlaps or duplicates. In the next column is the number of users who have opted-out of receiving text messages. You will also see a count of users where the phone number is flagged as invalid or unavailable. Keep in mind also that the actual list of phone numbers is not built until the text message is sent. So for text messages to be sent in the future, these counts may change. Also, the system automatically removes duplicates (for example, the same person in more than one interest group.) Once the text message has been sent, an accurate count will be available.

The content of your text message

Enter in a title for the message, to be used in Text Message searching, and a category from the preconfigured list of categories. You may also elect to send the text message on a specific date and time, or immediately.

Clicking on "Click here to add a link" displays a short link builder screen. You may link to any of the following:

- Home Page
- Custom Page
- Photo Album
- Upcoming Event
- Volunteering Opportunity
- News/Article
- Blog Entry
- External Page

Creating the short link may take several seconds. The link will not appear in the drafted text message. It is saved separately from the text message and only inserted later when the message is sent by the system.

If you have enabled double length messages, you will also see a checkbox to use a double length message, which will increase the number of characters available.

Click **Save** to save the message without sending, **Ready For Delivery** to send the text message, or **Cancel** to exit without saving your changes.

Sending a Text Message

If you click **Ready for Delivery**, the message will be queued for immediate delivery, or on the specified date if you have chosen delayed delivery. Text messages are sent about every 15 minutes once delivery is scheduled (either immediately or at a specified date and time). Once your text message has been sent, you can click on the **Results** icon to see what was actually sent. The **Reports** icon lets you see reports that include details about the text messages, including results, failed delivery, and the number and cost of **Received** messages.

Bad Emails

Control Panel > Communications > Admin Functions

Select this option to see a list of email addresses from your member and non-member databases that have been flagged as "bad". You will see a screen similar to the following:

Communications

Home > Control Panel	Bad Email List				
Bad Email I	List				
Bad Format - t Invalid Address Blocked - deliv Temporary Fai For "Bad Format" and we may stop sending n	he email address is s - the email address eries to the email a lure - temporary pro 'Invalid Address" ao nessages to that en	ddress are blocked by an anti-spam filter oblem such as the mailbox being full or the mail server being temporarily o ddresses, no emails will be sent. For "Blocked" and "Temporary Failure" ar	ffline	d again. Note that if the ten	nporary failures continue,
Search Bad Ema Failure Type an					
Found 195 email(s	i).				Page 1 of 7 < >
Name	Member?	Email Address	Problem	Phone	Maintain 📑
Bagodonuts, Junior	Member	jr@bagodonutes.com	Temporary Failure		1
Expired	Additional Info: ad	ction: failed			
ball, george	Member	gball@tm.net	Invalid Address	6529568975	24
Expired	Additional Info: 5	50 no such user here			
Ballard, Sara Expired	Member	sasdfa@kijasidf.org	Invalid Address	1574555555	1

This screen lists members and non-members who have had email delivery problems. Four possible causes may be listed and you can filter by each type:

- 1. Bad Format the email address is not correctly formatted.
- 2. Invalid Address the email address does not exist.
- 3. Blocked deliveries to the email address are blocked, usually by an anti-spam filter.
- 4. Temporary Failure temporary problem such as the mailbox being full or the mail server being temporarily offline.

You can also exclude expired members from the list by checking the box.

30 entries are shown at a time. Using the Paging options to move forward or backward through the list. For each entry, the system shows the name and membership status, whether this entry is a member or nonmember, the current email address, one of the problems defined above, the primary phone number, and an additional information section with technical details (including the SMTP error code if one was provided.)

The Maintain column has a single **Fix** icon. Clicking it displays the following screen:

Communications

Home > Control Panel > Bad Email List > Bad Emails	
Bad Emails	
One or more of your email addresses is not receiving e address(es). The following reasons could be the cause • Bad Format - the email address is not correctly • Invalid Address - the email address does not e • Blocked - deliveries to the email address are bo • 'mail2.clubexpress.com' to your email whitelist have to set it to skip 'mail2.clubexpress.com'. • Temporary Failure - temporary problems such to send email to yiu at this address. Please ch Some email servers return additional information on wl For blocked messages or temporary failures, make amy For bad format or invalid address, this page includes s • Change the email address.	y formatted. The address must be changed before we can try to send you email. xist. The address must be changed before we will try again to send you email. locked by an anti-spam filter, or a challenge/response mechanism. To prevent this, add . We cannot respond to challenge/response mechanisms, so if you are using one, you will as the mailbox being full or the mail server being temporarily offline. We will continue to try eck your account to be sure it is able to receive mail. hy a message was rejected. This is displayed if available. y changes necessary on your email account. We will continue to try sending email.
Ignore the error for now - you can come back a Email Address Problem Disposition	
abby@abc.com Bad Address Change to: Reactivate address Drop it - I no longer Ignore error - do no Additional Info: 550 5.1.1 user unkn	r use this address ot fix
	Save 🗸 Cancel 🗙

For each bad email address, the following options are available:

- 1. Change the email address to the value entered.
- Reactivate the email address if you believe it can now receive messages (not available if the error is "Bad Format".)
- 3. Drop the bad email if the member or non-member no longer uses this address. Note that this will remove the affected email address completely from the account.
- 4. Ignore the error for now; you can come back and correct it later.

Click Save to save your change and return to the Bad Emails list or Cancel to return without saving.

Click the **Clear Temporary Failures** button to remove all temporary failures (mailbox full; mail server offline; etc.) You will be prompted to confirm this action.

Note: We recommend that you visit these pages on a regular basis to manage this list and keep it as short as possible. This is one way to ensure that all email addresses in your member and non-member databases are valid.

Email Accounts

Control Panel > Communications > Setup

Note: Forwarding accounts should not be used as the main email for accounts with other companies, especially those that send login verifications or two-factor authentication passwords. When

orwarded, these email are generally blocked by the receiving servers. You should use a personal or pusiness email address in these cases.

ClubExpress supports club-level email forwarding accounts such as:

- president@myclub.org
- info@myclub.org

If we are not handling email for you, you will see a message on this page indicating that forwarding email accounts cannot be created.

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:

Home > Control Panel > Emai	Account Administration		
Email Account Adı	ministration		
president@domain or memb	rding email accounts linked to your domain names. Use these to ership@domain. When email is sent to these addresses, we wil counts; additional ones are available on request.		
Account	Forwarded to	Maintain 🔳	
membership@demoforums.org	mary@gmail.com	🧷 🛱	
president@demoforums.org	john123@hotmail.com		
treasurer@demoforums.org	andyjones@comcast.net 🧷 🛱		
<unassigned></unassigned>			
<unassigned></unassigned>			
			-
	Return to Previous Page		

You will see a grid with the number of rows equal to the number of available email accounts.

The following options are available in the Maintain column:

lcon	Description
(Assign)	The Assign option allows you to define a club-level email account and assign it to a mem- ber's individual email address.
🧪 (Edit)	The Edit option allows you to modify email forwarding assignments.
(Delete)	Use the Delete option to delete an email forwarding assignment.

Maintain Options

When you click **Assign**, you will see the following screen:

Communications

	nd part of the ernal address in the topopul bitli then sated are of your mild to inscribing ernal address where and actually for detwend, thus may up separated to serie colors. Do not use species or commen-	ing danaka. adiy nutiges
Assount	eastanty .	
Domain	demolecum.org 1	
	nenterting@dendtrum.arg	
Portelaritis To	maygipmal.com	•

Enter the email account name (for example: president). Select which of your domains this email account belongs to; you will only see those for which ClubExpress is handling email. Then specify the actual email address to which emails should be forwarded. See "Organization Titles" on page 520

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.

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.

Notes about Email Accounts

By default, each club is given five email forwarding accounts. Additional ones can easily be added for \$5.00 / account / year..

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.

If your club has multiple domains, you cannot simply change the domain assigned to an account. It needs to be deleted and recreated.

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.)

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Emailings	,
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Mailing List Categories

Control Panel > Communications > Setup

ClubExpress allows you to organize both members and non-members into categories. Sometimes this is done automatically, such as when someone registers for an event that has a specific category assigned to it. It can also be done manually, such as when you want to assign someone to a "Press" category you have created to track members of the press. People can be in multiple categories. See "How Did You Hear About Us" on page 246

The system provides a data export to generate a CSV list of everyone in a category. It also allows you to select categories when you are sending out blast emails.

Clicking this option displays a screen similar to the following:

Home > Control Panel > Mailin Mailing List Ca	-	•		
existing category; you can onl	ed to sor y click "D	t people within your elete" if there are r	r database (for exa to entries assigned	ble, prospective members, donors, press, etc.) Click "Add Category" to add a new category; click "Edit" to mor that category.
Add Category Category	Entries	Show On	Maintain 📻	
		'Add Me' Screen		
2008 Peach State 1/2 Marathon	23	Yes	Ø	
Ad Hoc Form User	20	N/A	System	
Collectible Owner	0	N/A	System	
Donor	37	N/A	System	
Event Registrants	77	N/A	System	
Guest	16	Yes	6ª	
Interested Persons	19	N/A	System	
mailing list	7	Yes	Ø	
Member Referral	0	Yes	0 🙀	
Plumbers	1	No	Ø	
Press	7	No	Ø	
Storefront Customer	3	N/A	System	
Volunteer	1	N/A	System	

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:

Add/Edit Mailing List Category	⊕ 0 ⊗
Enter a new category or edit the existing category, the	en press Save or Cancel.
Category Press Show on 'Add Me' Screen	•
Save 🦋	al 🗶

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 Mailing List 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 people who make a donation using the Donations module, unless a different category has been specified for that fund.
- Event Registrants for people 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 and have not selected any other categories on the form.
- Storefront Customer for people who place orders through the club's E-Commerce storefront.
- Volunteer for people who sign up for a volunteering opportunity.

Social Networking

Control Panel > Communications > Setup

When you select **Social Networking**, you will see a screen similar to the following:

		ial Networking Setup		
		· ·		
				rk" to choose a social network link/icon to s well as additional share options.
Add Social Net	work Soci	ial Networking Options	Display Sequence]
				-
Social Network	Maintain			
FaceBook	🥟 🙀			
Twitter	N 🙀			
		1		
				Return to Previous Page

This screen allows you to add links to one or more social networks where your club or association has a presence. These links appear in a special panel defined for each website layout.

Click Add Social Network to add a new social network. You will see the following screen:

This screen lists sup network to your activ		tworks. Select a ne	twork from the list, then cl	ick the Add button to add the
ocial Network				
Twitter	\$)		
JRL enter the wh	ole url including	http(s)://		
http://www.twitter.com/nwballoonclub		Test		

Select the social network from the drop-down list, then enter the URL to your account (or wall or page or feed, or whatever wacky name that network uses!) The full URL should be entered, including the http:// or https://. Click the **Test** button to open a new window and test the URL.

Click **Add** to add this network and return to the main setup screen, or **Cancel** to close the dialog without saving.

The standard social networks are available. If new ones are added, or if your club has a presence on a more obscure social network, contact ClubExpress and we can add a definition for that network.

Social networks appear on your website with a standard icon, from among the options defined by that social network. This is not configurable by each club.

Back on the main setup screen, click the **Edit** (pencil) icon to modify a social network definition, or the **Delete** (trashcan) icon to remove a definition.

Display Sequence

This option will only appear if more than one social network is defined. It displays the standard ClubExpress sequence dialog, allowing you to define the order in which icons will appear.

Social Networking Options

When you click this button, the following screen appears:

Social Networking Options
This screen lists general social networking options. You may choose to turn social networking off entirely, or to use a minimal set of icons instead of the "Like & Share" Panel.
General Options
Display Social Networking? 💿 Yes 🔘 No
Show Share Links and Panel? O Yes 💿 No
Social Networking Preview Image
This image will be displayed whenever a link to your site is posted. (Supported by some social networks)
No Image Uploaded Yet
Select File
Choose File no file selected
Save 🗸 Cancel 🗙

Display Social Networking allows you to turn the social networking panel on or off.

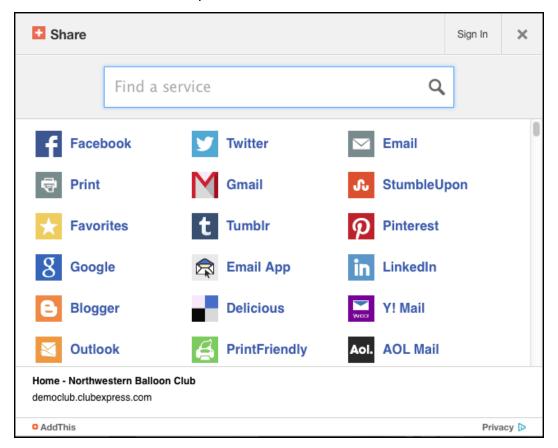
Show Share Links and Panel allows you to enable or disable a standard panel or share links. These are not for the club's social networking page but rather for each individual user's page or feed. If a member or non-member finds an interesting page on your website, he or she can share it on their wall or feed using this option. If enabled, this icon will always appear at the end of the list.





This panel stays open until explicitly closed, allowing you to share the interesting website content on multiple services.

Users will see a standard icon in the social networking panel, on public pages only (since member pages require a login to access.) Clicking this icon displays a popup panel with standard sharing options (Facebook, Twitter, Pinterest, and LinkedIn), as well as an orange "+" sign that ultimately opens a dialog with almost 200 additional options!



Social Networking Preview Image

This option allows you to upload an image that represents your website. When someone posts a link to a page on your website on their personal wall or feed, this image will be used to represent the site. Select a file from your local hard disk. At present this option is for Facebook only.

Click Save to save your changes and return to the Setup page or Cancel to return without saving.

Posting to Social Networks

In a number of places within ClubExpress, administrators and coordinators can push content to your club's social networking pages, including Facebook and Twitter.

Note: LinkedIn no longer supports push notifications due to policy changes by that company.

In order to post to social media, you need to explicitly authorize "ClubExpress.com" to be allowed to post to your page or feed via that network's API (Application Programming Interface.) For Facebook, this only needs to be done once. For Twitter, it needs to be done in each session (by Twitter policy.)

Note: The posting process is secure. ClubExpress does not have access to your passwords; we don't see them at all since the login and authorization is done on a page served by each social network.

Facebook

When you are posting to Facebook, be sure first to connect to the club's page rather than your personal page, via the **"Using Facebook as..."** option.

When you try to post to Facebook the first time, you will see the following dialog:

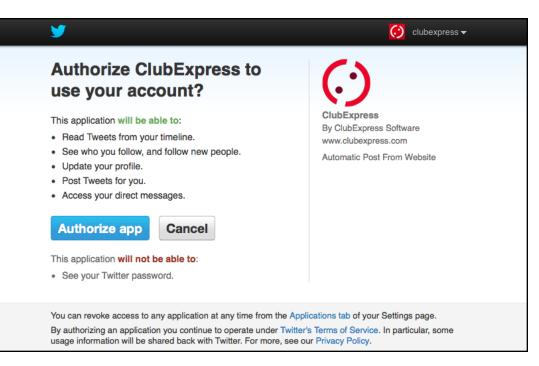


You will usually want the post to be public, but you can click the **Public** drop-down to limit the scope of your post. Click **Okay** to complete the authorization or **Not Now** to cancel the process.

For this feature to work, you must be configured as an "admin" on the club's account, or have the privilege to post to the page.

<u>Twitter</u>

When you try to post to Twitter the first time in each session, you will see the following popup browser window:



The top right corner of the screen will show the Twitter feed you are trying to access. Click **Authorize App** to complete the authorization or **Cancel** to close the window without authorizing.

Note: Of the five bullets listed, the only one ClubExpress actually does is "Post Tweets for you."

System Emails

ClubExpress sends various emails related to membership (such as renewal notices), and to activity on your website (such as ever confirmations). You can customize many of these emails. The list below includes all the emails you can customize. Emails marked have been configured.				with
Emails marked with a were customized in our old plain-text email system. Those customized emails will no longer be used, how you edit the new html email, you will see a button allowing you to view the old email. You can copy and paste your original custom NOTE: Please send a test email to yourself (click a) before using any customized emails. Check the layout and alignment. Tes expected (member-specific links like payments or renewal will not work).	izations into the i	new email.		
Send System Tag Test Email Defaults				
nail	Customized	From Email	Maintain	
			0 8 🖂	
d Hoc Form Response Status Changed Sent to user once he's paid for response or when response is withdrawn or reactivated d Hoc Form Response Status Changed - Coordinator Notification Sent to coordinator once user has paid for response or when response is withdrawn or reactivated			<i>i</i> i i i i i i i i i i i i i i i i i i	

System Emails are automatically generated based on a user or admin action on your website, such as member registration, a payment, or completing a form on your website. System Emails are generated from the following addresses:

- Emails to users mailer@mail2.clubexpress.com, with the From address specified based on the email being sent (for example, a survey confirmation email will come from the survey coordinator)
- Emails to admins support@clubexpress.com.

This form shows an alphabetical list of all system emails that can be customized. Each email is shown with a title and description of when it's sent. A gear icon in the Customized column tells you whether the email has been customized. If you see a yellow caution symbol, this system email was customized manually using our old system (prior to February, 2015 when this feature was deployed.) These customized emails are no longer being used but you can view the original email in order to make the same changes to the new formatted emails. When this is done, the yellow caution symbol will be replaced by the green check mark.

Note: The built-in Payment Confirmation email cannot be customized; some content in this email is required and cannot be edited or removed.

Send System Tag Test Email

When you click this button above the grid, the system will generate and send a test email to an email address that you designate. This email will list all the replaceable tags available for your organization and

Communications

for each member (using your own personal data for the membership info).

Send Email Test	0 8 0
Send To info@clubexpress.com	٠
Send Test 🗲 Cancel 🗙	

Configure Email Defaults

Email Configure: Defaults	88
Use this page to configure your email. You will be able to change who the e-mail appear from, and who the reply-to is. Please be aware that when you set a system-wide defaul e-mails will use the specified field values unless you further configure a specific System Email, even if the e-mail previously came from a specific person such as an Event Con-	t, all 1
From Address	
From Name	
Reply To Address	
Reply To Name	
Save Cancel X	

Select this option to configure the default From and Reply names and email addresses. These are systemwide defaults and will affect every system email generated. You can specify separate From and Reply names (as well as the subject line and whether or not to track opens), for individual emails using the Configure (wrench) icon in the Maintain column. See "Configure Individual Emails" on page 582.

Maintain Options

The following options are available in the Maintain column:

lcon	Description
(Edit)	Edit this email. You will see the screen described below.

Communications

Icon	Description
(Send Test Email)	Send a test version of this email so that you can see how it looks. As above, you will be prompted for the destination email address.
(Results)	This icon will only appear if you have enabled Tracking.
Configure)	Configure the specific defaults for the email, including the subject line and whether or not "opens" are tracked for that email.
(Remove Cus- tomized Version)	Remove the customized version of this email. The system will send out its default version instead. You will be prompted to confirm this action.

Maintain Options

Editing System Emails

See "Content Editor" on page 103

When you click the **Edit** icon, you will see an editor dialog window similar to the following:

Email Edit: Misc. Charge Confirmation
Use this page to customize your email. The drop down list at the top of the page includes all the tags available for this email. NOTE: If you have previously customized this email in the old plain-text system, click the 'View Old Customized Email' button to access your customizations.
< Select Tag > Insert Tag View Old Customized Email
Fon B Z 旦 A
A miscellaneous charge was entered into your account by an administrator:
~~description_of_charge~~
Amount: \$~~amount~~
Please <u>click here</u> to log into the website, review this charge, and complete payment. If you have any questions about this charge, contact ~~membership_director_name~~ Phone: ~~membership_director_phone~~ <u>~~membership_director_email~~</u>
Design
Save 🗸 Cancel 🗙

Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

If you had previously customized this email in our old system (prior to February, 2015), you will see a button in the top right corner allowing you to view the old customized email in a popup window. You have three options:

- Replace the text in the editor with the original text;
- Insert the original text into the editor, alongside the new text;
- Close the dialog without copying the original text over.

Click **Save** to save your changes and return to the list of system emails, or **Cancel** to return without saving your changes.

Configure Individual Emails

Email Configu	re: Donation Confirmation 🛛 😧 😒 😒
from, and who the rep	gure your email. You will be able to change who the e-mail appears y-to is. You will also be able to change the default e-mail subject, not you want e-mails to be tracked when they are opened by
Subject	
From Address	
From Name	
Reply To Address	
Reply To Name	
Track Opened Emails	
	Save Cancel X

Select this option to configure the From and Reply names and email addresses for this specific email. These will affect this email only and will override any defaults you may have configured for all system emails. You can specify separate From and Reply names, as well as the subject line and whether or not to track opens. **Note:** If you configure a custom From, Reply To or subject field, test system emails will not include those entries; the test email will only include the customized body.

Note: ClubExpress will only use a 'From' email address if we host the domain, or if we have an SPF record authorizing us to send emails on behalf of your domain. Contact our <u>Support Team</u> to provide us with the details.

Understanding ~~tags~~

Each of these system emails includes a number of replaceable \sim tags \sim , designated by two leading and two trailing tilde symbols.¹

When an email is generated by the system and sent out, we replace these ~~tags~~ at runtime with their actual values, based on the operation just completed.

Example: When new members sign themselves up, the confirmation email includes the following tags:

- First Name
- Club Name
- Member Number
- Total Charge
- Date and Time of Transaction
- The membership director's title, name, phone and email address
- The president's title and name
- Etc.

When it's sent out, each tag is replaced by its actual, current value for that member who just signed up.

Some of this information is pulled from other modules of ClubExpress.

Example: The membership director's title and name are pulled from the Titles and Contacts function. So you don't need to modify dozens of emails each time your club's officers change. Instead, change them in one place (the Contacts screen) and every email from that point forward will pick up the new information.

¹Note that the old system (replaced in February, 2015) used angle brackets to designate replaceable <<tags>>. When you convert old emails to the new system they are replaced automatically by tildes.

You cannot invent new tags since each one requires programming. But there is an extensive and dynamic list of tags that can be dropped into each email, many of them email-specific. Tags fall into three categories:

- · Club level tags such as the club's name and website address;
- Member level tags such as the member's name and member type;
- Email-specific tags, such as the payment amount for a payment confirmation.

Note: The "Contact" tag (contact_name and contact_email) correspond to the contact designated for the item, for example the contact in an event-related email would be the event coordinator.

Click the <Select Tag> option in the top left corner to see the full list. Click **Insert Tag** to insert that ~~tag~~ at the cursor position.

Be sure not to modify any inserted ~~tags~~ directly, including removing the tilde symbols, otherwise the email will not be formatted as you expect. It's always a good idea after modifying and saving an email to send a test to yourself, to verify that everything is correct.

Tracking System Emails

Select the Results icon to see how many emails have been sent and opened since Tracking was turned on for the specified email. You can filter your search results by date range, or select Search without any criteria to display all records.

System I	Email Tracking - M	isc. Char	ge Confirmation	?
View a summary of	of system emails that have been sent and flagge	ed as tracked. Click or	a member or non-member's name to see their contact info.	
	a			
Start Date	Finish Date	Sear	ch 🗲	
Search Results:	6 record(s) found			
Date	То	Opened?		
7/21/2022 4:23 PM	Member Test (test@email.com)	No		
7/21/2022 4:23 PM	Samantha Elizabeth (samantha@email.com)	No		
7/21/2022 4:17 PM	Orville Acton (orville_acton4242@gmail.com)	No		
7/21/2022 4:17 PM	Colleen Carter (colleen@email.com)	7/21/2022 4:21 PM		
7/21/2022 4:17 PM	Samantha Elizabeth (samantha@email.com)	7/21/2022 4:21 PM		
7/21/2022 4:17 PM	Martin Smith (martin@email.com)	No		
		Return t	o Previous Page	

Each record shows the date and time the email was sent, the recipient, and the open status (whether or not the email has been opened and when).

Disabling System Emails

ClubExpress has the ability to turn off many of the emails sent by the system. Some organizations do not want their members contacted by the system.

Note: With the Renewal Notice exception noted below, **System Emails** can only be disabled by ClubExpress and on an **all-or-nothing** basis; you cannot choose individual emails to disable.

Renewal Notices **can be disabled** from within the system by an administrator (or coordinator with the appropriate rights). You control whether they are sent out or not via the settings in the middle panel of the Renewal/Expiration Settings screen. See "Renewal / Expiration Settings" on page 274

The following emails sent by the system cannot be disabled even if System Emails have been disabled:

- Forum Emails, if a forum is set to send out emails and members explicitly subscribe to receive these emails.
- Event Auto Reminders, if you have scheduled them to be sent.
- Volunteering Auto Reminders sent out the day before a volunteering opportunity for which the member or non-member signed up.
- Emails created by someone in your organization using the Emailing function on the Control Panel Communications tab. Note that members can individually opt out of receiving these emails from their Profile – Contact Information screen.
- Emails created by someone in your organization using the Emailing function within an Event.
- Emails sent to members of a committee using the Send Email to Members button (which only Admins and committee members can see) in Committees.
- For Aging-in-Place Villages using the village special features, Service Request Auto Reminders that are configured in the Service Options screen.

Reports/Exports

Administrators: See "Reports" on page 93 for more information about running reports.

Reports

If available, selecting Reports displays the Report Group selector pop-up. Once you select a group, the system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Group	Report	Description	Filter Options
Member Email Prob- lems	Members without Email	Members without an email address, including phone number and address, sorted by last name	Members status, type, level
Member Email Prob- lems	Members Refusing Email	Members refusing blast emails, including email address, phone number and city and state, sor- ted by last name	Members status, type, level
Member Email Prob- lems	Members with Bad Emails; see "Bad Emails" on page 567	Members with bad email addresses, including email address, status and phone number, sor- ted by last name	Members status, type, level
Member Email Prob- Iems	Non-Members with Bad Emails	Non-members with bad email addresses, including email address, status and phone num- ber, sorted by last name	N/A

Communications Tab Reports

Support

Online Help

Every screen in ClubExpress includes a help link in the top right corner. Clicking this link takes you to context-sensitive online help for that screen.

Administrator Forum

If you enable the Discussion Forums function, administrators will see a special "Administrator Forum" at the end of the list. This is a peer-to-peer discussion forum for all ClubExpress administrators.

Note: You do not need to put the Forums function on the menu if you don't plan to otherwise use it.

Manuals

Provides links to view printable manuals for administrator instructions. These manuals are printable versions of information in the help system.

Video Tutorials

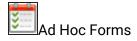
Provides links to view tutorials on many of major features in ClubExpress. Click the double-down arrow to expand each category.

Newer tutorials are stored on YouTube . Older ones are available in different formats for PCs and Macs.

Contact Us

Lists other methods to contact support, including our email address and phone numbers.





Custom forms on the website to collect information from members and/or non-members Read More



The benefits of joining the organization Read More



Publish periodic articles of interest or opinion pieces Read More

Business Directory

An online directory of member businesses Read More



Locate chapters, districts or regions of the organization Read More



Keep track of visits to a facility Read More

ClubExpress Modules



Maintain and track member collections Read More



Organize committees and committee members Read More



Ways for your members and website visitors to contact your club Read More



Online discussions on a variety of topics Read More



Document Library

Organize documents into folders for website visitors to download Read More



Funds into which members and non-members can donate Read More



Online club calendar Read More



ClubExpress Modules

Questions and answers organized into topics **Read More**

Gift Memberships

Allow members and non-members to purchase a membership for someone else Read More



List various special interests, programs or affiliations that the organization sponsors **Read More**

Member Directory

Locate and contact other members **Read More**



Wember Signup/Renewal

Configure the wizard used for joining your club Read More



News/Articles

Communicate announcements or create a library of articles **Read More**



Albums of photos uploaded by administrators or members **Read More**



Sell club merchandise though your website **Read More**

ClubExpress Modules



Create surveys and polls on your website Read More



Post volunteering opportunities for signup Read More

Ad Hoc Forms

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The Ad Hoc Forms module allows Administrators to create custom forms on the website to collect information from members and/or non-members. Such forms can be used for different purposes.

Ad Hoc Forms comprise a single page with as many questions as you want. For each question, the answer can be in any of 25+ formats (the same list of options that's available for additional member data questions, surveys, and event-specific questions.)

You can allow users to upload one or more documents or images with their form submission, and even charge a one-time fee to submit a form.

Note: Unlike every other module in ClubExpress, Ad Hoc Forms does not include a "user" side to the module. There is no list of forms available for members and/or non-members to complete. Rather, you provide access to a form by using the Insert Link function in the content editor.

Example: If your association has an annual conference you will likelyyhave a section of the website that describes this conference. On one of these pages, you might place text such as the following: Interested in presenting at this year's conference.

Click here to submit your abstract and credentials.

Find Your Non-Member Record

If you know you are already on the non-member mailing list, have attended an event or made a donation as a non-member, you can search for your non-member record by clicking the Click here to search link and providing your email address and last name. If your record is found your contact information will populate the fields on this screen. Otherwise, provide at least all of the required fields (noted by a red dot). Click the Save button to save your changes or the **Cancel** button to exit without saving.

Ad Hoc Forms Manager

In Ad Hoc Forms you will see a screen similar to the following:

Use this screen to manage ad create a new ad hoc form. Yo "Questions" to specify the que functions.	u will see the properties scre	en which allows	you to define g	eneral for	m properties.	Click "Edit	" to mo	dify the	ese pro	opertie	s for an exis	ting form. Click
Search For Forms						Form	Categ	jories				
Title						A	d For	m				
Coordinator Last Name												
From Date		Through [Date									
Category < A	II Categories >	•										
Status < A	ny Status > ▼											
Include Archived				Search	4							
Search Results	Category	Created	Last Update	Status	Responses	Maintain						
2020 Fly-In Photo Contest	Photo Contests	1/15/2020	1/15/2020	Closed	1	0	1 1	0	d	-		
Event Suggestions	Default Category	5/17/2019	5/5/2020	Active	1	0) [0	di.	-	<u> </u>	
Fiv-In Photo Contest	Photo Contests	11/21/2017	1/15/2020	Closed	10	1	h (=			গল	<u></u>	

The Search panel at the top allows you to filter forms by title, coordinator, date created, category and status. The Search Results panel lists each matching form.

Ad Hoc Form Status

Ad Hoc forms can have one of the following status values:

- **Pending** a new form that has just been created or is still in development. These forms can be modified.
- **Test** once some questions have been defined, the form can be put in Test mode, which allows you to review it before it's published. These forms can be modified.
- Active when a form is ready to be activated, change its status to Active. Submissions created while the form was in Test mode are deleted (including attachments).
- **Closed** If Close Method is defined as manual, change the status on the Edit form. If Close Method is defined as happening on a specified end date or when a specified number of responses have been received, the form is closed automatically by the system.

Note: Status does not appear on the "Add" version of the dialog but it does appear on the "Edit" version of this dialog.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
🥟 (Edit)	Edit properties for this form.

Icon	Description
(Questions)	Update the list of Questions that will appear on this form.
(Preamble)	Edit the Preamble text that will appear at the top of the form.
(Respond)	Respond to this form. This option only appears for forms that are in Test mode and allows you to test the form you have created.
(Attach- ments)	Define the list of Attachments that can or must be submitted with a form sub- mission.
(Responses)	View the list of Responses to this form.
(Reports)	View the list of Reports available for this form. You will see the standard reports dialog.
(Delete)	Delete this ad hoc form. You will be prompted to confirm this action. This option is not available if an ad hoc form already has responses.
(Сору)	Copy this ad hoc form. You will be prompted to enter a new name and other properties. The list of questions and attachments will be copied, but no responses. This option can be used when essentially the same form must be used from year to year, with only minor changes.

Maintain Options

Configuring the Module

Categories

Click the **Form Categories** button to define categories for forms. You will see a screen similar to the following:

Ad Hoc Forms	s Catego	ory Administration 0
Ad Hoc Forms can be organi expected functions.	zed into categorie	es. This is especially useful for larger clubs. Click the "Add Category" button to create a new category; "Edit" and "Delete" perform the
Add Category		
Category	Maintain 💼	
BUDGET REQUEST	🥟 🙀	7
Default Category		1
jewel call	🥟 💼	
Photo Contests	<i>6</i> 2	
Scholarships	🥟 🙀	-
Sponsor Applications	6 ³	1
Teaching / Demonstrations	0	-
Tow Planes	<i>6</i> 2	1
	🥟 🙀	

Click **Add Category** to create a new category. Click the **Edit** icon to edit the text of an existing category. If a category is not being used, you will also see a standard **Delete** icon.

The Default category cannot be deleted and will be used if no other categories are defined.

Creating and Editing a Form

Add a Form

Click the **Add Form** button to see the following popup dialog:

Edit Ad Hoc Form	@ & &
	the ad hoc form, including its availability, status, and close changes and return to the Ad Hoc Form Manager, or Cancel to
Title	2020 Fly-In Photo Contest
Description	Deadline: March 31 Photos must be from a summer club Fly-In event. Limit of two (2) entries per person. 340 of 1000 characters used
Category	Photo Contests
Status	Active •
Availability	All Site Users
Financial Account	Master Education 🔻
QuickBooks Item Name	
Member Fee	\$ 0.00
Non-Member Fee	\$ 5.00
Tax Rate	None (0.00)
Mailing List Category	Ad Hoc Form User 🔻
Close Method	End Date •
End Date	3/31/2020
Attachments	● yes ○ no
Include Attachments with Emails	
Contact Person Martin Smit Notify on completion	th Select Remove
	Save 🖌 Cancel 🗶

Specify the title, description, and category for the new ad hoc form.

Forms can be available to all site users (members and non-members), members only, members of a specified committee only, members with a specified member type only, or members of a specified subgroup (chapter, district, or region.)

If there is a **fee** to submit the form, specify the financial account to which this fee should be assigned, as well as the actual fee for members and non-members.

If QuickBooks® integration is enabled, you can also specify the item name into which fees for this form will be categorized when you export transactions.

If you have **general sales tax** enabled, specify the sales tax to be charged with the form.

You can also specify the mailing list category into which members and non-members who complete this form will be assigned.

The ad hoc form can be closed manually, based on a specified end date (at 11:59:59 PM of that date), or when a specified number of responses have been received.

Select "Yes" for the attachments option if you want to allow or require form users to upload one or more attachments as part of their submission. This value controls whether the Attachments icon appears on the Manager page. You must define the requested or required attachments using this icon before the form can be activated.

Specify a contact person for the form and whether this person should be notified by email when a form is submitted.

Click **Save** to save these properties and return to the Ad Hoc Forms Manager, or **Cancel** to close the dialog and return without saving the new form.

Add a Preamble (optional)

The **Preamble** option allows you to define a custom block of instruction text that will be displayed at the top of the ad hoc form. Select this option in the Ad Hoc Form Manager and you will see the ClubExpress advanced content editor in a popup dialog. You can enter any text you want, including formatting, as well as images, links and other elements.

The Preamble is typically used for instructions on how to complete the ad hoc form. It may also tell people how submissions will be evaluated, how long it will take to complete the form, or when users can expect to get a response to their submission.

Adding Questions

Questions are added using the standard answer-type dialogue you would use to add questions to events, surveys and more. See "Question and Answer Types" on page 665.

You also have the option to copy a question from an existing form. Select the form containing the question, then select the question you want to copy to the form you are editing.

Note: When you add questions with a correct answer configured but enabled the "Other" option, and the user enters their response, the answer will be incorrect.

Configuring Attachment Options

When you define an ad hoc form, you can specify one or more attachments that can or must be included with each submission.

Example: If you're asking for submissions to be a speaker at next year's annual conference, you might request that users submit a resume, a recent photo, and a detailed abstract of their proposed talk, all of this in addition to the information provided on the form.

When you click the Attachments icon, you will see a popup form similar to the following:

Add /	Edit Att	achme	ent Defini	tions			68	8
This s	creen allows y	ou to define	and edit attachm	nent definitions for y	our ad hoc form.			
Nbr I	Description		Required	Add				
Number	Description	Required	Maintain					
99	Photo #1	Yes						
99	Photo #2	No		_				
99	Photo #3	No						

In the top panel, specify the number and description of the attachment and whether its required, then click the **Add** button. It will be moved to the grid section below.

In the grid, click the **Edit** icon to move that attachment definition back to the top for editing, or the **Delete** icon to remove it. These icons do not appear if the ad hoc form has been published and responses have already been submitted.

Click **Save** to save your attachment definitions and return to the Ad Hoc Forms Manager, or **Cancel** to close the dialog without saving.

Manage Responses

Control Panel > Communications > Website Modules > Ad Hoc Forms > Maintain Options > Responses

Ad Hoc	Form R	lespo	nses Ad	min		
submitted resp		withdrawn r	e to search for response. IMPORTA			
Search					E	xport Res
	Status < A	ny >	•			
Date Submitted	beginning			Search 🛷		
Date Submitted	Name	Member?	Status	Reviewed?	Mainta	ain 🛅
11/21/2017	Martin Smith	Yes	Submitted	Yes	۲	9
11/21/2017	MaryAnn Mason	No	Payment Pending	No	۲	9
11/21/2017	John Dektol III	No	Payment Pending	No	۲	9
11/21/2017	Ben Richards	Yes	Submitted	No	۲	9
11/21/2017	Jenny Cho	Yes	Submitted	No	۲	9
11/21/2017	Manny Diaz	Yes	Submitted	No	۲	9
11/21/2017	Barb Rad	Yes	Payment Pending	No	۲	9
11/28/2017	Ztester ZZZ	No	Withdrawn	No	۲	\odot
12/7/2017	John Dektol	No	Payment Pending	No	۲	9
121112011						

Select this option to view a list of responses to an active or closed form.

A search panel allows you to filter the list by Status and the start date of when a form was submitted. For each submission, the results grid shows the date submitted, the submitter's name, whether they are a member or not, the submission status, and whether it has been reviewed.

Responses can have the following status values:

- **Payment Pending** is used when an ad hoc form submission requires a payment that has not yet been made.
- **Submitted** indicates a completed form that is ready to be reviewed. If a payment was required, it has been made.
- Withdrawn indicates a completed form that has been withdrawn from consideration. This change is made by an admin or module coordinator at the request of a submitter.

Maintain Options

Icon	Description
(View)	View this ad hoc form submission.
(With- draw)	Withdraw this submission at the request of the submitter. You will be prompted to confirm this step.
(Reactiv- ate)	Reactivate this withdrawn submission at the request of the submitter.
	Maintain Options

Export Response Details

Click this button to generate a CSV file (which will be opened in Excel if found) showing a summary of each submission, including whether any attachments were uploaded.

View Submission

	se Det	ails		0)
Ad Hoc Form	Fly-In Phot	o Contest			
Name	Martin Smit	th			
Response Date	11/21/2017				
Member	Yes				
Question	Answer(s)				
30 people	No Answer				
Business Phone	No Answer				
Name	Lisa Mason				
Category	Youth (Under 1	18)			
Phone	312-555-1212				
Number of fly-ins	2-4				
Agreement	I have read an	d agree to the rule	s and uses for the ph		
Attachment Title	Required	Received	Maintain 📑		
Photo #1	Yes	Yes	۲		
Photo #2	No	No			
Photo #3	No	No			

At the top is a summary panel showing the form, who submitted it, when it was submitted, and whether that person is a member or not. Below that is a grid showing each question and the answer provided.

Below that is a list of the attachments and whether one was received. Click the **View** (eye) icon to view a specific attachment in a new tab of your browser. The contents of this window (such as a JPEG, PDF, or Word document) can be saved to your local hard disk.

Click the **Add Review Comment** button to add a comment to the submission. You will see a standard popup form with a text box. Comments are shown below the button and each comment is tagged with the commenter's name and the date/time when the comment was made.

Click **Return to Previous Page** to return to the list of submissions.

Benefits

Benefits

Benefits Manager		604
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The Benefits function 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 function screen is shown below.

Bene	fits
Join t	he Northwest Ballooning Community
	orthwest Ballooning Club attracts members from throughout the region. Almost everyone who owns a hot air balloon is a member of the club. We provide umerous opportunities throughout the year to meet and talk with other owners and fans, and especially to fly.
Facili	ties
a	Ve own our own meeting, storage, maintenance and launch facility. Butler Field is located 15 miles outside town and features a number of paddocks for training nd launching, as well as a club hall. The hall includes storage rooms for gear, a maintenance workshop with plenty of floor and counter space, a committee room nd larger meeting hall. We hold almost all of our activities there.
Safet	у
e o a	veryone in the ballooning community is concerned about safety. Our hobby enjoys an enviable reputation because we make it the focus of our florts. Northwest Balloon Club is no exception. Every member must go through a rigorous training program and be certified to fly at club events. We fler annual refresher courses and Intermediate and Advanced courses for more experienced balloonists. Our inspectors are authorized by the FAA in local authorities to conduct inspections and to issue and revoke certifications. We also conduct inspector training for balloonists with more than 10 ears of flying experience.
vent	-S
ra	Ve organize a regular schedule of at least 10 events each year, including a Spring Rally which opens the season, an autocross in the early summer, a summer ally and picnic, attendance at the annual British Car Union show in early September, a fail rally through changing leaves, a holiday party in December and a ouple of winter noggins at an English or linis pub in the area. We also try to arrange tours to regional events, including the Mad Dogs and Englishmen show over uly 4th weekend and the Road America races in late September organized by the VSCDA.
Vews	sletter
	he club publishes a quarterly newsletter which is included in your subscription. In less than two years, our newsletter has become one of the best balloon club ublications in the country, featuring full color photos and many safety and technical articles.
	Sign Up Now

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 Manager

Control Panel > Club > Website Modules > Benefits

There are two ways to edit Benefits:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Club tab) to access the admin side of the function.
- 2. When viewing the Benefits panel, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed showing the list of existing benefit headings:

Benefits Administ	ution		Ŭ
Use this module to list the benefits of more remove a benefit. Click "Display Sequer		k "Add Benefit" to add a new benefit. Click "Edit" to change an existing benefit ar which benefits are displayed.	d description. Click "Delete" to
Add Benefit Display Sequence			
Benefit	Maintain 📑		
Join the Northwest Ballooning Community	1		
Facilities	1		
Safety	1		
Events	1		
Newsletter	1		

Maintain Options

The following options can be found in the Maintain column:

Icon	Description
(Edit)	Edit this benefit.
(Delete)	Delete this benefit.
Maint	ain Options

To add a benefit, click **Add Benefit**. The following popup window is displayed:

ld/Edit	Be	nef	its																		(08)
This dialog al Administratio			o add	or up	date a	a benefit. Spec	ify the Be	enefit Na	ime a	nd Co	ontent	then	click '	"Save'	' or "C	ancel	l" to re	eturn t	o the E	Benef	its		
Benefit N	Vam	e													•								
Heading 1	\$	в	I	<u>U</u>	S	Default \$	Arial		\$	<u>A</u>	A		≣	<u>4</u> =	-	=	Ð		0	<u> 7</u> ×	٢	A BC	
							S	ave 🖌		C	anc	el X											-
							_						_										

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 – Setup – Website Options.** Change "Show member sign-up link in Benefits" to **Yes**, then specify the text to appear on the link button.

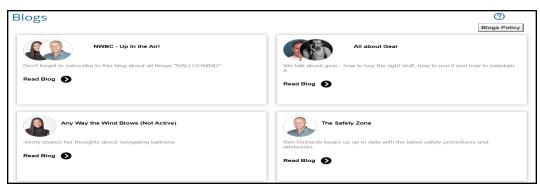
To disable the button, just go to the same screen and change the option to No.

Blogs

Searching, Subscribing and Commenting on Blog Posts	
Search for a Blog Post	
Subscribing to Blogs	
Leaving Comments on a Post	
Creating and Managing Blogs and Authors	611
Blog Manager for Authors	
Blogs Manager for Admins	
Maintain Options	616

ClubExpress includes a powerful Blogs ("weB LOG") function 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. Email subscriptions are fully supported, allowing readers to subscribe to a blog feed so that they are notified when a new blog entry is published. There is also a Search function to find blog entries that discuss a specific topic.

A typical Blog opening screen is shown below:



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. A blog can have more than one author; each post is linked to the author of that post.

In the ClubExpress model, an administrator or Blogs module coordinator creates a blog and then hands it over to a blog author or authors to manage.

For non-members, accessing blogs through the menu will show all blogs that are flagged as visible to the public. Members-only blogs are not shown unless you are logged in.

Searching, Subscribing and Commenting on Blog Posts

Search for a Blog Post

In a specific blog, click the **Search Blogs** option at the top of the screen and you'll see a screen similar to the following:

B	logs Sear	rch	?
	Search for blogs by po order to read the blog	post title, post content, or tags. You must enter either searchable text or tags, or both to perform the search. Posts are returned by the search. Click the view og post.	icon in
	-Search Criteria—		
	Search Text		
		Searches blog title, description, and author	
	Blog	g < All Blogs > ▼	
	Blog Tag(s)	s)	
		Search	

Specify your search criteria. You can search for text in any or all blogs within the blog title, description or author. You can also enter one or more tags that will be used to further limit the search.

Click the **Search** button to initiate the search.

When the results are displayed, click the **View** icon or the **title** of the blog post to jump to that blog post.

Subscribing to Blogs

Non-Members

If you are not a member of the organization you will see a link to subscribe to the blog, even if you have already subscribed. Subscribing to the blog means you will receive an email each time a new blog post is published. If you subscribe to the same blog more than once you will only receive one email each time a new post is published.

Members

If you are not an author of the blog and you have not already subscribed to the blog, you will see a link to subscribe to the blog. Subscribing to the blog means you will receive an email each time a new blog post is published.

If you have already subscribed to the blog, you will instead see a link to unsubscribe.

Leaving Comments on a Post

If comments have been enabled for a blog, click the **Show Comments** button to view comments and post a new comment. You will see a screen similar to the following:

The cost is around \$100,000 more than your standard balloon, but comes with obvious benefits. What do you guys think? Is it worth it?
HIDE COMMENTS
Leave a Comment
Handle
Maggie23
Great post Martin! 18 of 500 characters used Save V Cancel X
All Comments
Jenny Cho • (4/3/2020) I agree with Colleen. I imagine you could also take more people on your trip too, so that's another way you could recoup costs.
Colleen Carter • (4/3/2020) This is great! I think over time the cost would even itself out with the fuel savings.

Enter your handle and comment text, then click **Save** to post your comment or **Cancel** to cancel without posting.

Creating and Managing Blogs and Authors

Adding a new blog

Click the Add Blog button to create a new blog.



Specify the blog's title, 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.

If your organization has subgroups, where each subgroup has its own website, you'll see the option to share the blog posts to that blog with lower-level subgroups. Check the box to enable this feature.

Manage Blog Authors

Click the Authors icon to specify one or more authors for the blog. A blog can have multiple authors, or different authors over time. Each post is linked to a specific author. So if you have a "From the President" blog, it will show the correct author as the club's president changes over time.

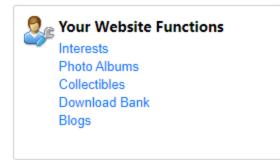


Blogs

The blog's authors will see it in their blogs list, even if the initial status is Draft or Offline. Authors can modify the title, description, visibility, status and whether comments are allowed.

Blog Manager for Authors

To manage your blog post, select the **Manage Posts** link in the top right corner, or select **Blogs** from your member profile.



Select Manage Posts to navigate to the Post Manager screen.

Use this screen to manage b will appear. You can edit pos							
Subscribers		Constant of the second	(+) Add Pos	it			
Up In The Air	d						
Up In The Air Results: <i>3 post(s) four</i> Title		Published Date	Views	Maint	ain		雨
Results: 3 post(s) four		Published Date 9/18/2020	Views 9			3 🗊	_
Results: 3 post(s) four	Visible				۲	9 🗊	

Each post can be edited or viewed. You can view comments, push an update to social networking, or delete the post completely.

The grid lists each post in descending date order, showing the post title, visibility status, date of publication, and how often that post has been viewed.

Buttons are available to view a list of subscribers, search blog posts, edit the properties of the blog and add a post.

Select **Subscribers** to view a list of subscribers, with member and non-member subscribers listed separately and the ability to remove each subscriber individually.

Select Search Blog Posts to search within a blog by title, description, author and tags.

Select **Edit Blog Properties** to change the author, title, description, status and visibility of the blog, and whether comments are allowed.

Select **Add Post** to add a blog post using the content editor.



Specify the title and author for your post, any tags that apply to it, the summary and an image to be used on social networking websites to represent this post.

Note: You may add a maximum of five (5) tags to any single post.

If a summary is not specified, the system will use the first 200 characters of the post itself, along with a "More..." link. Finally, choose a post status:

- Draft (not published) the post will be hidden from view and will not be published. The draft can be revised and viewed by blog authors and administrators.
- Ready to Publish you will be prompted to select a publish date and time. Leave both fields blank to publish the post immediately. To schedule the blog post for a future date and time, enter the date and time in the fields. The time will respect your club or association's time zone.
- Offline use this status to deactivate a post which was previously visible.

You will use our content editor to create the blog post, with 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.

Subgroups: For organizations with subgroups, where each subgroup has its own website, the top level club will see a new checkbox on the blog edit page: 'Share with lower level subgroups?'. When checked, the blog will appear on lower level clubs blog module. On the blog home page, the upper level club name will be displayed. Shared blogs and posts will appear in search results and the blogs widget.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit this blog entry.

Icon	Description
(View)	View this blog post.
(Com- ments)	View and edit Comments posted on this blog entry. This icon will only display if com- ments have been added to the blog.
(Share)	Share this post on your club's social networks, including Facebook and Twitter. This icon will only appear if the blog post is flagged to be visible.
(Delete)	Delete this blog entry. You will be prompted to confirm this action. Any posted comments will also be deleted.

Maintain Options

Viewing and Editing Comments

Click the **Comments** icon to view and edit comments. You will see a screen similar to the following:

Comments Manage	er					
Use this screen to view and / or edit comment	ts about blog posts.	Dates and times have	been adjusted for	r your local timezone.		
Blog: Up In The Air (Martin S	mith)				
Post: Ballooning and			t			
•			0			
comments on this post	1		17			
Comment	Posted By	Post Date/Time	Maintain 📑			
Thanks marshallmatters! I'm glad you enjoyed it!	martysmithereens	1/04/2022, 3:14 PM	N 🙀			
This is such a great article!	marshallmatters	1/04/2022, 3:13 PM	1			
This is such a great article!	marshallmatters	1/04/2022, 3:13 PM	N 🙀			
1						
			Return to	Previous Page		

Comments are listed in descending date order, 50 comments per page with paging options. Click the **Edit** icon to modify a comment that might be inappropriate. Click the **Delete** icon to remove it completely; you will be asked to confirm this action.

Share this Post

Click the **Share this Post** icon to share a blog post on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:



Blogs

At the top will be on or more checkboxes, representing the social networks where your club has a presence and which are defined on the Control Panel – Communications – Setup – Social Networking screen.

The Text dialog will change depending on which social network(s) you select. Facebook allows up to 300 characters and Twitter up 120 (actually more, but the link to the event requires 20 characters.) When more than one option is checked, only the shortest length will be available.

Enter whatever text you need to communicate the details to your audience, then click the **Share** button to post this blog entry to your club's social network(s), or **Cancel** to close the dialog without posting.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Concept Information

ogs	
•	

Reference Materials

Social Networking	573
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Related Tasks

Your Website Functions	1354
------------------------	------

Blogs Manager for Admins

Control Panel > Communications > Website Modules > Blogs

There are two ways to manage Blogs:

1. Administrators and Function Coordinators can select the module in the Control Panel (Communications) to access the admin side of the function.

Administrators: Don't see the module in the Communications Tab? See "Enabling and Disabling a Website Module" on page 100

2. When viewing any screen in the Blogs function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

Use this scre page. You c author.								
Add Blog	Option Visibility		Edit P	Policy # Authors	Repo	orts		-
All about Gear			1	# Autions 4				
Up In The Air	Members	V	3	2	Ø	1	2	n n

The grid lists each blog that has been created, showing the title, visibility (public or members only) status (active or closed), number of posts, and the number of authors.

Blog Options

Click the **Blog Options** button to modify default options for all blogs.

Configure the m You can modify comments on b allowed to be us	if non-mer log posts, a	nbers can m and if custor	n tags are
Allow No Allow Cus		er Comme s?	ents?
Save		Cancel	×

Only two options are currently provided: whether non-members can post comments and whether blog authors can enter custom tags or must specify from the list of master tags.

Note: You may add a maximum of five (5) tags to any single post. See "Tags" on page 373

Edit Blogs Policy

Click the **Edit Policy** button to edit your club's or association's policies regarding blog posts and comments. You will see a pop-up dialog with a simplified version of the standard content editor.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit properties for this blog. This will open the Edit Blog Properties screen where you can edit the information entered when you created the blog.
(Posts)	View Posts for this blog. You will see the Posts Manager screen, including 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. See "View, Manage and Add Posts" below below for more information.
(Authors)	Display one or more Authors who can create and edit posts on this blog. Each post is linked to a specific author. See "Manage Blog Authors" on page 611 for more information.
(Delete)	Delete this blog, including all posts and comments. You will be prompted to confirm this action but, once deleted, a blog cannot be recovered.

Maintain Options

View, Manage and Add Posts

When you click the **View Posts** icon, you will see a screen similar to the following:

posts will appear. You can ed							Properties" to change this blog's properties. If you have more than one blog, select the blog from the dropdown list and
L ^P Subscribers Search Ble Posts Search Ble Posts Blog Up In The Air		Edit Blog properties	(H) Add Po	st			
Ip In The Air							
Jp In The Air esults: 3 post(s) foun	d						
esults: 3 post(s) foun	_	Published Date	Views	Mainta	in		Re l
esults: 3 post(s) foun	_	Published Date 9/18/2020	Views 8		in		PB
	Visible			Ø		1	

A filter at the top allows an administrator to select one of the available blogs. The remainder of the screen is similar to the Blog Manager for Authors with options to add a post, edit blog properties, search posts, and view a list of blog subscribers.

Each post can be edited or viewed. You can view comments, push an update to social networking, or delete the post completely.

Blogs

The grid lists each post in descending date order, showing the post title, visibility status, date of publication, and how often that post has been viewed.

Buttons are available to view a list of subscribers, search blog posts, edit the properties of the blog and add a post.

Select **Subscribers** to view a list of subscribers, with member and non-member subscribers listed separately and the ability to remove each subscriber individually.

Select **Search Blog Posts** to search within a blog by title, description, author and tags.

Select **Edit Blog Properties** to change the author, title, description, status and visibility of the blog, and whether comments are allowed.

Note: When this screen is viewed by administrators or Blogs module coordinators, a special panel is displayed at the top allowing them to select a different blog to view posts.

Select **Add Post** to add a blog post using the content editor.

Specify the title and author for your post, any tags that apply to it, the summary and an image to be used on social networking websites to represent this post.

Note: You may add a maximum of five (5) tags to any single post.

If a summary is not specified, the system will use the first 200 characters of the post itself, along with a "More..." link. Finally, choose a post status:

- Draft (not published) the post will be hidden from view and will not be published. The draft can be revised and viewed by blog authors and administrators.
- Ready to Publish you will be prompted to select a publish date and time. Leave both fields blank to publish the post immediately. To schedule the blog post for a future date and time, enter the date and time in the fields. The time will respect your club or association's time zone.
- Offline use this status to deactivate a post which was previously visible.

You will use our content editor to create the blog post, with 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.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit this blog entry.
(View)	View this blog post.
(Com- ments)	View and edit Comments posted on this blog entry. This icon will only display if com- ments have been added to the blog.

Share this post on your club's social networks, including Facebook and Twitter. This
icon will only appear if the blog post is flagged to be visible.Delete this blog entry. You will be prompted to confirm this action. Any posted com-
ments will also be deleted.

Maintain Options

Viewing and Editing Comments

Click the **Comments** icon to view and edit comments. You will see a screen similar to the following:

Comments Manage	er						
Use this screen to view and / or edit comment	ts about blog posts.	Dates and times have	been adjusted fo	or your local timezo	ezone.		
Blog: Up In The Air (Martin S	mith)					
Post: Ballooning and			t				
2 comments on this post							
Comment	Posted By	Post Date/Time	Maintain 📑				
Thanks marshallmatters! I'm glad you enjoyed it!							
This is such a great article!	marshallmatters	1/04/2022, 3:13 PM	1				
			Return to	o Previous Pag	age		
					-		

Comments are listed in descending date order, 50 comments per page with paging options. Click the **Edit** icon to modify a comment that might be inappropriate. Click the **Delete** icon to remove it completely; you will be asked to confirm this action.

Share this Post

Click the **Share this Post** icon to share a blog post on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:

Blogs



At the top will be on or more checkboxes, representing the social networks where your club has a presence and which are defined on the Control Panel – Communications – Setup – Social Networking screen.

The Text dialog will change depending on which social network(s) you select. Facebook allows up to 300 characters and Twitter up 120 (actually more, but the link to the event requires 20 characters.) When more than one option is checked, only the shortest length will be available.

Enter whatever text you need to communicate the details to your audience, then click the **Share** button to post this blog entry to your club's social network(s), or **Cancel** to close the dialog without posting.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Business Directory

Update Your Business Directory Listing	
Removing Your Directory Listing	
Business Directory Manager	
Reports	
Exports	
Advanced - Creating Custom Directories	

The Business Directory module allows clubs and associations to display a directory on the public side of your ClubExpress website. It is specifically designed for chambers of commerce as well as business networking and trade associations, that want to share member information with the public. But it can be used by any type of organization.

The Business Directory will typically be accessed from a choice on your public menu but it can also be accessed from a button or link on the home page or any other custom web page. When you access the directory, you will see a screen similar to the following:

Search for phones listin	gs by entering search text and searching by category,	pe or postal code / radius. If no results are found, you will be notified to refine your search. Result	ts are
lisplayed below. If a ma	ap is displayed, pins will indicate the location of the pho	es. Please note that not every phones may be displayed on the map.	
earch Criteria ———			
Search Text			
	Searches phones description and phones name Leaving this field blank will return all results		
Phones Category	< Select >		
Phones Type	< Select > ▼	Reset	
Within	<any distance=""> of zip</any>	Search 🛷	

This module allows you to limit which member types are included in the directory.

Example: A sailing club may have a business or sponsor member type, and could implement the directory to only include members with that type.

The module includes a standard set of business categories and sub-types. Clubs and associations can add their own categories and sub-types. Highly specialized organizations can even hide the standard set and use their own categories only.

Searching the Business Directory

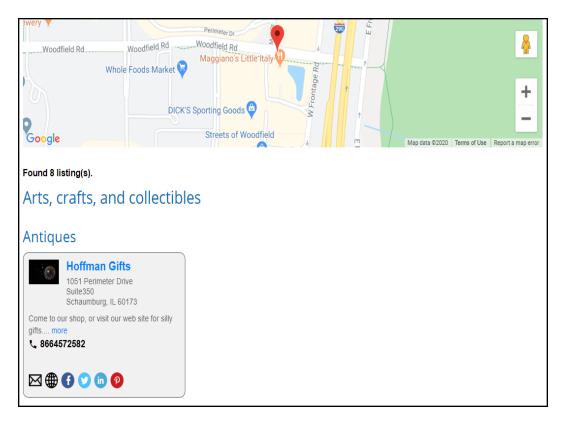
The following search options are available:

- Use the Search Text field to search for a value anywhere in the business description or business name fields.
- Select a Business Category from the drop-down list, then optionally select a Business type within that category from the second list.
- Specify a distance and a zip/postal code to find matching businesses within the specified radius of the centroid of that zip/postal code.

You can specify any number of search criteria and they will be treated as AND conditions. (For example, find "Florists" within 3 miles of 60606.) Click the **Search** button (or press *[Enter]*) to find all matching members, or the **Reset** button to clear all search criteria and start over.

The results will be displayed in a Google map below the search panel, followed by either a list or a grid of "business cards".

Business Directory



The list view shows the business logo or image followed by the name, address, and phone no. On the right are icons to jump to a detail view, jump to the business's website, or send an email. The grid shows the same information but in a "business card" format.

Note: The list or grid view may show more results than the map, if there are businesses who choose not to enter full address information. Also, a module option allows the map to be hidden completely and only list or grid view results are shown.

Clicking the business name or Details icon displays a page similar to the following:



This screen shows the same contact information, including a Google Map link, social networking links, a detailed business description, an optional "Languages Spoken" field, and an optional "Special Offers" field.

Immediately below the business name, users will also see a list of categories and sub-types assigned to this business. Each entry is also a link that can be clicked to view other businesses in that category or sub-type.

No information from the member's personal profile is displayed in the Business Directory. Everything shown on this screen can be customized independently of the member's personal membership information.

Update Your Business Directory Listing

Business Directory information is completely separate from a member's personal information in the database. This allows someone to be a member of the organization but to completely hide their personal data and only show what they explicitly want to show to the public.

The Business Directory includes primary and secondary members within the membership. This option allows a business with multiple locations to list each location separately. Businesses can also hide themselves completely if they don't want to be included in the directory.

There are two ways for members to update the information in the Business Directory:

- From their Profile screen
- · From the Detail screen within the directory itself

Member Profile

In the Member Profile, the Business Directory option allows you to edit or update your directory listing (if the Business Directory is enabled).



Selecting Business Directory displays the following edit screen:

Home > Member Profile > Bu	-	rin ti a n
	Information & Desc	· · · · · · · · · · · · · · · · · · ·
Enter the basic information a business description. Enter y	about your business here including a text description about your busin your business description using the editor, however you may want to	ess. Select a business category and type from the lists, you may continue adding eep the formatting simple.
Business Name	Smith Accounting, LLC	•
	Financial services and products Accounting	
	You are allowed up to 5 listings. 4 entries remaining	
Business Category	< Select >	
Business Type	< Select > 🗇 🍳	
Contact Name	Martin Smith	
Address 1	1100 S Roslie Rd	
Address 2		
City	Schaumburg	
State	Illinois O	
Zip Code	60193	
Country	UNITED STATES 🔹	
	Refresh Geocode	
Address Latitude	42.006729112945216	
Address Longitude	-88.080120101790129	
Phone	8664572582	
Toll Free	800-Bill-me	
Fax		
Email	geoffrey@clubexpress.com	
Website		
Facebook		
Twitter		
LinkedIn		
Youtube		
Pintrest		
Instagram		
Google Plus		



When this screen is first accessed, the system will copy over the member's personal contact information. But everything can be changed to show different information.

Example: The member may list a home address as part of her membership but could list a different address for the business.

Except for the Business Name, nothing on this screen is required. A member who works out of her home could leave the address fields blank and only show a phone number and email address. (Note that this means her icon would not appear on the Google map but it would be in the listing below the map.

Users can select one or more business categories and types from the drop-down lists. When a type is selected, an **Add** button will appear. Clicking this button displays the category and type below the list, with a **Delete** (trashcan icon). If there is a limit to the number of listings, this information will also be displayed.

Business Category	< Select >	\$	
Business Type	< Select > 🗘 🍳		
Business Category	< Select >	٢	
Business Type	< Select >	۰	
	Business to business	Accounting	1
	Business to business	Hiring services	î,
	Manuara allowed up to F	listings. 3 entries ren	nainin

- Languages Spoken -may or may not appear, depending on your organization's preferences.
- Special Offers allows you to define any special deals or offers for members of the organization or even the public. (For example, "10% off your first order over \$50.00".)
- Show in Directory controls the overall visibility. A member's listing will not show in the Business Directory if this box is unchecked.
- Logo or Image allows users to upload a company logo or any image (for example, a photo of their storefront or an award that they won.)
- Description allows you to enter a fully formatted description of your business, the products and services you provide, your mission or values, the populations you serve, or really anything that would help you communicate with a potential customer or client.

For each of the social networking fields, a **Test** button will appear when a value is entered. This allows the user to verify that the link leads to the correct opening page on each social network.

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

Removing Your Directory Listing

If you wish to remove your directory listing completely, without canceling your membership, select Remove My Listing at the bottom of the Business Directory Profile screen.

Directory Detail Screen

When you are viewing your detailed listing in the directory, an **Edit** (pencil) icon in the top right corner allows you to display the Add/Edit screen.

If you are a primary member and you also have secondary members under your listing, you will see a second icon allowing you to edit information for each secondary member.

econdary Members	
Click on the name of your secon member below to create/edit the business directory listing. Secon members may also edit their listi their profile screen	ir dary

Note that secondary members can login with their own accounts and access their Business Directory Add/Edit screen from their Profile screen.

Secondary members are useful if your business has multiple locations that you want to display in the directory.

Example: In a Chamber of Commerce, a florist might have more than one store and needs to list each location in the directory. This is done by defining a secondary member for each location. The member record can be the manager of that store but the directory needs only to show the store's name and location. This approach has the added benefit of ensuring that the manager of each store is notified of Chamber activities when blast emails are sent out.

Business Directory Manager

Control Panel > People > Website Modules > Business Directory

There are two ways to manage the Business Directory:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (People) to access the admin side of the function.
- 2. When viewing any screen in the Business Directory function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Business Director	y Categor	y Adı	min	stration	?
	te it. Click "Delete" to rer	nove a cate	gory. You	 Click "Add Category" to add a new category. Click "Edit" to change an exist cannot delete a system category. Note that all Business Types assigned to th category. 	
Show system categories				Add Category	
Category	Business Types	Maintain	•	Reports	
Arts, crafts, and collectibles (1000)	11			Export	
Baby (1001)	4			Options	
Beauty and fragrances (1002)	3				
Books and magazines (1003)	7				
Business to business (1004)	23				
Church content providers (6653)	2	Ø 🕹	ī,		

The grid shows business categories into which each business can be organized. The system includes a standard set of categories that you can choose to use or hide completely. Check the "Show System Categories" to display them.

Each category can include one of more business types or sub-categories.

Maintain Options

The following options can be found in the Maintain column:

Icon	Description
Busi- ness Types)	Display the list of business types within a category.
(Delete)	Delete this category. This option only appears for user-defined categories and then only if there are no business types under the category. You will be prompted to confirm this action.

Maintain Options

Add Category

Click the **Add Category** button to create a new category, specific to your organization. You will see a standard ClubExpress popup to specify the name of the category.

Click the **Business Types** icon to view the business types within a category. You will see a screen similar to the following:

Business Directory

Business Directory T	ypes	Administration ⑦
Use this screen to maintain business types ass and coordinator. Click "Delete" to remove a bus	igned to a s iness type.	pecific category. Click "Add Type" to add a new business type. Click "Edit" to change an existing business type, its description
Category: Arts, crafts, and o	ollect	ibles
Add Business Type		
Show system types		
Business Type	Maintain	
Antiques (2000)		
Art and craft supplies (2001)		
Art dealers and galleries (2002)		
Camera and photographic supplies (2003)		
Digital art (2004)		
Memorabilia (2005)		
Music store (instruments and sheet music) (2006)		
Sewing, needlework, and fabrics (2007)		
Stamp and coin (2008)		
Stationary, printing and writing paper (2009)		
Vintage and collectibles (2010)		

This screen lists the business types within a category. Check the "Show System Types" box to view system types. Click the **Add Business Type** button to add a type within that category. The Maintain column will include a **Delete** icon for business types defined by your club or association.

Reports/Exports

Reports

If available, selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Options

Click the **Options** button to display a form showing module options. The following screen is displayed:

Home > Business Directory > Business Directory Options
Business Directory Options (2)
This page allows you to define the appearance of the results returned by the business directory search, as well as the categories used for organization. Select "Use System Categories" to use the predefined system categories and business types. Select "Show Languages Spoken" to display an optional text field on user input and results where users can define what additional languages are spoken at the business. Select the member type(s) that are allowed to use the business directory. Members of the specified type will see the business directory edit link in their profiles. Members who are not of the specified types will not see the link.
Results format 💿 List 🔘 Grid
Show map in results 💿 Yes 🔘 No
Use system categories 💿 Yes 🔘 No
Show languages spoken 💿 Yes 🔘 No
Maximum categories 5
Search Radius Choices Image: Instant state Image: Imag
 ✓ 5 miles ✓ 10 miles
 ✓ 20 miles ✓ 50 miles
 100 miles 200 miles 500 miles
500 miles 1000 miles

The following options can be configured:

- **Results Format** controls how display results are shown below the map (if it's enabled): in a list format or using a grid display of "business cards".
- Select Yes for Show Map in Results to display a standard Google map with each matching business
 indicated with a clickable icon. Note that if a full address is not specified, some matching businesses will not display on the map, although they will always be listed in the grid or list view under
 the map.
- Use System Categories determines whether the built-in system categories and business types are available to be selected and used for searching. For a Chamber of Commerce, the system categories should be fine. For a highly specialized trade association, you might want to hide the system categories and specify your own categories and business types instead.
- Set the **Show Language Spoken** option to Yes to include this field in the member's Profile and in search results. This field is useful for retail establishments in a Chamber of Commerce, where it's important to let potential customers know what languages are spoken.
- The **Maximum Categories** option can be used to limit the number of categories that a member can select. Set it to 0 (zero) if there is no limit.
- Use **Search Radius Choices** to define what values will be available to users who want to search by radius. A chamber of commerce might allow all options within 5 or 10 miles, while a national trade association might for options as wide as 500 or 1000 miles.
- Use the Allowed Member Types list to define which member types should be included in the directory. This option is useful if your organization has a mixture of member types, some of which represent sponsors who should be included in the directory. Other types such as "Family" or "Staff" can be excluded.

Click **Save** to save your changes and return to the Business Directory Manager, or **Cancel** to return without saving.

Advanced - Creating Custom Directories

The Business Directory module can be called with a number of search options preloaded.

Example: You might want to highlight a particular category of businesses using a special link from the home page, or businesses in a particular area of the country where the annual conference is going to be held.

When you create a link from a page to the Business Directory, you can reference the built-in function directly. But to use this feature, you need to create an "External Link", similar to the following:

https://demochamber.clubexpress.com/content.aspx?page_id=154&club_id=522353

where the first part of the URL will be your domain name and the club_id will be your ID (522353 references the demo chamber.) page_id=154 references the Business Directory.

The following options are then specified as part of the URL link:

&cat=<category id> - use this option to pre-specify a category. Category Ids can be found in parentheses after each category name on the admin screen.

&type=<type id> - use this option to pre-specify a type within a category. It is not necessary to also specify the category if you already know the type. Type Ids can be found in parentheses after each type on the admin screen.

&zip=<zip code> - use this option to search within a specified zip code.

&radius=<radius miles> - use this option to search a zip code within the specified radius. You can use any value but the dropdown values are 1, 5, 10, 15, and 20.

The angle brackets are not specified. In place of these, use the relevant ID values.

Example: The following link opens the Business Directory showing all businesses in the "Clothing, accessories, and shoes" category. ...content.aspx?page_id=154&club_id=522353&cat=1005

Example: The following link shows all restaurants within a 1-mile radius of 60173. ...content.aspx?page_id=154&club_id=522353&cat=2129&zip=60173&radius=1

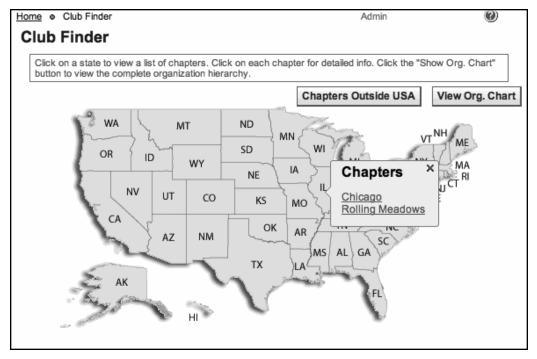
Chapter Finder

Select a Chapter	
Configure Chapters, Districts and Regions	635

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 one of four options (based on how the club has configured this module).

Select a Chapter

<u>US Map</u> <u>US/Canada Map</u>



Click a state or Canadian province to see a list of chapters in that state or province. When you click a chapter name, you'll see contact details for that chapter.

Google Map



A standard Google icon shows the location of each chapter. Click the icon to display information about that chapter. You may also see an aggregator icon with a number in the middle indicating multiple chapters in close proximity. Click this icon to zoom in and see the individual chapters.

Organization Chart

ome	Admin	
Club Finder		
Navigate the organization hierarchy by clicking of the selected item.	on the "+" and "-" buttons. Click on a name to se	e more info on
		View Maj
··· Northwestern Balloon Club		
≝ South		
in Illinois		
Chicago		
Rolling Meadows		

This option shows the hierarchy of chapters, districts and regions in the club or association. It's used by organizations where chapters do not necessarily map to a geographic location. Click a subgroup at any level to display details about that subgroup.

This organization chart option is also available for each of the map options, allowing users to display this hierarchy even if one of the maps is configured by default.

Viewing International Chapters

If your club or association has chapters outside the US and Canada, you can optionally display a special button that, when clicked, displays a list of these chapters.

Configure Chapters, Districts and Regions

Control Panel > Club > Website Modules

Select **Control Panel – Club – Setup – Organization Data** to configure your club's hierarchy, including regions, the districts within each region, and the chapters within each district. You can also configure this Chapter Finder function from the same screen.

Configure Organization

Click the button to see the following configuration screen:

Chapter Finder

Configure Organization Data	?
Your organization is set up with 4 levels. Use this page to select the name associated with each level, and to set a couple of security options.	
To change the number of levels, contact ClubExpress at 1-866-HLP-CLUB (457-2582 - outside the US, +1 847-255-0210)	
Level Names Club Level 1 (This may be changed on the "Control Panel - Club Options" page)	
Region Level 2	
District Level 3	
Chapter Level 4	
Subgroup Security Options	
Subgroup Admin Access in the Member Manager	
Edit Read-only	
Subgroup Admin Access to financial screens, reports and exports	
Yes	
◎ No	
Subgroup Admin can assign members to subgroup	
• Yes	
No No	
Subgroup Custom Page Options	
Copy subgroup menu and other pages from template	
• Yes	
Template pages category Subgroup Template	
Template for subgroup landing page Template Home Subgroup pages category Subgroup Pages	
Subgroup pages category Subgroup Pages	

The number of levels in your organization is preset. Contact ClubExpress to specify this number. Use this screen to define the keyword used for each level.

Subgroup Security Options

In the Subgroup Security Options panel, 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 – People 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, and whether subgroup admins can assign members to subgroups.

If the last option is enabled, chapter or district admins can add members to their chapter or district. This option is useful when chapters are used as a type of interest group. When this option is enabled, a new button appears in the People Manager to allow members to be assigned to a subgroup.

Subgroup Custom Page Options

ClubExpress makes it easy to create a sub-website within the main site for each subgroup.

Example: A chapter in Chicago could have their own set of custom pages describing interesting information about the Chicago chapter.

This sub-website could also include:

- A link to the Event Calendar showing just events for that subgroup;
- A link to the Member Directory pre-filtered for chapter members;
- A link to the Business Directory pre-filtered for chapter members;
- A link to the Photo Albums Index module, pre-filtered to just photo albums belonging to that subgroup.

This function works off a template of pages that you create in a specific Custom Web Page category. So the first option on this panel is to specify with category holds the template pages. The second option is which page should be considered to be the landing page, or the "home" pages for the sub-website. And the final option specifies which destination Custom Web Page category any copied pages should be added to.

When a copy is initiated, the system performs the following tasks:

- 1. Makes a copy of each of the pages in the template, moving the copies from the template category to the destination category.
- 2. Updates the subgroup listing so that the designated landing page is the one directly linked to the sub-group entry in the Chapter Finder module.
- 3. Assigns the sub-group Administrator to be an admin for all copied pages.
- 4. Looks for any replaceable parameters (described below) on any pages and replaces them with their values for that subgroup.
- 5. Looks for any links to the four modules listed above and updates them with the appropriate options to point to a filtered version of that module. For example, a Member Directory link would be modified so that clicking the link pre-filters the directory to only show members of that chapter.

Template Page Tags

The system allows you to place replaceable tags on these pages. When the copy is performed, these tags are replaced with the values for that subgroup. The following tags are supported:

- ~~subgroup_number~~
- ~~subgroup_name~~
- ~~mailing_address~~
- ~~mailing_city~~
- ~~mailing_state~~
- ~~mailing_zip~~
- ~~mailing_county~~
- ~~contact_name~~
- ~~contact_title~~
- ~~contact_phone~~
- ~~contact_fax~~
- ~~contact_email~~
- ~~external_website~~

Click Save to save your changes and return to the previous screen, or Cancel to return without saving.

Chapter Finder Options

Click this button to configure how the Chapter Finder module should behave. You will see the following screen:

Chapter Finder Options	?
Use this page to set up how you would like your chapter finder to appear to users.	
Ise Google Maps, with a marker for each chapter	
O Use a simple United States map. Click on a state to see a list of chapters	
US map (as above), including Canadian provinces	
\odot Do not use a map - show a clickable organization hierarchy tree	
Show option to display non-US/Canada chapters	
For each chapter, show:	
Address	
Phone and Fax	
Separate Website	
🖉 Email Address	
Contact Person Name and Title	
☑ Link to a Custom Web Page	
Link to Event Calendar	
Iink(s) to higher-level org. group info	
Link to Member Directory	

The first setting defines whether a map should be displayed and the type of map:

- Use Google Maps. The system will display a dynamic Google map with a marker for each chapter. Clicking the marker displays more detailed information about the chapter and, optionally, its district and region. The map can be scrolled and zoomed.
- Use a standard US map. Clicking a state displays a list of the chapters in that state.
- Use a standard US and Canada map. Clicking a state or province displays a list of chapters in that state or province.
- Do not show a map at all. Instead, display the organization hierarchy as a tree. Use the [+] and [-] signs to expand or contract levels. Click a subgroup to display its properties.

For organizations with non-US and Canadian chapters, you can optionally display a button which, when clicked, will list these chapters.

Use the check boxes in the bottom part of the screen to control what information to show for each chapter, district, and region:

- · Address of the chapter meeting or where correspondence should be sent;
- Phone and fax (blank fields will not be displayed);
- Separate website
- Email address
- Contact person name and title
- Link to a custom web page on the main website (some clubs and associations give each chapter, district and region a place on the main website to promote that chapter, district or region.)
- Link to the Event Calendar (some chapters, districts and regions post their local events on the club's main calendar; this option displays the calendar pre-filtered for that subgroup.)

- Link(s) to a higher-level subgroup (for example, the district or region that the current chapter belongs to.)
- Link to the Member Directory (for the chapter's primary contact person.)

When the Google Maps option is chosen, the system will automatically geocode the chapter address to display an icon on the screen at the correct location. For US locations, geocoding is based on the full street address (P.O.Boxes are not accepted.) If an icon does not appear, try changing the address to a more standardized one. For locations in Canada, geocoding is based on the postal code only; the icon will appear at the centroid of the postal code.

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:

And Address of Address	

This dialog allows you to specify the district name and number (if your organization uses numbers. If this subgroup is in the middle or bottom of the hierarchy, you will also specify it's immediate parent.

Four status options are available:

- Active visible and open to new members;
- · Closing visible but no longer open to new members;
- Closed no longer visible;
- Pending being set up; not yet visible.

You can also define a main committee linked to this subgroup or have the system create a blank committee for you.

Financial Account is used for membership transactions only, including membership signups, renewals, and mid-year changes (if this option is available for your organization.) Specify a non-archived financial account or select "<Create Financial Account>" to have the system create one for you automatically.

If your club or association has activated the mobile app, you will see a Create Channel option, allowing you to automatically create a mobile channel based around this subgroup. Members who are assigned to the chapter, district, or region will automatically be added to the channel.

Committee Members: check the box is restrict committee members for committees linked to this subgroup, to subgroup members only. Uncheck the box if subgroup committee members can come from anywhere in the organization.

The remainder of this dialog allows you to define the subgroup's address and primary contact, as well as a separate website or page within the main site. If the top level club is using the Chapter Finder, you can also define a directory entry that will appear when this subgroup is selected in the chapter finder.

If geocoding has been enabled, you will also see **Latitude** and **Longitude** fields in the address panel for the lowest level of subgroup, allowing you to enter or update the location of each chapter in the Chapter Finder module. The system will update these geocodes automatically based on the address (in the US and Canada only) but you can change them if necessary.

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

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:

Region Administrators	000
1881 "Add Adverservator" in unless a dator annotationale for the segme class the fluor senses an adverse and form Revise. Our	Contraction of the local division of the loc
antenianae	
Adventure Manual	
being both Barland	
[jure]	

Click **Add Administrator** to select a member from the list. Click the **Remove** icon 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.

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 People Manager, all committees belonging to any of these chapters or the district, same for events, documents, custom web pages, etc.

Note that someone can be a Subgroup Administrator without actually being a member of that subgroup.

<u>Delete</u>

Select this option to delete a subgroup. This operation can only be completed if the subgroup in question has no subgroups below it.

Example: You cannot delete a district until the chapters within that district have been assigned to other districts. It also cannot have any members or administrators.

Generate Custom Pages

Select this option to copy custom pages from the template category for this chapter. This option is described in detail above, on the Configure Organization screen.

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:

Chapter: Chicago	•			
This screen allows	you to set	local fees for yo	ur member types	
Member Type	Me	mber Fee		
	Default	Local		
Ionorary Member	No Fee	No Fee		
Individual	No Fee	0.00		
New Member-Racing	No Fee	No Fee		
Quarterly	No Fee	0.00		
Racing - Family	No Fee	0.00		
Racing - Individual	20.00	20.00		
Scout Family	No Fee	No Fee		
Social Member	No Fee	0.00		
Social Member-Family	No Fee	No Fee		
Trial Membership	No Fee	No Fee		

In the example above for the Chicago chapter, some member types can be customized while others cannot. You will 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.

Check-in Desk

Check Yourself In	
Using the Check-In Desk	
Checking a Member Out	647
Scanning a Physical Card	648
Scanning a Digital Card	
Configuring the Check-In Desk	

This function is designed for clubs and associations with a Check-in Desk at a clubhouse or facility. Coordinators can use it to check the membership status of people entering the facility. Members can optionally check themselves in if allowed by administrators, and if the module is placed on a menu.

Administrators: If the Check-In Desk is placed on a menu and you have not enabled the option to allow members to check in themselves, the link will redirect users to the home page.

The function allows lookups by last name/first name or by member number. It will work with a barcode scanner when members have a membership card that includes a standard barcode.

Check Yourself In

When this option is selected, the following screen will appear:

Check In Desk	?
Enter all or part of the member's Last (and, optionally, First Name) or the member's Member Number and press search. Note that the system will automatically initiate the search if you enter a complete Member Number.	
Member Number Search §	
Last Name First Name Search 5	
Return to Previous Page	

Note: If you are redirected to the Home Page your organization does not allow members to check in themselves. Please contact an administrator in your organization for questions.

Enter a Member Number, Last Name, or First Name and click the **Search** button. The screen will refresh to show matching members.

Home > Control Pa	nel > Check-In Desk		
Check In	Desk		
circentin			
Enter all or part o	f the member's Last (and, optionally, First Name) or the member's tem will automatically initiate the search if you enter a complete Me	Member Number and press se	earch.
Troto that the sys			
Member Number	Search 🔗		Check In Desk Manager
Last Name	smith First Name mar	Search 🔗	
Last Name	First Name mar	Search 4	
·			
	Marylou Smith Profile		
121	Member Type: Quarterly		
1.5/	Member Number: 55		
	Expiration Date: 12/31/2010		
	Status: Expired		
	Martin Smith Profile		
	Martin Smith Profile		
	Member Type: Social Member-Family		
	Member Number: 1015		
	Expiration Date: 12/31/2017		
	Status: Active		

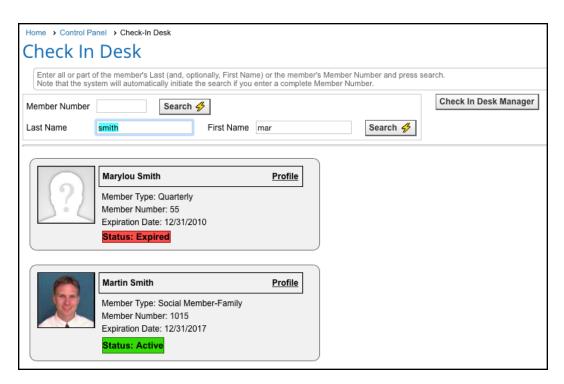
Once you select a member to check in and record the check-in (if the check-in is not automatically recorded) you will receive a confirmation message.

Using the Check-In Desk

When this option is selected, the following screen will appear:

Check In Desk	?
Enter all or part of the member's Last (and, optionally, First Name) or the member's Member Number and press search. Note that the system will automatically initiate the search if you enter a complete Member Number.	
Member Number Search # Last Name First Name Search #	
Return to Previous Page	

Enter a Member Number, Last Name, or First Name and click the **Search** button. The screen will refresh to show matching members.



If the coordinator doing lookups also has rights to the People Manager function, a **Profile** link will be displayed, allowing the coordinator to jump over to the member's profile to make updates (for example, a new email address.)

Once you select a member to check in and record the check-in (if the check-in is not automatically recorded) you will receive a confirmation message. The cursor will return to the starting field for the next lookup.

Checking a Member Out

If this option has been enabled, you will have the ability to record a checkout for any member currently checked in. Search for the member and confirm they have been checked in previously by looking for the Member Already Checked In icon at the top right corner of the member's result card. Select the checkbox next to the member, then select Record Check-Out.

Check In Desk Op	tions ⑦
This screen shows the club's Check In De	sk options. We have defaulted the settings to those that are most commonly used.
Member Number Search Length	5 When this number of characters have been entered, the system will automatically search for members whose member numbers start with the characters entered. Note that if you enter more than the specified number of characters, you will have to click the Search button to get the proper results.
Cursor Start Field	Last Name v
Show All Members in this Membership	
Recording Method	Do Not Record Do Not Record Active Advected Members Automatically Record Active Member Note: The system will 'Automatically Record Active Member' if and only if ONE active member and NO OTHER members (active or not) are returned from the values entered on the Check In Desk screen.
Record Check Out?	
Show Tert.'s Age?	Note: The system will calculate age from the date of birth on the member's bio page.
Show Member's Answer to This Question	What is your favorite color
Clear Search Fields After Checkin?	
Members Can Check Themselves In?	
	Save Cancel Cancel

Note: You will only see the option to check a member out if they have previously been checked in.

Barcode Scanning

Scanning a Physical Card

Many clubs issue members with a membership card that includes their member number as a barcode. This function allows you to scan the barcode for the quickest lookup (no keyboarding required.)

This option is often used in conjunction with setting a default length for the member number (for example, 6 characters.) When this value is set, and if a barcode scanner is used, once that many characters have been scanned, the lookup is performed automatically, without the user needing to click the **Search** button.

This function will work with any standard barcode scanner, such as the Taotronics TT-BS003 (available from Amazon for under \$40.00.)



Scanning a Digital Card

If you want to allow members to show their membership card on a mobile device, you will need a 2D scanner. Standard barcode scanners (1D) work using laser light reflected back at the scanner, however a mobile device screen cannot be scanned by a laser. Rather than using lasers, a 2D scanner takes a picture of the barcode and uses an algorithm to decode the data from the barcode.

Many 2D scanners are available on Amazon, including the REALINN scanner pictured below for under \$40.00.



Configuring the Check-In Desk

Select the Check In Desk Manager option to see a screen similar to the following:

This screen shows the club's Check In Dee	sk options. We have defaulted the settings to those that are most commonly used.
Member Number Search Length	5
	When this number of characters have been entered, the system will automatically search for membars whose member numbers start with the characters entered. Note that if you enter more than the specified number of characters, you will have to click the Search button to got the proper results.
Cursor Start Field	Last Name V
Show All Members in this Membership	○ Yes No
Recording Method	Do Not Record Record Checked Members Not matching Record Active Member Advantatically Record Active Member Advantatically Record Active Member Advantation of the second Active Member and Not of VME active member and Not OTHER members (active or net) are returned from the values entered on Advantation of the second Active Member and Not of VME active members and Not OTHER members (active or net) are returned from the values entered on
Record Check Out?	
Show Tert.'s Age?	
	Note: The system will calculate age from the date of birth on the member's bio page.
Show Member's Answer to This Question	What is your favorite color ~
Clear Search Fields After Checkin?	
Members Can Check Themselves In?	

This screen allows you to review check-ins that have been recorded in the database. You can search by date range and last name (starts with.)

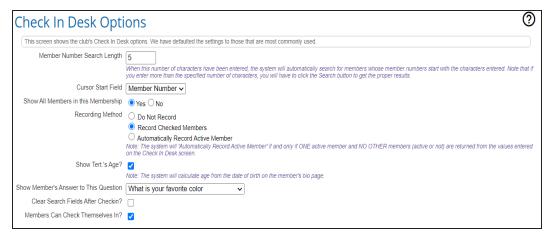
Click the **Reports** button to run reports of recorded check-ins.

Reports

Report	Description	Filter Options
Check Ins by	Check-ins sorted by most recent check-in, including member	Member Options,
Date	name, number, check-in date and time	type, level, date
Check Ins by	Check-ins sorted alphabetically by last name, including mem-	Member Options,
Name	ber number, check-in date and time	type, level, date
Check Ins by	Number of check-ins by member, sorted by member last	Member Options,
Member Counts	name	type, level, date

Check-In Desk Reports

Click the **Options** button to see the following screen where you can configure how the Check In Desk behaves:



The following options can be configured:

- For member number lookups, you can also configure the default length of your member number (for example, 6 characters.) When this value is set, and if a barcode scanner is used, once that many characters have been scanned, the lookup is performed automatically, without the user needing to click the **Search** button.
- Configure in which field the cursor should start: member number, last name, or first name. This is also the field the cursor will return to after you have checked in a member.
- When a search is performed, and if your club or association has memberships with multiple people, you can configure the system to show everyone in the membership when just one card is scanned or one member number entered.
- Configure whether the system should record check-ins for active members. When you select **Do Not Record**, you will not have the option to record a check-in for any member. When you select **Record Checked Members**, you must explicitly check which members are coming into the facility before

clicking the Record button. When you select **Automatically Record Active Member**, the system will automatically record this check-in if one and only one active member is returned from values entered on the Check-In screen.

- Select **Record Check Out** to enable check-out records for members. Checking a member out will only appear as an option if a member returned in the search results is already checked in.
- Select **Show Tert's Age** if age should be shown for tertiary members. Use this option if your club or association has family memberships and minors need to be accompanied by an adult. Age is calculated based on the date of birth shown on the member's bio page.
- Select **Show Member's Answer to this Question** to include the results or any one question in the panel for each member returned by a search. Use this option to verify some criterion that affects attendance. (For example, a swim club might require that members have received a Learn to Swim certificate.)
- Select **Clear Search Fields After Checkin** to clear the search criteria in the search panel after a member check-in has been recorded.
- Select **Members Can Check Themselves In** to allow members to check in themselves if the module is placed on the member menu.

Administrators: If the Check-In Desk is placed on a menu and you have not enabled the option to allow members to check in themselves, the link will redirect users to the home page.

Click **Save** to save your changes and return to the Check In Desk Manager, or **Cancel** to return without saving.

Collectibles

Search Collectibles (User)	
Collectibles in the Member Profile	
Collectibles Manager	
Configuring Collectibles	

The Collectibles module allows clubs and associations to track collectible items, such as cars, owned by members and, optionally, non-members.

A club admin will define a series of properties for each collectible item. An item can have as many properties as the club wants, with each property being in one of 25+ different formats. Properties are organized into pages.

Members (and admins) have the ability to define individual items within their "collections".

Example: A Corvette owner who owns 6 Corvettes will define 6 items within his personal collection, completing the specified properties for each car. The module allows linking a photo or a pre-defined photo album to a collectible item. It also allows for properties that are only editable by an admin but visible to everyone.

A single item can be in the database multiple times.

Example: A car may change ownership over the years and be modified along the way, including a new engine or paint scheme. There is nothing inherent in the system that stops this car being listed multiple times under the same or different owners. Searching for this car using its reference number will display its complete history of owners and updates.

Some clubs may want to use this module as a formal "Registry".

Example: Some vintage car clubs have records of every car manufactured and want to build such a registry to track each car's history. They have the ability to assign collectible items to non-members or even to specify that the owner is "Unknown".

Collectibles in the Member Profile

When the Collectibles module is enabled and the module has been configured to allow members to add and update their personal items, a new option appears on the member Profile screen.

Website
User Name / Password
Interests
Photo Albums
Collectibles
Classified Ads
Download Bank

Search Collectibles (User)

When you first display the user side of the Collectibles module, you will see the following screen.

E	Build a Link		080
			A server have a lot of the bar of the server
		art areas for the	telle, per un quelle section fin
	- Link Type and Add		
	Link Type	< Select >	
l		< Select >	
ſ	-Link Properties-	Built-in Module Custom Page	
	Link Display Typ		ge
		Future Event Document	
	Target Windov	Donation Survey	Vindow
		External Page	
		Email	
		Anchor	cel 🗙
		Link To Anchor	
		Blog	
		Quick Link	
		Volunteering Opportunity	
		Resource Scheduler	
		Ad Hoc Form	
		Gift Membership Add to Mailing List Link	

Every collectible item has a link to the owner's Member Directory page, as well as "Item Name" (called Car Model Name in the above screen shot.) For most of these fields, you can search for a value anywhere in the field.

Collectible items also have questions where the answers are visible to the public and can be searched. There may also be questions that are configured to be visible to everyone, but cannot be searched.

Enter or select the relevant search criteria and click the **Search** button.

Select a question from the drop-down list. What you see next depends on the answer format.

- For a Select List or Radio Button question, the Operator is "Equals" and the Value field shows you the allowable values.
- If it's an Integer, Number, or Date field, the Operator supports "Equals", "Not Equal to", "Greater Than", "Less Than", etc.
- If it's a Short or Long Text field, the Operator supports "Equals", "Not Equal to", "Contains", and "In List" (which is a comma-separated list.)

For each question, specify the operator and value. You can select multiple questions and, along with the fixed search fields, all specified criteria are treated as AND conditions (i.e., they must all match for a collectible item to be returned.)

When you've specified the criteria you want, click the **Search** button to see a screen similar to the following:

Home > Collectibles					
Collectibles					
<i>(</i>		en e liek ef eskine. Oes Medele is n			augurata it
changed owners or was	modified in a significant way.	ee a list of active Car Models in y	our club. Note that a Car Mo	del may appear in the list more than once if, for	example, it
		Q Click here to	hide search crit	eria	
Owner Name]	Owner City		
Owner State	Illinois	▼ Ca	r Model Name		
Year		1	L		
Chapter	All Members	•			
	c	lick here to toggle additi	onal questions		
					-
				Reset Search 4	5
Soorch Boculto					
	(6 Car Models found)				
My firs	t Woodie that was built in the factory in Cadil	Taj Mahal C Martin Smith	ору	Out of this World Martin Smith	
Martin	Smith	NO PHOTO AVAILABLE			
NITE -					
De	tails	Details		Details	
Manny	there 2 Diaz	Balloon Na Martin Smith		sdsadad Manny Diaz	
NO PHOTO AVAILABLE		NO PHOTO AVAILABLE		NO PHOTO AVAILABLE	
			_		
De	tails	Details		Details	

Matching items are shown below the search panel (which actually collapses when a search is performed.) 20 results are shown; if there are more than 20, the standard ClubExpress page controls will also be displayed to navigate forward and backward through the list.

Because the properties of each item will be different from club to club, only the fixed fields are shown, in addition to a photo. Click the photo to display a popup window with either the single photo linked to an item or the full photo album (using the standard ClubExpress viewer.)

Viewing Item Details

Click the Details button to view the details for a single item. You will see a screen similar to the following:

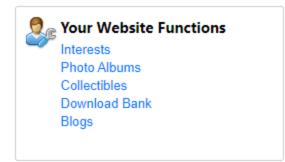
Home > Collectibles > Car Model Details			
Car Model Details			
Owner	Martin Smith Schaumburg		
Car Model Name	My first Woo	die that was built in 1945 at the factory in Cadillac Michigan by friends of my dad	
Year	123456		
Date Purchased / Acquired	1999		
Date Sold / Transfered	1999	-	
Page 1		Click photo to view pho	to album
What is the name of	your balloon	Out of this World	
What is the brand of y	our balloon?	Airborne Balloons	
Which model number is the ho	t air balloon?	ABC	
What kind of basket is on	the balloon?	A double T-partitioned basket	
What type of burner system does this	balloon use?	Triple burner	
What is your hot air ballo	on used for?	Commercial	
		Promotion and Advertising	
		Return to Previous Page ✔	_

Items can be organized into pages, with any number of pages and questions per page. The fixed properties and photo are shown at the top, then each page and its questions and answers in turn.

Click Return to Previous Page to return to the search and results screen.

Collectibles in the Member Profile

When the Collectibles and Member Directory modules are both enabled, a new link appears in the section Your Website Functions in the Member Profile.



Clicking this link displays a screen similar to the following:

Home > Member Profile > Collectibles Collectibles	
Enter your search criteria, and click the "Search" button to see a list of the Car Models that you have entered into the system. Note that your Car than once if you've made copies of the information to, for instance, preserve it's history when you change something about it. Click the "Add Car	
Active 🖉 Draft 💩 Archive 🙁 Rejected	
Status Active Search # Add Car Model	
Search Results (4 Car Models found) My first Woodie that was built in 1945 at the factory in Cadil	Taj Mahal Copy
	1
Balloon Name NO PHOTO AVAILABLE	
Return to Previous Page	

This is a similar screen to the main user side of the module, without the Search panel.

Use this screen to manage your collectible items.

Filter the list by **Status**. The following status values are available:

- Draft is an item in process; it's not yet ready to be shown to others.
- Active is a complete item that will be shown to others in the main Collectibles list.
- Rejected is available to admins only if an item is not suitable or needs corrections. The member will need to edit it and contact the admin to make it active again. Members cannot change the status of a rejected item but they can change everything else.
- Archived is for an item that you no longer wish to show, perhaps because it's been sold or otherwise removed from your collection.

Click the **Search** button to display matching results. Each item is shown with its reference number (which can be relabeled), it's formal "name", when it was acquired, and its status.

Click the **Display Sequence** button to control the order in which items are displayed.

Click the **Add <Item>** button to add a collectible item. The "item will be unique to your club.

In the grid listing collectible items:

The status colors are as follows:

- Green = Active = green
- Yellow = Draft or Archived
- Red = Rejected

Click the **Edit Information** link to edit standard properties for the item.

Click the **Copy** link to make a complete copy of the item. You might use this option if you own multiple items that are similar, or an item has been restored (such as a vintage car) and you want to list properties both before and after the restoration.

Click the **Delete** link to delete an item, including all of its properties. You will be prompted to confirm this action.

Add/Edit Basic Info

- Specify the item name.
- Specify the item ID (such as a VIN for a vehicle).
- Specify either the full date or just the year the item was purchased and/or sold.
- Click the Save button to save your changes or the Cancel button to exit without saving.

Photos

Select One Photo, and click the Upload Photo button to upload a photo. Click the Remove link to remove a photo. Note that if you disconnect a photo from your item, the photo still remains in your collection of photos. Select Use Photo Album and select a photo album from your member profile. Click the Save button to save your changes or the Cancel button to exit without saving.

Collectibles Manager

Control Panel > People > Website Modules >Collectibles

There are two ways to manage collectibles

1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

Edi

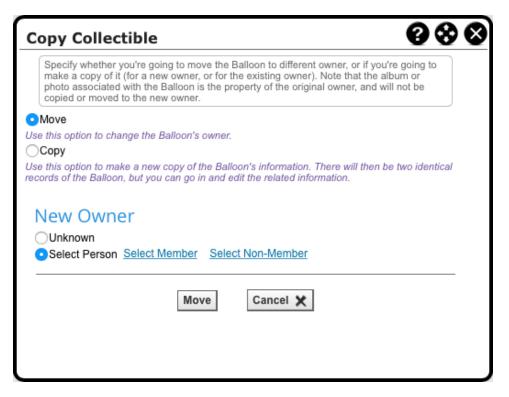
2. When viewing any screen in the Collectibles function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following Collectibles Manager screen is displayed:

Home Collectibles Collectibles Manager Collectibles Manager									
Enter your search criteria, more than once if, for example	and click the "Search" button to se mple, it changed owners or was mo r club or association. Click the "Pro	odified in a significant way.	Click the "Ad	id Car Model" to a	dd a new coller	tible. Clic			
Owne	er Name			C	Options]			
	Status	1		Pr	operties	1			
0						1			
Car Mode				R	Reports				
	Year			E	Export				
	Chapter All Members		•	A	Add 🔻]			
CI	ale bases da damala a dalidian	al avvaatie va		1		-			
	ck here to toggle addition	al questions							
		Reset	Search 🛷						
Soarch Posults	(11 Car Models found)								
					Year Status		_		
Year	Name	Owner	Member?	Member Status	rear status	Maintain	-8		
123456	My first Woodie that was built in	Martin Smith	Yes		A . C	I 🔿 🛁			
	1945 at the factory in Cadillac Michigan by friends of my dad			Active	Active	0	1		
123456		Martin Smith	Yes	Active Active	Active Active	0			
123456 123568	Michigan by friends of my dad	Martin Smith Lisa Abrams	Yes Yes						
	Michigan by friends of my dad Taj Mahal Copy			Active	Active			-	
123568	Michigan by friends of my dad Taj Mahal Copy Air up there	Lisa Abrams	Yes	Active Expired	Active Active			-	
123568 1968	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette	Lisa Abrams Sarah Black	Yes	Active Expired Active	Active Active Active			-	
123568 1968 55455454	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World	Lisa Abrams Sarah Black Martin Smith	Yes Yes Yes	Active Expired Active Active	Active Active Active Active				
123568 1968 55455454 5897	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World Air tup there 2 High Flyer	Lisa Abrams Sarah Black Martin Smith Manny Diaz	Yes Yes Yes Yes	Active Expired Active Active	Active Active Active Active Active				
123568 1968 55455454 5897 980-765	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World Air tup there 2 High Flyer	Lisa Abrams Sarah Black Martin Smith Manny Diaz Martin Smith	Yes Yes Yes Yes Yes	Active Expired Active Active Active	Active Active Active Active Active Draft				
123568 1968 55455454 5897 980-765 FAA Call Sign in ID field	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World Air tup there 2 High Flyer Balloon Name	Lisa Abrams Sarah Black Martin Smith Manny Diaz Martin Smith Martin Smith	Yes Yes Yes Yes Yes Yes	Active Expired Active Active Active Active Active	Active Active Active Active Active Draft Active				
123568 1968 55455454 5897 980-765 FAA Call Sign in ID field ID JB balloon	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World Air tup there 2 High Flyer Balloon Name JB balloon name	Lisa Abrams Sarah Black Martin Smith Manny Diaz Martin Smith Martin Smith NAME REMOVED	Yes Yes Yes Yes Yes Yes Yes	Active Expired Active Active Active Active Active Expired	Active Active Active Active Active Draft Active Active				
123568 1968 55455454 5897 980-765 FAA Call Sign in ID field ID JB balloon IG421P	Michigan by friends of my dad Taj Mahal Copy Air up there Corvette Out of this World Air tup there 2 High Flyer Balloon Name JB balloon name Barb's Balloon	Lisa Abrams Lisa Abrams Sarah Black Martin Smith Manny Diaz Martin Smith Martin Smith NAME REMOVED Martin Smith	Yes Yes Yes Yes Yes Yes Yes Yes	Active Expired Active Active Active Active Expired Active	Active Active Active Active Active Draft Active Draft				

The Search Results are displayed in a grid with columns for the item's ID, Name, and status, as well as the owner's name, if they are a member, and member status.

Note that the **Copy** icon has additional functionality for administrators.



Select the **Move** option to move a collectible item to an Unknown user or to a member or non-member. Click the appropriate **selector** to select the member or non-member from the database.

Select the **Copy** option to copy a collectible item to an Unknown user, to the same person (member or nonmember), or to a new person.

There are several buttons for configuring and reporting on the collectibles:

Collectible Options

Collectible options define how the Collectibles module will function for your club or association

Click the **Options** button to see the following dialog:

Home > Collectibles > Collectibles Manager > C	ollectibles Options	0
This screen shows the club's Collections options	. We have defaulted the settings to those that are most commonly used.	
Singular Keyword for Collectible Item	Balloon	
Reference Id Keyword	NAA Registration Number	
Show on Member Profile?	● Yes ● No	
Mailing List Category	Collectible Owner •	
Only active members in user search results?	Yes No Select No for Registries, or if you want users to see all collectibles regardless of the owner's membership status.	
Show Reference Id?	● Yes ○ No	
Sort collectible search results by	Reference Id Oclilectible Name When viewing an owner's collection, collectibles will instead sort by their owner's personal display sequence.	
Additional question search default display style	 Questions filter starts collapsed Questions filter starts expanded Always show questions, no toggle 	
	Save 🖋 Cancel 🗙	

From this screen, you can define the following properties:

- The keyword used to represent a collectible item.
- The keyword used to represent the reference ID(for example, in a car club, you might use Chassis Number or VIN.)
- Whether members can enter their own collectible items via a link in the Member Profile screen.
- The Mailing List Category that should be used when collectible items are assigned to a member or non-member.
- Whether the search results should include active members only or everyone. Select No for a "Registry" or if you want users to see all collectible items in the database regardless of the owner's membership status.
- Whether a reference number is shown.
- How collectible search results are displayed (either by reference number or by collectible name).
- The default display style of additional questions within the search.

Click **Save** to save your changes and return to the Collectibles Manager, or **Cancel** to return without saving.

Reports		
Report	Description	Filter Options
Collectible Items by Collectible Name	Collectible items sorted by name, including registration number, member/non-member name and status, and purchase/sell years	Subgroup (if applicable)
Collectible Items by Reference Num- ber	Collectible items sorted by registration number, including name, member/non-member name and status, and purchase/sell years	Member Options, type, level, date
	Collectible Reports	

Collectible Reports

Maintain Options

Doporto

Collectibles

The following options are available in the Maintain column for collectibles:

lcon	Description
🥟 (Edit)	Edit the properties of this collectible.
Move/Copy)	Specify whether you're going to move the item to different owner, or if you're going to make a copy of it (for a new owner, or for the existing owner). Note that the album or photo associated with the item is the property of the original owner, and will not be copied or moved to the new owner. Select Move to change the item's owner. If the new owner is unknown, select Unknown in the new Owner section. If the new owner is unknown, select Unknown in the new Owner section. Select Copy to make a new copy of the item's information. There will then be two identical records of the item, but you can go in and edit the related information. If the new owner is unknown, select Unknown in the new Owner section. Otherwise, select Select Person, then click either the Select Member or Select Non-Member link to select the new owner. If the new owner is the same person, select Same Person. Click the Move or Copy button to make the change or the Cancel button to exit without making a change.
(Delete)	Delete this collectible. 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.

Maintain Options

Configuring Collectibles

Collectible Properties

Properties define what pages are questions are shown for each item

Click the **Properties** button to see a screen similar to the following:

Home > Collectibles > Collectibles Manager > Pages/Questions for Balloon Pages/Questions for Balloon						
This screen allows you to build the pages and questions for your Balloon. Use the Scratchpad "page" for questions which are not shown to users. You must add a page for the Balloon 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 Q	uestion	Add \$	cale Question	Copy Question
Page Question(s)	Question Type	Required	Maintai	י 🖷		
Scratch Pad (Not Show	wn)					
Basket	Radio Buttons	No	🧷 (2		
Page 1			🗋 ໂ	🔋 🗄		
Balloon name	Short Text	Yes	🧷 (2		
Basket	Radio Buttons	No	Ø (2		
Burners	Radio Buttons	No	🤌 (2		
Manufacturer	Short Text	Yes	Ø (2		
Use	Checkbox List	No	Ø (2		
Which model number	Short Text	Yes	Ø (2		
					2	
					F	Return to Previous Page

This screen allows you to define the pages and questions used to define and describe collectible items.

The first page (page "0") is the Scratch Pad. 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 Scratch Pad are one or more pages, each of which contains one or more questions.

Add/Edit Page

Click the **Add Page** button to add a page. You will see the following dialog.

dit the collectible p	age	
Name	Envelope Properties	•
Heading	Envelope Properties	۵
	Save 🖌 Cancel 🗶	

The page Name is used on the administration screen, while the page Heading is shown on the page itself when people enter items. Click **Save** to save your changes and return to the main screen, or **Cancel** to return without saving.

Click the **Page Sequence** button to change the order of pages. The standard ClubExpress sequence dialog will be displayed.

Maintain Options

The following options are available in the Maintain column for pages:

lcon	Description
(Edit Page)	Edit the name and heading of this page.
(Delete)	Delete this page. If it has questions, they will be moved to the Scratchpad.
(Question Sequence)	Modify the sequence of questions on this page. The standard dialog will be displayed.

Maintain Options

Adding Questions

Questions are added using the standard answer-type dialogue you would use to add questions to events, surveys and more. See "Question and Answer Types" on the next page.

You also have the option to copy a question from an existing form. Select the form containing the question, then select the question you want to copy to the form you are editing.

Question and Answer Types

Customized questions can be configured in a number of ClubExpress modules, including Ad Hoc Forms, Events, Collectibles and more. Questions are created based on the answer type (for example, multiple choice, a select list or a checkbox list).

Learn how to manage pages of questions: See "Question Configuration" on page 201

Explore answer types: See "Answer Types" below

Learn more about formatted text questions: See "Formatted Text Questions" on page 668

Learn more about scale questions: See "Scale Questions" on page 668

Answer Types

The following answer types are available:

Note: To designate a **default** answer, add a ~ to the beginning of the line. To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.

Туре	Display Format	Additional Values	Options
Heading/ Instruction Text	Question text only, no response is allowed	Any formatted text, including images and photos	N/A
Short Text	Text field	Default answer, Max length	
Formatted Text	Text Field where the answer must be in a spe- cified format	Answer format • Numbers only (plus space and hyphen) • Letters only (plus space and hyphen) • Numbers and Letters (plus space and hyphen) • Email Address • Web Address (URL) • US Phone Number	Required: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options
		 US Zip Code Canada Post Code Australian Post Code UK Post Code UK Post Code Custom – Enter a Regular Expression and test the expression <u>Regular Expres</u>- sions are a powerful format string using dot characters, alternation, group- ing, character classes, quantifiers, word boundaries, anchors, and lookaheads. 	
Long Text	Large text block	N/A	Max length required: yes/no
Date Year	Drop-down list showing 4-digit numbers	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Date Month	Drop-down list showing the months of the year	Default answer	Required: yes/no Allow comments: yes/no
Date Day	Drop-down list showing the numbers 1-31	Default answer	Required: yes/no Allow comments: yes/no
Date Full	Text field with a popup date- picker icon	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Day of Week	Drop-down list showing the days of the week	Default answer	Required: yes/no Allow comments: yes/no
Time of Day	Time selector	Earliest time, latest time	Required: yes/no Allow comments: yes/no
Integer	Text field	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Number	Text field	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
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 [Enter] to move to the next line as you're entering the items. A minimum of two (2) items must be specified.	Required: yes/no Allow other: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options	
Check box List	Vertical list of check boxes; any and all can be selected	Enter the items to be displayed in the list, each on a separate line.	Specify the minimum and maximum selec- tions that can be made. Allow other: yes/no Allow comments: yes/no	
		Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter some- thing different (i.e. a write-in candidate for an election)	Required: yes/no	
Radio Buttons	Vertical list of radio buttons; only one can be selected	Note: To designate a correct answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.	Allow other: yes/no Allow comments: yes/no To define an initial default answer, add a ~ to the beginning of	
		Note: When you add questions with a correct answer configured but enabled the "Other" option, and the user enters their response, the answer will be incorrect.	that line	
True/False	Radio button	Specify "True" text Specify "False" text Select an initial default, or no default	Required: yes/no Allow comments: yes/no	
Multiple Text Boxes	Vertical list of text fields; any- thing can be entered into each field	Enter the number of text boxes to be displayed. Specify the maximum length of each answer. Specify the minimum number of values that must be entered.	Allow comments: yes/no	
Scale	Horizontal list of radio but- tons rep- resenting the "strength" of the respond- ent's opinion	Enter text to be displayed above each radio button, each entry on a separate line. The number of lines determines the number of radio buttons. A min- imum of two (2) items must be spe- cified.	Required: yes/no Store numbers: yes/no (If no is specified, val- ues will be stored)	

Question/Answer Types

Formatted Text Questions

When you select "Formatted Text" for the answer type, an additional option appears to define the answer format. The following predefined formats are available to select:

- Numbers Only (plus space and hyphen)
- Letters Only (plus space and hyphen)
- Numbers and Letters (plus space and hyphen)
- Email Address
- Web Address (URL)
- US Phone Number
- US Zip Code
- Canada Postal Code
- Australian Postcode
- UK Postcode
- Custom

When you select the "Custom" option, another field appears to allow you to define a custom format. This option uses a feature of many programming languages called a **Regular Expression**. With this feature, you define a format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. At runtime, this format string then defines what users can enter into the field.

Regular expression syntax is subtly different in different programming languages. ClubExpress uses the syntax defined by JavaScript.

Note: Regular Expressions are for experienced software developers only. They can be as simple or as complex as you want them to be, but there is a significant learning curve. ClubExpress cannot provide support for individual regular expressions that are not working as you might want them to work.

For more information about regular expressions, see the following websites:

Basic Reference: http://www.w3schools.com/jsref/jsref_obj_regexp.asp

A site with more detailed info, examples, and specifics of javascript support: <u>http://www.regular-expressions.info/</u>

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	\odot	\bigcirc	\odot	\bigcirc	
Government regulation	\odot	\bigcirc	\bigcirc	\bigcirc	
Education	\odot	\bigcirc	\circ	\bigcirc	
Open skies	$^{\circ}$	$^{\circ}$	$^{\circ}$	$^{\circ}$	
Equipment	0	\odot	0	0	

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.

Example: In the figure below, there is a typo in the value block for the last question ("Neutrall"), so it is separated out.

How important are the following factors in your enjoyment of ballooning?					
		Unimportant	Neutral	Somewhat Important	Very Important
:	Safety	\circ	\circ	\circ	\circ
Government regu	Government regulation		\circ	\circ	\circ
Educ	cation	\circ	\circ	\circ	0
Open	Open skies		\circ	\circ	0
	Unim	portant	Neutrall	Somewhat Important	Very Important
Equipment	(0	0	0	\circ

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:

	Hoc Form Question
	pe, and the appropriate data fields will be displayed (note that if an existing question has been answered e cannot be changed).
Question Name	•
Answer Type	Scale
Question Text	
I <u>U</u> "Tim	es New 🔹 16px 👻 🗛 🔹 🏷 🔚 🗮 🗮 🛱 🗱 🌌 🖑 🕗
Question Prompts	
	0 of 4000 characters used
	Enter question prompts, each on a separate line
Column Headings	Enter question prompts, each on a separate line
Column Headings	Enter question prompts, each on a separate line
Column Headings	Enter question prompts, each on a separate line
Column Headings	Enter question prompts, each on a separate line
-	Enter question prompts, each on a separate line

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/Instruction Text" 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 ad hoc form, 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 "Heading/Instruction Text" 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 heading.

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.

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 and Reporting 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.

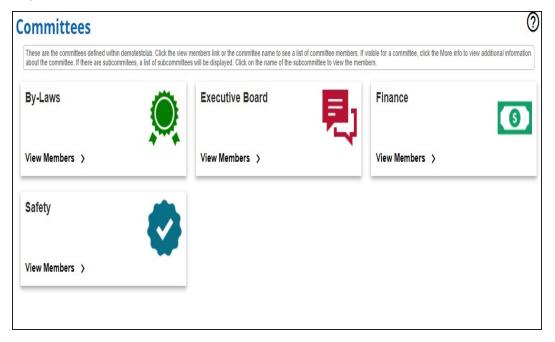
Example: "Poor,Fair,Good,Excellent" will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.

Committees

Committees Manager	675
Manage Committee Members	677

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.

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:

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:

	on (if enabled).	
Manny Diaz ♀ 123 Fourth Street Brooklyn, AZ 11255 ⊠ manny_diaz_42432@gmail.com Joined: 1/1/2020 Term Expires: 12/31/2021 ⊡	Committee Member Martin Smith (He/Him/His) ♀ 123 Fourth Street Chicago, IL 60601 ⊠ marty_smith42@gmail.com Joined: 1/1/2021 Term Expires: N/A III (III) ♀ 100 ♀ 100 III) ♀ 100 ♀ 100 III) ♀ 100 ♀ 100 III) ♀ 100 IIII) ♀ 100 IIIII ♀ 100 IIIII) ♀ 100 IIII) ♀ 100 IIII ♀ 100 IIII) ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIIII ♀ 100 IIIII ♀ 100 IIIII ♀ 100 IIII ♀ 100 IIIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 IIII ♀ 100 ♀	
	 ♀ 123 Fourth Street Brooklyn, AZ 11255 ☑ manny_diaz_4243z@gmail.com Joined: 1/1/2020 Term Expires: 12/31/2021 	♀ 123 Fourth Street Martin Smith (He/Him/His) Brooklyn, AZ 11255 ♀ 123 Fourth Street ⊠ manny_diaz_4243z@gmail.com Chicago, IL 60601 Joined: 1/1/2020 ⊠ marty_smith42@gmail.com Term Expires: 12/31/2021 Joined: 1/1/2021

The names are links that can be clicked to display that member's directory entry, including contact information (unless the member has suppressed this information from his or her directory entry.)

If you are a member of the committee, you will see a button that allows you to email the other members of the committee. Click this button to display a popup form, complete the form and click the Send button to send the email.

Click the **Sign Me Up** button (if this option is enabled) to volunteer for this committee. If you are already a committee member, click **Remove Me** to resign from the committee. This option will only be enabled for committees with an open membership.

Committees and Subgroups

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 Manager

Control Panel > People > Website Modules > Committees

There are two ways to manage committees

- 1. Administrators and Function Coordinators can select the module in the Control Panel (People Tab) to access the admin side of the function.
- 2. Edit When viewing any screen in the Committees function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Committe	es Adn	ninistratio	n	0
	of a committee an			The Board of Directors should be one of these committees. Click "Add Committee" to create a new committee. Click "Edit" to ove a committee while there are members assigned to it.) Click "Members" to view, add or remove members.
Add Dis	ence	ports		
Name	Members	Parent Committee	Maintain 👔	
By-Laws	0		🥖 🌡 🕵	
Executive Board	6		N 🌡 👔	2
Finance	7		🧷 🔱 違	
Safety	5		N 🌡 🗋]

Subgroups: 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:



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 (noone, members-only, or everyone.)

Note: If your club or association has activated the mobile app, you will see a **Create Channel** option, allowing you to automatically create a mobile channel based around this committee. Members who are assigned to the committee will automatically be added to the channel.

For associations that people join through their business / professional lives, the dialog will also ask if you want to **Show Work Title** information on the committee member cards. This is useful if a member's professional affiliation is relevant to their presence or role on the committee.

Determine who should be able to contact the committee as a whole via email on the user side of the module: no one, committee members only or al club members. Selecting None will remove the option to email committee members from the user side of the module. You can also set an email address for the committee, and committee members can determine if they'd like to be contacted via the committee email, their own email, or the email associated with their title (if applicable).

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.

If the **Limited Membership** box is not checked, you can configure a committee to allow members to add or remove themselves. With this option enabled, the committee behaves more like an interest within the Interests module. You can also configure a default Title to use for each new member.

Finally, choose an image to represent the committee. This image will display on the user side of the committees module.

You can also determine whether a committee should be displayed on the user side of the module, if you are using a committee to group and classify members and do not want the committee to be public-facing.

Click Save or Cancel to close the window.

Subgroups: If your club or association has subgroups, you can assign each committee to a specific level.

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.

Maintain Options

The following options can be found in the Maintain column:

Icon	Description
(Edit)	Edit properties for this committee.
(Mem- bers)	Update the Members of this committee.
(Delete)	Delete this committee, including all member assignments. You will be prompted to con- firm this action. Note that if a document folder in the Documents module is built around the committee just deleted, that document folder will revert to being visible to admins only. Similarly, a forum based around a deleted committee will change to be "moderator defined".

Maintain Options

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.

Manage Committee Members

Click **Members** to update the members of the committee. You will see a screen similar to this one.

To come mentioned and a set of the full laborary laborary and the full laborary research research and a set of the full laborary research research and a set of the full laborary research research and a set of the full laborary laborary and the full laborary laborary difference of the full laborary difference
ne fair Cann Bradan Bradan Bark Annan Sandha namar Sara

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. 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. The grid will expand and contract dynamically.
- If the committee has a restricted member count, then the grid will always show a number of rows equal to the count.

Maintain Options

lcon	Description
ledit/Assign Member)	Assign a member to this committee.
(Edit/Assign Non-Member)	Assign a non-member to this committee.
(Remove)	Remove this member or non-member from the committee.

Maintain Options

When you add or assign a member or non-member to an open committee, the following popup window is displayed:

committee. If th Expires Date fir	per, you can specify a title as well as the date they joined the e Track dates option is set, you should also complete the Term ald for each committee member. Click "Save" or "Cancel" to return Committee Members screen.
	Not Selected <u>Select Member</u> Include Tertiary Members
C	<none> ~</none>
	 ○ No ○ Yes (Members Only) ○ Yes (Everyone) ○ No ○ Yes (Members Only) ○ Yes (Everyone)
Which Email	⊘ Member's ○ Title ○ Committee's
	Save 🖌 Cancel 🗶

When you assign a committee member to a committee that has terms of office, the following screen is displayed:

For each member, y joined the committee complete the Term E	enmittee Member Of the table of table of the table of table
Name	Not Selected Select Member
Title	<none> •</none>
	Add Title
Join Date	
Term Expires	
	Save 🖌 Cancel 🗶

Click the **Select Member** or **Select Non-Member** link to display the standard member or non-member selector. Once you have selected someone, specify a title. 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 also control what contact information is shown (either the title email address, the committee email address or the member's email address) and to whom, members only, everyone, or not visible.

You can add a member or non-member to a committee without a title and a title to a committee without an assigned person (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.

Subgroups: 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.

Example: A district committee may pull members from any chapter within the district.

Reports

Report	Description	Filter Options
All Committee Mem- bers	Committee member name, title, phone and email, sorted by committee	Committee, subgroup (if applicable)
Committee Members	Committee member name, title, address, phone	Committee, subgroup

Report	Description	Filter Options
with Addresses	and email, sorted by committee	(if applicable)
Avery 5160 By Name	Committee member name and address, sorted alphabetically by last name	Committee, subgroup (if applicable)
Avery 5160 By Zip Code	Committee member name and address, sorted by zip code	Committee, subgroup (if applicable)

Committee Reports

Contact Us

Contacts

The top part of the Contact Us screen is shown below:

Contact Us	0
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 bottom of the page and click the "Send Email" button.	I, please complete the form at the
Club Info	
Official Address 1051 Perimeter Drive Suite 350 Schaumburg, IL 60173 United States of America	
Phone Number 847-255-0210	
Fax Number 847-221-8046	
Club Contacts	
President Rocky Beach president@nwballoons.com	
Board Member Diane Barrentine	
Webmaster Mike E Jones 816 655-1212 webmaster@nwballoons.com	
Data Protection Officer Martin Smith info@clubexpress.com	

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 "official" address plus a Google map link to this address
- If the mailing address and/or standard event location address are different, these will also be shown.
- 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.

The form continues below:

Contact Us

Send Us an Email	
Your Name	
Your Email Address	
Send To	
General Information	
Subject	
Message	
0 of 1000 characters used	
Send Email 🖌	
Website Technical Support	
Website Technical Support	
If you have a ClubExpress transaction on your credit card statement, technical support questions about this website or questions about ClubExpress, please call ClubExpress Technical Support.	
Please Note We are unable to provide information on Northwestern Balloon Club activities or policies, or to supply contact information that is not already displayed on this page.	
1-866-HLP-CLUB (457-2582 - outside the US, +1 847-255-0210)	

This form allows visitors to contact club or association officers or the general email address. It is designed to protect these actual addresses from spam bots that try to harvest addresses from web pages; the actual email is sent from the server.

A Captcha may also be displayed if the system thinks that the user is not a real human! It will need to be filled out, to protect the club against emails sent by spambots.

Contacts

Control Panel > Club > Admin Functions > Contact Us

Click Contacts to display the following screen:

This information is	displayed on the	Contact Us	nage and i	is used by C	lubExpres	s when we need t
to be included on t			page and i	o used by e	Nuberpres	55 When we need t
Add Contact	2 3 Display					
Title	equence Name	List on	Show		Email	Maintain 📑
		Contacts		Email	to Use	Maintain 💼

Before defining contacts, define the titles that the contacts will hold in Control Panel > Club > Setup > Titles.

The Contact Us screen allows you to assign members 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:

Add/Edit Contact					
Select the member, and optionally specify a title for the contact. Check "Show on Contacts" to display the contact on the "Contact Us" page. You may specify if and how the contact's phone and email are displayed.					
Member Mike E Jones Select Member					
Title Webmast	Title Webmaster •				
Show on Contacts					
	No • Yes (Members Only) • Yes (Everyone) No • Yes (Members Only) • Yes (Everyone)				
Which Email	◯ Member's ● Title				
Save 🖌 Cancel 🗙					

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.

Click the standard **Edit** icon to modify a contact. You will see the same screen shown above. Click the standard **Delete** icon to delete a contact. You will be prompted to confirm this action.

Discussion Forums

The Administrators' Discussion Forum	
Navigate Forums	
Administrators	
Create Messages in a Forum	
View Messages in Threaded View	
Administrators	
View Messages in Flat View	
Administrators	
Post Messages from a Mobile Device	
Post Messages via Email	
Forums in the Member Profile	
Forum Message Searching Tips	
Threads	711
Forum Administration	
Add Forum	
General Info	
Posting Messages Section	
Message Delivery Section	
Understanding Forum Moderators	
Moderating Messages	

Manage Forum Members	
Special Members for All Forums	
Manage Threads	
Manage Messages	

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.

Clubs 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. Clubs 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 web site, to make their content available to any site visitor. But in this position, they will be read-only; all editing functionality is disabled.

The Administrators' Discussion Forum

Club administrators have access to a special forum that is available to all administrators across all clubs and associations using ClubExpress. It provides a place for admins to ask questions and share their expertise with administrators from other clubs. It will be shown at the end of the list of forums. In order to access the administrator forum, forums must be *enabled* on your website. You do not need to give members access to the module, or even configure your own forums to participate.

Navigate Forums

Forums			?
My F	orum Memberships	Search	Our Forums Poli
General Forums			
Everyone can see these discussions of interest to the general public, but only club members can participate. You are encouraged to join our club so you can share y	our experiences.		
	threads	posts	last post
Safety Discussions about ballooning safety.	16	28	8/25/2020 3:19 PM New
Equipment This forum focuses on equipment, including what to buy for different skill levels and needs. Posts in this forum are submitted for moderator approval.	20	49	5/29/2020 3:33 PM
Restoration Use this forum for all discussions related to restoring and repairing old balloons.	4	7	9/25/2019 11:28 AM
Maintenance Discussion about maintaining ballooning equipment.	2	3	11/13/2018 7:14 PM
Navigation Forum A test forum to discuss balloon navigation.	0	0	
Volunteers	0	0	
Aembers Only Forums			
These discussion forums are only visible to club members. All NWBC members can participate.			
New members General questions for new club members	threads 4	posts 5	last post 2/27/2020 1:47 PM
Emergency Alerts This forum serves for emergency alerts	1	1	7/31/2018 1:31 PM
Member Buy/Sell/Trade Forum for members looking to buy, sell or trade items with other members. NW Balloon Club is not involved with these transactions, which are betwee members directly All transactions are at the member's own risk.	6 en	8	9/26/2018 5:59 PM
Does anybody know a good Forum to be used to receive referred trades people to help with various repairs and services.	5	6	7/9/2020 9:22 AM

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 and time of the last post. The forums listed are ones to which you are subscribed, either automatically based on subgroup, committee or interest, or ones to which you have manually subscribed.

Note: To view a list of all forums to which you are automatically subscribed and forums available for subscription, go to Member Profile > Forum Memberships or select the My Forum Memberships button at the top right corner.

Subgroups: If your club or association has subgroups defined and each subgroup has its own website and forums, members of each subgroup (child) can see the forums and messages belonging to the parent.

Select **Search** to navigate to a separate screen and search for specific messages either in all forums or a specific forum.

Select **Our Discussion Forums Policy** (if shown) to view the club's policies for maintaining harmonious and smoothly-running forums.

Select a forum to view all threads within that forum.

afety						
This is a list	of the threads in the forum you selected. Click on 'Subject' or 'Last Post' to sort the threads into th	e corresponding sequence. Click on a thread name to view	v the messages in t	hat thread.		
Start New Thre	ad My Forum Preferences		Search This	Forum		
Page 1 of 1		Go	Go To Forum: Safety			
Started By	Subject 🚔	Posts	Views	Last Post 🔷		
Marty!!	Test message with link	1	1	8/25/2020 3:19 PM by Marty!! New!		
Colleen Carte	Did you guys see that new training video? 😁	1	0	8/12/2020 6:26 PM by Colleen Carter New!		
Marty!!	Ignition Timing	1	0	7/18/2020 12:45 AM by Marty!!		
Colleen Carte	Study questions 🥹	1	3	5/13/2020 3:00 PM by Colleen Carter		
Jenny C.	Promoting Safety? 📩	2	21	10/24/2019 4:43 AM by Benny		

The number of threads that display on each page will depend on your preferences set in Forum General Preferences in the Member Profile. Paging controls will appear if the number of threads exceeds the number you set to display on each page.

Select **Start New Thread** to start a new discussion thread within the forum. Select **My Forum Preferences** to quickly navigate to Member Profile > Forum General Preferences and manage your forum preferences and settings.

Use the search bar to search through the forum for a specific message. Selecting the search icon will take you to the **Search For Messages** page where the search term(s) entered and the forum will be auto-filled into the search fields (see "Forum Message Searching Tips" on page 707).

To quickly navigate to another forum, select a forum from the **Go To Forum** drop-down menu.

If you are looking at a forum which allows members to opt-in to subscribe and participate, you will see a screen similar to the following:

Membe	er Buy/Sell/Trade			0
	f the threads in the forum you selected. Click on 'Subject' or 'Last Post' to sort the threads int in this forum, <u>click here to go to your Profile — Forum Memberships</u> screen and join the		to view the message	s in that thread.
			Search T	his Forum
Page 1 of 1			Go To Forum:	Member Buy/Sell/Trade ~
Started By	Subject 🗢	Posts	Views	Last Post 🔷
msmith	Bike for sale 🏂	1	116	10/14/2007 11:17 PM by msmith
<unknown></unknown>	Test Drive 😁	1	3	9/26/2018 5:59 PM by <unknown></unknown>

Select the **Profile - Forum Memberships** link to quickly navigate to the Forum Memberships settings in your member profile and subscribe to the forum.

Administrators

Administrators: Club administrators have access to a special forum (The Administrators' Discussion Forum) that is available to all administrators across all clubs and associations using ClubExpress. It provides a place for admins to ask questions and share their expertise with administrators from other clubs. It will be shown at the end of the list of forums.

Forums			0
You have message(s) awaiting approval reported	My Forum Memberships	Search	Our Forums Policy
General Forums			
Everyone can see these discussions of interest to the general public, but only club members can participate. You are encouraged to join our club so you can sha			
Safety Public Active Discussions about ballooning safety.	threads 16	posts 28	last post 8/25/2020 1:19 PM
Equipment Public Active This forum focuses on equipment, including what to buy for different skill levels and needs. Posts in this forum are submitted for moderator approva	20	49	5/29/2020 1:33 PM
Restoration Public Active Use this forum for all discussions related to restoring and repairing old balloons.	4	7	9/25/2019 9:28 AM
Maintenance Public Active Discussion about maintaining ballooning equipment.	2	3	11/13/2018 5:14 PM
Navigation Forum Public Active A test forum to discuss balloon nevigation.	0	0	
Technical Forum Club Members Only Inactive a place for technical questions	2	2	7/18/2020 12:15 AM
Testing Opt Out Public Active	0	0	
Members Only Forums			
These discussion forums are only visible to club members. All NWBC members can participate.			
	threads	posts	last post
New members Club Members Only Active General questions for new club members	4	5	2/27/2020 11:47 AM
Emergency Alerts Club Members Only Active This forum serves for emergency elerts	1	1	7/31/2018 11:31 AM

In addition to the options for members, next to a forum's name administrators can see is its **Visibility** setting (Public, Club Members Only or Forum Members Only) and its **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.

Viewing Messages for Approval

Forum Message	Approval			
Author (click to email)	Forum / Subject	Post Date/Time	Maintain	
Colleen Carter (Colleen Carter)	Safety / Summer Safety Jamboree	9/28/2020 7:25 AM	🖂 🎺 🛽	Ø
So disappointed we couldn't have the you guys do anything special instead	; jamboree this year!! I look forward to it every summer. Oh !? How are you all doing?	well, maybe next year	! Did	

Select this option to view messages posted by members either in forums which require moderator approval of posts, or posts by individual members who happen to be "moderated". The grid displays the name of the original poster as a link. Select the link to view all contact information for the member.

In the Maintain Column:

- Select the **Email** icon to send a message to the original poster.
- Select the **Approve** icon to approve the message and display it within the forum.
- Select the **Delete**icon to delete the message.

Select the **Edit** icon to edit the message. You will see the message editor to change its content. This option is available so that you can fix problems before approving the message.

Viewing Reported Messages

Forum Repo	orted Messages		0
This page shows messa will not show in their ent	ages that members have reported. You can approv tirety unless you click the "Expand Message" butto	ve the message to remove it from the list, delete the on shown in the top-right of the main message area.	message, modify the message, or edit the reported member's status. Longer messages
Q • Hide Search			
Search Criteria			
Select Forum	All Forums	~	
Posted By (Member)	Not Selected Select Member		
Reported By (Member)	Not Selected Select Member		
Post Date Range	Any Time 🖌		
	Reset Search	\$	
Author (click to email)	Forum / Subject	Post Date/Time Maintain	
Martin Smith (Marty!!)	Safety / Test message with link	8/25/2020 1:19 PM 🛛 🏈 🙆 🤌	
Jump to Google Here	is a link:		
Regards, Marty Balloons R. Us.			
Colleen Carter	Inapporpriate]

Select this option to view messages reported by members. Search through reported messages by forum, by original poster, by reporter or by date range. The grid displays the name of the original poster as a link. Select the link to view all contact information for the member.

In the Maintain Column:

- Select the **Approve** icon to approve the message.
- Select the **Delete**icon to delete the message. Delete the message, delete the message and all replies, move the message to a new thread, or move it to a new forum. You also have the option to email the original poster with details regarding your decision to delete or move the post.
- Select the **Edit** icon to edit the message. You will see the message editor to change its content. This option is available so that you can fix problems before approving the message.
- Select the **Manage Forum Status**icon to view the Forum Member Info dialog box and change the member's forum status to moderated or banned.
- Select the **Configure**icon to view the Member Status dialog box and to change the membership status to Freeze, Drop or Expire.

Threads of Messages

Selecting the forum name displays a list of threads in the forum, as shown in the following screen:

Basket Case				0
This is a list of the threads in the forum you selected. Click on 'Subject' or 'Last Post' to sort the threads into	the corresponding sequence. Click on a th	read name to view the r	messages in that thread.	
Start New Thread (My Forum Preferences) (Forum Admin) (Members)		Sear	ch This Forum	
Page 1 of 1		Go To Forum	Basket Case	~
Started By Subject $\stackrel{\scriptscriptstyle \wedge}{=}$	Posts	Views	Last Post 🔷	Admin
Colleen Carter	4	17	10/13/2020 5:05 PM by Martin Smith	0 🖻
Martin Smith Welcome new members!	1	0	9/16/2020 2:28 PM by Martin Smith	1 🖻
Return to	Previous Page			

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, and the date and author of the most recent post. You can change the sort order by selecting the **Subject** and **Last Post** headings. Selecting a heading a second time changes the direction of the sort.

Select the Forum Admin button to edit the configuration of the forum (see "Add Forum" on page 718).

Select the **Members** button to view the Forums Member Manager screen (see "Manage Forum Members" on page 727).

Select the **Edit** icon in the Admin column to manage individual threads.

Thread Adm	inistration 🛛 😧 🛠 🗙
Change the proper	ties of a thread, move it to a new forum, or delete it.
Subject	Hi, This is a new thread.
Pinned	(A 'pinned' thread always appears at the top of page one of the thread list.)
Read-Only	(Replies cannot be posted to a 'read-only' thread.)
Change Forum	Safety ~
Dele	te Thread Save 🖌 Cancel 🗙

In the *Thread Administration* pop-up window, you can edit the **subject** of the thread.

- Select the **Pinned** option to pin a thread to the top of the forum. The thread will display with a different background color to highlight the thread, and will always remain at the top of the forum thread list. This option is often used for frequently asked questions, or for a message explaining thread policies.
- Select **Read-Only** to change the thread to a read-only thread. Read-only threads do not allow replies to the post. This option is often used in conjunction with the pin option, to create a read-only thread at the top of the forum.
- Use the **Change Forum** drop-down menu to move a thread to a different 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.
- Select Delete Thread to remove the thread from the forum. 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.

Select **Save** to save your changes, or **Cancel** to exit without saving.

Select the **Export** icon to view the Export Thread window.

Export Thread	688
Choose which type of export you would like to perform.	
O Export thread to file	
O Export thread to FAQ	
Submit V Cancel X	

Select Export thread to file to export the thread as a .xml file. Select Submit to download the file.

If the FAQ module is enabled and has at least one category, an option will appear to export the thread to the module (see "FAQ / Tech Library" on page 875). Select **Export thread to FAQ**, followed by **Submit** to view the Add/Edit FAQ pop-up window (see "Manage Questions" on page 879). Add a Question Title, select a Category, and edit the text of the thread name or post. Select **Save** to save your changes.

) / Tech Library	6.6
category assigned t	is used internally only; readers will see the actual Question, which should be phrased carefully to convey the issue being explored by this qu to a question it will disappear from the current list when you save. Use the Active flag to control the visibility of the question without having to e a rich text answer, including images, linkns and complex formatting. Click "Save" to save and return to the FAQ list, or click "Cancel" to re	o delete it. The advanced Content Editor
Question Title	•	
Question	Crazy for baskets!!	
1	I9 of 500 characters used	
Category	Buying a hot air balloon ✔ ●	
Tags		
Active		
🗈 😩 🤊 •	- 🔍 - Styles 🔹 - 🖪 🖌 🖳 🗛 - 📲 副 三 三 建 建 😓 🗃 🖾 🚔 🔏 🕘	Insert Page Row
Quoted Text		*
	heir selection is like.	100% Width
actually been to	that shop and the owner (Todd) is so friendly! They have a decent selection, and Todd is happy to special order items you	50/50
	questions. The person I spoke to was very knowledgeable.	60/40
	i ballooner who recently moved to the area.	40/60
	election is pretty good but they aren't cheap. Hopefully, the level of service and support is sufficient to justify the higher prices.	75/25
	the new basket shop that joined? I wonder what their selection is like. Anyone checked out their website?	25/75
		33/33/33
		25/25/50
Davier At 11	TML Spreview Zoom -	50/25/25
Design <> H		25/50/25
rds: 109 Characte		-

Create Messages in a Forum

Click the **Start New Thread** button to start a new thread. You will initially see the Formatted Text Editor, shown below (see "Editing Text" on page 197).

Post Message	0 & 0
Type your message or reply here.	
Subject	•
Message Icon << None Selected >>	
Heading 1 ≑ B I U ⊖ 12px ≑ A ﷺ ☱ ☱ ☲ ☱ ☜ ☜ T _x ☺	
Regards, Marty Balloons R. Us.	
Ø Post Message ✓ Cancel ★	

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, or if the forum requires approval of new messages, the message will be saved for moderator or administrator approval. If you are a forum moderator or administrator the message will post immediate.

Adding Attachments to a Message

To add attachments (if allowed by the forum), click the paperclip icon at the bottom of the window. The screen will refresh to show the following panel:

A	Attachments (up to five allowed)					
		Browse	Remove			
	Add					

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.

Discussion Forums

Attachments (up to five allowed)		
	Browse	Remove
	Browse	Remove
	Browse	Remove
Add		

You can attach up to 10 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.

View Messages in Threaded View

Safety	0
Hi, This is a new thread.	Return to Forum Switch To Flat View Subscribe Search This Thread Image: Constraint of the search of th
Marty!! 12/12/2018 8:14 AM Just testing this out guys	
Regards, Marty Balloons R. Us. Reply Like Report This Post	
Jenny C. 7/8/2019 11:42 PM Hello I am posting a message. Reply Like Report This Post	
Marty‼ 9/28/2020 10:18 AM ♥ Hi Jenny! Welcome to the forum!	
Regards, Marty Balloons R. Us. Reply Like Report This Post	
Colleen Carter 9/28/2020 1:04 PM New! Hi Jenny! We're all friends here! Reply Like Report This Post	
Return to Forum	

This is the "threaded" view of messages in a thread. In Threaded View each message reply is indented beneath the original message to which is was a reply.

"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. New messages since your last visit are flagged with a New! tag next to the post date and time. Messages with attachments have an attachment section below the body of the message.

Note: The Edit link will only appear if this option is enabled in forum configuration by your organization. The Admin link will only appear if you are a forum moderator or coordinator, or a club administrator.

Select the **Switch to Flat View** button to change your view to Flat (see "View Messages in Flat View " on page 700). Select the **Return to Forum** button to return to the main page for the forum which lists all threads.

If the member who posted a message has enabled this option, you can click his or her name to display his or her bio is a popup window.

Use the search bar to search through the thread for a specific message. Selecting the search icon will take you to the **Search For Messages** page where the search term(s) entered and the forum will be auto-filled into the search fields (see "Forum Message Searching Tips" on page 707).

Replying to a Post



Select **Reply** to reply to an existing post within a thread.

Select **Reply to Forum** to post your reply in the forum for all forum members to see. If the sender of the message to which you are replying allows private replies, you will see an option to reply directly to the original poster via email (Private Reply). If you send a private reply, the screen will include a CC: field with your email address listed by default; you can leave it as is to receive an email copy of your message, change it or blank it out.

Select **Quote Previous Message** to quote the original message within your reply. In the Quote Message pop-up window, you can edit the text to show only the section relevant to your reply.



The quote will display with a highlighted background within your reply.

Use the Formatted Text Editor to create your message (see "Editing Text" on page 197).

When you Select **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. If the forum requires approval before messages are posted, the message will be saved for moderator or administrator approval.

Liking a Post

Select the **Like** link to like a post. The number of Likes will update to include your new Like and will italicize to show you've already Liked the post. Select the Like link again to un-like a post. The number of Likes will update to remove yours and the font will return to normal.

Hover over the Like link to show a list of all members who have Liked the post.

Reporting a Post

Select this option to report a post for inappropriate content, or if you feel the post should be moved to another forum. You will be prompted to provide a reason (500 characters or less). Select **Submit** to save and send your report, or **Cancel** to exit without sending a report. An administrator or forum moderator will review the report and take appropriate action.

Subscribing to a Thread

When this option is enabled, you will see a **Subscribe** button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

If you are already subscribed, the button changes to **Unsubscribe**. Click it to no longer receive notifications by email. There is also a screen on the Profile to view and update all forum subscriptions.

Members can only subscribe to a thread if this option has been enabled for the forum. If the forum is configured as a listserver (forum posts are emailed to members), subscriptions are only available if the member is not already receiving each forum message by email. Members will receive the complete posting via email. If the forum is not configured as a listserver, subscriptions are always available; members receive a notification about a new posting, including a link to the site to read the message.

If a thread is deleted, a subscription to that thread is also deleted. If a thread is moved to another forum, the subscription will be moved as well. Subscription messages always use the member's primary email address from the member Contact Info screen.

Administrators



In addition to the options for members, administrators are able to edit posts regardless of whether or not the forum configuration allows members to edit posts. Select the **Edit** link to edit the post text using the Formatted Text Editor. If the forum requires approval for new messages, messages requiring approval will be highlighted.

The Admin link below a post allows administrators to edit messages which have been posted. If the message is a new message requiring approval, hovering over the link allows administrators to approve or deny the post.

Hover over the **Admin** link to view the following options (*only appears when the message requires approval):

- Approve* Approve the message and post it to the forum immediately.
- **Block*** Block the message. The message will still display for administrators and moderators in the forum, but not memebers.
- Edit User Status Edit the forum status of that member using the Forum Member Info pop-up window. Change the user to the forum moderator, set the status of the user to Moderated or Banned, or opt the member out of receiving forum emails.
- **Message Admin** Use the Message Administration pop-up window to delete the message (with or without all replies), make the message a new thread, or move the message to another forum. You also have the option to email the original poster.

View Messages in Flat View

Safety	/		0
Hi, This is a new thread.			Return to Forum Switch To Threaded View
Author	Last Post 🗬		Search This Thread
0	9/28/2020 10:18 AM 🥶 🔤		
W	Hi Jenny! Welcome to the forum!		
Marty!!	Regards,		
	Marty Balloons R. Us.		
	Reply Like Report This Post		
	7/8/2019 11:42 PM		
Jenny C.	Hello I am posting a message.		
Jenny G.	Reply Like Report This Post		
0	12/12/2018 8:14 AM		
N.	Just testing this out guys		
Marty!!	Regards, Marty Balloons R. Us.		
	Reply Like Report This Post		

This is the "flat" view of the messages in a thread. The "Flat 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 New! tag next to the post date and time. Messages with attachments have an attachment section below the body of the message.

Note: The Edit link will only appear if this option is enabled in forum configuration by your organization. The Admin link will only appear if you are a forum moderator or coordinator, or a club administrator.

Select the **Switch to Threaded View** button to change your view to Threaded (see "View Messages in Threaded View" on page 697). Select the **Return to Forum** button to return to the main page for the forum which lists all threads.

If the member who posted a message has enabled this option, you can click his or her name to display his or her bio is a popup window.

Use the search bar to search through the thread for a specific message. Selecting the search icon will take you to the **Search For Messages** page where the search term(s) entered and the forum will be auto-filled into the search fields (see "Forum Message Searching Tips" on page 707).

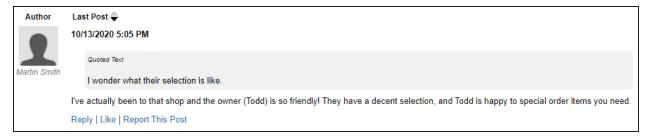
Replying to a Post

Cut Proved	000
Antin Character Residences	
THE CONTRACTOR OF A DESIGN AND A DESIGN AND A DESIGN AND A DESIGN AND A DESIGN A DES	
instance (mass)	

Select **Reply** to reply to an existing post within a thread.

Select **Reply to Forum** to post your reply in the forum for all forum members to see. If the sender of the message to which you are replying allows private replies, you will see an option to reply directly to the original poster via email (Private Reply). If you send a private reply, the screen will include a CC: field with your email address listed by default; you can leave it as is to receive an email copy of your message, change it or blank it out.

Select **Quote Previous Message** to quote the original message within your reply. In the Quote Message pop-up window, you can edit the text to show only the section relevant to your reply.



The quote will display with a highlighted background within your reply.

Use the Formatted Text Editor to create your message; see "Editing Text" on page 197).

When you Select **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. If the forum requires approval before messages are posted, the message will be saved for moderator or administrator approval.

Liking a Post

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Hover over the Like link to show a list of all members who have Liked the post.

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Select this option to report a post for inappropriate content, or if you feel the post should be moved to another forum. You will be prompted to provide a reason (500 characters or less). Select **Submit** to save and send your report, or **Cancel** to exit without sending a report. An administrator or forum moderator will review the report and take appropriate action.

Subscribing to a Thread

When this option is enabled, you will see a **Subscribe** button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

If you are already subscribed, the button changes to **Unsubscribe**. Click it to no longer receive notifications by email. There is also a screen on the Profile to view and update all forum subscriptions.

Members can only subscribe to a thread if this option has been enabled for the forum. If the forum is configured as a listserver (forum posts are emailed to members), subscriptions are only available if the member is not already receiving each forum message by email. Members will receive the complete posting via email. If the forum is not configured as a listserver, subscriptions are always available; members receive a notification about a new posting, including a link to the site to read the message.

If a thread is deleted, a subscription to that thread is also deleted. If a thread is moved to another forum, the subscription will be moved as well. Subscription messages always use the member's primary email address from the member Contact Info screen.

Administrators

Safety		0
Hi, This is a	new thread.	Return to Forum Switch To Threaded View
Author	Last Post 🔷	~
0	12/12/2018 6:14 AM	
No.	Just testing this out guys	
Marty!!	Regards, Marty Balloons R. Us.	
	Reply Like Edit Admin	
	7/8/2019 9:42 PM	
Jenny C.	Hello I am posting a message.	
Jenny C.	Reply Like Report This Post Edit Admin	
	9/28/2020 8:18 AM 🥶 New! Hi Jenny! Welcome to the forum!	
Marty!!	Regards, Marty Balloons R. Us.	
	Reply Like Edit Admin	
2	9/28/2020 11:04 AM Newl Hi Jenny! We're all friends here!	
Colleen Carter	Edit Admin	

In addition to the options for members, administrators are able to edit posts regardless of whether or not the forum configuration allows members to edit posts. Select the **Edit** link to edit the post text using the Formatted Text Editor. If the forum requires approval for new messages, messages requiring approval will be highlighted.

The Admin link below a post allows administrators to edit messages which have been posted. If the message is a new message requiring approval, hovering over the link allows administrators to approve or deny the post.

Hover over the **Admin** link to view the following options (*only appears when the message requires approval):

- Approve* Approve the message and post it to the forum immediately.
- **Block*** Block the message. The message will still display for administrators and moderators in the forum, but not memebers.
- Edit User Status Edit the forum status of that member using the Forum Member Info pop-up window. Change the user to the forum moderator, set the status of the user to Moderated or Banned, or opt the member out of receiving forum emails.
- **Message Admin** Use the Message Administration pop-up window to delete the message (with or without all replies), make the message a new thread, or move the message to another forum. You also have the option to email the original poster.

Post Messages from a Mobile Device

If you are using a smartphone or tablet to create a new message, the full editor is specially optimized for a mobile device:

📶 Verizon 🗢	2:56 PM	🔊 75% 🔲		
A		?		
Post Mes	sage			
Type your message of	-			
Subject		•		
Message Icon	<< None Selected >>	V		
	S 12px \$ AcRegular \$ Ξ Ξ Ξ Ξ S ဩ <u>T</u> _x			
Regards, Marty Balloons R. Us.				
	Cancel 🗶			

Specify the subject and, optionally, a message icon. The editor box is in the middle of the screen; if you have a signature, it will be inserted automatically. Tap at the top of the text box and your device's keyboard will appear to enter the forum post.

The toolbar rows above provide the following functions:

- Bold, italic, underline, and strikeout
- Font size
- Font type, using any of the custom fonts added to your website
- Text color and background color
- Numbered and bulleted lists
- Indent and outdent
- Alignment
- Create link
- Add image (from your local camera or photo list)
- Remove formatting

For many of these icons, you can either tap the icon and continue typing with the new property enabled, or highlight a block of text and tap the icon to apply that format to the block.

The Attach File icon is below the text box. Tap it and you can add up to 10 files from your device, including photos, as attachments.

Tap the **Post Message** button to post your message to the forum, or the **Cancel** button to exit the editor without posting. You will be prompted to confirm this action and if you tap OK, any message content you have added will be lost.

If you are replying to a previous message, there are additional options:



The subject is filled in and you have the option of replying to the forum or of sending a private reply via email (if allowed by the member.) You can also optionally send a CC: to another email address.

If you tap the **Quote Previous Message** link, the message will be inserted into your reply, indented and with a shaded background to distinguish it from the reply itself. The previous message can be edited for brevity and clarity, for example, just to retain the comment that you are replying to.

Post Messages 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, email the 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.

Select the **Report Email** option at the end of the email to report a message to the forum moderator or club administrator using the Report Message page. You will be asked to enter a reason for reporting the message. An administrator or forum moderator will be notified of the report, and can then take the appropriate action (blocking or allowing the message).

Note: 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.)

The forum system automatically ignores "Out-of-Office" messages that user may create when they go on vacation or are out for other reasons. In rare occasions, if a message being posted by email has language similar to an "Out-of-Office" message, it will not be delivered to the forum. If this happens, edit the message and resend it.

Forums in the 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. See "Forums" on page 1347

Forum Message Searching Tips

From the main Forum screen, click the Search button. The following screen is displayed:

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 100 messages will be returned.	
Search For	Messages	
Search For	•	
Search Type	● All Words ○ Any Words ○ Exact Phrase ○ Advanced (Boolean) ○ Fuzzy	
Select Forum	All Forums	
Posted By (Handle)		
Posted By (Member) Note: Overrides handle	Not Selected Select Member	
Post Date Range	Any Time	
Sort By	Relevance O Date (Newest First) Search 4	

Type in one or more words for which to search and specify a search type, date range and forum. Search results will display below the search panel. Each thread subject is a link, allowing you to quickly navigate to the thread where the search text entered on the Search screen is highlighted in the thread.

For example, a search for "balloon" yields the following results:

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 r	no more than 100 messages will be returned.
Search For	Messages		
Search For	balloon	•	
Search Type	All Words O Any Words O Exact Phrase Advanced (Boolean) O Fuzzy		
Select Forum	Safety 🗸		
Posted By (Handle)			
Posted By (Member) Note: Overrides handle	Not Selected Select Member		
Post Date Range	Any Time 🗸		
Sort By	Relevance O Date (Newest First)	5	
Search Result	S (2 messages found)		
Subject	Author	Posted	Forum
Wind speed?	John Richards	6/8/2018 10:34 AM	Safety
Here is an FAA docume	nt that gives guidelines about Balloon Flight Safety		
Wind speed?	Benny	6/5/2018 7:09 AM	Safety
I'm new to this what is	the best wind speed for balloon flight? When is it too windy?		

Navigating to the first result will take you to the thread, where all instances of the word "balloon" are highlighted.

Benny C. Jenny C. Senny C. Senny C. Senny C. Benny C. Senny	Search This Thread Search This Thread /5/2018 7:09 AM m new to thiswhat is the best wind speed for balloon flight? When is it too windy? Reply Like Report This Post Edit Admin /5/2018 7:10 AM Seneral advice: Ialloon fly best in light and stable winds of 4-6 miles per hour. Iaximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin /8/2018 10:34 AM Iere is an FAA document that gives guidelines about Balloon Flight Safety Reply Like Report This Post Attachment (1) Edit Admin
Benny C. Benny C. Jenny C. Benny C. Ben	m new to this what is the best wind speed for balloon flight? Vhen is it too windy? Reply Like Report This Post Edit Admin /5/2018 7:10 AM Seneral advice: lailoons fly best in light and stable winds of 4-6 miles per hour. laximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin /8/2018 10:34 AM lere is an FAA document that gives guidelines about Balloon Flight Safety
Benny C. Jenny C. Jenny C. Benny C. Ben	Vhen is it too windy? Reply Like Report This Post Edit Admin /5/2018 7:10 AM Seneral advice: Ialioons fly best in light and stable winds of 4-6 miles per hour. Iaximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin /8/2018 10:34 AM Iere is an FAA document that gives guidelines about Balloon Flight Safety
Jenny C. Get Ba Ma Re G/5 Get Ba Ma Re G/5 Ba Ma Re Get Ba Ma Re Get Ba Ma Re Get Ba Ma Re Get Ba Ma Ba Ma Ba Ba Ma Ba Ba Ba Ma Ba Ba Ba Ba Ba Ba Ba Ba Ba B	/5/2018 10:34 AM Beneral advice: Iaximum safe winds are 8-10 miles per hour. Iaximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin /8/2018 10:34 AM Iere is an FAA document that gives guidelines about Balloon Flight Safety
Jenny C. Ge Ba Ma Re	Seneral advice: talloons fly best in light and stable winds of 4-6 miles per hour. laximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin 18/2018 10:34 AM lere is an FAA document that gives guidelines about Balloon Flight Safety
Jenny C. Ba Ma Re 6/8 He	Ialloons fly best in light and stable winds of 4-6 miles per hour. Iaximum safe winds are 8-10 miles per hour. Reply Like Report This Post Edit Admin /8/2018 10:34 AM Iere is an FAA document that gives guidelines about Balloon Flight Safety
6/8 He	/8/2018 10:34 AM lere is an FAA document that gives guidelines about <mark>Balloon</mark> Flight Safety
He	lere is an FAA document that gives guidelines about Balloon Flight Safety
Re Richards Re	teply Like Report This Post Attachment (1) Edit Admin
ohn Richards	
6/8	/8/2018 10:37 AM
Th	his is a really dumb question you really should search the forum first.
Benny 0	This message has been blocked Edit Admin
6/8	/8/2018 10:48 AM
Th	hanks for posting the FAA document, it has lots of useful information.
Benny Re	teply Like Report This Post Edit Admin
6/8	/8/2018 2:15 PM
An	re there any additional documents available? I want to learn as much as I can.
Benny Re	Reply Like Report This Post Edit Admin
6/8	/8/2018 2:22 PM
Th	hese don't have to be FAA documents are there any other good sources?
Benny Re	teply Like Report This Post Edit Admin
6/8	/8/2018 2:26 PM
Th	hanks to everyone who has responded so far
Benny Re	Reply Like Report This Post Edit Admin
eturn to Search	

All Words

The system will find every message that includes all of the specified words.

Example: If you specify "red blue green", the system does an internal search for "red AND blue AND green", finding matching messages that include all three words. You do not need to include the word "AND" in your search.

Note that the system will ignore more than 120 "noise" words in your search value, such as "a", "the", "is", "and", etc.

Any Word

The system will find every message that includes any of the specified words.

Example: If you specify "red blue green", the system does an internal search for "red OR blue OR green", finding matching messages that include any of the listed words. You do not need to include the word "OR" in your search.

Exact Phrase

The system will find the exact phrase that you entered.

Example: If you specify "red and green balloons", the system finds messages that include that exact phrase (case insensitive).

Advanced (Boolean)

With this option enabled, the system allows you to construct an advanced search, including the following special operators:

- AND
- OR
- NOT
- NEAR
- () Parentheses to indicate grouping
- "" Quotation marks to indicate an exact phrase
- * Asterisk to indicate a wildcard (for example, "bl*" to find "black" and "blue") Note that a wildcard search term must be enclosed in double quotes as shown above.

This option is for users who have more experience with programming models or other search systems.

<u>Fuzzy</u>

This option uses an internal thesaurus to search using words with similar meanings to the phrase you entered. Note that AND, OR, *, etc. do not work with this option. Enter a simple phrase and the system will find messages including that phrase and related phrases.

Post Date Range

You can further filter the search to messages posted within a specified date range, including the past week, month, two months, six months, year, or an explicit date range.

Select Forum

Specify a forum or use the <All Forums> option search across all active forums.

When you click **Search** (or just press the [Enter] key), a screen similar to the following will appear:

Search			0		
	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 100 messages will be returned.				
Search For	Messages				
Search For	test	•			
Search Type	All Words O Any Words O Exact Phrase Advanced (Boolean) O Fuzzy				
Select Forum	Safety ~				
Posted By (Handle)					
Post Date Range	Any Time v				
Sort By	Relevance O Date (Newest First)	Search 🞸			
Course Doub					
Search Resul	ts (3 messages found) Author	Posted	Forum		
Wow	Michael Jordan	2/14/2019 1:57 PM	Safety		
test					
Bjones Test thread	Unknown	7/20/2018 10:11 PM	Safety		
Hello this is a test dis	scussion added by bjones. Full Steam Ahead, Jonesy Ch	ago, IL mailto:dan@clubexpress.com			
Testing	Michael Jordan	2/14/2019 1:52 PM	Safety		
Test email to the Safe	ety Forum. Posted directly on the site.				

The first 100 matches are shown, including the message subject, author and date/time posted, as well as the forum in which the message appears and the first few lines of the message body. When you click the

link in the Subject column, it will take you directly to that message. Click **Return to Search** to go back to the search screen.

Previous search values and forum selection will be remembered.

Threads

Below are the threads in this forum.

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 and the date and author of the most recent post.

Change the sort order by clicking the up or down arrows next to the Subject or Last Post. headings.

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 "new messages icon will appear in the Last Post column.

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 read a thread, click on its subject line.

Click the Go To drop-down in the top right corner to select a different forum to go to.

Click the Start New Thread button in the top left corner to start a new thread in this forum.

Click the My Forum Preferences button to modify your preferences for this forum.

If you are a moderator of this forum

Click the Members button 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. You may also see a Forum Admin button, which allows you to change the properties of the forum.

Search in the current forum

By entering a value in the Search This Forum box and clicking the Go button. All entered words must be present in the message for a match to be made.

Example: Searching for "red blue green" finds messages containing all three words, but you do not need to enter any special keywords. (Note: additional options are available on the search page.)

<u>Thread Administration Administrators, coordinators and moderators will see</u> an Admin column on the far right.

They can click the Admin link in that column to do the following for each thread:

Change Subject (Subject may not be blank)

Pinned (A 'pinned' thread always appears at the top of page one of the thread list.)

Read-Only (Replies cannot be posted to a 'read-only' thread.)

Change Forum Delete thread

Forum Administration

Control Panel > Communications > Website Modules > Discussion Forums

There are two ways to manage forums:

- 1. Administrators and Function Coordinators can select the module the Control Panel (Communications tab) to access the admin side of the function.
- 2. When viewing any forum screen, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

A screen similar to the following is displayed.



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**.

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:

Forums Cate	egor	y Ad	ministr	ation
	annot delet	e a catego	ory if one or more t	n this screen. Click "Add Calegory" to add a new calegory. Click "Edit" to change an existing calegory and its description. Click "Delete" to remove a orums is associated with it. Click "Forum Sequence" to organize forums associated with the calegory in the desired order. Click "Calegory t.
Add Category	lory			
Category	Forums	Status	Maintain 💼	
General Forums	23	Active	0 HE	
Members Only Forums	12	Active	0 HE	
Special Member Forums	9	Active	0 HE	
Archived Forums	6	Inactive	0 HE	
Job Postings	0	Active	🧷 🛱	
Admin Maintenance	1	Active	Ø	
Test forums	6	Inactive		
Job Postings	0	Active	V 🛱	

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:

Add/Edit 0	Category 🛛 🕄	\otimes
	Im category and a description if appropriate. Click "Save" or Irn to the category list screen.	
Category	•	
Description		
ABC		11
	Max 500 characters - 500	
Active		
	Save 🖌 Cancel 🗶	

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 on the main forums page on your website.

Click the **Edit** icon in the maintain column to modify an existing category.

Click the **ForumsSequence** icon in the maintain column 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:

Forums Policy 20 S
You can enter your forums policy here. A button will appear on the forums home page so users can view it.
※ ℡ 詹 學 哈 詹 ヴ・♡・ ■ ≡ ≡ ■ ■ 掌 掌 Ⅲ・ ⊗ ⊗. 凿 猛 営 Ω・♡・★・Ø
Styles 🔹 "Times New 🔹 48px 🔹 🖪 🖌 🖳 🐴 🖓 🖓 🛪 🗴 🗛 🔹 🖓 📲 👫 🧮 📝 🕈 🦓 👬
Benice! This is a friendly club forum, so treat others with respect. All moderator and administrator decisions are final.
✓ Design ♦ HTML ♥ Preview Zoom•
Words: 20 Characters: 128
Delete Save 🖋 Cancel 🗶

The advanced content editor allows you to define forum policies using the full range of formatting options.

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 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 – Forums Defaults

Select **Configure – Forum Defaults** to update forum global options and defaults for each forum member. You will see the following screen:

Discussion Forums

Start New Thread Text			
This is the 'Start Ne	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 Start New Thread		
Forum Def	aults		
These are the defau	It values that will be assigned to each new forum when it is started. You can change the values for each forum.		
Visibility	Public		
Who Can Post	All Forum Members		
	O Moderator Only		
Allow Editing Posts	Yes - members can edit their messages		
-	O No - messages can be edited by admins only		
Posting Method			
	Online and Via Email		
File Attachments	Allowed		
	O Not Allowed		
Moderator Approval	No - messages post immediately		
	O Yes - moderator approval required		
Sending Emails	Messages are sent to forum members via email		
	\bigcirc Messages can be read online only		
Forum Mode	O 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.		
	Select reply-to. O Forum O Original Message Poster		
Subscriptions	Allow users to subscribe to threads, to receive notifications when messages are posted Subscriptions are available to club members only, and only when not already receiving immediate message posts. If the forum is configured to send emails, the notifications will include the full text of the messages. If the forum allows online reading only, then the notifications will contain only a link to the thread page.		

Visibility - Public forums are visible to members and non-members, Club forums are visible to all members, and Forum Members forums are only visible to members of the specific forum.

Who Can Post - Moderator only posts are usually used in announcement-only forums.

Allow Editing Posts - Allow members to edit their forum messages after they've posted.

Posting Method - Allow members to post to a forum thread using an email.

File Attachments - Allow members to include attachments in their posts.

Moderator Approval - Configure your forums to require moderator approval for all posts, or allow members to post without approval by a moderator. If members are allowed to post without moderator approval, messages will be live on your website immediately. Of course, you are still able to moderate individual members of a forum, and you can still change the default setting for an entire forum when it's created.

Sending Emails - Send forum messages to members via email, or make them viewable online only.

Forum Mode - In Discussion Forum Mode, emails containing posts are sent to the member (for example, Martin Smith) from the forum (for example, Board Members), and all replies are sent back to the forum. In Listserver mode, emails are sent to the forum (Board Members) and replies go back to either the forum or the original poster of the message.

Subscriptions - Allow members to subscribe to individual threads within a forum, and receive notifications when a new message is posted in a thread.

Forum Me	mber 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	Daily Digest = Full Messages 🔻		
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 5/13/2020 3:22 PM. Specify your offset time in hours (+/-).		
Show Picture	Display member's picture with messages		

Allow Private Replies - Allow forum members to reply to another member posting a message directly via email (outside of the forum).

Send Email - Allow members to receive forum messages via email. If this option is not checked, members cannot receive messages via email regardless of their individual forum settings.

Email Format - Configure the format of forum thread emails.

Frequency - Define the default email frequency for forum messages. These settings can be changed by individual members in the forum settings of their member profile.

Preferred Text Editor - Allow members to post formatted messages with the Formatted Text Editor; see "Editing Text" on page 197.

Message Signature - Allow members to include a short signature at the end of their posts (up to 200 characters). The signature can be configured in the forum settings of their member profile.

Show Name - Show the members fill name when posting messages.

Link to Bio - If you have enabled the Member Directory, display a link to the member's bio with their posts.

Show Location - Display a member's location (from their contact information) with their posts.

Local Time Offset - Adjust the time listed for message posts based on your time zone.

Show Picture - Display a member's directory profile photo with their posts.

Configure - Forum Email Disclaimer

If your organization has email routing set up with ClubExpress, the option to edit and include a disclaimer in every forum email appears in a pop-up window similar to the following:

rums Email Disclaimer	•
You can enter your forums disclaimer here. This disclaimer will be included at the bottom of each emainter and the bottom of e	ailed message.
is is not legal advice.	
lease read these carefully before participating in the forums, as th orums constitutes your agreement with these rules.	e use of the
Disclaimer: This website may be viewed by friends and families of vic school aged children for school project research. We require members rights and feelings of the families and friends of victims, by placin comments.	to respect the
23 of 500 characters used	11
ote that the disclaimer is only included in email message notifications. It is not displayed while online.	
Delete Save 🗸 Cancel 🗙	

This text will apear at the bottom of every forum email.

Maintain Options

The following options are available in the Maintain column:

lcon	Description
(Edit)	Click the Edit icon to modify properties for this forum. Note that 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.
(View)	Click the View icon to go visit the selected forum.
(Mem- bers)	View forum Members and make changes to member status within forums.
(Reports)	Run Reports on members for this forum.

Maintain Options

Add Forum

Control Panel > Communications > Website Modules > Discussion Forums

Administrators: Check out our step-by-step guide to creating a Discussion Forum. See How to Create and Manage a Forum

When you click the **Add Forum** button the following popup dialog is displayed:



Use this dialog to specify the name and configuration of the new forum. Each option is described in the following sections.

General Info

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.

<u>Status</u>

Forums have one of four status values:

Status	Description
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 pos- ted. 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 nor-mally shown.

Forum Statuses

Membership

The membership of a forum can be defined in a number of ways.

Туре	Description
All Active Mem- bers	All active club members are automatically members of this forum. Note that mem- bers 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 Mem- berships screen, and they have the option of opting in to participate in forum dis- cussions.
Moderator Defined	A forum moderator, forums module coordinator or club administrator defines mem- bership in these forums.
Interest Mem- bers	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

Туре	Description	
	interest group to which the forum should be linked.	
	Organizations with subgroups (Multi-Tier Option 2), you can base forum membership on an Interest at the parent level. Members at the parent level can participate if they select the Interest. Members at lower levels sign in to the parent-level website, join the Interest group, and participate in the forum.	
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 selec- ted, a new field will appear allowing you to specify the member type to which the forum should be linked.	
Subgroup	Forum membership is maintained automatically, based around a subgroup such as a chapter, district or region. When this option is selected, the organization hierarchy is displayed and you can select a subgroup at any level.	
Member Addi- tional Data	Forum membership is based on member answers to an additional data question. This option is available only for questions with a defined answer list: select list, radio buttons, checkbox list, and true/false; other answer types can be used. When this option is selected, you will see two additional fields, one to specify the question and the other to select a response from the options linked to that question.	
Forum Membership Types		

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.

Also note that forum memberships are not maintained in real time. When changes are made, there is a slight queuing delay before the forum member list is updated.

Example: If you create a forum based around a committee, you will need to wait up to an hour 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 up to an hour 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:

Level	Description
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 Mem-	If the forums module is placed on the public side of the website, this forum will not be

Level	Description
bers Only	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.)

Forum Visibility Levels

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.

Allow Editing Posts

Select **Yes** to allow members to edit their messages or **No** to block this. Some clubs and associations do not allow members to edit their messages in order to protect the club in the event that a "flame war" breaks out on the forum. Members should be more circumspect knowing that they cannot change what they have posted. (Note that administrators and forum coordinators always have the ability to edit or delete messages in a forum.)

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.

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. Note that if the message poster is also a moderator of the forum, his or her message will post immediately, without requiring approval.

Notify of Reported Messages

Select **No** if moderators should not receive an email when a message in their forum is reported. In this case, logged-in administrators or moderators will see a message at the top of the list of forums noting one or more messages have been reported. Select **Yes** to automatically notify moderators via email when a message is reported.

Message Delivery Section

Message Deli	very
Sending Emails	 Messages are sent to forum members via email NOTE: For a busy forum, you can specify that digest emails will be sent multiple times per day. This applies only to members who have elected to receive digest or subjects emails. Send digest messages Once Per Day ÷
	O 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. Select reply-to: Forum Original Message Poster
Subject Tag	Restoration
	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.
Subscriptions	Allow users subscribe to threads, to receive notifications when messages are posted Subscriptions are available to club members only, and only when not already receiving immediate message posts. If the forum is configured to send emails, the notifications will include the full text of the messages. If the forum allows online reading only, then the notifications will contain only a link to the thread page.
Message Threading	• Strong Strong threading uses a token added to the message subject so replies can be 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.
	Save 🗸 Cancel 🗶

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.

For busier forums, you can also configure how many times digest messages will be sent out during the day. Options are once, twice, three times or four times.

Example: If you pick four times, digests will be sent every 6 hours. (Note that the individual send times cannot be configured; the system spreads these out throughout the day to balance the loads on our servers.)

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.

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.

Subscriptions

Check this option to allow members to subscribe to a thread. This option only applies to members who are not already receiving each message via email. If the forum is configured to send emails, members will receive the full text of each message posted to a forum. If the forum is not configured to send emails, members will receive a notification only, including a link to jump to the website to view the message online.

Message Threading

This option only appears if **Posting Method** 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.

Note: When you create any type of new forum except Moderator Defined or Member Opt-In, it may take up to 30 minutes before the forum is ready to accept posts. The member list needs to be populated first.

Understanding Forum Moderators

Control Panel > Communications > Website Modules > Discussion Forums

The forums module introduces a new level of security that doesn't exist in other modules: the "moderator" (see "Site Visitors" on page 47).

Where club "administrators" control everything on the website and in the membership database, and "coordinators" have admin rights over one module or admin function (see "Administrators/Coordinators" on page 503), 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 can also manage reported messages, and either edit, remove or approve the message. Moderators will also see a pencil icon in the Page Tools Widget floating on the right side, at the thread and message level, giving them the tools required to fully moderate a single forum.

Moderating Messages

Control Panel > Communications > Website Modules > Discussion Forums

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 > Discussion Forums	
Discussion Forums	
I You have message(s) awaiting approval	Search Our Discussion Forums Policy

Clicking the link takes you to a page similar to the following:

Author (click to email)	Forum / Subject	Post Date/Time	Maintain 📕
Martin Smith (MartyNickName)	Equipment / New Engines	1/15/2015 9:23 AM	🖂 🖋 🙆 🧪
Regards, Marty Balloons R. Us.			
Martin Smith (MartyNickName)	Equipment / Test Message	1/15/2015 9:24 AM	🖂 🖋 😣 🧪

You will see all pending messages and can take the following actions:

- Click the member's name to see a standard popup, including the email address specified with their Profile.
- Click the **Forum Email** icon to popup a small display showing the email address that the member is using for this forum (which may be different from the email address linked to their account.

Post I Forum Email: martys@NWBCDemo.com		
1/15/2	015 9:23 AM 🛛 🖂 🥓 🙆 🧪	

Click the link to open a new email, or copy and paste it into an email already created. There is a Close button of you can wait five seconds and the small popup will disappear.

- V Click the **Approve** icon to approve the message so that it's visible to all members of the forum.
- Click the **Block** icon to block the message. It will still be in the forum but only moderators, coordinators and administrators can view it.
- Click the **Edit** icon to edit the message. You will see the message editor to change its content. 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, module coordinators, or administrators view messages in a forum, messages requiring approval will be highlighted in yellow.

Basket Case				?
This is a list of the threads in the forum you selected. Click on 'Subject' or 'Last Post' to sort the threads into the To participate in this forum, click here to go to your Profile – Forum Memberships screen and join the forum the forum of the total screen and solution to the forum the total screen and solution to the total screen and screen and solution to the total screen and sc		read name to view the mes	sages in that thread.	
Forum Admin) Members		Search	This Forum	
Page 1 of 1		Go To Forum: E	asket Case	~
Started By Subject 🔷	Posts	Views	Last Post 🔷	Admin
Colleen Carter	1	0	8/25/2020 10:19 AM by Colleen Carter New!	Ø

Select the message to review to see a screen similar to the following:

Basket	t Case	?)
Crazy for b	baskets!!	Return to Forum Switch To Threaded View	2
Author	Last Post 🜩		
Colleen Carter	8/25/2020 10:19 AM 😁 (New) Have you guys seen the new basket shop that joined? I wonder what their selection is like. Anyone ever been? Edit Admin		
Return to Foru	_		

Hover over the Edit link to edit the message.

Hover over the Admin link to view the following options:

Baske	t Case	0
Crazy for t	baskets!!	Return to Forum) Switch To Threaded View) Search This Thread Q
Author	Last Post 🜩	
Colleen Carter		
Return to Foru	 ✓ Approve Message Block Message Edit User Status 	

Click the **Approve** icon to immediately approve the message.

Click the **Block** icon to immediately block the message.

Click **Edit User Status** to change the status of the forum members to Moderator, Active, Moderated, Banned, or to opt the member out of receiving messages.

Clicking the **Message Admin** (wrench) icon displays a dialog similar to the one shown above, but with the additional approve and block options.



Manage Forum Members

Control Panel > Communications > Website Modules > Discussion Forums

Click the **Members** icon 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:

		ck the 'Search' button to search for members that participate in this forum. You would typically select to 'show special anned, and moderated). Click 'Edit' to set or clear the options for a specific forum member. The other links in the Maintain anned.
Hide Search	Add Moderator	
Search For Members of "Burning	" Questions	
Email Address		
Handle		
) Show 'Special Members' Only 🥥	Show All Members Search 🗳	

The default is to view All Members. Select "Special Members" only to view:

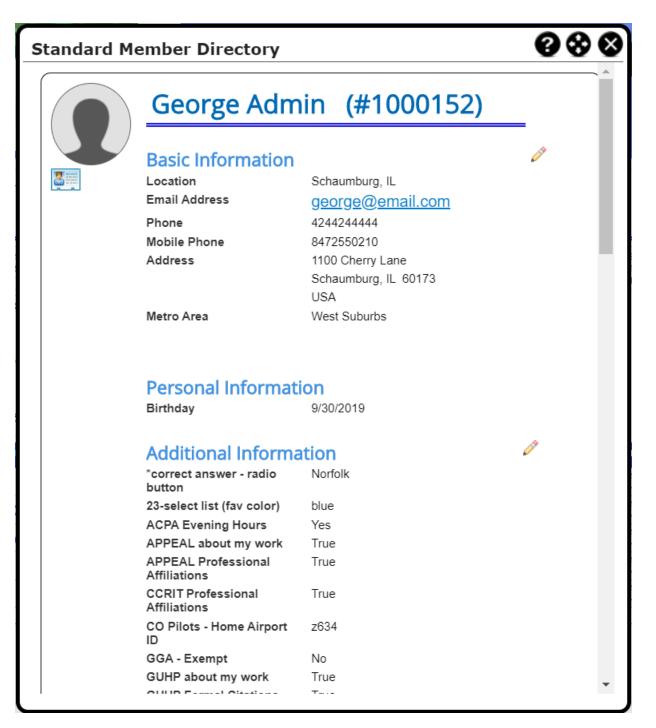
- members who are banned from the forum;
- members whose messages are moderated;
- members who are designated as moderators; and
- members who have opted-out of receiving messages from the forum.

If you are searching for a specific person, enter a portion of his or her name, email address or handle 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!

The results grid will show the member name, email address, username used in forums, forum status, whether the member is a moderator, and if the member has opted out of receiving forum emails.

To view the member's directory listing, click the member name. You will see a screen similar to the following:



To modify the status of a member, click the **Edit** icon beside that member's name. You will see the following dialog:

Forum Member Information 😡 🚱	X
Choose the options for this forum member. These options will apply only to the forum specified.	
O Moderator	
Status Active	
Moderated	
Banned	
✓ Opted-Out	
Save 🖌 Cancel 🗶	
	/

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

Control Panel > Communications > Website Modules > Discussion 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:

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.
Hide Search Search For Forum Members Last Name O Show 'Special Members' Only O Show All Members Search

The default is to view "Show All Members". Select "Show Special Members Only" to view:

- 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** icon beside that member's name. You will see the following dialog:

Forum Member Information 🗿 🛛 🕯	3
Choose the options for this forum member. These options will apply to ALL forums.	
Status Active	
 Moderated 	
Banned	
Save 🖋 Cancel 🗶	
	/1.

Select the appropriate option and click **Save**, or click **Cancel** to close the dialog without saving. Changes take effect immediately.

Manage Threads

Control Panel > Communications > Website Modules > Discussion Forums

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:



Use this dialog to perform the following changes:

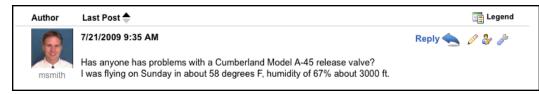
- Specify a new subject for the thread;
- Pin the thread to the top of the forum. This option is often used for frequently asked questions, or for a message explaining thread policies.
- Make a thread Read-Only. Replies cannot be posted to a read-only thread. This option is often used in conjunction 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.

Manage Messages

Control Panel > Communications > Website Modules > Discussion Forums

In Threaded or Flat view, administrators, forum module coordinators and individual forum moderators will see additional options for each message:



Click the **Edit** (pencil) icon to edit the content of the message itself. You will see the popup content editor window.

Click the **User Status** (person) icon to change that user's status in this forum. You will see the Forum Member Info dialog, allowing you to make the current user a moderator, moderated, or banned. You can also opt-out this user from the forum.

Click the **Message Admin** (wrench) icon to move or delete the message, or separate it to a new thread. You will see the following dialog:

Me	essage Administration 🛛 😯 🛠 🛇								
	Move, delete, block, or approve a message. Click "OK" or "Cancel" to return to the message list screen.								
Mes	Message Subject: Sticky Release Value								
\bigcirc	Delete Message - Content Only								
\bigcirc	Delete Message - Completely (including all replies)								
\bigcirc	Make Message A New Thread In This Forum								
ullet	Move Message To Another Forum								
	Equipment \$								
	Send Email To Message Poster?								
	Message subject: Sticky Release Value.								
	This was moved because it's a commercial message, which is not allowed in a technical forum.								
	10								
	OK 🗸 Cancel 🗶								

Using this dialog box, you can perform the following changes:

- **Delete Message Content Only.** 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.
- Delete Message Completely (including all replies). Select this option to completely remove the
 message and all direct replies. Use this option to remove all evidence that the message and its
 replies ever existed.
- 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.

When you select this option, you will be prompted to select a forum. You also have the option of notifying the message poster that the message was moved, including some text perhaps to explain why this was done.

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:

,	Attachments	
	File (click to view)	Delete
	Photo01.jpg (31.5 KB)	
	Photo02.jpg (22.2 KB)	

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.

Documents

Uploading and Linking to Documents	
To Link to a Document	
Navigating the Document Library	
Searching for Documents	
Document Library Administration	
View Documents	
Manage Folders	
Delete Folder	

The Document Library function 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.

Uploading and Linking to Documents

If the current folder supports member uploads, a blue **Upload** option will appear in the top right corner of the document list. Click it to display the following dialog:

AUTOR	econecida	00
100	and firsten	
2	Particle in 14, ince one and plate a	10
	Ro COLORADO DE ANNALIS	
-		
Centrol (ED Revour Set	
	(Installe) whenever the local Diff	
	(int) (int A	

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.

Clubs and associations can allow uploaded documents to be visible immediately or to require that they first be approved by an administrator or module coordinator before they become visible and available for download by others.

To Link 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. You can also link to a folder, to view the documents in that folder.

Navigating the Document Library

A typical document folder screen is shown below.

Home > Documents	(?					
Documents						
Documents are organized into folders. Hover over a folder to view that folder's description. Click a folder to view its documents. The documents for that particular folder will appear in the right Documents pane. Click the document name to open/hide a details window where you can leave comments or rate the document (if enabled). You may also download the document from within the details window, or the download arrow next the document name. An upload button will appear near the top of the Documents pane if uploads are enabled for that particular folder.						
Expand All 🖬 Collapse All 🗐 S	earch \wp					
Document Folders	2019 Meetings					
🔁 2019 Meetings (2)	Documents issued by various government departments, both domestic and foreign.					
Tips / Techniques (9)	📰 Club_By-Laws2.doc (Pending Approval)					
Board of Directors (13)	Building_Strong_Clubs_Whitepaper.pdf					
Training (4)						
Event Committee (1)						
Test Files (1)						
Midwest Region Documents (0)						
Financial (1)						
Technical (12)						
Archive_xenforo (10)						
Club Policies (3)						
🖻 Newsletters (9)						
🛅 Minutes (1)						
Harketing (4)						

The left panel shows a tree structure of folders and subfolders. If a folder has subfolders, an open arrow will be shown on the left of the folder icon. Click the folder name to expand that folder. For expanded folders, click the parent folder name to collapse that part of the tree. You can also click the **Expand All Folders** and **Collapse All Folders** options above the folder panel.

Hover over a **folder** name to show its folder description.

Click and drag the **line** separating the tree from the list of documents within the selected folder to widen or narrow each panel.

Click the double-down **arrow** to display links to popular file readers.



Documents within a folder are shown on the right side. Each entry consists of an icon describing the type of document, the document title, and a green "Download" link. Click it to download the document.

Click the icon or document title to see more details about that document, similar to the following screen:

Documents

Offi	cial Club Doc	uments	
	Club Logo - LoF	Res	
6	Club Logo - HiR	es	
	Description	Official logo of the club	\otimes
	Author	Various	
	Date Created	12/01/2002	
L.	Format	Unknown	
	File Size	0 KB	Download
'			

This panel includes another **Download** icon. Click the close button or the document title to close this panel.

This panel may optionally include **Ratings** and **Member Comments**, as shown in the following example:

Pas	t Newsletters		Upload	
Ø	test			
	test document			
×	August, 2005			
w	January 2008			
	Description	The first ballon flights of 2008 were in watertown NY	⊗	
	Author	M Smith		
	Date Created	07/31/2008		
	Format	MS Word	Download	
	File Size	25 KB	Download	
	Your Rating 🌱	Verall Rating 🚖 🚖 🏦	☆	
	Member C	Comments		
			_	
	Submit Comn	lent		

Click a rating star to record your rating. You can click $\frac{1}{2}$ stars so the rating range is from $\frac{1}{2}$ to 5 stars. The Overall Rating represents the average score of everyone who did this action.

To enter comments, type into the box and click **Submit Comment**. Previously recorded comments will be shown above the box, prefixed with the member's name and the date/time when the comment was recorded. Comments are shown in descending date/time order. As the number of comments increases, a scroll bar will appear to allow users to scroll through the complete list.

Searching for Documents

Click the **Search** icon above the file list to search for a document. You will see the following screen:

	by text, tags, format, and/or folder .		
— Search Criteria —			
Search Text	Fishing		
	Searches document title, description, and author		
Document Tag(s)	Equipment x	\bigcirc	
Document Format	< Any Format >		
Folder	Any Folder -		
		Search	
		Search	
earch Result	s (5 documents found)	Search	
earch Result	s (5 documents found) license pricing	Search	
2017 PA fishing	· /		
2017 PA fishing 2017 Pennsylva	license pricing	•	
2017 PA fishing 2017 Pennsylva 2017 Pennsylva	license pricing nia Fishing License multi-year nia Fishing License single year	© 0	
2017 PA fishing 2017 Pennsylvai 2017 Pennsylvai PA Free and Ree	license pricing nia Fishing License multi-year	0	

Search supports the following options:

- Search for a text string anywhere in the document title, description or author list.
- Search for documents with one or more tags. Enter any string and press [Enter] to add a search tag or click the down arrow to select one of the pre-defined Master Tags.
- Select a document format. For example, look only in PDF files.
- Select a folder to search only in that folder and any sub-folders under it.

When you click the **Search** button, the system will find documents that match all specified criteria.

Document Library Administration

Control Panel > Website > Website Modules > Document Library

There are two ways to manage documents:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Website tab) to access the admin side of the function.
- 2. When viewing any screen in the Documents function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

A screen similar to the following is displayed:

Document Library Manager	0
Documents are organized into folders which can be updated from this screen. Click on sub-folder* to add a new folder. Select "Edit" to change an existing folder and descriptic "Display Sequence" to change the order in which document folders appear. Click "Docu	the plus sign to the left of a folder's name to see its sub-folders. Click on a folder name for folder maintenance options. Select "Add on. Click "Delete" to remove a folder (note that this is only available if the folder has no sub-folders and no documents). Click umenis" to view and update the individual documents within that folder.
Q ReportsQ SearchImage ApprovalsImage Coptions	
Expand All Collapse All	
Top Level Folder Committees (1 documents) Safety (1 documents)	Q
Digital Storefront Products (3 documents) Archived Machine Manuals (1 documents)	
— Tips and Tricks (5 documents)	
	Return to Previous Page

This screen displays a tree structure of folders and sub-folders. Click the [+] symbol to expand a folder or the [-] symbol to contract it. You can also click the **Expand All** and **Collapse All** options at the top which do exactly what you expect!

Hovering over a folder highlights it with a green background. If you then right click your mouse, you will see a popup menu with some of the following options:

View Documents
Edit Folder
Add Sub-Folder
Delete Folder

Select **View Documents** to view the list of documents within a folder.

Select **Edit Folder** 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 **Add Sub-Folder** to create a new folder below the selected one. The Add/Edit Folder dialog is displayed. To learn how to add a new folder, see "Manage Folders" on page 746.

Select **Delete Folder** 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.

<u>Search</u>

Click the **Search** button to display the Document Search (Admin) screen. The results panel is a standard ClubExpress admin grid, showing Maintain options for each document.

Approvals

If a folder has been configured to allow member uploads document library coordinators are notified via email that a new upload is awaiting approval, including the member's name, title of the document and its location. If no coordinators have been assigned to the document library, all administrations will receive the notification.

Click the **Approvals** button to see a screen similar to the following:

Home > Documents > Documents > Documents Manager > Documents for Approval Documents for Approval																
	'hese documents Delete" link to de		approval. You can o nent.	edit and approve	each one individua	lly, or use the	e check	boxes to ap	oprove a gro	oup all at onc	e. Click the '	'View" link t	o see the c	document -	click the	
	Title	Create Date	Uploaded By	Format	Maintain	Ì										
	Test document	4/16/2017	Barbara C Jones	MS Word 2007	🧷 💿 🙀											
																_
					Approve Check	ed Items	Ret	turn to Pr	evious Pa	ge						

The screen shows all documents uploaded by members and awaiting approval. Click the check box on the left side to check that document for approval or the check box in the heading to check all pending documents. Click Approve Checked Items to approve all checked documents and return to the Documents Manager, or **Return to Previous Page** to return without approving any items.

The following options are available in the Maintain column:

Edit properties for this document. (Edit) Download and View the document.	Icon	Description
Ownload and View the document.	(Edit)	Edit properties for this document.
	(View)	Download and View the document.
(Delete) Delete the document from the system. You will be prompted to confirm this action	(Delete)	Delete the document from the system. You will be prompted to confirm this action.

Maintain Options

Manage Tags

Select this option to display the **Tag Manager**, allowing you to manage master tags that are used throughout the system to identify and organize items such as documents, photos, and news articles.

Note: You may add a maximum of five (5) tags to any single item document.

Options

Click the **Options** button to display the following screen:

lations	
free and management of	
May 10 Kingson X	
Here Gamman 1	
the second control of	
lang (sec.)	

The **Folder Defaults** section allows you to define defaults that will be applied to all new folders as they are created. These settings can then be customized for each folder.

Subgroups: Check the **Allow subfolders within subgroups** option if you want to allow chapters, districts and regions to create their own subfolders within the top-level folder that's defined for each subgroup.

Check **Allow custom tags on documents** if you want to allow administrators and coordinators to create their own tags. If this option is not checked, only master tags can be assigned to a document.

Click Save to save your changes and return to the Documents Manager, or Cancel to return without saving.

View Documents

Control Panel > Website > Website Modules > Document Library

To manage documents within a folder, select the **View Documents** option. You will see a screen similar to the following:

Home > Documents	Home > Documents > Documents Manager > Documents for Folder: Official Club Documents														
Documen	Documents for Folder: 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.															
Add Document Add Multiple Documents Display Sequence															
Title Create Visibility Rating Downloads Format Maintain															
THE	Date	VISIONITY	Nau	19	#	Since	Reset	1 officiat	maint						
VBC Membership car d	1/30/2017	Public	N/A	0	4	1/30/2017	0	Acrobat (PDF)	Ø	۲	<u> </u>	ī,	\bigcirc		
QSG for Groups	4/11/2016	Member	N/A	0	8	4/11/2016	0	Acrobat (PDF)	Ø	۲	<u> </u>	î,	\bigcirc		
First Aid	2/12/2016	Public	N/A	•	22	2/12/2016	0	Acrobat (PDF)	Ø	۲	–	1	\bigcirc		
Guidelines	2/12/2016	Public	N/A	0	3	2/12/2016	0	Acrobat (PDF)	Ø	۲	<u> </u>	î,	\bigcirc		
Waiver - REQUIRED	2/12/2016	Public	N/A	•	3	2/12/2016	<u> </u>	Acrobat (PDF)	Ø	۲	Ë	1	\bigcirc		
Club Bylaws	7/1/2002	Member	N/A	0	21	5/20/2014	0	Acrobat (PDF)	Ø	۲	÷	1	\bigcirc		
Return to Previous Page															

Documents are shown with the most-recently uploaded at the top unless you have changed the **Display Sequence** using the button provided. 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** icon 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 nonmembers.

Maintain Options

The following options are available in the Maintain column:

Documents

Icon	Description
(Edit)	Edit properties for this document. If member uploads are enabled, documents so uploaded will have a Visibility of "Pending". Click this link to make the document visible to everyone, members only, or admins only.
(View)	Download and View the document.
Copy URL)	Copy a URL to clipboard that can later be used to download this document from any- where (another web page or website, or an email.)
(Delete)	Delete the document from the system. You will be prompted to confirm this action.
(Com- ments)	View Comments posted by members. You will see a small popup form listing the com- ments, with options to display the newest or oldest first.
(Reset)	Reset the document rating or the download counter. You will not be prompted to con- firm this operation.

Maintain Options

Add Document

To add a document to the current folder, click the **Add Document** button. The following popup window is displayed:



For each document, specify the information shown. The description can be up to 1000 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. If you don't specify a title, the filename will be used, with underscores replaced by spaces and the extension removed.

Note that the system will define the document format from the extension of the file uploaded.

The Visibility field controls whether the document is visible to:

- All Users (Public)
- All Users (Members Only Download) non-members can see that the document exists but cannot download it. Use this option as an incentive for people to join the club or association.
- Members Only
- Pending Approval use this option to flag a document as needing review by another administrator.
- Administrators Only

Note: Whether a document is visible to everyone also depends on whether the Documents module as a whole is available to non-members, and also whether the current folder is visible.

Note: Documents for purchase should be stored in a folder with the options "Show this folder on the website" turned **off**. This will prevent the documents from appearing in search results within the Document Library.

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	Letter_from_Mannix_Kane_Appeal.jpg 🗹 Update?			
Select Document	Choose File no file selected			
	Max file size 80 MB			
	Preserve Original File Name Use New File Name			
	Save 🖌 Cancel 🗶			

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.

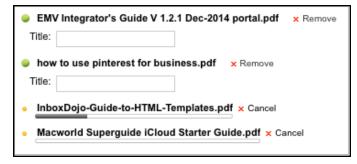
Add Multiple Documents

Click the Add Multiple Documents button and you will see a screen similar to the following:

ocuments. You	
	Select Documents
	NOTE: Max file size: 100 MB per file
Folder	Official Club Documents
Tags	
Author(s)	
Create Date	
Visibility	< Select >

When you click the **Select Documents** button, you will be prompted to select multiple documents from your local hard disk. Both Windows and the Mac allow you to select a contiguous range of documents by using **[Shift-Click]** and non-contiguous documents by using **[Ctrl-Click]** (PC) or **[Command-Click]** (Mac).

When you return to the dialog, you will see a panel similar to the following:



Each document you selected is immediately uploaded into temporary storage. You can modify the title of the document, click the *x***Remove** link to remove a document already uploaded, or click the *x***Cancel** link to remove a document not yet uploaded.

The other dialog options allow you to specify the folder into which all selected documents should be uploaded, tags to be applied to each document, author(s), a create date and a visibility setting. Click **Save** to complete the multi-file upload, or **Cancel** to return to the Document screen without uploading.

Display Sequence

Click the **Display Sequence** button to show the standard ClubExpress display sequencer.

Manage Folders

```
Control Panel > Website > Website Modules > Document Library
```

Back in the Documents Manager, select **Edit Folder** to edit the properties of an existing folder. You will see the following dialog:

Edit Folder	0
	nent folder, description, parent folder and visibility. Click "Save" or "Cancel" to return cument Folders screen.
Folder Name	test
Description	
ABC	
	0 of 400 characters used
Sub-folder of:	2013 👻
Visibility	All Users (Public)
	Parent folder visibility: Public
Member Uploads	Not Allowed, Admin Only ᅌ
Settings	Show this folder on the website
	Allow member ratings
	Allow member comments
	Save 🖋 Cancel 🗶

Specify the folder name, a description (up to 400 chars) and the parent folder (you can use this option to move a sub-folder to a different place within the hierarchy.)

The following Visibility options are available:

- All Users (Public)
- All Users (Members Only Download) non-members can see that the folder exists but cannot download documents from it. Use this option as an incentive for people to join the club or association.
- Members Only
- Members of a Committee you will be prompted to select the committee from a drop-down list.

• Members of a Subgroup – you will be prompted to select the subgroup from a dropdown tree structure.

• Administrators Only

The **Member Uploads** option controls whether members can upload files to the folder and whether these files must be approved by an administrator or module coordinator before becoming available for download or whether they are immediately available for download.

The following Settings are available:

• Show this folder on the website: this option allows you to create a folder which is governed by the Visibility options but which is not shown on the user interface. The box is checked by default; when it's unchecked, the folder will respect the specified availability but will not be shown. Use this option if you want to allow anyone to download documents but only if they have a specific link to them.

Note: Documents for purchase should be stored in a folder with the options "Show this folder on the website" turned **off**. This will prevent the documents from appearing in search results within the Document Library.

- Allow member ratings: when checked, this option displays a "rank" of 5 stars that members can click (including ½ stars) to rate a document. Average ratings are shown beside each document to indicate its importance or usefulness.
- Allow member comments: when checked, this option displays comments posted by members and a box to allow members to add a comment to the list. Click **Save** or **Cancel** to close the window and return to the previous screen.
- For organizations with subgroups, where each subgroup has its own website, you'll see the option to share the folder you create with lower-level subgroups. Select this box to share the folder. Member uploads to shared folders are not allowed.

To modify an existing folder, click the **Edit** link and the same popup window is displayed. Use the "Subfolder of" option to rearrange the document tree by specifying a different parent folder.

Delete Folder

This option only appears if the current folder has no sub-folders and no documents (they have either been deleted or moved to different folders.) Select this option to remove the folder completely. You will be prompted to confirm this action. Please note that, once deleted, a folder cannot be restored.

Donations

Make a Donation	
Make a Single Donation	
Make a Recurring Donation	
Donation Administration	
Non-Cash Donations	

The Donations function allows you to establish funds into which members and non-members can donate. A number of options are provided to control fund visibility, and whether anonymous donations and/or recurring donations are allowed. Donations are processed through the same payments processing module that's used for memberships and event registrations.

Note: Organizations using the ClubExpress merchant account must contact us to enable recurring donations on their site. Clubs using their own merchant processor will have the option enabled automatically.

Note: Only members will be able to set up recurring donations. Non-members will only have the option to donate once.

Make a Donation

A typical Donations screen is shown below:



Each fund has a title and description plus, optionally, progress towards a target amount.

Make a Single Donation

Click the **Donate** button to make a donation. You will see a screen similar to the following:



Logged in members see the screen above. Non-members (or members who have not yet logged in) see a set of fields to collect their name and basic contact information, followed by the Date and Donation \$ Amount. There is also a prominent warning and link for members to login.

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.

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 without your name. If the Anonymous option is set to "No", you can specify how you want your name to appear in the Contribution Records.

Example: We specifically want to support the club's efforts to educate the community about hot air ballooning.

The Donation Date field is editable for admins only; for all other users, it will show today's date. Use the **Comment** field to attach a note to the donation; it will be included in the confirmation email and on donation reports.

The **Contribution In** option allows you to make a donation in honor of, in memory of, in thanks to, etc., another person or organization.

Notify

The system also allows you to request that the club notify another person about a donation made in their honor or in memory of a loved one. When **Yes** is selected, you will see the following set of fields:

Notify	
Do you want t	ne Club to notify someone about your contribution? 💿 Yes 🔘 No
Name	
Address Line 1	
Address Line 2	
City	
State/Province	< Select > \$
Zip/Postal Code	
Country	UNITED STATES
Email	

Enter that person's name, address, and email address.

Matching Gifts

The system also allows you to record whether your employer or your spouse's employer matches gifts. You will see the following screen:

Donations

Matching Gifts		
Does your employer or your spouse's employer match gifts Will you mail the form? • Yes No	s? 💿 Yes 🕞 No	O Not Sure
Employer Name		•
Employer City		
Employer State < Select > +		
Employer Contact Person		
Employer Contact Phone		
Matching Terms		

Enter the specified information, including a general description of matching gift terms. The club will follow up with you to obtain the necessary forms and submit them to your employer.

Click **Proceed to Payment** to complete the Donation by paying via credit card or check, or click **Cancel** to close the form without completing the donation.

Additional Info

You may ask members or non-members if they'd like to receive additional information related to their donation.

Additional Info		
I am interested in learning about other opportunities to help support Northwestern Balloon Club.	Ves	No
Please send me more information about including Northwestern Balloon Club in my will or estate plans.	O Yes	No
Send en	nail to donor?	

Make a Recurring Donation

Note: Only members will be able to set up recurring donations. Non-members will only have the option to donate once.

If your club or association allows **recurring donations**, members have the option to enter the number of donations you would like to make, as well as a start date for the first donation.

Home > Donations > Make a Donati	on				
Contribute to Youth Scholarship Fund 🛛 🔿					
Enter the amount of your contribution and an optional comment. Depending on the configuration, you may also be able to specify if this should be reported as anonymous (although the administrator will still know who made the contribution.) Click Proceed to Payment to finalize and pay by credit card or by printing an invoice and mailing a check.					
Contribution Det	ails				
Number of occurences	Frequency of a	ccurences < Select > >			
First Contribution Date	Last Contrib	ution Date			
Amount (\$) Amount must be e	50.00 • qual to or above \$ 1.00				
Contribution in	< Select > V 🔹	•			
Comment	j.				
Do you want this reported as an anonymous contribution?	○Yes				
How do you want your name to appear in the Contribution Records?	Colleen Carter •				

Enter the number of times you wish to donate, including the date the donations should begin and how often the donations should occur. The date of your last contribution will be calculated automatically based on the previous information.

Logged in members see the screen above. Non-members (or members who have not yet logged in) see a set of fields to collect their name and basic contact information, followed by the Date and Donation \$ Amount. There is also a prominent warning and link for members to login.

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 without your name. If the Anonymous option is set to "No", you can specify how you want your name to appear in the Contribution Records.

Example: We specifically want to support the club's efforts to educate the community about hot air ballooning.

The Donation Date field is editable for admins only; for all other users, it will show today's date. Use the **Comment** field to attach a note to the donation; it will be included in the confirmation email and on donation reports.

The **Contribution In** option allows you to make a donation in honor of, in memory of, in thanks to, etc., another person or organization.

Notify

Donations

The system also allows you to request that the club notify another person about a donation made in their honor or in memory of a loved one. When **Yes** is selected, you will see the following set of fields:

Notify	
Do you want th	e Club to notify someone about your contribution? 💿 Yes 🔘 No
Name	•
Address Line 1	
Address Line 2	
City	
State/Province	< Select >
Zip/Postal Code	
Country	UNITED STATES
Email	

Enter that person's name, address, and email address.

Matching Gifts

The system also allows you to record whether your employer or your spouse's employer matches gifts. You will see the following screen:

Matching Gifts			
Does your employer or your spouse's employer Will you mail the form? Yes No	⊖ No	O Not Sure	
Employer Name			•
Employer City			
Employer State < Select >	\$		
Employer Contact Person			
Employer Contact Phone			
Matching Terms			

Enter the specified information, including a general description of matching gift terms. The club will follow up with you to obtain the necessary forms and submit them to your employer.

Click **Proceed to Payment** to complete the Donation by paying via credit card or check, or click **Cancel** to close the form without completing the donation.

Additional Info

You may ask members or non-members if they'd like to receive additional information related to their donation.

Additional Info						
I am interested in learning about other opportunities to help support Northwestern Balloon Club.	O Yes	No				
Please send me more information about including Northwestern Balloon Club in my will or estate plans.	O Yes	No				
Send en	Send email to donor?					

Credit Card

Note: You must have a credit card saved in your <u>member profile</u> to schedule a recurring donation.

Credit Card
To schedule a recurring donation, your credit card must be stored. There is no credit card on file. Please specify the information below. Credit Card Card Type > ~ Card Number
Expiration < Select Month > ~ < < Select Year > ~ <
Name on Card First Last
For a business or organization name, just use the last name field
Address
City
State/Province < Select >
Zip/Postal Code 🖉 🔺
Country United States of America V Show All Countries

Donation Administration

Control Panel > Money > Website Modules

There are two ways to manage Donation funds and Donations:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Money tab) to access the admin side of the function.
- 2. Edit When viewing any page in the Donations function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Home > Donations > Donations	ations Fund Admini	stration											
Donations F	und Adı	mini	strat	ion									
This screen lists the fund the Donations link to view					I Fund button to create a	new fu	ind. C	lick th	e Edi	link t	o modif	y properties for an existing	fund.
Add Fund Display Se	quence Repo	rtsEx	port No	on-cash Donatio	Donation Optio	ons							
Fund	Established	Status	Goal (\$)	# Of Donations	Amount Received (\$)	Main	ain				Ē		
Harvest Ministry Fund	9/18/2018	Inactive	5,000.00	30	4,825.00	Ø	.			•			
Facility Repair	10/1/2019	Active	6,000.00	6	242.00	Ø	**		Ë	-			
Nebraska ASHRAE	4/3/2019	Active	5,000.00	0	0.00	Ø			<u> </u>	1			
Youth Scholarship Fund	6/5/2018	Active	0.00	13	4.390.65	1	1001	a 0.	÷.	1 2			

This screen shows the various funds you have defined. Funds have a specific purpose and act as buckets into which donations are made.

Click the **Display Sequence** button to control the order in which active funds appear on the Donations user pages. You will see the standard ClubExpress display sequencer dialog.

Click the **Reports** button to run reports that aggregate donation data across the whole function. There are also separate reports at the individual fund level. A special report allows you to print an annual tax letter for each donor, formatted for a standard #9 double-window envelope.

Click the **Export** button to export donations within a date range.

Add Fund

To add a new fund, click the **Add Fund** button. You will see the following screen:

to enter the respective am	scription 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 ounts.
Fund Name	Repair Clubhouse Roof
Fund Icon	
Purpose	
	Heading 1 🕈 B I U S Default 🕈 Arial 🕴 A 🌋 🗄 🚍 🖅 🗁 🗄 🛛 🖉
	Our clubhouse roof has been leaky for many years and needs to be fixed before it starts snowing!
Date Established Fund Coordinator	
Active	
Members Only	
Allow Anon.	
Allow Recurring Donations	
Minimum Amount	US\$ 1.00
Maximum Amount	USS Use this field if there are legal limits.
Suggest Amount	
Goal Amount	USS 1,000
Show Goal	
External Amount Received	US\$ 0.00 Use this field to store amounts towards goal not recorded through the system.
Financial Account	Master Donations
Mailing List Category	Donor
Additional Info	Text entered here will appear on the donor's confirmation email.

Specify the title and description for the fund (up to 1000 chars) and the date the fund was established. Choose an icon to represent the fund. The following options are also available:

- Specify an optional **Fund Coordinator** by clicking the **Select** link. When you check the "Notify..." box, the fund coordinator will receive an email when a donation is made. (Note that your club's designated "Treasurer" will also receive an email when a donation is made.)
- 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 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 Anon**(ymous). 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.

- Check **Allow Recurring Donations** to allow users to contribute repeatedly (on a schedule they configure) to a fund.
- **Minimum** and **Maximum Amoun**t options allow you to set a minimum accepted donation amount, which must be more than \$1.00, and a maximum amount (if, legally, there is a limit to the amount which can be donated.)
- 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 \$500. Please contact us if you would like it raised to a higher number.

Note: If Suggested Amount is checked, the Suggested Amount must be greater than or equal to the Minimum Amount, and less than or qual to the Maximum Amount.

- Use **Goal Amount** to define a goal for this fund. You can also optionally check **Show Goal** to display this amount alongside the fund description.
- Specify the **External Amount Received** to track donations made outside the system or before the fund was set up. The amount specified in this field is added to the sum of donations made within the module to give a total progress number.

You can also specify the non-archived financial account to be used for donations and the mailing list category to which all donors (members and non-members) will be assigned. Click **Save** to save your changes and return to the Donations Administration screen or **Cancel** to return without saving.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit properties for this fund.
(Donations)	View Donations made into this individual fund.
(Recurring Don- ations)	View Recurring Donations made into this individual fund. See below.
(Сору)	Copy this fund to a new fund. All properties are also copied but not donations already made.
(Reports)	Run Reports for this individual fund.
	Maintain Options

Donations

Click the **Donations** icon to display a list of donations. You will see a screen similar to the following:

Home > Donations > Donations Fund Administra	tion > Donations for Facility Re	apair	
Donations for Facility		?	>
This screen lists the donations made for the spe donation. You can also click Cancel to remove a	cified fund. Click the Add Donati donation if it has not been paid.	tion button to create a new donation. Click the Payment link if you received payment for a pledged I.	
Add Donation Delete Unpaid Donations]		
Donor Last Name			
Member	< Either > •		
Contribution Date between	and	1	
Contribution Amount (\$) between	and		
Donation Status	< Any > •		
Order By	🖲 Donor Last Name 🛛 🔘 🛛	Date O Amount	
		Reset Search 🗲	
		< Page 1 of 1 V	
Donor Name Member Date Ref #	Amount (\$) Anon. Status	Matched Maintain 💼	
Callie Abrams Yes 12/12/2019 4733	65.00 No Paid in Full	II N 🖉	
Martin Smith Yes 12/18/2019 4735	50.00 No Paid in Full	II N 🖉	
Martin Smith Yes 12/18/2019 4739	1.00 No Paid in Full	II N 🥟	
Martin Smith Yes 12/17/2019 4734	100.00 No Paid in Full	II N 🥟	
		< Page 1 of 1 v	
	R	teturn to Previous Page	_

You can search donations made by members and non-members using the donor last name, the date of contribution, contribution amount, and by donation status (paid in full, not paid, partial payment).

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. Donations are displayed in pages of 30 donations; use the paging controls to navigate through individual pages.

Click the donor's name to see a standard popup of contact information.

Maintain Options

The following icons are available in the Maintain column:

lcon	Description
(Edit)	Edit details about this donation. The available options will be different depending on the payment status.
(Delete)	Delete this donation. This option is only available if the payment status is "Not Paid".
S (Make Payment)	Make Payment for this donation. This option is only available if the payment status is "Not Paid" or "Partially Paid".
	Maintain Options

Click the **Delete Unpaid Donations** button to delete unpaid donations, including their transaction records. This option will only impact donations with a status of "Not Paid".

Recurring Donations

Click the **Recurring Donations** icon to display a list of donations. You will see a screen similar to the following:

Recurring I	Donations fo	or Youth	Schol	arship I	Fund	0	8
	s each active recurring donation		ig made to t	he selected d	lonation fund. A member	may appear multiple times if	
Name	Member Number	Frequency	Amount (\$)	Start Date	Next Donation Date	Final Donation Date	
Richard Alexander	4783036	Monthly	1.25	1/31/2020	1/31/2020	3/31/2020	
			[Done			-

Information for all active recurring donations will appear, including the member's name and ID, the donation frequency, amount, start date, next donation date and final donation date.

Editing a Donation

Click the **Edit** link to modify a donation. For unpaid donations, you can change the values of all fields. For paid donations, you can only change the date and comment fields.

Add/Edit Fu	und 🛛 🗇
Specify the fund name, de displayed to enter the resp	escription 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 pective amounts.
Fund Name	Facility Repair Fund
Fund Icon	G .
Purpose	Styles 🔹 Verdana, Gen・ 16px ・ 🐰 🔄 👸 🧐 ・ 🕙 🔹 🖪 🖌 リー A ・ 🕼 ・ 冨 喜 言 〓 🌉 🧕 鳥 臣 汪 諱 淳 🖺 🏠 🖄
	≣ ダ • ♥ 0
	Let's raise money to fix our clubhouse
	<u>→ Design</u> → HTML
	Words: 7 Characters: 39 SPAN > RemoveFlement

For a paid donation, the fund and donation amount cannot be changed, but all other information is available. For an unpaid donation, the fund and donation amount can also be changed.

Note: Funds with recurring donations will not be allowed to be set to Inactive. You must contact the members making recurring donations to rescind their donation in order to deactivate the fund.

Click Save to save your changes and return to the Donations screen, or Cancel to return without saving.

Donation Options

Donation Options		?
This screen shows the Club's donation options	s. We have defaulted the settings to those that are most commonly used.	
Donate Button Text	Donate Once	
Recurring Donation Button Text	Make a Recurring Donation 🔹	
Donation Preamble	B I U Verdana, Gen ▼ 16px ▲ ▲ ▲ ●<	
Mailing List category for Non-cash Donations	Donor v	
Display In Honor Of field	Ves No	
Display Matching Employer panel	Ves No	
Display Additional Info panel	Ves No	
Fund Display Style	Cards Rows	
	Save V Cancel X	

Use this screen to set your default options for donations, including:

- Donate Button Text Determine the text displayed on the button users will click to donate.
- **Recurring Donation Button Text** Determine the text displayed on the button users will click to make a recurring donation.

Note: Organizations using the ClubExpress merchant account must contact us to enable recurring donations on their site. Clubs using their own merchant processor will have the option enabled automatically.

- **Donation Preamble** Write a preamble which appears at the top of every donation page (above the donation fund description.)
- Mailing List Category Select the mailing list category for non-cash donations.
- Display In Honor Of field Allow users to make donations in honor of another person.
- **Display Matching Employer panel** Allow users to enter contact information for employers which match donations.
- **Display Additional Info panel** Use this option to show members and non-members a section allowing them to elect other items about which they'd like to receive more information.
- Fund Display Style Display donation funds in rows or cards.

Non-Cash Donations

Control Panel > Money > Website Modules

Clicking the **Non-cash Donations** button allows a club or association to track other types of donations, such as clothing, building supplies, etc. You will see a screen similar to the following:

Donations

Home > Donati	ons > Don	ations Fund	Adminis	stration > Non-cas	h Donations Admin	nistration		
Non-cast	1 Dona	tions A	dmin	istration				
					New york Description			
This screen	lists the nor	1_casn_dona	ations m	ade. Click the Add I	Non-cash Donation	button to create a new donation.		1
Categories	Add	Non-cash	Donat	tion				
	_						Page 1 of 1 ‡	>
Donor Name	Member	Date	Anon.	Category	Maintain 📑			r
John Adams	Yes	8/19/2014	Yes	Clothing	0 🗵			
Martin Smith	Yes	8/19/2014	No	Building Supplies	<i>i</i> 🗵			
							Page 1 of 1 💠	>
				Return	to Previous Pa	age		

The screen will show up to 30 non-cash donations with the most recent at the top. Use the paging controls to move through the screens.

Click the **Categories** button to create or edit categories. This is a standard ClubExpress category grid screen, with a separate add/edit popup. You need to define at least one category before you can start recording non-cash donations.

When you click the Add Non-cash Donation button, you will see the following screen:

Home > Donations > Donations Non-cash Donations Admin > Make a Donation
Non-cash Donation
First, select who is making the non-cash donation: you, another member or a non-member. For non-members, specify the additional contact information. Then enter the details. You can also specify if this should should be reported as an anonymous donation.
 Make a donation yourself Record another member's donation Harrison, Jon (11) Select Member Record a non-member donation
Contribution Date 08/19/2014 Category Ballooning Equipment Description JA-43 Ballooning burner to use in training classes
Do you want this to be reported as an anonymous donation? How do you want your name to appear in the Donation Records? Jon Harrison
Save 🗸 Cancel 🗙

Only admins or module coordinators can record non-cash donations. So the three radio buttons allow them to specify from whom the donation is coming.

Select the category and enter a description. You can also specify whether the donor requested that the donation be anonymous and, if not, how they want their name to appear.

Donations

ClubExpress does not attempt to record a value for the donation and the club should not be doing this. Per IRS regulations, if donors want to claim a tax deduction, it is up to them to determine a value using the most appropriate method (and it's up to IRS to determine if this value is reasonable and to challenge it if they don't think so!)

Click **Save** to save the non-cash donation or **Cancel** to return without saving.

Event Calendar

Event Calendar for Users	
List View	
Register for an Event	773
The first section of this page varies according to the following rules:	773
Manage QuickEvents	
RSVP to a QuickEvent	
Share this Event	
Events Manager	
Configure Options	793
Reports	
Exports	
Event Reminders	
Create an Event	
Registration	
Registrant List Visibility	
Register Button Text	
Avoid Duplicate Registrations	
Sequence Numbers	
Capacity	
Waitlist	816

Fees / Payments	
Scheduled Payments	
Immediate Payment Required	
Does the Fee Change After a Certain Date	
Financial Account and QuickBooks®Item Name	
Attendance	
Registrant Options	
Non-Member Settings	
Event Admin Screen	
Resetting Your Event	831
Multi-Activity Events	
Editing Events	
Manage Registrations	
Transaction and Payment Status	
Transaction and Payment Status	
Mark Attendance	
Quick Release	
Copy Event	
Archive/Delete	
Notifications	
Creating Custom Calendars	

The Event Calendar function 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 function fully supports options such as:

- · Single-activity or multiple-activity events;
- QuickEvents, that can be defined and registered for on one screen;
- 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;
- Allowing guests 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 guests;
- · 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;

The system allows a coordinator to be specified for each event. An event report and photo album can also be entered by the coordinator and viewed by any user who has access to the event.

Event Calendar for Users

Control Panel > Website > Website Modules > Events

Administrators: Days with more than one event will show a Display Sequence icon you can use to reorder the way events are displayed in grid view. If an event spans multiple days, you'll only be able to change it on the start date. For repeating date events, each instance of the event can be changed independently. Only administrators and event module coordinators will be able to change the order of events.

Tuesday	October 2021 Wednesday		d QuickEvent Attend	dance Today Legend
				Na
	Mednoeday			INC.
	weunesuay	Thursday	Friday	Saturday
28	29	30 Ballooning Without Borders	1 S	2 Events Committee Meeting
		17		Member Meeting
		Ballooning without Borders	3 ★	
5	6	7		9
	5	5 6	Safety Committee Meeting	5 6 7

When users open the events module, the first thing they generally see is the Month Grid view, shown below.

Administrators: Configure a different default view on the event calendar admin screen under Event Defaults.

and any rules regarding at	tendance; you can also register	for events from this screen. C	lick on the magnifying glass on th	Click on the event to view more inform to toolbar to see search and filter opti-	ions.	puon, unica, location, loca
Switch to List View	Show Search			Add	QuickEvent Attendan	ce Today Legend
Aug			September 2020)		Q
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
o	31	1	2	3	4	ő
	7	8	9	10	11	12
3	14	15	10	17	18	19
20	21	22	23 Executive Board Meeting	24	25 Ballooning Autumn Camp CANCELED	28 Ballooning Autumn Camp CANCELED
					Basic Rope/Line handling	More Rope/Line handling
7 Ballooning Autumn Camp CANCELED	28	29	30	1 Paper Lantern Release for Kidsl	2	3 Burner Basics
						Passenger Safety Training
	5	ō	7	8	9	10 Safety Conference
						Basic Balloon Electronics

This view shows a traditional month grid, with events shown on the day scheduled. Today is highlighted in a special color. Links at the top of the calendar allow users to scroll to the previous or next month.

Events may be color-coded based on the event category defined by your organization. Select the **Legend** button to see a list of categories and the color associated with each. Select the "X" icon in the top right corner to close this list.

Events that are flagged as **Members Only** will not be displayed when visitors are viewing the calendar. Events can also be configured 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.

The **View:** panel at the top of the screen appears in all views but its contents are different depending on the current view:

Switch to List View	Add QuickEvent	Today	Legend

- Switch to List View- Change your view from grid to list view.
- Add QuickEvent Create a Quick Event (if your organization allows members to create QuickEvents).
- Today Jump the grid back to the current month.
- Legend Display a drop-down legend of the color-coding.

List View

Here is what List View looks like:

Events - Month View	0
The event calendar shows upcoming club events. Select a view then use the navigation buttons to move between dates. Click on the e and any rules regarding attendance, you can also register for events from this screen. Click on the magnifying glass on the toolbar to s	
Switch to Grid View Month Week Day Future Show Search	Add QuickEvent Attendance Today Legend
Previous September, 2020 Ne	xt 🔻
September, 2020	
Wednesday Executive Board Meeting 5:00 PM Image: Constraint of the second sec	
Friday 25 Basic Rope/Line handling 8:00 AM More Info ♥	
Ballooning Autumn Camp CANCELED 8:00 AM	
Saturday More Rope/Line handling 8:00 AM 8:00 AM More Info ♥	

In List View, the View panel has the following options:

- Switch to Grid View Change to grid view from list view.
- Month See a list of events in the current month. Use the navigation buttons to move forward or backward by months at a time.
- Week See a list of events in the current week. Use the navigation buttons to more forward or backward by weeks at a time.
- **Day** See a list of today's events. Use the navigation buttons to move forward or backward by up to six days at a time.
- Future See all events past today.
- Add QuickEvent Create a Quick Event (if your organization allows members to create QuickEvents).
- Today Jump the grid back to the current month.
- Legend Display a drop-down legend of the color-coding.



In List View, entries are grouped by month. Each entry has a color-coded date panel that can be selected to jump to the event detail view. The event title and green "View" icon can also be selected to jump to the same place.

Select the **More Info** text or the arrow icon to display the event's short description.

List view will also display Notifications and major public holidays. These are not clickable.



Click the mini calendar icon to add this event to your personal calendar. This option uses the vCalendar standard to communicate with other applications.

F

If a small letter on a colored background appears beside the event title, this indicates that the event belongs to a chapter, district or region.

Administrators: The letter and color can be changed to match the type name of your subgroup and your website color scheme.

Add QuickEvent

The View panel may include an Add QuickEvent button, visible to members only when they are logged in.

Administrators: An <u>event calendar option</u> allows clubs to allow their members to create QuickEvents on their own, without getting an administrator or event calendar module coordinator involved.

When this button is clicked a single screen is displayed to define the QuickEvent. Clicking **Save** on this screen immediately creates the event.

Searching and Filtering

Select the **Search** icon at the top to display the following panel:

Search For Events	
Included Categories	All items checked 🗸
Excluded Categories	
Show Events For	Northwest Balloon Club 👻
Included Metro Areas	All items checked
Excluded Metro Areas	
Title	
Description	
	Only show events with available capacity
Dates	From To To
Date fields are ignored when fill	tering current view Reset Search 🞸

Using this panel, you can filter the current view to show only events that match your specified criteria.

Select categories and/or metro areas (configured by your club administrators) to include or exclude in your search results. You can also search by entering part of the title or event description. Select **Search** to display all events that match your specified criteria. Select the **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 your club has defined metro areas.

Subgroups: 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.)

Event Details

Event Calendar

To view the details for an event, Select the event title in the current view. You will see a display similar to the following:



This view shows the event title, location, description and rules (registration, attendance and fee, if any.) If the event is in the future and <u>registration</u> is required or recommended, the **Register Now** button allows users to begin the registration process. If the event is full and has a Waitlist available, you will have the option to add yourself to the Waitlist.

If a Google Maps icon appears, selecting the icon opens a new window showing the event's location (where attendees can also get directions to the event location.)

Note: The **Register Now** button will not appear if registration is not required, if the event is for members only and you are not logged in, if the event is full (you may see a WaitIsit button), has passed, or if registration is closed for some other reason.

For a multi-day, multi-activity event, the **Register Now** button will appear until the last day of the event, to allow you 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 attending. Members can select their **Bio** link to jump to each member's Bio / Directory page.

If an event needs volunteers, you may also see a **Volunteer!** button. Selecting the button takes you to the volunteering module to show the available volunteering opportunities for this event.

Add to my Calendar

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 Contact Manager programs, including Outlook, Eudora, Mozilla Thunderbird, Apple Mail, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Selecting **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.

Event Report & Event Photos

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:

C Activiti	es/Items (Click the down-arrow to the left of the activity/item to view the details)		
Base T	rip		
Details:	Includes lodging, parties, etc. Does not include air. Includes transfers if arriving with main group. Discuss with Trip Leader		
When:	Monday, Apr 20, 2015, 12:00 AM to 5:00 PM		
Where:	Same as event		
Registrat	ion is Required		
Capaci	ty: 24		
Availat Slot	ole 21 ts:		
<u>Registra</u>	ation Types & Fees:		
Member	\$ 895.00		
S Day L	.ift Ticket		
S 3 Day L	S 3 Day Lift Ticket		
S Visit Mo	ormon Tabernacle		

Each activity is shown in an *accordion* control. Click the down-arrow to expand the control and see the details of that activity; click the up-arrow to collapse the control again. You can also click the down- and up-arrows next to the section heading to expand or collapse all activities.

Each activity listing includes a title, short description, date/time, location, registration details, capacity (if limited) and fees (if any.)

Sign Quick Release

You may also see a Sign Quick Release button. ClubExpress provides an option for event guests who did not go through the full registration process to electronically sign a Quick Release form. This option is described in more detail below.

Register for an Event

To register for an event, click the **Register Now** button. (Note that it may be called something different, such as **Sign Up**.) If the event is configured to handle registrations using a different website, a new window will open showing the configured site and page.

If you have already registered for this event, a warning message will be displayed, but the system will not stop you from registering again unless duplicate registrations are explicitly blocked.

The Registration wizard may have up to **seven** different screens, depending on how the event is configured and which options are enabled:

Who is Registering

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.

Home > Events	Powerline Safety Registration
Event Re	egistration - Who's Attending
To begin the re- this option and	gistration 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 specify your name. Then proceed to the next step.
Event:	Powerline Safety
When:	-riday, August 10, 2018, 12:00 PM until 2:00 PM
1	Riverside Diner Jack Room 123 Court Street Vilton, IL
	ayment In Advance Only
Are you a Clu	b Member? Login to Register Recover Username/Password
Me only Me only Me +	gistering for this event? guests ut I'm registering - + Others
My Regist	ration
Non-mem	iber
Personal 1	Information
<u>Have you pr</u>	eviously registered for an event or are you on our mailing list? Click here to search
First M	Name •
Middle I	nitial
Last N	
	hone
Email Add	Iress
	Cancel 🗶 Next 🕨

The event details are listed at the top so that users can see which event they are registering for.

Members are invited to login and can click a button to recover their credentials.

Who is registering -The options are:

- The current user only
- The current user plus 1 or more guests
- · Not the current user but he or she is registering others

If the event configuration does not allow guests, then the 2nd and 3rd options are not shown.

Current user's Registrant Type - The system will only show registration types that are appropriate. In the above example, there is one Registrant Type for a non-member so that's the only option. And if the "Not Me but I'm registering X others" radio button is selected, then this panel will not be displayed because there's no reason to collect a Registrant Type for someone who's not registering.

Because this is a non-member registration, the system next prompts for the user's contact information. Non-members are asked if they have previously registered for an event. Some information may be required depending on the event configuration.

Select the Click here to search to display the following panel:

Event Calendar

Search for yo	our infomation - enter the following	\otimes
Email Address		
First Name		
Search 🔗		

Enter an email address and first name then select 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:

this option an	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 d specify your name. Then proceed to the next step.
Event:	Powerline Safety
	Friday, August 10, 2018, 12:00 PM until 2:00 PM
	Riverside Diner Back Room 123 Court Street Wilton, IL
Payment: Who is re	egistering for this event?
Who is ro Me only Me only Me +	Payment In Advance Only egistering for this event?
Who is ro Me only Me only Me +	Payment In Advance Only egistering for this event? guests but 1'm registering tration

The system already knows who the member is. All he or she has to do is specify who is coming and select a registrant type. Multiple registrant types may be listed. And if the member chooses to bring guests or is signing up other people, the Registrant Type selection moves to the next screen.

If the current user is a club **administrator or module coordinator, or a coordinator of this specific event**, he or she will see the following screen:

	epistration - Who's Attending
	inistrator, you can sign up yourself, another member or a non-member (if the event is open to them.) Select the appropriate option, then proceed to the next step.
Event:	Powerline Safety
When:	Friday, August 10, 2018, 12:00 PM until 2:00 PM
Where:	Riverside Diner Back Room 123 Court Street Wilton, IL
Payment:	Payment In Advance Only
Sign up ye €Sign up m	
Me only •Just this •This me	
My Regis	
	Cancel 🗶 Next 🕨

Three radio buttons allow admins to register themselves, another member, or a non-member using the name and address panel. Administrators can register active and pending members only.

The admin 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.

Adding Guests to the Registration (2 screens)

If the event allows guests to be signed up and the user has specified the number of guests to be added, the next wizard screen allows you to specify a registrant type for yourself as well as for each guest up to the total number specified.

For member guests, there are three possible registrant types:

- · Someone in your membership, such as a family member
- Another member
- A non-member

Note: When searching for other members to add to a registration, you will see Pending members included in the member selector list (a Pending status indicates the individual has not yet paid their membership dues). To register these members, you will need to also pay their membership dues.

For non-member guests, there are two possible registrant types:

- Another non-member
- A non-member in a specific mailing list category (e.g. "Press")

There are also special registrant types that may be used:

- Everyone (usually used on its own, when everyone pays the same fee)
- Members based on their member type
- Members of a specified committee
- Members of a specified subgroup (chapter, district, or region)

What appears on the screen will depend on what registrant types have been configured for this event. And some options may appear more than once, with different fees.

```
Example:
Members of a Committee – Board of Directors - $20
Members of a Committee – Education - $25
Non-Members in a Category – Press - $10
Non-Members in a Category – Servicemen in Uniform - $0
```

Event registrants will only see registrant types that apply to them, based on their membership status, type, level, committee membership, non-member category, etc. They can then pick the best price available to them.

Example: The following event registration is for a member and three guests:

Guest 1
Member Guest - another member Member Guest - a non-member Family Member
Guest 2
 Member Guest - another member Member Guest - a non-member Family Member
Guest 3
Member Guest - another member Member Guest - a non-member Family Member

And this registration is for a non-member with two guests:

My Registration • Non-member	
Guest 1 • Non-member Guest	
Guest 2 • Non-member Guest	

In many cases, only one registrant type will be available and it will be automatically selected.

In the member example above, the selection determines what will appear on the next screen:

0	Guest 1 - Someone in my membership		
Guest 2 - A Not Selected	nother Member Select		
Guest 3 - N First Name Gu Last Name 3	on-Member est		

- Selecting "Family Member" (or whatever it's called for that event) displays a list of people in your membership to pick one. In this case, there is only one secondary member.
- Selecting "Member Guest another member" (or whatever it's called for that event) allows you to search for a member by clicking the **Select** link to add him or her to your registration.
- Selecting "Member Guest a non-member" (again, the name could change) allows you to enter the contact information for that person. In the above example, the event has been configured to only collect first name and last name, but you could prompt for more information including:
 - Company and title
 - Address
 - Email address
 - Phone
 - Mobile Phone

Note: If text messaging is enabled for the club or association and you would like to receive text messages regarding event updates, you must opt-in to receive text messages.

Administrators: You can control which information is required or optional. Non-member guests will be added to the non-member database using the mailing list category that you have specified for this event. The default category is "Event Registrant".

Click **Next** to proceed to the next screen in the wizard. The next screen you see will depend on whether the event as defined has just a single activity or multiple activities, whether there are event-specific questions and whether a release agreement must also be signed. For a single activity event, the following screen is skipped.

Specifying Activities for Multi-Activity Events

After the initial registrant information page, for a multi-activity event, users are taken to a page similar to the following, which lists the individual activities for the event and allows separate registration for each activity.

Home > Calenda	dar > Snowbird Ski Trip (Practice) > Registration	
	egistration - Activities	
	box next to each activity that this person will be attending. Also check the box next to any items that this person would like.	
	i w i .	
Event:	Snowbird Ski Trip (Practice)	
When:	Monday, Apr 20, 2015 to Friday, Apr 24, 2015	
Where:	Snowbird, Utah	
Contact:	Martin Smith 847-255-0210 <u>testing@test.com</u>	
Payment:	Payment In Advance Only	
Activities	es for Martin Smith ties/Items (Click the down-arrow to the left of the activity/item to view the details)	
S Base Tr		95.00 🗹
S Day L	Lift Ticket \$40	00.00 🗆
S Day L	Lift Ticket \$ 25	50.00 🗆
O Visit Mo	Normon Tabernacle \$4	40.00 🗹
Details:	Will be going Wednesday evening to hear the Mormon Tabernacle sing in Salt Lake, City	
When:	Monday, Apr 20, 2015, 8:00 AM to 5:00 PM	
Where:	Same as event	
Registration:	n: Required	
	Registrant Total	: \$935.00
	Registration Total:	\$935.00
	Cancel X Next D	

This wizard screen will be displayed once for each person who is part of the registration, first the primary registrant and then each of his or her guests in turn. Only activities that each individual user or guest 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, 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.

If the multi-activity event includes items, such as a conference t-shirt, you can specify the quantity of each item that you want to purchase.

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 is immediately displayed.

Answering Event-Specific Questions

If the event has event-specific questions, a page similar to the following is shown:

Home > Calenda	ar > Balloon Maintenance > Registration			
Event Registration - Additional Information				
Event:	Balloon Maintenance			
When:	Friday, May 1, 2015, 9:00 AM until 5:00 PM			
Where:	Flying Field 1000 Forest Drive Anywhere, IL			
Payment:	Payment In Advance Only			
Registratio	n Questions			
* What is the Pilot	e highest level of certification you have achieved?			
Registrant	Questions			
1 Questi	ons for Martin Smith			
_				
* What kind of sandwich do you want for lunch? Roast Beef				
1 Questi	ons for Mary Smith			
* What kind Tuna	of sandwich do you want for lunch?			
	✓ Back Cancel ★ Next ▷			

Questions can be defined at any of three levels:

- For the registration as a whole;
- For each registrant including guests added to 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.

Signing a Release/Waiver Agreement

If a release agreement is defined, this page is displayed next. Click the **"I agree on behalf of myself and everyone included in this registration"** 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.

Note that the system will store the date and time when the release agreement was signed.

Summary Page

The Summary page is the last page in the event registration wizard. For a single activity event with no guests, no event-specific questions, and no release agreement, the wizard only has two screens.

If guests were added to the registration, these will also be listed. The system will show who is signed up for each activity and any event fees, based on the registrant and guest types already specified. If there is no fee, the summary page will confirm this fact.

Home > Calenda	dar > Balloon Maintenance > Registration	
Event Reg	gistration - Summary	
Review the re	registration info shown below.	
E		
Event Info	brmation	
Event:	Balloon Maintenance	
When:	Friday, May 1, 2015, 9:00 AM until 5:00 PM	
Where:		
Payment:	Payment In Advance Only	
Registrant	t Information	
	a & Cliff Jones (Primary Registrant)	
L Cliff Jon	nes (Companion)	
Activity/It	tem Information	
Balloon M	Maintenance	
When:	Friday, May 1, 2015, 9:00 AM until 5:00 PM	
Where:		
	L Barbara & Cliff Jones	\$ 50.00
	L Cliff Jones	\$ 50.00
		Registration Total: \$100.00
Payment I	Information	
page. Depen	ust be made in advance for this registration. Click the "Complete Registration" b nding on which options this organization has configured, you may be able to pay c. Please note that your registration will not be confirmed until payment is receiv	y with a credit card online or print an invoice and pay
	Gancel X Complete Registration	Print 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.

Payment

For events with a fee, clicking the **Complete Registration** button displays a screen similar to the following.

Event Calendar

Home → Make Payment		
Make Payment for Martin Smith (1015)		
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.		
Event Registration (4/27/2015 Ref # 2872) Due \$ 935.00 Pay \$ 935.00 4/20/2015 - Snowbird Ski Trip (Practice)		
Martin Smith - Base Trip 895.00		
Martin Smith - Visit Mormon Tabernacle 40.00		
Transaction Total: 935.00		
Total Selected For Payment \$ 935.00		
······		
Net Payment \$854.97		
Have a coupon? Enter the code: Apply		
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		
All payments are final. We do not provide refunds for membership signups and renewals, event registrations, donations, storefront purchases, or other misc. charges. Please carefully review the charge(s) checked above and be sure you know what you are paying for.		
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 Payment 🗙		

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 transactions, such as a membership renewal or registration for another event, these will also be listed and you can pay for them all with one payment.

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 you choose to pay by check, your 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.)

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.

Partial Payments

Some events may be configured to allow partial payments.

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, select 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.

Registering for a QuickEvent

Some events in the calendar are defined as QuickEvents. They have fewer options, no fees, and you can register for them on one screen in just a few seconds (sometimes even with just one click!) Two screens if you're adding guests.

To begin the r	jistration - Personal Information egistration process, select one of the following options. If you are a club member, you must first log in before registering. If you are mber and the event is open to non-members, select this option and specify your name. Then proceed to the next step.	
Event:	Test Quickevent	
When:	Thursday, Apr 30, 2015, 8:00 AM until 12:00 PM	
Where:	Flying Field 1000 Forest Drive Anywhere, IL	
Contact:	Martin Smith	
Members	s & Guest(s)	
	Cancel X Complete Registration 3	

If the QuickEvent does not allow guests, just select Complete Registration, and you're done!

If the QuickEvent allows guests, the wizard will have a second screen. Select the **Next** button to see the Add Guests screen. You can quickly add guests or people who are part of your membership (such as family members.)

If you're not a member, you will be asked to enter basic contact information on the first screen.

When you click **Complete Registration**, you are registered! There are no fees for QuickEvents, no additional questions to be answered, and no release/waiver agreement to be signed.

Canceling Registration

Where cancellation of registration is allowed, you may cancel from either the Member Profile screen, or from the event itself.

Events - Event View This is the "Event Detail" view, showing all available information for this event. If registration is required or recommended, click the 'REGISTER' button to start the process. If the event has passed, click the "Event Report" button to read a report and view photos that were uploaded.	う		
	·		
	as		
Ice Cream Social			
When: Monday, November 18, 2019, 8:00 AM until 5:00 PM REGISTER Where: Riverside Diner Back Room 123 Court Street Wilton, IL 30030 5555551234 S55551234			
Category: Party			
Registration is recommended Payment In Advance Only Registration cancellations will be accepted Active members USD 10.00			

To cancel registration from the event, view the Event Details and click the Cancel Registration button. You will receive an email confirming your cancellation request, and a refund (if applicable) for the event.

Manage QuickEvents

```
Control Panel > Website > Website Modules > Events
```

Administrators: Not sure if you need a QuickEvent or a full event? Check out the differences: Skin/Formats/CrossReferencePrintFormat("" on page 1)

Create a QuickEvent

QuickEvents are constrained to be easy to define and easy to register for:

- One screen only to define the event
- One screen only to register for the event
- Single activity only
- No fees
- One day only
- One registrant type for members, non-members, and guests
- Optional RSVP only
- Enable QuickRelease (default policy only)
- Whether the registrant list should be shown, and to whom
- No event-specific questions
- No event page or photos (can be added afterwards)

To create a QuickEvent, click **Add** then select QuickEvent from the drop-down menu. You will see a single page of options to define the event.

Home > Events > Events Manager > Create QuickEvent			
Create QuickEvent			
Use this screen to create your QuickEvent, including its title and visibility, date and time, and whether or not it requires registration. Once you're finished, click Save to add it to the calendar of events. You will be able to add it tarf from the event details page.			
Basic Info			
Title Bike Ride - Red Group			
Short Description Join the red group for a 25 mile ride this Wednesday evening			
l do dr 250 characters used			
Used for the vCalendar description and as a toolip in the Calendar			
Category Training			
Event Is For Select a level			
Visibility (Visible to everyone ¢)			
Mobile Channel < No Mobile Channel > +			
Contact Person Smith, Martin (200000323) Select Remove			
Show Email? No			
Show Phone? ®No			
Everyone			
Members Only Notify on Registration 🗹			
Event Date/Time 8/1/2018 From 6:00 PM 🔯 • To 8:00 PM 🔯			

The following settings can be defined:

- Title shown on the calendar;
- Short Description shown as a tooltip on the calendar;
- **Category** controls the color coding. The available list of categories can be limited if you allow members to create their own QuickEvents (see below.)
- Event is for only shown if subgroups are enabled. Allows you to specify the chapter, district, or region organizing this QuickEvent;
- Visibility who can see this QuickEvent (everyone, everyone but details for members only, or members only);
- **Mobile Channel** only shown if your club or association has purchased the ClubExpress mobile app. Allows you to link this QuickEvent to a mobile channel.
- **Contact Person** Click the **Select** link to select a member, then specify what contact information should be shown for that member and whether he or she should be notified when someone registers for the QuickEvent. You can also **Remove** a contact person.
- Specify the **date** and start/finish times for this QuickEvent.

The QuickEvent Add/Edit screen continues below:

Registration			
Registration	Required		
Are Cancellations Allowed?			
Cancellation Cutoff Date/Time			
Registrant Type	Select V		
Registrant List Visibility	○ None ● Public ○ Members Only ○ Registered Members Only		
Maximum Guests			
	(if guests are allowed)		
Capacity			
Is the capacity of this event limited	?●Yes ○No		
Capacity			
Show capacity?			
Show available slots?			
Enable Quick Release?	○ Yes ● No Uses your organization's default release agreement. Can be used on a mobile device to collect a signature at the start of an event.		
Location			
Location			
Address			
City			
State/Province	< Select > 🗸		
Zip/Postal Code			
Country	United States of America V Show All Countries		
Metro Area	< Not Specified >		
Show Map Link			
Location Phone			
Location Website	Select		
	Save 🖌 Cancel 🗙		

- Specify how registration should be handled:
 - Not Required
 - Recommended includes the ability to set a capacity
 - · Required includes the ability to set a capacity
 - Required by a close date a date field will appear, includes the ability to set a capacity
 - RSVP Only
 - Available to admins/coordinators only includes the ability to set a capacity
 - Temporarily unavailable
 - Closed
 - External a URL field will appear to specify the other website
- Are Cancellations allowed? If so, a Cancellation Date field will appear.
- What **Registrant type** should be used for people who register.
- Should the **Registrant List** be visible, and to whom?
- If attendees can bring guests, what is the maximum number allowed?
- Is the capacity of the event limited? If so, select Yes. Three new fields will appear allowing you to set the event capacity, and whether or not you want ot display the capacity and available slots left for registering users. This option is only available if under Registration you selected Recommended, Required, Required by close date, or Available to admins/coordinators only.
- Enable QuickRelease using the default policy (see .
- Location this section behaves the same way as location in a regular event. You can also select from one of the predefined locations that your club or association often uses.

Click **Save** to save this QuickEvent and add it to the calendar, or **Cancel** to return to the Event Calendar Manager without saving.

You can optionally configure the system to allow members to create their own QuickEvents on your club or association calendar.

Example: A cycling club might allow any member to organize a ride for other members. No approval is required when this option is enabled, but only selected categories will be available in the Category drop-down. Note that admins and event calendar coordinators can define QuickEvents in any event category.

RSVP Option for QuickEvent

On the Registration panel for a QuickEvent, you can select RSVP Only for the Registration question. When you do, the panel changes as shown below:

Registration	
Registration	RSVP Only
RSVP Responses	🗹 Yes 🗹 No 🗹 Maybe
Allow RSVP Comments	
RSVP Scope	Everyone 📀 🕈
RSVP List Visibility	ONone OPublic OMembers Only
Maximum Guests	2 • • (If guests are allowed)
Enable Quick Release?	OYes ○No

Check off which **RSVP Responses** you want to display.

Example: If you only want to record those people who can come, check the Yes option and leave No and Maybe unchecked.

You can optionally enable a **Comments** panel where people can enter notes as part of their RSVP.

Example: A "No" comment might be something like "Apologies, but we're out of town." A "Yes" comment might be "I'll be a little late, depending on traffic."

RSVP Scope controls who can RSVP: everyone or active members only.

RSVP List Visibility controls whether members and the public can see who else is coming. The list is displayed in categories for each enabled response.

Maximum Guests allows people to RSVP and bring one or more guests.

Enable Quick Release is the same option described above.

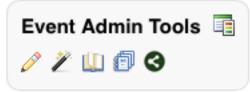
When someone responds "No", no further action is required; their response is immediately recorded in the database.

When someone responds "Yes" or "Maybe", and the guests and comment options have not been enabled, their response is also recorded immediately.

When someone responds "Yes" or "Maybe", and the guests and/or comment options are enabled, a dialog will popup to collect this information before the RSVP can be recorded.

Edit a QuickEvent

When you view a QuickEvent that you created and for which you are the designated coordinator, you will see a list of admin options for the event in a panel on the right side:



Hover over the Legend icon to see the meaning of each option:

Icon	Description
🥟 (Edit)	Select Edit to edit the QuickEvent. You will see the Add/Edit QuickEvent screen.
🧪 (Convert)	Convert this QuickEvent to a Single Activity Event. You will be asked to confirm this step because it cannot be reversed.
(Regis- trations)	Select this option to see a list of people registered for this event. You will see the same Registration Manager screen described below (except that fees are always \$0.00 and Status is always "Paid".)
(Reports)	Run reports for this event, including name badges and check-in lists.
(Share Event)	Select this option to share the details of this event on your club's Facebook page, LinkedIn Group page, or Twitter feed.

QuickEvent Admin Tools

Convert a QuickEvent

To convert a QuickEvent to a regular event, click the Convert QuickEvent icon in the admin options. You will be asked if you want to register all respondents/ registrants for the regular event, and if you want to send an email to current registrants.

RSVP to a QuickEvent

If a QuickEvent is configured for RSVP only, you will see one or more of the following buttons in place of the **Register Now** button:

RSVP Yes	
RSVP No	
RSVP Maybe	

The RSVP function allows for optional guests and comments. If you click the Yes or Maybe options and guests and/or comments are allowed, you will see a popup dialog similar to the following:

Event RSVP		6
Complete the inform	ation to RSVP to the event.	
Title:	Publicity Committee	
When:	Tuesday, July 16, 2019, 4:00 PM until 5:00 PM	
Comments		1
	RSVP Yes 🖋 Cancel 🗶	

Enter any necessary information and click the **Save** button, or click **Cancel** to close the dialog without RSVP'ing Yes or Maybe.

If guests and/or comments are not supported, clicking RSVP Yes or Maybe will immediately record this information; no further clicks are required.

If you click the No option, this response is also immediately recorded.

Note: You can change your response at any time and the new RSVP will replace your previous choice.

Share this Event

Click the **Share this Event** icon to share a new or updated event on your club's Facebook page or Twitter feed.

Select the social network on which to post. You will see a new popup that allows you to connect to the social network, enter some text describing your post and, in some cases, specify where the post should be made.

Example: On Facebook, you can post to a group, your personal timeline, the timeline for another page you manage, and some other options.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Events Manager

Control Panel > Website > Website Modules > Events

There are two ways to manage events:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (WebsiteTab) to access the admin side of the function.
- 2. When viewing any screen in the Event Calendar, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

A screen similar to the following is displayed:



The screen is initially displayed without search results. Click the Search button without entering a value to display all events (except canceled and archived events), or use the filter criteria to limit the display by the following options before clicking the **Search** button:

- A range of dates. Select Future Dates Only to preload the date fields to show only future events.
- Event type
- Event status
- Include archived events
- Subgroup (region, district or chapter)
- Event state (location)
- Event metro area (if defined);
- Any part of an event title

- Event category;
- Sort by most recent event, earliest event, title, category or number of registrants

Click the **Search** button to perform a search. Click **Reset** to reset all search criteria and start with a clean slate.

Each event is listed with the event's start date, title, status, category, number of event registrants, number of users on the waitlist, type and for a club with chapters, the grid will also show the "level" of this event—which chapter, district or region it was defined for.

The following options are avilable in the Maintain Column:

lcon	Description
(View/Edit)	Click the Edit icon to jump to event detail view, including the options necessary to modify/update the event.
📋 (Сору)	Click the Copy icon to copy the event, including multi-copy options.
(Share)	Share this event on your club's social networks, including Facebook and Twitter. This icon will only appear if the event is in the future.
(Archive)or	Click Archive/Delete to archive or delete the event. Events with registrations cannot be deleted and can only be archived. Events without registrations can be archived or deleted. You should make an effort to archive events when you no longer need them in the list, otherwise this list will get very long.
(Reset Event)	Click Reset Event to reset the event if registrants are experiencing errors when attempting to access the event. All event data will be cleared and reset. Registrations will not be deleted.
(Unarchive)	The Unarchive link will only be shown for archived events.

Maintain Options

The Events Manager screen is also where you'll configure your event and module settings, access reports and create events.

Configure Options

Mass Event Archive

Select the **Configure – Mass Event Archive** option to archive all events within a specified category that are older than or equal to a specified date. You will see the following screen:

Mass Event Archive	8
Select the event category and event end date of events to archive, then click "Archive" or "Cancel".	
Event Category Club Ride \$	
Archive End Date 12/31/2013	
Archive 🗸 Cancel 🗙	

Select the category and end date and click **Archive** to perform the archive, or click **Cancel** to close the dialog without archiving.

Mass Event Delete

Select the **Configure - Mass Event Delete** option to delete multiple events at one time. Selecting this option will take you to the Mass Event Delete screen.

Ma	ass Ev	vent Delete						0
Fr	om this scree	n, you can delete one or more even	ts that mee	et your selecti	on criteria. Note	that eve	ents that have	registrations cannot be deleted from this page. They will appear without a checkbox.
Sea	arch fo	r Events to Delete						
	Start E)ate Fir	hish Date		Eutur	e Dates	Only	
	Event T	ype All items checked	•	Event S	tatus 3 items	checke	d	•
Shov	VEvents For				•			
		tate < All States >	~	Metro	Area < All Me	etro Ar	eas > 🗸	
	03	Title						Search
						_		
	Cate	gory < All Categories > 🗸						Reset
Sear	ch Result	s (34 events found; 20 can be d	eleted)					
		for or one round, 20 our 20 d	onocouj		Registrations/			(
	Start Date	Title	Status	Category	Registrants	Level	Туре	
	9/23/2020	Executive Board Meeting	Active	Committee Meetings	0/0	Club	Single Activity	
	9/25/2020	Basic Rope/Line handling	Active	Tech Event	N/A	Club	Single Activity	
	9/26/2020	More Rope/Line handling	Active	Tech Event	N/A	Club	Single Activity	
	10/1/2020	Paper Lantern Release for Kids!	Active	Social Event	0/0	Club	Single Activity	

Search through events using the same search criteria you use on the Event Manager screen. Each event that can be deleted will have a check box. Select the check boxes corresponding to the events you wish to delete. Scroll to the bottom of the list and select Delete to delete the selected events.

Note: Note that single or multiple-activity events with registrations and fees will not have a checkbox; these events cannot be deleted.

Event Categories

Select the **Configure – Event Categories** option to modify your organization's event categories. Both you and your website visitors will be able to search and filter events by category. You will see a screen similar to the following:

Home > Events > Events Mana	·	• •	nistration	
Category Adm	inistra	ition		
Events can be organized into	categories, espe	ecially useful fo	or larger clubs. Cli	ck the "Add Category" button
Add Event Category				
Category	QuickEvents	Color	Maintain 💼	
Balloon Rides (2067)	¥	Sample Text	Ø	
Committee Meetings (4)	×	Sample Text	Ø	
Conventions (1052)	×	Sample Text	Ø	
Cruise (13838)	×	Sample Text	Ø	

Note: Note Category ID numbers after each category can be used to create a custom calendar.

To create a new category, click the **Add Event Category** button to navigate to the Add/Edit Category screen:

	g calegory, then click "Save" or "Cancel".		
Calego	V Balloon Rides	H	
Enable for Member QuickEven	b []		
Text Col	🛯 📕 Sample Text		1
Background Col	Y .		
Limit Registrations per Memb	er () Yes 🔋 No		
	Limits do not apply to non-members.		
Linked Wember Atlachmen			
	Available	Selected	
	Connercial Ballooning License		
	Flight Students	6 10	
	Balconing License		
	Insurance Card Photo		

Enter the category name. You can also specify whether this category is available if member-defined **QuickEvents** are enabled on the *Configure – Event Defaults* screen. This option allows members to create QuickEvents for the categories you enable here.

Color-coding helps users visually distinguish events of a specific type in the calendar. When you click the drop-down arrow beside one of the colors, a color selector panel will appear, allowing you to select a "web-safe" colors. You can also select a color using one of the tabs at the bottom: RBG (Red. Blue, Green), HSB (Hue, Saturation, Brightness) or HSV (Hue, Saturation, Value).

You can also limit the number of events a member can register for in each category. Select **Yes** to view additional fields and input a date range and the maximum number of registrations allowed.

Example: From March 1, 2020 - June 1, 2020 a member can only register for 12 events in the Seminars category.

Finally, if you've enabled Member Attachments, you can associate an attachment with an event category. When you associate an attachment with an event category, all member registrations for events in that category will include a link to their existing attachment. For example, if members are required to provide a copy of a license or certificate for an event, and you asked members to upload the item when they signed up, a copy of the attachment will be visible with their registration details.

Click Save or Cancel to return to the category list.

To edit an existing category, click the **Edit** icon. To remove an existing category, click the **Delete** icon. You will be asked to confirm this action.

Note: You can only delete a category if it's not currently in use.

Registrant Types (Legacy)

With ClubExpress version 8.0, released in August, 2018, we have implemented a new scheme for managing event Registrant Types, but many clubs and associations have events that were defined using the old scheme.

Select the **Configure – Registrant Types** to view a list of legacy registrant types. You will see a screen similar to the following:

Censulant Typ	e Administrati				
This page contains a list of lega	cy registrant types that can no long	er be used o	n new even	ts.	
Registrant Type	Usage	Hidden	Archived	Maintain	Ē
<u> </u>				-	Ē
Registrant Type Active members	Usage Member	Hidden No	Archived No	Maintain	Ē

With version 8.0, these legacy registrant types can no longer be edited. If a registrant type is not being used, it can still be deleted.

This screen will be removed from the platform once a sufficient amount of time has passed for all active events to have been defined in the new system.

The new model allows registrant types to be defined in more flexible ways and with each event. If you often use the same set of registrant types, they can be copied from one event to another.

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.

Administrators: To learn how to configure questions on your ClubExpress website, go here.

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.

You can also reuse data you've already collected from your members by linking an event question to contact information from the Member Profile and Additional Member Data questions.

Example: If your Ski club asks members for emergency contacts with each event registration, link the event question to the emergency contact information entered in their Member Profile. They'll still be able to enter a different contact for the event if necessary.

Selecting **Configure – Event Questions** displays a screen similar to the following:

Home > Events > Events N	· ·			
	uestions which are asked of members that if you delete a question, all answe			ick Ad
Question Name	Ans. Type	Required?	Maintain 📑	
Meal Choice	Select List	No	🤌 違	
Are you a pilot?	True/False	Yes	²	

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:



The questions can be linked to additional data questions you may have asked your members, or to the member's contact information collected in their member profile. 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; it is only shown to users in error messages.

Questions here are created the same way they're created for many other features on your website, including Additional Member Data, Survey Questions and Ad Hoc Forms.

The **Question Text** field contains the actual text that will be shown to users. This is a miniature version of our advanced content editor, with options to control fonts, lists, and alignment, and to display photos or images. Line breaks are supported in this field. The actual question text can be of virtually unlimited length. (Note that a simple text box replaces this editor for a Scale question, where the question itself uses a different answer type.)

The **Notes** field allows you to enter additional text that will be shown under the question and in a smaller font. It is usually used for prompts or hints on how to answer the question. There is a limit of 250 characters.

Most answer types also support a **Response Required** option. Select "Yes" if an answer must be provided.

Some answer 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.

Some answer types support a **Comments** box. Select "Yes" to display this box, so that event registrants can add comments beyond their main answer.

Click **Save** to save your question and return to the Event Questions grid, or **Cancel** to return without saving.

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 > Events Man	ager > Event	/ Volunt	eering Locations	
Event / Volunt	teering	e Lo	ocations	5
Default Locations can be used "Delete" to permanently remo	d as a quick wa			
Location	City	State	Maintain 💼	
Club Airfield	Wilton	IL	🤌 🙀	
Club Hangar	Wilton	IL	ili 🖉	
Club House	Wilton	IL	🧷 🙀	

Click the **Add Location** button to add a new location. You will see the following screen:

Add / Edit	Location	0 & 8
Enter or edit the	location. Then click "Save" or "Cancel".	
Location	Ama's Restaurant	
Address	123 Main Street	
City	Lincolnshire	
State/Province	Illinois +	
Zip/Postal Code	60015	
Country	UNITED STATES	
Phone	111-333-4444	
Location Website	Not Selected Select	
	Save 🗸 Cancel 🗙	

Enter the default location and click **Save**. Or click **Cancel** to return without saving.

Click the **Edit** icon to edit an existing location. Click the **Delete** icon to delete a saved location.

Note: The Volunteering module uses this same list of frequently used locations. Further, any locations you add to the Volunteering module will be added to the Events module.

Event Reminders

The system can send out two types of automated reminders: to all members and to everyone who has already registered for the event (see "System Emails" on page 578). Select the **Configure – Event Reminders** option to customize these emails. You will see the following screen:

Click the Edit (pencil) icon to edit each reminder. You will see the following screen:

Email Edit: 3	8	8
Use this page to customize your email. The drop down list at the top of the page includes all the tags available for this email. We recommend that you do not use a word processor or other external tool to edit this email - it is likely to produce text which cannot be properly displayed and formatted in an email, and to break any links you have added.		
< Select Tag >		
[16px • Β Ι 坦 ¶ 書 書 書 A • ⊗ • 🐰 🗅 🚯 🔊 • ♥ • 掌 譯 😣 😣 🖾 Ω • 註 註 들	ABC	
A message from ~~club_name~~: A gentle reminder about this upcoming event:		
~~event_title~~ ~~event_date_and_time~~		
~~event_location~~		
~~short_description~~		
~~event_url~~		
Don't forget to check the website and calendar for future events, schedule changes, and cancellations.		
Design A HTML		-44
Save 🖋 Cancel 🗶		

Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

Replaceable tags are available from a drop-down list in the top left corner. Select a ~~tag~~ and click the **Insert Tag** button to add that tag at the cursor position. Tags are replaced with their actual values at runtime.

Click **Save** to save your changes and return to the Event Manager, or **Cancel** to return without saving your changes.

Event Defaults

Default options can be configured for the entire Event Calendar module. Like in other modules, these default options can be overridden at the individual event level. They're designed to save time when creating each event, especially if most or all of your events will share the same settings.

To learn how to configure your default settings, and what each setting means, go Event Default Settings.

Reports/Exports

Reports

If available, selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

To see reports on a specific event, go to the Event View and click the **Reports** icon on the administrator ribbon bar.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Event Reminders

Control Panel > Website > Website Modules > Events

The system can send out two types of automated reminders: to all members and to everyone who has already registered for the event. Select the **Configure – Event Reminders** option to customize these emails. You will see the following screen:

Home > Events > Events Manager > Events Email Reminders Events Email Reminders			
ClubExpress sends reminder emails, which you may optionally customize. Email reminders marked w			ed with
Email	Customized	Maintain	•
Event Reminder to Members Sends reminder email(s) for the event to all active members		Ø	
Event Reminder to Registrants Sends reminder email(s) to anyone currently registered for the event		Ø	
		Retu	rn to P

Click the Edit (pencil) icon to edit each reminder. You will see the following screen:

Email Edit: 🛛 🚱 🗞 🔇
Use this page to customize your email. The drop down list at the top of the page includes all the tags available for this email. We recommend that you do not use a word processor or other external tool to edit this email - it is likely to produce text which cannot be properly displayed and formatted in an email, and to break any links you have added.
< Select Tag > Insert Tag
16px ▼ B I U ¶ 副 書 著 A * 3) ▼ ※ 哈 (1) ♥ * (1) ≠ 課 8) 8) 20 * 注 注 量 🖤
A message from ~~club_name~~:
A gentle reminder about this upcoming event:
~~event_title~~ ~~event_date_and_time~~
~~event_location~~
~~short_description~~
~~event_url~~
Don't forget to check the website and calendar for future events, schedule changes, and cancellations.
Design
Save 🖌 Cancel 🗶

Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

Replaceable tags are available from a drop-down list in the top left corner. Select a ~~tag~~ and click the **Insert Tag** button to add that tag at the cursor position. Tags are replaced with their actual values at runtime.

Click **Save** to save your changes and return to the Event Manager, or **Cancel** to return without saving your changes.

Feature	QuickEvent	Full Event
Select a category	Х	Х
Select a subgroup	Х	X
Visibility	Only (1) visible to everyone, (2) visible to members only, (3) visible to everyone, details for members only	X
Event Web Page	Х	Х
Repeating Dates		Х
Multiple Days		X
Short Description	Х	X
Formatted Descrip- tion		X
Event Coordinator	Only one (1) contact allowed	Multiple contacts allowed
Location	Х	X
RSVP Registration	Х	
Cancellation cut-off	Х	X
Cancellation Policy		Х
Release Agreement	Default agreement only, and only using Quick Release	Use default policy, or create a new policy for the event
Registrant Type	Only (1) everyone, or (2) members only	Registrants based on interest, com- mittee, member type, subgroup, mailing list category
Allow guests	Х	X
Charge a fee		X
Track attendance		X
Ask registrants questions		x
Configure auto- matic reminder emails		X
Blast emailing with event-specific dis- tribution lists	X	X
Waitlist		Х
Share event to social media		x

Create an Event

Control Panel > Website > Website Modules > Events

Administrators: Check out our step-by-step guide to creating a Single Activity Event; see How to Create a Single Activity Event.

To add a new event, click the Add button and select Event. This will launch the Basic Info screen.

Administrators: Not sure if you need a QuickEvent or a full event? Check out the differences: see Skin/Formats/CrossReferencePrintFormat("" on page 1).

Basic Info	
Enter title, date(s), and brie	f description to begin building your event. Then check off any additional information that you will need. If you have completed this section, mark this panel as complete. Then click 'Save.'
Activities	Single O Multiple
Title	Flying for Kidsl
Short Description	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
	0 of 2000 characters used
	Used for the vCalendar description and as a tooltip in the Calendar
Category	Flying Fun v
Event Is For	Northwestern Balloon Club
	Limit attendance to this subgroup only
Visibility	Visible to everyone Visible Date Visible
List View 'View' Button Text	View
Event Web Page/Site	Not Selected Select
Mobile Channel	< No Channel > v
Start Finish	7/25/2020 Display 9:00 AM Image: Comparison of the second sec
	This event repeats on multiple and/or non-consecutive dates

If you're editing an existing event, you'll see the Builder Status Menu, along with Event Panels and Editing Areas as your initial screen:

15th Annual Win	ter Gala		0
Use this page to view and edit areas rel	evant to the event.		
Back to		ports	
15th Annual Winter G Saturday, December 04, 2021 Join us for the 15th annual Winte	I, 6:00 PM until 9:00 PM	ebration!	
Basic Info	Basic Informatio	n	
Formatted Description	Title	15th Annual Winter Gala	
	Short Description	Join us for the 15th annual Winter Gala dinner and member celebration!	
 Event Contact(s) 	Category		
Location	Event is For	demotestclub	
Registration & Fees	Visibility	Visible to everyone	
	Event Web Page/Site	10///2004 C 00 DN	
 Who Can Register 	Start	12/4/2021 6:00 PM	
Questions	Finish	12/4/2021 9:00 PM	
• Emails			
Policy			

Event Types

You can define three types of entries on the calendar:

- An **Event** is the basic calendar unit. It has different registrant types, each with its own fee, event-specific questions, a capacity and a deadline for registering. All of the configuration options are available for events. Only administrators or event calendar coordinators can create this type of event.
 - A Single Activity Event is something that everyone attends, at the same location and at the same time, such as a committee meeting or a lunch time lecture, with no optional side activities.
 - A **Multi-Activity Event** is an event with options. It could be a multi-day conference where people can attend different parts of the conference, with optional side-events and special activities for spouses. Or it could be a single ride or run but with options for different distances, or optional shirts that participants can purchase, etc. When you define the multi-activity event, you will be asked to define different activities or items, each with their own description, location, registrant types, and fees. Only administrators or event calendar coordinators can create this type of event.

A Single Activity Event can be converted to a Multi-Activity Event, and vice versa if there is only one activity.

• A **QuickEvent** is a simple event with just one registrant type, no fees, and no event-specific questions. It happens on one day only. It can be open to members and/or non-members and guests are allowed, but registration is much simpler and only requires a single page. You can optionally allow members to define QuickEvents (with or without approval.) QuickEvents can be converted to single activity events.

• A **Notification** is an entry on the calendar that people do not register for. Rather, it tells them about a deadline or milestone, something they need to know about that is date-constrained in some way. Or it could be an event created by another organization (with a link to the other website.)

Basic Info

Click the **Basic Info** arrow or edit icon to return to the basic event information screen. There, you can change the event's title, description, category, visibility, dates and times, and other basic options. You can also check panels to add options to the event or uncheck panels to simplify the event.

Note: If your organization has the Continuing Education and Certification module enabled (see "Continuing Education and Certification" on page 1121), an option will appear asking if the event is eligible for continuing education credit. Checking the box prompts you to enter in the number of credits. The category used when creating the event is automatically added to the Continuing Education module as a credit type. In order for the registrant to receive credits for attending the event, the registrant must be marked as "attended".

Once you complete the Basic Info section, you'll advance to the Event Creation Wizard, which includes the Builder Status Menu and Editing Panels. Select an option from the menu, then select the Edit icon inside the Editing Panel.

15th Annual Win	ter Gala		?
Use this page to view and edit areas rele	evant to the event.		
Peak te		Image: Second system Image: Second system Image: Second system Ima	
15th Annual Winter G Saturday, December 04, 2021 Join us for the 15th annual Winte	l, 6:00 PM until 9:00 PM	bration!	
Basic Info	Asic Information	1	
 Formatted Description 	Title	15th Annual Winter Gala	
	Short Description	Join us for the 15th annual Winter Gala dinner and member celebration!	
Event Contact(s)	Category		
Location	Event is For	demotestclub	
	Visibility	Visible to everyone	
 Registration & Fees 	Event Web Page/Site		
Who Can Register	Start	12/4/2021 6:00 PM	
Questions	Finish	12/4/2021 9:00 PM	
• Emails			
Policy			

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.

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.

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 iCal/vCal 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 **Configure** 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

Subgroups: 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.

You can also specify whether only members of this subgroup can register for the event. The default is no; any member can register for a subgroup event.

<u>Visibility</u>

Four options are available for event visibility:

- Visible to everyone, members and non-members alike.
- Title visible to everyone (not clickable); details for members only.
- Visible to members only. If the calendar is available on the public side of your website, these events will not be shown.
- Visible to interest group(s) only
- Visible to committee(s)
- 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, or if you need to close the event even after it has registrations. Admins can still see it.

You can also specify a Date when the event will become visible. This feature allows you to define the event in advance.

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** link displays a link selector, allowing you to link to a custom page, photo album, document, external website or email address. (If you need multiple pages, use the specified custom page as a "jumping off point.")

List View 'View Button Text

When viewing the event calendar items in List View (as opposed to grid view on a standard calendar), specify the text used for the icon the user will select to view the full details of the event.

Mobile Channel

If your club or association has purchased the ClubExpress mobile app, use this option to link the event to a mobile channel.

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. Special popups are available to select a date from the calendar or a time from a drop-down list, using the increment previously defined under Event Defaults.

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.

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.

Subgroups: If your club or association is a parent organization with chapters defined, an additional option allows you to show the event on chapter calendars. A user selecting the event will be taken to the parent website to register for the event. Chapters have the option to show the event on the parent calendar. A user selecting the event will be taken to the chapter website to register for the event.

Events can be different in so many ways, not only from one club or association to the next but even within a club or association. ClubExpress has dozens of options to allow you to configure each event perfectly. But having so many options can also be daunting!

These check boxes try to make the process simpler. When you're building an event, you get to choose which features you need to define in order to complete and publish the event. Each check box represents a different panel or screen. If the box is checked, that panel will appear and you can define its options. If a box is not checked, that panel will not appear.

Whether or not a panel is initially checked can be specified on the Event Defaults screen. Specify these defaults if many of your events have similar characteristics.

Each panel is described in detail on the following pages. For now, we will assume that every panel has been checked.

When you have completed a panel, check the box in the bottom left corner to indicate that "This panel is complete." It controls the progress bar on the main event admin screen.

Click **Save** on the Basic Info to screen save your changes and return to the main event admin screen. Click **Cancel** to return without saving. If cancelling a new event being built, nothing will be created. For an existing event, no changes in the current edit session are retained. Note that when the event is saved and the Basic Info panel is marked complete, the event immediately appears on the calendar (unless a later Date Visible option is specified.)

You can return to this screen at any time to change the event's basic info, or to add or remove panels if an event becomes more or less complex.

Formatted Description and/or Rules

Click the **Formatted Description** arrow or edit icon to create a fully formatted description for the event. You will see a screen similar to the following:

Registration & Fees Join us for our live Who Can Register virtual grand opening and enjoy great conversation, games and prizes!!	Basic Info	🐰 🗈 📸 🍠 🕶 🖓 🕇 Styles	▪ B ℤ 凹 A ▪ ¶ 票 署 署 注 注 詳 詳	8. 🖻 🖾 📫 🄏 🞯
Location Registration & Fees Who Can Register Questions Emails Design ♥ HTML ♥ Preview Words: 41 Characters: 233 Display event description ● at the top of event details ○ at the bottom of event details 0 of 2000 characters used	Formatted Description			• •
Location Registration & Fees Who Can Register Questions Emails Legistration & Fees Conversation, games and enjoy great conversation, games and prizes!! Login & HTML Preview Vords: 41 Characters: 233 Display event description Conversation of event details Conversation Convers	Event Contact(s)	Virtua	Shop Grand Op	ening!
• Who Can Register Join us for our live virtual grand opening and enjoy great conversation, games and prizes!! • Design ◆ HTML ● Preview Zoom・● • Words: 41 Characters: 233 Other the bottom of event details • Display event description Event Rules ● at the top of event details • at the bottom of event details • of 2000 characters used • of 2000 characters used • of 2000 characters used	Location	l		
Who Can Register Questions Emails Virtual grand opening and enjoy great conversation, games and prizes!! Zoom・ Vords: 41 Characters: 233	 Registration & Fees 		loin us for our live	
Questions and enjoy great conversation, games and prizes!! ✓ Design	Who Can Register	L		
	 Questions 			
Vords: 41 Characters: 233 Display event description Event Rules 0 of 2000 characters used	• Emails			
Words: 41 Characters: 233 Display event description Event Rules 0 of 2000 characters used			and prizes!!	
Display event description at the top of event details tevent Rules of of 2000 characters used		🧨 Design 🔹 HTML 🔍 Preview		Zoom• 🌧
Event Rules	W	/ords: 41 Characters: 233		
Share Image	D	Event Rules	ers used added Yet	
□ This panel is complete		This panel is complete		

Use the advanced content editor to create your formatted description. You can insert virtually any kind of formatting, as well as images, links, and tables. Click the wrench icon (at the end of the toolbar) to display a second toolbar with more advanced options. Use the editor's "row tools" on the right to create content that is automatically responsive for mobile devices. Experienced developers can also switch into HTML mode to build more advanced displays and effects, including custom styles and JavaScript.

Below the editor, specify whether this formatted description should appear at the top of the screen (below the title) or at the bottom of the screen after all other information. The default value specified on the Event Defaults screen will initially be used.

If this event has special rules, enter them in the text box provided. They will be displayed in the Event Info screen.

If this panel is complete, check the box in the lower left corner. The Formatted Description option on the Builder Status Menu will display a green dot. You can always come back to this panel, if even if you've previously flagged it as complete, if you want to make a change.

Click **Save** to save your changes and return to the Event Admin screen, or **Cancel** to return without saving.

Note that many of these screens also have a **Remove from Event** button. Clicking this event will display a confirmation step; if you click OK, that panel and it's contents are removed from the event. This is the same as if you had displayed the Basic Info screen and unchecked the box corresponding to this panel.

Notice that the first two panels are now flagged as "Complete".

Event Coordinator

Note: Members assigned as a contact for an event will need coordinator rights for Emailings in order to be able to contact event registrants using Event Emailings.

Click the **Event Coordinator** option, then the edit icon to define a contact for this event.

Click the **Select** link to select a member as the event coordinator. When you do so, additional options will appear:

- List items for which the event coordinator is responsible;
- Determine whether the Event Contact or Coordinator should have admin rights over the event. Without admin rights, the even coordinator's information will be displayed (to the level you select) but they will not have access to the configuration of this event. This includes being able to mark attendance, run reports, canceling the event or managing registrations. Note that this setting will apply if you copy the event.
- Show the email address to everyone, to members only, or to no-one;
- Show the phone number to everyone, to members only, or to no-one;
- Show the mobile phone number to everyone, to members only, or to no-one;
- Notify this contact on registration;
- Is this the primary contact? Only one contact can be the primary; this person's information will be included on confirmation emails.

Click the Add button to add this contact to the grid. You can have as many contacts as you need for each event.

For each contact in the grid, click the **Edit** (pencil) icon to move their information up to the top panel to make changes. Click Add to save these changes. Click the **Delete** icon to remove this member as a contact.

Click the **Copy** button to copy a complete list of contacts from another event. You will see a dialog similar to the following:

pecify an event cate ontacts.	agory and date to search since, then select the event from which you want to copy event
Category	Monthly Meetings
Since Date	1/1/2019 Search
elect an event to o Select	copy registrant types from
	Copy 🥒 Cancel 🗙

Select a category and a starting date and click the **Search** button. The Select list will be populated with matching events. When you select one and click the **Copy** button, all the contacts from that event will be copied to the current event.

Click the **Display Sequence** button to change the order in which event coordinator appear. You will see the standard ClubExpress display sequence dialog.

All listed contacts have administrator rights over the event and will be able to modify basic event properties, view registrants, run reports, etc.

Check the "Panel Complete" box when you're done. Click **Save** to save your changes and return to the Event Admin screen, or **Cancel** to return without saving.

Location

Click the **Location** option to define the event location.

Event Calendar

	◯ Virtual Only (Zoom, WebEx, e	tc)		
Location				
0 0	of 100 characters used			
Country U	United States of America V	Show All Countries		
Address				
City				
State/Province <	< Select > V			
Zip/Postal Code				
Metro Area <	< Not Specified > V			
Show Map Link				
Location Phone				
Location Website No	ot Selected Select			
Videoconferenci	ing			
Video Link				Test
Meeting ID				
Passcode			N	
Show Video Link O on Event	t O After Registration		\square	
This panel is complete	e			

If the event is a "hybrid" event, where there is both a physical location and a virtual meeting link, you can enter both the physical and virtual location information. If the event is in-person only, simply enter the physical address. If the event is virtual only, select Virtual Only at the top of the screen, then enter the meeting information.

For physical locations, specify the event location or select a saved location from the drop-down list. Locations that you use frequently can be defined in the **Configure – Locations** screen.

You can optionally display a Google Map icon as well as a location website if such exists.

For a multi-activity event, this panel defines the default location. But it can be changed for each activity.

Videoconferencing

For virtual meetings, enter the meeting information in the provided fields, then determine when the meeting link is sent to registrants, either on the event day or after registration,

Check the "Panel Complete" box when you're done. Click **Save** to save your changes and return to the Event Admin screen, or **Cancel** to return without saving.

Registration & Fees

Click the **Registration & Fees** arrow or edit icon to configure how people will register for the event, it's capacity, what fees if any they will pay, whether you will track attendance, and what information to collect if non-members can register.

Registration & I	Fees
Complete the registration fees and a payments for events. The choices yo	ttendance section by filling out and selecting the various fields below. You can select the registration type, who can see registrations, track attendance, and set up the partial u make here will influence the "Who can Register" form.
Back to Event Registrations	Reports Exports Emaillings Imaillings Imaillings Imaillings
Virtual Shop Grand Friday, April 15, 2022, 7:00 Join us for the virtual grand op	
• Basic Info	Registration
Formatted Description	Registration Not Required ~
 Event Contact(s) 	Show Registrants' 💿 Full Name 🔿 Mailing Name
 Location 	'Register' Button Text Register Now
 Registration & Fees 	Avoid Duplicate Registrations 🔿 Yes 💿 No
 Who Can Register 	Capacity Is the capacity of this event limited? O Yes No
 Questions 	Fees / Payments
• Emails	Fee A fee will be charged for all or part of this event V
	Payment In Full In Advance Only

Registration

The Registration field controls how online registration is handled. The following options are available:

Option	Registration Button
Not Required	Not displayed
*Recommended	Displayed
*Required	Displayed
*Required by Close Date/Time	Displayed until the date and time specified.
Admins/Event Coordinator Only	Only admins, event calendar coordinators, and event coordinators can register people for this event. Members and the public can not register themselves.
Temporarily Unavailable	A note is shown that online registration is temporarily unavailable. This is the ini- tial 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.
	Online Event Registration

Note: *Choosing one of these options for registration and setting a registrant capacity enables the Waitlist feature.

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.) This allows them to register attendees even if registration has closed for members and/or non-members.

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 View 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".

Avoid Duplicate Registrations

Select **Yes** to have the system check for duplicate registrations and block them if possible. For members, this is reasonably straightforward since the member has logged in to register. For non-members, the system checks on last name and email address and will block a registration if both match. But there's no way to stop a non-member registering using a different email address.

Sequence Numbers

If this feature is enabled under Event Defaults, you can tell the system to optionally generate a unique sequence number for each registration and/or each registrant. Specify or change the label to be used and the starting number at each level (for example, 1001 instead of 1.)

This information will be included on the Registration Details screen and also in the appropriate exports at each level. You can use it in a number of ways:

- At the registration level, to number each information packet handed out;
- At the registrant level, a running or cycling club could register each runner or rider signed up for a specific event;
- For an annual banquet or dinner, each registrant could receive a unique number used in a prize drawing.

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.

Note: Setting a registrant capacity and choosing one of the starred options for registration enables the Waitlist feature.

Waitlist

If a specific registration option is selected (Recommended, Required, Required by Date) and a registrant capacity is set, you have the option to enable a Waitlist for the event.

Waitlist	
Create Waitlist	● Yes ◯ No
Maximum count	10
Waitlist hours	8 (# of hours a Waitlisted person is limited to register for an event; 0 if no time limit)
Process Waitlist	Manually Automatically

Select "Yes" to enable the Waitlist or "No" to skip the section.

Enter in the capacity of the Waitlist, and the number of hours the person has to register once a spot opens in the event and the Waitlisted person is notified via email. For example, if Waitlisted registrants are given 8 hours to register and they are notified at 8:00 AM, they will have until 4:00 PM to register for the event.

Members are notified by email as soon as a spot becomes available, for example if another member or non-member cancels their registration, or if event capacity is increased by an administrator or event coordinator.

Determine how the Waitlist will be processed, either manually or automatically. A Waitlist processed manually will require administrators or event coordinators to send notifications to Waitlisted registrants manually by notifying each person individually or all Waitlisted registrants at the same time. A Waitlist processed automatically will send a notification to the user added to the Waitlist first. If the notified user does not register for the event within the time limit set, the next user on the Waitlist will be notified.

Fees / Payments

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.

You can select an option where registrants can only pay by schedule, where you will be prompted to define the payment schedule

Fees / Payments	
	Fee A fee will be charged for all or part of this event •
Pay	ment Payment By Schedule Only
	Schedule Edit
	Date Percent
	Schedule has not been defined

Click Edit to configure the payment schedule.

Event Calendar

F	Payment Sch	edu	ıle	0	X
1	Set up the payment s date and percent of t total must add up to If an initial payment i the primary registran registration date or tt date, whichever is ea registrant's payment the remaining balance	the tot 100 p s requ t's scl he firs arlier. scheo	al event fee ercent. uired, it will b hedule with t t scheduled The rest of t	due. The le added to he payment he	
	Date	%			
	2/10/2020	40	Remove		
	2/20/2020	30	Remove		
	3/5/2020	20	Remove		
	3/15/2020	10	Remove	ĺ	
	TOTAL % Scheduled	100	Complete]	
-	Save 🖋		Cancel 🕽	٢	_

If an amount is to be collected upon registration, enter the amount in **Initial Payment**. For the remaining scheduled payments, enter a date and define a percentage of the total payment due on that date, then click Add to add the schedule item. If you have entered an Initial Payment amount, the remaining percentages in the schedule will be based on the total amount minus the initial payment.

Note: When this option is selected, the schedule will appear for the registrant on the payment page. If the payment schedule changes after people have registered, the updated payment schedule will apply to new registrations only; existing registrants' payment schedules will not change. However, if the cost of the event is changed, the final payment of the schedule will be updated as necessary. For example, if the number of activities selected changes, or a registrant is added or removed.

Fees / Payments					
	Fee	A fee will b	e charge	d for all or part of this eve	nt 🔻
	Payment	Payment E	By Sched	ule Only 🔻	
	5	Schedule Ed	it		
		Initial Payn	nent: \$ 0.(00	
		Date	Percent		
		2/10/2020	40%		
		2/20/2020	30%		
		3/5/2020	20%		
		3/15/2020	10%		

The last option is "Charges will be added to your monthly bill". This option is only for clubs and associations that manage member billing outside ClubExpress. When this option is selected, event registrations will not generate transactions that need payment. Any required payments have to be handled separately.

Specify whether payment must be collected in advance, or whether it will only be collected at the event, or whether either option is acceptable.

Scheduled Payments

For some types of events, you can enable partial payment support that allows registrants to pay on a schedule. This option is suitable where the event is expensive and may be paid in installments.

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. If this option is enabled, the Immediate Payment Required option is not available.

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.)

Click Edit Schedule, you will see a popup screen similar to the following:

Payment Sch	edu	ıle	6
Set up the payment s date and percent of t total must add up to If an initial payment i the primary registran registration date or th date, whichever is ea registrant's payment the remaining balance	the tot 100 p s requ t's scl ne firs arlier. scheo	al event fee ercent. uired, it will b hedule with th t scheduled p The rest of th	due. The e added to he payment ne
Date	%		
2/10/2020	40	Remove	
2/20/2020	30	Remove	
3/5/2020	20	Remove	
3/15/2020	10	Remove	
TOTAL % Scheduled	100	Complete	
Save 🖌]	Cancel 🕽	t

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.

Immediate Payment Required

This option is only available if "Payment in Advance Only" is selected above. Select **Yes** to require users to pay for this event immediately (the default is **No**.) When this option is enabled, users will see a special note on the summary and payment pages indicating that immediate payment is required for this event. If a payment is not recorded for the event within 30 minutes, the registration will be cancelled (flagged as "Cancelled-not paid in time limit") and a cancellation email is sent to the user. **These registrations cannot be reactivated**.

Does the Fee Change After a Certain Date

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.

Financial Account and QuickBooks®Item Name

QuickBooks: Specify the non-archived 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.

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.

Registrant Options

If guests are allowed, the "Maximum Guests" option controls how many guests 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.

When members or non-members register for this event, which mailing list category will they be assigned to. When you create a category for a specific event, it allows you to export all attendees or to send them a blast emailing.

Non-Member Settings

For each of non-members and member guests, you can separately control what data is collected.

The grid lists five general categories of non-member and guest data, and allows you to configure the fields that should be displayed and that 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.

Note: If you have text messaging enabled and would like to send non-member and guest registrants text messages, you need to collect a mobile phone number upon registration.

Check the "Panel Complete" box when you're done. Click **Save** to save your changes and return to the Event Admin screen, or **Cancel** to return without saving.

Who Can Register

With version 8.0, ClubExpress introduces a new model for how to define event registrant types and the fees associated with each. The old model where you selected from a list of global registrant types has been replaced by specific types for each event. But the new types are more flexible and we have also

provided Copy functions to allow you to copy registrant types from other events or from other activities within a multi-activity event.

Option	Description
Everyone	When there is one fee for everyone, member, non-member, or guest. This option will usually be used on its own.
Any Non- Member	When non-members pay a different fee than members.
	When non-members in a category may pay a different fee than other non-members.
Non-Member of a specific category	Example: You might have special pricing for Press. This option will only be shown to non-members who are already in the non-member database and who register by linking to their existing non-member record.
Non-Member Guest	When non-members bring a guest, who might pay a different fee. Use this option for children who might pay less than adults, or if the first non-member in a registration pays one fee but additional non-members pay a lower fee.
Active Mem- bers	When members pay a different fee than non-members.
Members by selected type	 When members pay a different fee depending on their member type. This option will only be shown when we detect that the registrant has the specified type. Example: You might have one fee for "Senior" or "Honorary" members and a different fee for all other member types.
	When committee members are eligible for a different fee.
Committee Members	Example: Board members might pay less (or nothing at all!) This option will only be shown when we detect that the registrant is a member of the committee.
Subgroup	When members of a chapter or district pay a different fee than other members. This option will only be shown when we detect that the registrant is a member of the specified subgroup.
Subgroup	Example: Members of the chapter sponsoring the annual convention might pay less than other members.
Member Guest – sec- ondary or ter- tiary	When members can bring other people in their own membership, such as spouses, chil- dren, or business associates.
Member Guest –	When members can sign up other members of the organization to be their guests.

Option	Description
another mem-	
ber	
Member	
Guest – a	When members can bring non-members to the event as their guests.
non-member	

Registrant Options

Some of these registrant types will prompt for additional information, such as a committee name or member type. You can then specify a display name (or leave it blank to use the registrant type name, a fee, and a visibility. If you specified that the fee changes after a certain date, you will see two fee fields, one for the initial charge and one for the changed charge.

Registrant Types that are visible to admins or coordinators only are useful if you want to have special pricing that is only available in special circumstances, or if you occasionally need a way to get around the normal event rules.

Some of these registrant types can be used multiple times in a single event.

Example: You might have different rates for the members of different committees, or different rates for different member types.

When members or non-members try to register they may see multiple registrant types that apply to them, some with different fees, and they will naturally pick the lowest one. This is perfectly normal; the system will only show them registrant types for which they are eligible.

Click the **Add** button to add each registrant type to the list.

Once all the required registrant types have been defined, check the Panel is Complete box and click **Save** to save your changes, or **Cancel** to return without saving.

For a multi-activity event, this panel moves to each activity or item within the event.

Click the Who Can Register arrow or edit icon to define these registrant types.

Select a Registrant Type. The following options are available:

Copying from Another Event

You can also copy registrant types from another event, if they are similar or if you regularly have events with the same parameters. You might also consider creating one or more "template" events of different types, perhaps under a special category, from which you can copy registrant types each time you have an event of that type.

When you click the **Copy from Another Event** button, you will see a screen similar to the following:

	tegory and date to search since, then select the event from which you want to copy te: events containing old-style registrant types will not be included in the list.
Category Since Date	Fly-In \$ 1/1/2018 Image: Compare the second secon
ect an event to	copy registrant types from 9/15/2018 - Alberta Fly-In 🛟

Specify a Category and a starting date, then click the **Search** button. You will see a drop-down list of matching events from which one can be selected. When you click **Copy**, the registrant types from this event will be copied to the event you are currently working on. Or click **Cancel** to close the dialog without doing a copy.

Note that the Event Calendar module also has single and multi-copy functions that will copy a whole event, including all its parameters.

A Note about the ClubExpress 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

ClubExpress Technology Fee

(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 the 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 increase the non-member cost of the event so that it allows for this fee to be charged.

Questions

Many events have questions that you need to ask of registrants and that are unique to the event. At the simplest level, for a luncheon or dinner, you might want to collect a meal choice. At more complex levels, you might need to know all about a registrant's level of experience in the subject matter being communicated at the event.

Questions can be defined at multiple levels:

- Once per registration. For example, "Will your group by staying at the official event hotel?"
- Once per registrant included in the registration. For example, "What is your t-shirt size?"
- For selected activities within the event and then, only for those people who register for those activities. For example, "What is your meal choice for the optional evening banquet?" For multi-activity events, this option will appear at the activity level.

A generic list of questions can be defined in the Event Manager by clicking the **Configure – Event Questions** option. Once this is done, you can link one or more questions to the event at the appropriate level. Note that a question can appear only once across all three levels. In the rare instance where you need a question at more than one level, you must define it twice.

Click the **Questions** arrow or edit icon to define these questions.

Add Question at the appropriate level to see a screen similar to the following:

egistration Question Add/Edit	00
Select from the list of predefined event questions, then click "Save" or "	Cancel".
Question Do you own a balloon?	
Visibility All Registrants	
Required 🧹	
Save 🖌 Cancel 🗶	

Select a question and specify its visibility:

- Everyone
- Admins only
- Not visible use this option if s question must be turned off before the event but you don't want to
 lose the collected data. For example, if you have an event where the first 1000 registrants get a free
 t-shirt, use this option to disable the question after 1000 people have registered. Their data will be
 retained but subsequent registrants will not see the question.

Specify whether an answer is required and click **Save**, or click **Cancel** to close the dialog without saving. Once a guestion is selected, it won't appear for the other categories.

Click the Edit icon to change whether or not an answer is required for the question and, for Activity -Registrant guestions only, which activity the guestion is linked to.

Click the **Delete** icon to remove that question from the grid. Be careful with this option; any answers will also be deleted! If you want to hide the question but retain the answers, use the "Not Visible" option.

Once all the required questions have been defined, check the Panel is Complete box and click Save to save your changes, or **Cancel** to return without saving.

Emails

Select this option to configure special information that should be included in confirmation emails and also to specify when and to whom reminder emails about the event are sent out.

Click the **Emails** arrow or edit icon to emailing information. You will see a screen similar to the following:

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. Line / paragraph breaks will be retained.

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.

Automated Reminder Emails

ClubExpress allows you to automatically send reminder emails for upcoming events. You can send up to two emails to every active member and/or just to the people actually registered for the event.

As you check each box, the subsequent boxes become available to also be checked. Enter the date when each email will be sent.

Note that reminders will not be sent if the event is in the past or if its visibility is changed to "Not Visible".

Cancellation Policy and Release Agreement

Many events need to specify a cancellation policy and/or release agreement. Click the **Policy** arrow or edit icon to specify these policies.

Cancellations

If you want to allow members to cancel their event registrations, select **Yes** for this question. The screen will refresh to allow you to 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.

Note: ClubExpress does not issue credit card refunds. However, you can flag a credit as having been "used up" by a refund issued outside the system.

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 default Cancellation Policy is specified on the **Configure – Event Defaults** screen.

Release Agreement

If this event requires a release agreement (waiver of liability), select one of the Yes options:

- **Including admins** means that admins will also see the agreement. Use this option if club admins frequently help members to register for events.
- **Excluding admins** means that only members and non-members will see the agreement; admins completing a registration on behalf of other users will not see it. Use this option if club admins process printed registration forms that already include a signed agreement.

Enable Quick Release allows you to obtain release agreements from guests who show up at the event without having registered for the event or signed the club's standard Joining Agreement as a member.

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. Users will see the following text and a check box to signify their agreement:

I agree on behalf of myself and everyone included in this registration.

When event waivers are enabled, the system will store the date and time when the waiver was agreed to, or an empty value if the waiver page was not displayed for that registration. If a legal situation arises, a special report allows you to print a list of every registration and the date/time when the waiver was signed.

Once the required policies have been defined, check the Panel is Complete box and click **Save** to save your changes, or **Cancel** to return without saving.

After Event

For major events, many clubs and associations have someone write up an event report for sharing with members and the public. They may also collect photos from the event and upload them into an album, to **show** everyone what a good time was had by all.

If this panel was enabled, click the **After Event** arrow or edit icon to link a page or album to the event. You will see a screen similar to the following:

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 Album** option to select a ClubExpress photo album containing photos of the event. The album must have already been defined.

In both cases, you can also specify whether the page and/or album buttons should be displayed immediately or only after the event.

Once the required information has been defined, check the Panel is Complete box and click **Save** to save your changes, or **Cancel** to return without saving.

Event Definition is Complete

When the progress bar is showing all green arrows, you have marked the event definition as complete. If it's not already visible on the calendar, go back to the **Basic Info** panel and change the event visibility there. Click **Save** and the event will appear immediately on your calendar.

Event Admin Screen

Control Panel > Website > Website Modules > Events

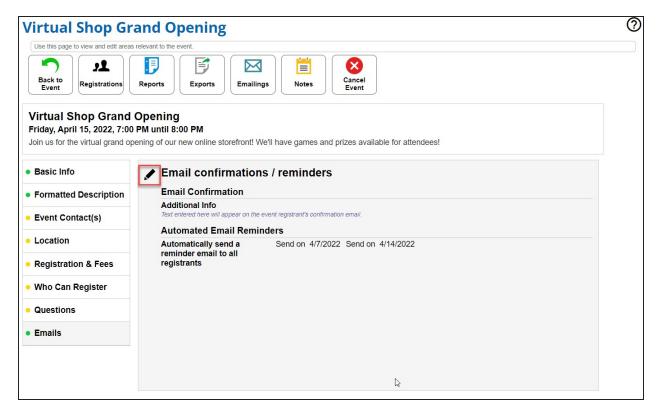
When you create a new event and save the **Basic Info** screen (and assuming that you checked the "This panel is complete" box, you will be taken to the event admin screen. Initially, it looks similar to the following:

Spring Treasure	Hunt		?				
Use this page to view and edit areas rel	evant to the event.						
Back to Event Registrations	Reports	imailings					
Spring Treasure Hunt Saturday, April 30, 2022, 8:00 Bring the whole family! We'll be h are plenty of prizes to go around!	AM until 11:00 AM Aniding markers and clues all o	over our airfield and invite YOU to be the lucky treasure finder!! Don't worry, there					
Basic Info	🖌 Basic Informati	ion					
Formatted Description	Title	Spring Treasure Hunt					
 Event Contact(s) 	Short Description						
Location	Category						
Registration & Fees	Event is For	demotestclub					
	Visibility	Visible to everyone					
 Who Can Register 	Event Web Page/Site						
• Emails	Start	4/30/2022 8:00 AM					
Reset Event	Finish	4/30/2022 11:00 AM					
	(Return to Previous Page	_				

At the top of the screen you'll see the Event Manager Buttons. Click **Back to Event** to jump to the screen that users will see when they click an event in the calendar. It shows the details of the event and allows them to register, add the event to their calendar, see who else is coming, or view an event report or photo album. Using these buttons you'll also be able to manage registrations, run reports, send emails to registrants and more. To learn more about your options to manage events you've created using the Event Manager Buttons, go <u>here</u>.

At the top is the event title, date, time and short description. On the left you'll see the **Builder Status Menu**. This menu will allow you to navigate between panels and further configure event details. Completed panels will have a green dot, panels which have not been marked as complete will have a yellow dot.

When you select a panel, you'll see a summary of the details that you've configured in the **Event Panel**. To add or change details for that panel, click the **Edit** icon next to the panel name, in the top left-hand corner.



You'll edit the details for that section within the **Editing Area**. The **Builder Status Menu** will remain on the left-hand side of your screen. When you're satisfied with your changes, you have two options: you can mark the panel as complete by checking the box at the bottom of your screen, then click Save to save your changes, or you can simply save your changes without marking the panel as complete. In either case, your changes are saved to the event, and you can still make changes in the future.

Emails	0
Configure your email confirmations	and reminders on this screen. You can add additional info or the text that will be displayed in the email confirmation, as well as set the schedule for the email reminders.
Back to Event Registrations	Image: Constraint of the second se
Virtual Shop Grand Friday, April 15, 2022, 7:00 Join us for the virtual grand o	
 Basic Info 	Email Confirmation
Formatted Description	Additional Info
Event Contact(s)	
e Event Contact(3)	0 of 4000 characters used Text entered here will appear on the event registrant's confirmation email.
 Location 	
Registration & Fees	Automated Email Reminders
	Automatically send a reminder email to all registrants
Who Can Register	 ✓ Send on 4/7/2022 □□□ ✓ Send on 4/14/2022 □□□
 Questions 	Automatically send a reminder email to all demotestclub
Emails	Send on Send on
	☑ This panel is complete
Remove From Event	Save 🖌 Cancel 🗶

Resetting Your Event

Below the *Builder Status Menu* you'll see a button allowing you to reset the event. Resetting the event should only be done if your users are experiencing issues access and registering for the event. Resetting the event will not delete event details or registrations.

Multi-Activity Events

Control Panel > Website > Website Modules > Events

To create a multi-activity event, click the **Add** button and select Event. The first option on the Basic Info panel allows you to specify a multi-activity event.

When you do so, a new menu option appears: Activities/Items.

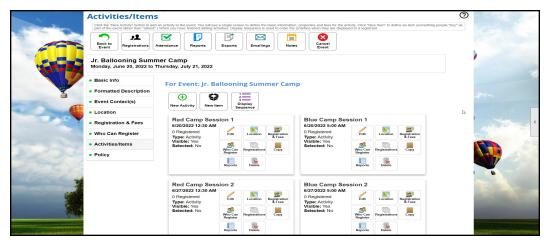
When configuring a multiple-activity event, there are several points to keep in mind:

• Each activity can have a location different from the event itself. For example, a medical conference may take place at a convention center, but individual seminars will each take place in different rooms or meeting spaces. a ski trip at a resort may include a wine tasting that takes place at a local

vineyard.

- Questions can be asked of registrants at the event level or at the activity/item level for the activities and items the registrant selects. For example, all attendees at a ski trip will be required to answer questions regarding emergency contact info, but only those who register for dinners will be asked for their meal selection.
- Registrant types are selected for each activity and item, but they are first narrowed down and configured for the event as a whole. When you reach the Who Can Register screen for the event, you'll narrow down the list of registrant types and rename them (if desired) to something more discoverable to members. For example, instead of members seeing "Member Guest - Another person in your membership" which is used for secondary and tertiary members, perhaps rename it to read "Member Guest - Spouse/Partner" or "Member Guest - Co-Worker".
- If you are using the Waitlist, make sure you carefully read the Waitlist notes under Registration & Fees, and always configure the Waitlist before you open the event for registrations. This ensures the Waitlist activates properly based on registration.

Selecting it displays a screen similar to the following:



This screen lists the activities and items that make up the event. If you started with a single activity event that you then converted to multi-activity, the first activity will already be listed.

Click the **New Activity** button to create an activity, something that people attend. Click the **New Item** button to create an item, something that people purchase (such as an event sweatshirt.) An Activity has a date, time and place associated with it, whereas an Item does not.

Click the **Display Sequence** button to control the order in which activities and items are displayed to users. It will popup the standard ClubExpress display sequencer.

The grid of activities/items shows the following information:

- Activity/Item title, including the start date/time;
- Type: Activity or Item;
- Visibility;
- Whether it's selected and/or required by default;
- How many people are registered for this activity/item;

The following options are available in the Maintain column:

Icon	Description
111	Edit the Basic Information for this activity or item
9	Specify the location of an activity. This option does not appear for items.
8	Configure registration and fee details for an activity or item.
*	Who can register for this activity or purchase this item, and what will they pay.
•	Configure any activity- or item-specific questions.
H	View who has registered for this activity or item.
Ť <u></u>	Delete this activity or item. You will be prompted to confirm this action. If there are paid regis- trations for this activity or item, this option will not be available; instead, edit the activity and set its Visible flag to No.
	Copy this activity or item. Copying an activity or item will not copy who can register and what fees they pay. Be sure to add this information. Copying an activity will copy the same date and time of the original, so be sure to change it.
	Select Reports to display the standard ClubExpress reports dialog, with a list of reports avail- able for this activity or item.
L	Maintain Options

When you have finished defining activities and items, click **Return to Previous Page** to return to the Event Admin screen for this event.

New Activity

Click **New Activity** to define an activity for the event. The following screen will be displayed:

Home > Events > Ba	alloon Navigation Training (Admin Panels) > Activities/Items > Activity Basic Info
Activity Ba	asic Info
Activity Do	
sign up for this activ	for this eachily 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 ifly 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 en, or Cancel to return without saving.
For Event: Bal	loon Navigation Training / Optional Lunch
Activity Title	Optional Lunch •
Description	Select this option if you want to join us for lunch after the training class
Visible	€ Yes ONo
Date	8/20/2018 Start 1:00 PM 0 Finish 2:00 PM 0
	Save 🖋 Cancel 🗶

Each activity has a title, description and visibility. Activities also have a date and start and finish times.

Click Save to return to the Activities/Items screen, or Cancel to return without saving.

New Item

Click **New Item** to define an item for the event. The following screen is displayed:

Home > Events > Ba	alloon Navigation Training (Admin Panels) > Activities/Items > Item Basic Info					
Item Basi	c Info					
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.						
For Event: Bal	lloon Navigation Training / Training T-Shirt					
Item Title	Training T-Shirt					
Description	T-shirt with the Balloon Training logo and date					
Visible	⊘Yes ○No					
	Save 🖋 Cancel 🗙					

This screen is the same as the New Activity screen, except without the date and time fields.

Activity Location

Click the **Location** icon for an activity to see the following screen:

Home + Events + Balloon Navigation Training (Admin Panels) + Activities/Items + Activity Location						
Activity Location						
Complete the fields below to define where your activity will be located at. Use predefined locations or type in a new one. Select contry, address, postal code, and other various location fields.						
For Event: Balloon Navigation Training / Balloon Navigation Training						
Gene as Levent () for () the definition of encoded to compare the definition of th						
Save 🖋 Cancel 🗶						

If the location is the same as the "master" even location, there's nothing more to specify. If it's different, click the **No...** option to see the following screen:

Home > Events > Ba	alloon Navigation Training (Admin Panels) Activities/Items Activity Location						
Activity Lo	pcation						
Complete the fields	below to define where your activity will be located at. Use predefined locations or type in a new one. Select contry, address, postal code, and other various location fields.						
For Event: Balloon Navigation Training / Balloon Navigation Training							
Same as Event?	○Yes ON, this activity has a different location						
Location	Locations V						
Country	United States of America Show All Countries						
Address							
City							
State/Province	(Illinois \$						
Zip/Postal Code							
Location Phone							
Location Website	Select						
	Save 🖋 Cancel 🗙						

This screen is essentially the same as the "master" event location. Enter the location details or click the **Location** button to select a saved location.

Click Save to return to the Activities/Items screen, or Cancel to return without saving.

Activity/Item Registration & Fees

Click the **Registration & Fees** icon for an activity or item to configure registration details for this activity, including fees, sequence numbers, capacity, and attendance. You will see the following screen:

in the Carly Colorest Carly Spinster Bendler Land	
The second second second second second	
teens .	
Notice Statistics	
house (regis	
Not have	

Individual activities can be "not selected", "selected" by default for registrants (it can be unchecked), or to be selected and required (it cannot be unchecked.)

If Sequence Numbers are enabled under Event Defaults, you can tell the system to optionally generate a unique sequence number for each registrant within this activity. Specify or change the label to be used and the starting number at each level (for example, 1001 instead of 1.) This information will be included on the Registration Details screen and also in the activity-level export.

Example: A car club holding an annual show could use this feature to number each car registered for the show itself or the concourse judging event.

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 number of available slots, which you might do if you expect the activity to be popular and there are limited slots available.

You can configure the activity so that registration is required. If this question is set to Yes, people must register in order to attend. If it's set to no, people do not need to register but they can if they want. If you configured the activity to be "Selected and Required" at the top of the screen, this question will be grayed out.

If you have set registration to "Selected and Required" and set a capacity for the activity, the option to enable the Waitlist if capacity for the activity fills will appear ("Waitlist Inclusion"). If you select "Yes", all of the activities where you have selected "Yes" must be filled in order for the Waitlist to be activated.

Note: Because all activities assigned to the Waitlist must be filled in order for the Waitlist to be activated, carefully consider the activities and items included. For example, if you are hosting a conference with an overall capacity of 300 people with a dinner each evening for 100 attendees, not every attendee will register for each dinner, and capacity for the activities will never fill.

You can also specify whether a fee will be charged and if the fee changes.

Select the applicable Sales Tax Rate, Financial Account and QuickBooks®Item Name to be associated with the activity.

Finally, you can specify whether you want to track attendance for this activity and whether members receive an attendance credit.

Click **Save** to save the new activity and return to the Event Activities/Items screen, or **Cancel** to return without saving.

Who Can Register

Click the Who Can Register icon to specify who can attend this activity or purchase this item, and what each registrant type will pay. Registrant types must draw from the same list for each activity or item. You will a screen similar to the following:

elect who can register for the event, and then define fees and late fees (if any). You can a ill display who can register for the event.	also set who can see the registrant list; everyone or just admins. After clicking the 'Add' button for a registrant type, a
Event: Balloon Navigation Training / Optional Lunch	1
elect and add one or more registrant types who can register	
Registrant Type Not Selected	Copy from another activity
Display Name	
Registration Fee	
Visibility • Everyone OAdmins/Coordinators	
legistrant types that can now register	
Display Name Registrant Type Fee Late Fee Visibility Maintain	
Everyone Everyone 15.00 N/A Everyone 🧷 🔂	

This screen works the same way as the screen for a single activity event. Be sure to click the **Add** button as you define each registrant type, to move it from the definition panel at the top to grid below.

Note: Remember that only registrant types you add will be able to register for the activity or select the item. Be sure to add all registrant types you want to be able to add or select the item.

A good approach is to define the Registrant Types for one activity and then use the **Copy from Another Activity** button on each subsequent activity or item to copy Registrant Types from the first activity. Then click the Edit icon to change the fees as appropriate or click the Delete icon for each Registrant Type that is not eligible for that activity or item.

Click **Save** to save the new activity and return to the Event Activities/Items screen, or **Cancel** to return without saving.

Activity Registrant Questions

Click the **Activity Registrant Questions** icon to define questions that will be asked of any registrant who signs up for this activity. You will see a screen similar to the following:

Home > Events > Balloon Navigation Training (Admin Panels) > Activities/Items > Activity Registrant Questions						
Activity Registrant Questions						
Select which questions should appear for registrants for this activity or item. 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 Question button in the Event Manager screen.						
For Event: Balloon Navigation Training / Training T-Shirt						
These questions are answered for each registrant who has signed up for the specified activity.						
Add Question						
Question Activity Visibility Required Maintain m						
T-shirt size Training T-Shirt All Registrants Yes 🥜 🙀						
Return to Previous Page						

Click **Add Question** to add a pre-defined question to this activity. The popup screen is where you will select a pre-defined question and specify its other properties.

Click the **Edit** icon to modify question properties or the **Delete** icon to remove this question. Any answers provided by people who have already registered will also be deleted.

Click Return to Previous Page when you have finished.

Completing Activity/Item Definition

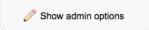
When you have defined all the activities and items you need, check the "Panel is Complete" box and click **Return to Previous Page.** The "Activities/Items" progress arrow will now be in green.

Editing Events

Control Panel > Website > Website Modules > Events

Once an event is created, you can show the event Admin Panels in two ways:

- From the Event administration screen, click the Edit Event (pencil) icon.
- From the Grid View or a List View, click the event title. You will see the Event Details screen, with a special option in the top right corner:



When you jump to the Admin options, this panel changes:



Registrations

Click **Registrations** to see a list of registrations for the event. A screen similar to the following will be displayed:

	n displays the regi	This screen displays the registrants made for the selected event.								
	Title: Farewell Good Friends									
	When: Tuesday, January 17, 2023, 9:00 AM until 8:00 PM									
Registration	n Count: 1 (1 re	gistrants)								
Add Reg	istration	Delete U	Inpaid Registrations							
St	art Date		Fini:	sh Date			••••	Sea	arch	
Registration	n Status All		~							
Primary's Las	st Name							Re	set	
earch Res	ults (2 matchin	ig of 2 tota	I registrations, including 1 canc	eled)					Page 1 of 1	~ >
Registrant	Туре	Member?	Contact	Date	Ref #	Fee (\$)	# Reg.	Status	Maintain	1
Martin Smith	Dinner Only	Yes Active	martin@clubexpress.com 8882550210	12/10/2022	N/A	85.00	1	Canceled - Not	E) 📓 💼	
Martin Caritte	Golf and Dinner	Yes Active	martin@clubexpress.com 8882550210	12/16/2022	6095	100.00	1	Paid	🖳 📓 🖂 😢	Ø

When the screen is first displayed, the Search Results panel will not be visible. Click the **Search** button to show all registrations or enter search criteria then click the button to show a filtered list. This option is especially useful for events that have hundreds or thousands of registrations. Click **Reset** to clear search criteria.

This screen shows primary registrants who went through the wizard, their registrant type, member or nonmember and, for members, their membership status, contact information, the total fee paid, the number of people included in the registration (including the registrant) and the registration status:

- Paid
- Open still to be paid.
- Cancelled.
- Cancelled not paid in time limit (for events where the Immediate Payment Required option has been enabled and the registration was not completed within the 30 minute time limit.)

100 registrations are shown on each page, sorted in alphabetical order by the primary registrant's last name. Use the paging controls to move forward and backward through pages, or the drop-down list to select a specific page.

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.

The following options are available in the Maintain column:

Event Calendar

Icon	Description
	View registration details.
Ø	Edit this registration.
	Jump to the member's Profile. This option is only available for member registrations.
S	Jump to the Payment page for this Open (unpaid) registration.
8	Cancel this 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 been paid, this step also deletes the pending transaction. You will then see a Delete icon that allows you to delete the cancelled registration completely (so that it no longer appears in the list.)
X	Resend the registration confirmation email for this registrant. The email will state clearly that it is a duplicate confirmation.

Maintain Options

When you select the **Details** option, a screen similar to the following is displayed:

Registration Details		88
Title: Dan's Test Event		
When: Friday, Apr 26, 2013, 10:0	0 AM until 5:00 PM	
Registrant Dan Ehrmann (Non-Member) 847-255-0210	Total Fee: \$30.00	
Companions		
Mary Ehrmann	Edit Name	
Questions		
Registrant Shirt Size Dan Ehrmann Medium Entree Type Dan Ehrmann Salmon Shirt Size Mary Ehrmann Medium Entree Type Mary Ehrmann Chicken		
CH	ose	

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.

<u>Waitlist</u>

In the Admin screen, click the Registration and Fees to see Waitlist details configured when you created the event.

You will see one of the following statuses:

- **Disabled** This is the default setting when creating a new event.
- Enabled and Inactive The Waitlist feature has been enabled for this event, but has not been activated because event capacity is not yet filled.
- Enabled and Active The Waitlist feature has been enabled for this event and is active because registrant capacity for the event has been reached.
- Full The Waitlist capacity is currently filled.

Click the **Waitlist** icon to see a list of people on the Waitlist for the event. A screen similar to the following will be displayed:

Waitl	ist I	Vanager						0	
This screen di	splays the w	vaitlist for the selected event.							
		nival Conference urday, May 30, 2020							
Add Membe	er (Add Non-Member		Remove All aitlist Entri		awaitlist Noti	fy Next Waitlist User		
Start	Date		Finish Date			0t			
Waitlist St	atus All	▼				Search			
Last N	ame					Reset			
Search Result	S (4 recor Member?	rds; 3 total available seats; 2 Contact	on Waitlist) Date/Time	Total Reserved	\	Age 1 of 1 🔹 📏	,		
George Admino	Yes Active	george@email.com	5/12/2020 10:05 AM	1	Removed by Admin	🌌 💽 🙀			
Belinda Brown	Yes Active	belinda@email.com	5/12/2020 10:05 AM	1	Removed by Admin	🌆 💿 📷			
Sally Hanks	Yes Active	sally@email.com	5/12/2020 10:05 AM	1	Waitlisted	🌌 🖂 🙀			
Marcia Brady	Yes Active	marcia@email.com	5/12/2020 10:05 AM	1	Waitlisted	🏽 🖂 🙀			

When the screen is first displayed, the Search Results panel will not be visible. Click the **Search** button to show all people on the Waitlist or enter search criteria then click the button to show a filtered list. This option is especially useful for events that have hundreds or thousands of registrations. Click **Reset** to clear search criteria.

At the top of the screen, the following buttons are displayed:

- **Delete Waitlist** Permanently deletes all users from the waitlist after a confirmation message and optionally sends emails to waitlisted users.
- **Remove All Waitlist Entries** Changes status of all waitlisted users to 'Removed by Admin' after a confirmation message and optionally sends emails to waitlisted users.
- Notify All Waitlist Users Sends an email notification to all waitlisted users; this button only appears if there is at least one available slot available.
- Notify Next Waitlist User Sends an email to the person at the top of the waitlist queue (first in/first out); this button only appears if there is at least one slot available.

You will see one of the following statuses next to each person:

- Waitlisted The user has been added to the Waitlist.
- Send Notification The user has not yet been notified via email.
- Notified The user has been notified via email.
- Time Expired The elapsed time specified in the event Waitlist section of Registration & Fees has passed.
- Removed by User The user has removed the user from the Waitlist.
- Removed by Admin An administrator has removed the user from the Waitlist.

In the Maintain column:

- Edit profile Takes the administrator to the member's profile (not available for non-members).
- Reactivate user Adds a removed or timed-out user back to the Waitlist.
- Notify user Sends the user an email notifying them that a spot for registration is open.
- **Remove user** Removes the user from the Waitlist when the status is Waitlisted, Send Notification, Notified, or Time Expired. The status is changed to Removed by Admin.
- **Delete user** Permanently deletes the user from the Waitlist when the status is Removed by User or Removed by Admin.

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 (for a single activity event):

Home > Events Calend	tar > Vali Ski Trip > Attendees						
Attendees							
This screen allows ye	ou to track attendance of event registrants.						
Title:	Title: Vail Ski Trip						
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM						
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)						
Mark attendar	ce for pre-registered members, non-members & guests ce for not-yet-registered members, no guests dee(s) (registrations will not be cancelled)						
Here is the li	st of attendees currently recorded as attending the event. Uncheck the registrants who were incorrectly marked as attended, and click 'Save' to make the adjustment.						
	Save 🗸 Cancel 🗙	_					

Select "Mark attendance for Pre-registered members, non-members & guests" and the screen will refresh as follows.

Home > Events Calend	dar > Vali Ski Trip > Attendees
Attendees	
This screen allows y	ou to track attendance of event registrants.
Title:	Vail Ski Trip
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)
Mark attendar	nce for pre-registered members, non-members & guests
-	cos for not-vet-registered members, no guests
0	dee(s) (registrations will not be cancelled)
Jim & Barba	ra Jones (Open)
Here is the li	st of attendees currently recorded as attending the event. Uncheck the registrants who were incorrectly marked as attended, and click 'Save' to make the adjustment.
Check all Unch	ack all
	Save 🖌 Cancel 🗶

You will see an alphabetical list of everyone registered for the event, with a checkbox beside each person's name. Their payment status is also shown in parentheses. 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.

For a multi-activity event, an additional option appears in the top panel to select the activity for which you are marking attendance. Also, "Mark Attendance for not-yet-registered members and guests" is not available.

Select "Mark attendance of Not-yet-registered members, no guests" and the screen will refresh as follows:

Home > Events Calend	ar > Vali Ski Trip > Attendees
Attendees	
This screen allows yo	ou to track attendance of event registrants.
Title:	Vail Ski Trip
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)
Mark attendan	ce for pre-registered members, non-members & guests
 Mark attendant 	ice for not-yet-registered members, no guests
OUnmark attend	dee(s) (registrations will not be cancelled)
Registrant Type	Adult Member
Jim Adams	
Bill Alexande	ar and a second
Ed Ames	
Daley Auteb	erry
Unmark attend Registrant Type Jim Adams Bill Alexande Ed Ames	dee(s) (registrations will not be cancelled) Adult Member +

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, send an email to confirm their registration, 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.)

You can also optionally suppress the event registration confirmation email by checking the option at the bottom of the page.

Note that this option is not available for multi-activity events.

Select "Unmark attendee(s) (registrations will not be cancelled)" to see a list of people already registered for the event who have been flagged as attending. The screen will refresh as follows:

	r → Vall Ski Trip → Attendees	
Attendees		
This screen allows you	u to track attendance of event registrants.	
Title:	Vail Ski Trip	
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM	
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)	
	ee(s) (registrations will not be cancelled)	
John Adams		
Martin Smith		
Check all Unchec	<u>k all</u>	
	Save 🖌 Cancel 🗙	

Uncheck the box beside anyone who was flagged as attending in error.

If you are marking attendance for an event which repeats over multiple dates, you have the option to mark attendance for a specific date.

Attendee	S	?
This screen allows y	ou to track attendance of event registrants.	
Title:	Balloon Cleaning 101	
When:	Sunday, August 02, 2020, 5:00 PM until 9:00 PM	
Date to Record:	Select V	
Recorded Attendees:		
	ndance for registered members, non-members & guests ttendee(s) (registrations will not be canceled)	
	Save 🖌 Cancel 🗙	

Select the date for which you want to record attendance, and select either **registered users** to mark them as attended, or **unmark attendance** to correct an error made in marking someone as having attended.

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:

Event Calendar

Event Exports
Select the data option, the click 'Export' to create a comma separated value (CSV) file.
Registration Data
◯ Registrant Data
◯ Registration Fees and Charges
◯ Waitlist Data
Status Not Paid, Paid, Cancelled, Not paid in time limit
Not Faid, Faid, cancelled, Not paid in time initit
Export Cancel X

Because of the nature of event registration data, it's not possible to include 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. For this reason, event registration data has to be split across the three exports listed first in the above dialog.

The last export was especially created to collect all transaction and payment data only. It is the best export to run if you want to see the total transaction value of the event, how much is flagged as paid (including write-offs and comps), how much was collected (excluding write-offs and comps), and what is still owed. Note that if partial payments are enabled, some transaction items may appear twice in this export because two or more payments were required to cover this transaction item.

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. Or click **Cancel** to close the dialog without exporting.

Emailing

Click **Emailing** to send emails about this event. You will see a screen similar to the following:

Home > Events(2017) > Event Emai		Workshop > Event Emailing			
This module allows you	u to send emails	to the whole membership or sm w email. Click Distribution Lists t	aller groups of memb o add, edit, or delete	pers. If Status is 'Drat predefined emailing	t', the email has not yet been sent. Sent emails cannot be edited but they can be copied. Click distribution lists
Search For Ema Start Date Subject		Finish Date		Search 🗲	Configure V Add Emailing
Status	From	Subject	То	Maintain	1
Draft (created 7/29/2018)	Dan Ehrmann	Learn all about Balloon Repair	All active members	🧷 🚹 🗎 🍳	
			F	Return to Previous	Page

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 "Hi-Res Bio Photos" on page 294.)

The **To** selection has some additional options for sending event-specific emails:

- Everyone registered for this event*
- All non-members who registered for the event
- All active members not registered for this event
- Unregistered members of a selected interest group
- Unregistered members of a selected committee
- Unregistered members of a selected subgroup
- 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*
- · Registrants for a specific activity or item
- · Registrants for a specific activity or item with a canceled registration*
- Event contacts for this event*
- All registrants who attended this event
- All non-members who attended this event
- All members to attended this event
- All registrants with a canceled registration*

Note: These distribution lists ignore the member's opt-out setting since recipients will have explicitly registered for the event.

Additional options may be added in the future. 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.

When you are building an event emailing, a special element is available to insert the event details into the emailing. Drag the "Event Info" element from the lower right corner of the elements panel into your emailing.

∰ HTML	/口首		24	
Balloon Repair Workshop		Hero Section	Image	Image Group
When: Friday, September 7, 2018, 12:00 PM until 5:00 PM Where: Club Hangar 122 Court Street Witton, IL 30030 718-555-1212			D	00
Contact:Alan Admin Email nwbcadmin@gmail.com		Divider	Link/Button	Social Media
Category:Tech Event Registration:is not Required		,	E	stanta
Register Now			تر	LO
		HTML	File	Event Info

<u>Notes</u>

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:

Enter notes a notes. These													
leading 1	\$ в	I	U	S	Default	<u>+</u>	A		≣	Ē	E	<u>T</u> _x	A BC
Aartin Smit										10/0			
Martin Smit confirmed						d a <mark>f</mark> irn	n hea	dcou	nt by	12/2	!1.		
						d a firn	n hea	dcou	nt by	12/2	1.		
						d a firm	n hea	dcou	nt by	12/2		f 2000	characters

Select New Note to enter your name, the date and the time, then begin typing your note. Once you're done, 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. Each admin or event coordinator who views the event notes will be able to see the name and date associated with previous notes. You can also add notes without entering your name and date by simply typing in the Event Notes popup and clicking save.

Cancel Event

Select this option to cancel the event. You will be prompted to confirm this action. If you do so, the following things will happen:

- The Registration type is changed to "Not Required";
- The event title has "- CANCELLED" appended to it (but it will remain on the calendar unless you change its visibility);
- Paid registrations have their status changed to "Cancelled" and a credit is issued;
- Unpaid registrations are deleted;
- A cancellation email is sent to all registrants. This email can be customized on the System Emails screen.

Note that this operation cannot be reversed or undone, so proceed with caution!

View Quick Releases

View Event Details

QuickEvent Admin Tools

QuickEvent Tools 🗐 🥢 🖉 🛄

Icon	Description
🧪 (Edit)	Select Edit to edit the QuickEvent. You will see the Add/Edit QuickEvent screen.
🧪 (Convert)	Convert this QuickEvent to a Single Activity Event. You will be asked to confirm this step because it cannot be reversed.
(Regis- trations)	Select this option to see a list of people registered for this event. You will see the same Registration Manager screen described below (except that fees are always \$0.00 and Status is always "Paid".)
(Reports)	Run reports for this event, including name badges and check-in lists.
(Share Event)	Select this option to share the details of this event on your club's Facebook page or Twitter feed.

Quick Event Tools

Manage Registrations

Control Panel > Website > Website Modules > Events

Click the **Edit** (pencil) icon to modify an event registration. This option is only available to administrators and event coordinators. You will see the following screen:

Home > Calendar > Winter Training > Registration Manager > Edit Registration		
Edit Registration		
Select from the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the action. Some actions may require payment, while others may issue credits.		
Title: Winter Training When: Saturday, Jan 4, 2014, 8:00 AM until 10:00 AM		
I want to < select >		
Return to Previous Page		

The following edit options are available. Note however that some of these options only appear for certain kinds of events.

Viewing Attachments

If the category of the event has any associated attachments, you'll see an attachments icon in the Maintain Column. For each member registrant you'll see both Pending and Approved attachments; attachments with an Expired status are not included. If the member does not have any uploaded attachments, or if the registrant is a non-member (and therefore has no attachments), clicking the icon displays a message noting there are no attachments to view.

When viewing Pending attachments, you'll have the same icons available to approve or decline the attachment as in Pending Attachment Approvals. Read more in "Member Attachments" on page 289.

Note: Attachment statuses within Events are calculated based on the date of the event, not the actual expiration date of the document. If a user's attachment expires December 1st and the event is scheduled for December 2nd, the attachment will appear as expired.

Manage RSVPs

In the grid listing RSVPs:

- Click the Edit link to edit an RSVP.
- Click the Profile link to jump to the member's profile screen.
- Click the Delete link to delete an RSVP.
- Click the Member RSVP button to add an RSVP for a member
- Click the Non-Member RSVP button to add an RSVP for a member.
- Click the Delete All Responses button to delete all responses.

Remove someone from the registration

Home > Event Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration	
Edit Registration	
Select from the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the action. Some actions may require payment, while others may issue credits.	
Title: NEW Event Editing Test (multiple)	
When: Wednesday, Apr 30, 2014	
I want to remove someone from the registration Remove someone from the registration	
Registrant Carol C. Brady	
Remove 🗸 Cancel 🗙	

Select the registrant to remove and click **Remove**. This person is removed from all activities for which he or she was registered.

Transaction and Payment Status

- If the registration was not paid, the pending transaction is adjusted to reflect the new balance. The individual transaction items for the removed person are also removed. The status remains as Not Paid.
- If the registration was paid, individual credits are issued for the cost of each activity for which this person was registered. The individual transaction items for the removed person stay in the transaction history, but the description is modified to indicate that these items were cancelled along with the date when this was done. The status remains as Paid.
- If the registration was partially paid, the outstanding balance is adjusted for each removed activity. The individual transaction items for the removed person stay in the transaction history, but the description is modified to indicate that these items were cancelled along with the date when this was done. If the removal leaves an outstanding balance, the status remains as Partially Paid. But if the removal exceeds the outstanding balance, the status is changed to Paid and a credit is issued for the difference.

Note that this option is not available if the event registration has been partially paid. Unfortunately, it is not possible to retain the integrity of the transaction, payment, and bank data in this situation.

Instead, you can cancel the whole registration (generating available credits to be used later) and re-enter it. Or pay it completely and then modify it to remove the registrant.

Remove someone from an activity or item

Home > Event	Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration		
Edit Registration			
	he list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the actions may require payment, while others may issue credits.		
Title: NEW E	Title: NEW Event Editing Test (multiple)		
When: Wedne	esday, Apr 30, 2014		
I want to remov	I want to remove someone from an activity or item		
Remove some	one from an activity or item		
Registrant	Carol C. Brady		
Activities/Items	Raffle Ticket		
	Remove 🗸 Cancel 🗙		

Select the Registrant and the system will display a list of activities/items for which that person is signed up. Select one of them and click **Remove**. This person is removed from that activity or item only.

Transaction and Payment Status

- If the registration was not paid, the pending transaction is adjusted to reflect the new balance. The individual transaction item is also removed. The status remains as Not Paid.
- If the registration was paid, a credit is issued for the cost of the removed activity. The individual transaction item for the removed activity stays in the transaction history, but the description is modified to indicate that this item was cancelled along with the date when this was done. The status remains as Paid.
- If the registration was partially paid, the outstanding balance is adjusted for the removed activity. The individual transaction item for the removed activity stays in the transaction history, but the description is modified to indicate that this item was cancelled along with the date when this was done. If the removal leaves an outstanding balance, the status remains as Partially Paid. But if the removal exceeds the outstanding balance, the status is changed to Paid and a credit is issued for the difference.

Note that this option is not available if the event registration has been partially paid. Unfortunately, it is not possible to retain the integrity of the transaction, payment, and bank data in this situation. Instead, you can cancel the whole registration (generating available credits to be used later) and re-enter it. Or pay it completely and then modify it to remove the activity-registrant.

Note also that you cannot remove someone from an activity if it was the last activity selected for that person. If the registrant chose the wrong activity, add a new one to his or her registration before removing the wrong one.

Add someone to the registration

Home >	Event Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration	
Edit	Registration	
	t from the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the n. Some actions may require payment, while others may issue credits.	
Title:	NEW Event Editing Test (multiple)	
When:	n: Wednesday, Apr 30, 2014	
I want to	add someone to the registration	
Add som	neone to the registration	
Ad	Id a member Add a non-member Add a companion	
	Return to Previous Page	

Click one of the links to add a member, non-member, or companion. For members and non-members, you will see a standard selector. For companions, you will be prompted to enter their first name, last name, email address and phone number.

The next step is to select a Registrant Type; you will only see registrant types appropriate for members, non-members, or companions. Then:

- For a single activity event with no fee or event-specific questions, click **Complete Registration**.
- For a single activity event with a fee but without event-specific questions, click **Proceed to Payment** to pay the difference from this addition.
- For a single activity event with event-specific questions but no fee, answer the questions then click **Complete Registration**.
- For a single activity event with a fee and event-specific questions, answer the questions then click **Proceed to Payment** to pay the difference.
- For a multi-activity event, you will see a list of activities appropriate for the type of person being
 registered (member, non-member or companion). Check the activities for which this person is signing up. Then follow the same instructions as above regarding fees and event-specific questions.
 Note that the list of questions to be answered may change dynamically depending on which activities are selected.

In the following example, a member has been added, a member registrant type selected, one out of two activities checked, and a question answered at the registrant level.

Event Calendar

Home > Event Calendar > NEW Event Editing Test (multiple) > Registration	on Manager > Edit Registration		
Edit Registration			
Select from the list of editing actions available for this registration, make th action. Some actions may require payment, while others may issue credits			
Title: NEW Event Editing Test (multiple)	Title: NEW Event Editing Test (multiple)		
When: Wednesday, Apr 30, 2014			
I want to add someone to the registration			
Add someone to the registration			
Banner, Bob (440)			
Select Registrant Type Member Only	•		
Activity/Item			
	\$ 5.00		
Raffle Ticket			
Registration: Required			
	✓ \$ 25.00		
Lunch			
When: Wednesday, Apr 30, 2014, 12:00 PM to 1:30 PM			
Where: Same as event Registration: Reguired			
Capacity: 25			
Available Slots: 18			
	Total: \$25.00		
Registrant Questions			
Questions for Bob Banner			
* What city were you born in?			
Chicago, IL			
*Note for Birth City question			
Cancel X Prod	ceed to Payment		

Transaction and Payment Status

In each case below, the existing registration is adjusted. New transaction items are also added to the existing transaction and the overall balance is adjusted. The new transaction items include the date that these items were added to the registration.

- If the registration was not paid, the status remains as Not Paid.
- If the registration was paid, the status is changed to Partially Paid.
- If the registration was partially paid, the status remains as Partially Paid.

Add someone to an activity or item

Home > Event	t Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration	
Edit Reg	gistration	
	the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the e actions may require payment, while others may issue credits.	
Title: NEW	Event Editing Test (multiple)	
When: Wedn	nesday, Apr 30, 2014	
I want to add someone to an activity or item		
Registrant	< Select > •	
	Return to Previous Page	

When you select an existing registrant, you will see a list of activities or items for which that person has not yet registered. Select one of them and, if a fee is owed, the screen will be updated. Also, if that activity or item has an event-specific question, it will be displayed.

Click Complete Registration if no fee was owed, or Proceed to Payment if there was a fee.

Transaction and Payment Status

In each case below, the existing registration is adjusted. A new transaction item is also added to the existing transaction and the overall balance is adjusted. The new transaction item includes the date that this item was added to the registration.

- If the registration was not paid, the status remains as Not Paid.
- If the registration was paid, the status is changed to Partially Paid.
- If the registration was partially paid, the status remains as Partially Paid.

Change a registrant's name

Selecting this option displays a list of each registrant attached to the registration and allows you to edit their first and last names.

Home > Event Calendar > NEW Event Editing Test (multiple	e) > Registration Manager > Edit Registration	
Edit Registration		
Select from the list of adition actions available for this regist	tration, make the desired change(s), and click the appropriate button to complete the	
action. Some actions may require payment, while others ma		
Title: NEW Event Editing Test (multiple)		
When: Wednesday, Apr 30, 2014		
I want to change a registrant's name		
Change a registrant's name		
Geoff	Walsh	
Test	Member	
Save 🗸 Cancel 🗙		
Sav	e ✓ Cancel X	

Click **Save** to complete the change or **Cancel** to return without saving.

Change the answer to a question

Select this option to see the following screen:

Home > Event Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration		
Edit Registration		
Select from the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the action. Some actions may require payment, while others may issue credits.		
Title: NEW Event Editing Test (multiple)		
When: Wednesday, Apr 30, 2014		
I want to change the answer to a question		
Change the answer to a question		
Meal Preference		
Mike Brady 👻		
Lunch		
Please select a menu option for this attendee Grilled Chicken with fresh fruit sauce		
Save 🗸 Cancel 🗙		

Select the question, then the member, and then the activity. If the question exists for that activity, a field will appear to change the answer. This field will be appropriate for the type of question. Click **Save** to save your change or **Cancel** to return without saving.

Change quantity of items ordered

Select this option to see the following screen:

Home > Event Calendar > NEW Event Editing Test (multiple) > Registration Manager > Edit Registration		
Edit Registration		
Select from the list of editing actions available for this registration, make the desired change(s), and click the appropriate button to complete the action. Some actions may require payment, while others may issue credits.		
Title: NEW Event Editing Test (multiple)		
When: Wednesday, Apr 30, 2014		
I want to change quantity of items ordered		
Change quantity of items ordered		
Item Raffle Ticket		
Registrant Carol C. Brady		
Save 🗸 Cancel 🗙		

Select an item and then a registrant. Enter the new number and click **Save** to save your change or **Cancel** to return without saving.

If an addition results in a higher registration fee for the event, the system will add a new event registration transaction or a new misc. charge (depending on the type of change) for the difference. If a removal results in a lower registration fee for the event, the system will create an open credit for that person's account, which can be used against a future transaction, or reimbursed by the club and flagged as closed.

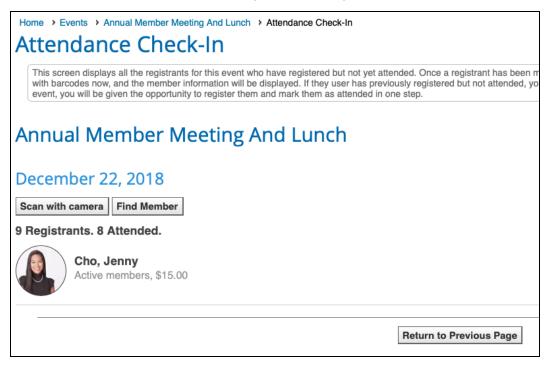
Mark Attendance

Control Panel > Website > Website Modules > Events

If an event is flagged to track attendance, a special **Mark Attendance** button will appear on the Event View button bar for the following classes of users:

- System administrators
- Event calendar coordinators
- A coordinator of that individual event

Clicking this button for a single activity event displays a screen similar to the following:



The system will list registrants who have not yet checked in (where their attendance has been marked.) Clicking the attendee image or name displays the following popup screen:

	he "Mark Attendance" button to mark them as attended. Once marked, they will bear in the list.
ark this	user as attended?
	Cho, Jenny Member Type: Individual Member Member Number: 2445 Status: Active
	Mark Attendance 🛷 Cancel 🗙

Click the **Mark Attendance** button to confirm or **Cancel** to close the dialog without confirming this registrant's attendance.

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 (for a single activity event):

Home > Events Calendar > Vail Ski Trip > Attendees			
Attendees			
This screen allows y	This screen allows you to track attendance of event registrants.		
Title:	Title: Vall Ski Trip		
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM		
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)		
Mark attendance for pre-registered members, non-members & guests			
Ounmark attendee(s) (registrations will not be cancelled)			
Here is the list of attendees currently recorded as attending the event. Uncheck the registrants who were incorrectly marked as attended, and click 'Save' to make the adjustment.			
	Save 🖌 Cancel 🗶		

Select "Mark attendance for Pre-registered members, non-members & guests" and the screen will refresh as follows.

Home > Events Calendar > Vall Ski Trip > Attendees			
Attendees			
This screen allows ye	This screen allows you to track attendance of event registrants.		
Title:	Vail Ski Trip		
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM		
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)		
Mark attendar	ice for pre-registered members, non-members & guests		
Mark attendance for not-yet-registered members, no quests			
Ounmark attendee(s) (registrations will not be cancelled)			
Jim & Barbara Jones (Open)			
Here is the list of attendees currently recorded as attending the event. Uncheck the registrants who were incorrectly marked as attended, and click 'Save' to make the adjustment.			
Check all Uncheck all			
Save 🖋 Cancel 🗶			

You will see an alphabetical list of everyone registered for the event, with a checkbox beside each person's name. Their payment status is also shown in parentheses. 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.

For a multi-activity event, an additional option appears in the top panel to select the activity for which you are marking attendance. Also, "Mark Attendance for not-yet-registered members and guests" is not available.

Select "Mark attendance of Not-yet-registered members, no guests" and the screen will refresh as follows:

Home > Events Calend	lar > Vail Ski Trip > Attendees
Attendees	
This screen allows ye	bu to track attendance of event registrants.
Title:	Vail Ski Trip
When:	Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM
Recorded Attendees:	2 member(s), 0 non-member(s), 0 companion(s)
 Mark attendar 	ce for pre-registered members, non-members & guests ce for not-yet-registered members, no guests lee(s) (registrations will not be cancelled)
Registrant Type	Adult Member 💠
Jim Adams	
Bill Alexande	ar
Ed Ames	
Daley Auteb	erry

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, send an email to confirm their registration, 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.)

You can also optionally suppress the event registration confirmation email by checking the option at the bottom of the page.

Note that this option is not available for multi-activity events.

Select "Unmark attendee(s) (registrations will not be cancelled)" to see a list of people already registered for the event who have been flagged as attending. The screen will refresh as follows:

Home > Events Calendar > Vail Ski Trip > Attendees
Attendees
This screen allows you to track attendance of event registrants.
Title: Vail Ski Trip
When: Friday, December 8, 2017, 8:00 AM until Tuesday, December 12, 2017, 5:00 PM
Recorded Attendees: 2 member(s), 0 non-member(s), 0 companion(s)
Mark attendance for pre-registered members, non-members & guests
Mark attendance for not-yet-registered members, no guests
Unmark attendee(s) (registrations will not be cancelled)
Here is the list of attendees currently recorded as attending the event. Uncheck the registrants who were incorrectly marked as attended, and click 'Save' to make the adjustment.
🕝 John Adams
☑ Martin Smith
Check all Uncheck all
Save 🖌 Cancel 🗙

Uncheck the box beside anyone who was flagged as attending in error.

If you are marking attendance for an event which repeats over multiple dates, you have the option to mark attendance for a specific date.

Attendee	s	?
This screen allows ye	ou to track attendance of event registrants.	
Title:	Balloon Cleaning 101	
When:	Sunday, August 02, 2020, 5:00 PM until 9:00 PM	
Date to Record:	Select V	
Recorded Attendees:		
	ndance for registered members, non-members & guests ttendee(s) (registrations will not be canceled)	
	Save 🖌 Cancel 🗙	

Select the date for which you want to record attendance, and select either **registered users** to mark them as attended, or **unmark attendance** to correct an error made in marking someone as having attended.

Scan with a Barcode Scanner

If you have a barcode scanner attached to the computer (such as the one below), the Attendance Check-in screen is live. Holding a membership card with a barcode of the member number up to the scanner will cause the system to look for that member number in the list of registrants, to display the screen above.



This function will work with any standard barcode scanner, such as the Taotronics TT-BS003 (available from Amazon for under \$40.00.)

Scan with Camera

The scanning function will also work with a camera attached to your computer. Click this button to activate the camera so that you can hold up a membership card with a member number barcode to it.

Find Member

Click the Find Member button to search for a member. You will see the following dialog:

Member Lookup (Se	arch) 🕜 🔗 🤇
Number and press search.	ber's Last (and, optionally, First Name) or the member's Member atomatically initiate the search if you enter a complete Member
Member Number	
Last Name	First Name martin
	Search 🗳 Cancel 🗙

Enter the member number and/or last name and/or first name and click the **Search** button. You may see one matching member or a list of members, from which one can be selected. Then, if the member is in the registrant list, you will see the dialog above to confirm their attendance.

Registrant Already Marked

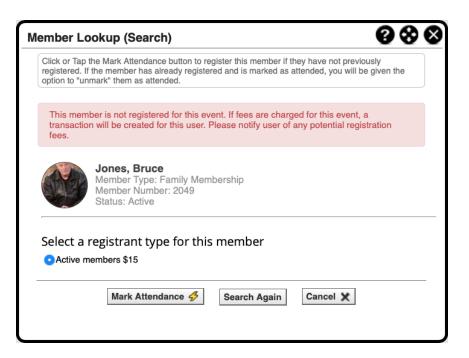
If the event registrant has already been marked as attending the event, you will see the following dialog:

Member Lookup (Search)	×
Click or Tap the Mark Attendance button to register this member if they have not previously registered. If the member has already registered and is marked as attended, you will be given the option to "unmark" them as attended.	
This member has already been marked as attended. Do you want to unattend them?	
Wong, David Member Type: Family Membership Member Number: 2332 Status: Active	
Unmark Attendance Search Again Cancel 🗙	

You can Unmark Attendance if it was done in error, search again, or cancel and return to the main screen.

Member Not Registered

If you scan a member number or search and select a member who has not been registered for the event but who wants to attend, you will see the following dialog:

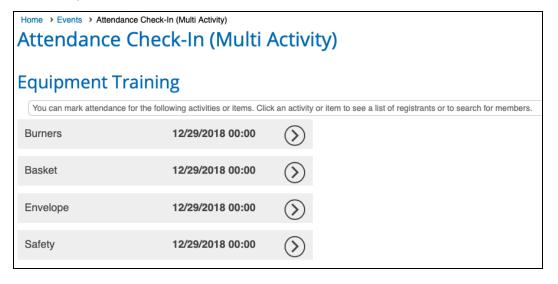


This member is not registered for the event. He can be registered and his attendance marked in one step. If there are multiple, available registrant types, you will need to select one of them. The system will then create the registration and transaction, as well as marking attendance. The member will still need to login and complete payment.

Note: Members not registered for multi-activity events cannot be registered and marked as attended simultaneously. The member must be registered for the activity prior to being marked "attended".

Mark Attendance for a Multi-Activity Event

When you click the **Mark Attendance** button for a multi-activity event, the first screen allows you to select the activity:



Once you select the activity, the system will behave as for a single activity event. Note however that you cannot register someone for the event who is not already registered, because there may be other prerequisites and fees than just this one activity. There may also be capacity limit issues.

Note: Members not registered for multi-activity events cannot be registered and marked as attended simultaneously. The member must be registered for the activity prior to being marked "attended".

Mark Attendance on a Mobile Device

All the functions (with one small exception, described below) are fully supported on mobile devices such as a smartphone or tablet.

When you open the website on a mobile browser such as Safari or Chrome and login, you can go to the event, tap the **Mark Attendance** button. The screens will adjust to your mobile device and you'll tap the various options and buttons instead of clicking them. For scanning a member number, the camera on your mobile device is fully supported.

The Mark Attendance function is also available within the ClubExpress Mobile App, which we build individually for each club or association, and it works the same way as if you were using a mobile browser.

The one exception is that scanning a member number using the device's camera is not available on Apple devices running iOS, due to a limitation in that operating system. It works fine on Android devices and, as noted above, if you use the mobile browser instead of the app.

Quick Release

Control Panel > Website > Website Modules > Events

Most clubs and associations that are involved in active sports activities have their members sign a standard Release Agreement / Waiver of Liability. Many of these organizations also attach such a release/waiver to their event registrations, so that each registrant also signs the agreement. ClubExpress supports both of these options.

But guests will sometimes show up for an event, either on their own or at the invitation of a member. These guests have not signed a release/waiver agreement, which may leave your club or association open to legal action if there is an accident or injury.

The **Quick Release** function protects against this. It allows you to obtain a release signature in the field, using any device with an Internet connection.

This option is enabled when you configure the event, on the Policy tab. It will use the same release agreement attached to the event registration process. When this option is enabled, a new **Sign Quick**

Release button will appear in the button bar in Event View. Clicking this button displays the following popup dialog:

click the checkbox a	per first name, last name and email address. Have the non-member Ind sign with their finger or the mouse. The time and signature will be	
	member does not have a record in the system, one will be created for	
First Name	Martin	
Last Name	Smith	
Email Address	info@clubexpress.com	
M	artin Swith	
Clear	Sign above	
	Save 🖌 Cancel 🗶	

All fields are required. The standard release agreement will appear in a panel in the center of the dialog, with a scrollbar if it's longer than the available height. Users must check the box to indicate their agreement.

The signature panel can be completed using a mouse, or a finger or stylus if you're using a device with a touchscreen such as a smartphone. Click **Save** to save the information entered (including the signature!) or **Cancel** to close the dialog without saving.

The user who signed the form will receive a confirmation email showing the date and time that they signed, as well as the text of the release agreement.

The Quick Release function is fully mobile enabled, so it can be used by an event coordinator in the field, using a tablet or smartphone.

When you are viewing the event's Admin Options, click the **View Quick Releases** icon to see a screen similar to the following:

Quick	ts > CCBA_Sumr	Man	ager	Martin Smith
This page list	sts all of the quick re Info (PDF)	eleases tha	t have been signe	Martin Twith
Registrant	Date	Maintain		1 ann with
Dan Ehrmann	05/10/2019 16:29	۲		· · · <u>·</u>
Barb Ehrmann	05/10/2019 19:57	۲		
Martin Smith	05/11/2019 18:06	۲		
	I	1	I	Return to Previous Page 🗶

Click the **View** icon to view that Registrant's signature in a popup window, as shown in the example above.

Click the **Print Release Info (PDF)** button to view a report in a new tab showing all quick release registrants, including their signatures.

Copy Event

Control Panel > Website > Website Modules > Events

In the Event Manager and in the Maintain column for each listed event, click the **Copy** icon 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:

Copy Event	8)
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.	
Сору Туре	
Make One Copy Make Multiple Copies	
Copy Options	
New Start Date 10/31/2013	
Copy Event 🖋 🛛 Cancel 🗶	
	11.

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:

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.
Сору Туре
Make One Copy Make Multiple Copies
 Daily Oweekly Monthly Yearly
Copy Options
New Start Date 5/20/2013
Every 3 day(s) Every weekday
Copy Range
End after 10 occurences
End by
A maximum of 50 new events can be created.
Copy Event 🖌

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:

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.
Сору Туре
Make One Copy
Daily • Weekly O Monthly Yearly
Copy Options
New Start Date 5/20/2013
Every 2 week(s) on: Mon Tue Wed Thu Fri 🗹 Sat Sun
Copy Range
End after 20 occurences
End by A maximum of 52 new events can be created.
Copy Event 🖌 Cancel 🗶

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:

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.
Сору Туре
Make One Copy • Make Multiple Copies
Daily Weekly Monthly Yearly
Copy Options
New Start Date 5/20/2013
Day 1 ÷ of every 1 ÷ month(s)
The Second Tuesday of every 1 month(s)
Copy Range
End after 20 occurences
 End by 8/31/2013
A maximum of 24 new events can be created.
Copy Event 🖌 Cancel 🗶
1.

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.
Сору Туре
Make One Copy Make Multiple Copies
Daily Weekly Monthly Yearly
Copy Options
New Start Date 5/20/2013
Every January 1
The First Sunday f June t
Copy Range
End after 5 occurences
End by
A maximum of 12 new events can be created.
Copy Event 🖌 Cancel 🗶

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.

Note: Unlike 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!

In the grid listing event dates:

Select the **edit** icon to edit the details for the occurrence.

Select the **delete** icon to delete the occurrence.

Select the **cancel** icon to cancel the occurrence. The icon will change to "uncancel", allowing you to reinstate the occurrence.

Archive/Delete

Control Panel > Website > Website Modules > Events

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.

hoose whether to dele ptionally select the eve		ve the event. If archiving the eve /.	ent,
 Archive 			
Category "A" Clu	ub Ride	\$	
Oelete			
Sa	ve 🖌	Cancel X	

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

Control Panel > Website > Website Modules > Events

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 holiday. Notifications don't have reports or photos.

To add a notification, click the **Add** button and select Notification. You will see the following screen:

Home Events Cal	endar • Events Calendar Manager • Edit Notification
Edit Notific	ation
Notifications are	calendar entries with no detail information or registration. The title will be displayed in the calendar on
the date(s) speci	ified. The Category and Metro Area fields can be used for filtering and the Visibility field controls who
can see the notif	ication.
B	
Basic Info	
Title	Last day to deliver balloons for storage
Short Description	Be sure to download the club's storage guidelines and rules for packaging before preparing your balloon.
	Used for the vCalendar description and as a tooltip in the Calendar
Category	Maintenance 🗸
Visibility	Visible to everyone
External website	
Schedule	
Start	11/5/2005
Finish	11/5/2005
	Show only start and end date on calendar if event spans multiple days
	Save 🕖 Cancel 🗶

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.

Creating Custom Calendars

The Event Calendar module can be called with a number of search options pre-loaded.

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 function directly. But to link to a specific calendar view (for example, events for a specific subgroup and category), you need to link to the calendar using an "External Link", similar to the following:

http://democlub.clubexpress.com/content.aspx?page_id=4001&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=4001 references the calendar.

The following options can be specified as part of the URL link to the calendar:

- &ec=<event category id> use this option to pre-specify a category.
- &ma=<metro area id> use this option to pre-specify a metro area.
- &es=<subgroup id> use this option to pre-specify a chapter or district.
- &reset=1 use this option to reset any search parameters the user may already have when viewing the event calendar.
- **Example:** If a user has just searched for a specific category of event, then selected a custom calendar menu item to display a weekly calendar, the user would only see events of that category displayed for the week. Resetting the search parameters using this option removes any previously entered parameters to display the calendar specified in the link created. In the previous example, resetting the search parameters would remove the event category search and instead display all events for the week.

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. Event category IDs are found in parentheses after the event category name on the screen where event categories are defined.

In the event calendar manager, click the **Configure – Event Categories** button.

Metro area IDs are found in parentheses on the Metro Area page. Go to **Control Panel – Club** tab **– Setup** section **– Metro Areas.**

Subgroup IDs are found in parentheses on the Organization Data page. Go to **Control Panel – Club** tab – **Setup** section – **Organization Data.**

Example: Appending &ma=25 to the URL will pre-load the demo club's calendar with events for metro area ID=25 (which, for the demo club, is the Chicago metro area.) ...content.aspx?page_id=4001&club_id=245449&ma=25 You can also combine options:

```
Example: ...content.aspx?page_id=4001&club_id=245449&ma=25&ec=16
will pre-load the demo club's calendar with "Education and Training" (ec=16) meetings in the Chicago
metro area.
```

Note: The parameters specified in the URL will populate in the event calendar search fields to allow the user to see exactly which events are being displayed, and to further refine the search if they choose.

Specifying Multiple Options at Once

You can also specify multiple event categories or metro areas or subgroups at once, or specify everything **except** a list of event categories, metro areas of subgroups. This is done using a different but related set of options:

&ecal=40;50;62

Event Category Allow List

&ecbl=23;12;87

Event Category Block List

&maal=123;124;125

Metro Area Allow List

&mabl=126;127;128;129;130

Metro Area Block List

&sgal=1234567;1234568;1234569

Sub-Group Allow List

&sgbl=1234571;1234574;1234576;1234577;1234578

Sub-Group Block List

The ...**Allow...** options are used to include multiple categories in a custom calendar, while the **...Block...** options used to show everything **except** the specified categories.

For a specified parameter (event category, metro area, sub-group), the **...Allow...** and **...Block...** options cannot be used at the same time. If they are, only the **...Allow...** parameter will be recognized.

However, multiple parameters can certainly be specified at the same time.

Example: ...content.aspx?page_id=4001&club_ id=245449&ecal=4356;4362;4401;4410&sgbl=4301458;1231569;8453166 specifies that the calendar should be displayed showing events from four categories and from every chapter (sub-group) **except** the three listed.

Note also that a Search on the calendar or clicking the **Reset** button will cancel these settings.

FAQ / Tech Library

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FAQ stands for "Frequently Asked Questions". This function is used to create custom pages in a question and answer format, organized into topics. It is also called the "Technical Library" function because of its ability to create a library of articles on technical subjects.

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 function 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 screen is shown below.

FAQ Click the Calegory Name in the sidebar to display all questions for the calegory. Click on an individual question to show / hide the answer for that particular question. Click the "collapse all / expand all" links to display
Click the Calegory Name in the sidebar to display all questions for the calegory. Click on an individual question to show / hide the answer for that particular question. Click the "collacse all / excand all" links to display
the content for all questions. Click the 'search' link to search for lext or tags.
Expand All 🚦 Collapse All 📮 Search FAQ 🔎
FAQ Categories Committees
Committees How can I serve on a committee? Buying a Hot Air Balloon What does the Event Committee do? Maintenance Balloon Burner

Click the double-down arrows to view the questions within a category and then the answer to a specific question.

FAQ / Tech Library Administration

Control Panel > Website Tab > Website Modules > FAQ

There are two ways to manage FAQ categories and pages:

1. Administrators and Function Coordinators can select the module in the Control Panel (Website tab) to access the admin side of the function.

Administrators: Don't see the module in the Website Tab? Enable the module.

2

When viewing any page in the FAQ function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Home > Control Panel >	FAQ Category Administration
FAQ Category	Administration
	nies. Click "Add Category" to create a new category, or "Edit" to edit an existing category. You can only delete a o questions assigned to it. Click "Questions" to manage the questions assigned to each category.
Add Category Di	splay Sequence
Category	Maintain 🗉
Annual Auction	
Buying a Hot Air Balloon	
Locations	🧷 🛞 🛱
Maintenance	
Repairing a Balloon	
	Return to Previous Page

The grid lists each category. To create a new category, click the Add Category button. You will see the following screen:

	e category name and click "Save" to save and return to the category list, or cell to return without saving.
Category	Maintenance
Description	Everything you wanted to know about maintaining your balloon, basket, burners, and support equipment.
FAQ View	Multi-Page Single-Page

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.

Maintain Options

The following options are available in the Maintain column:

Icon	Description
(Edit)	Edit properties for this category.
(Ques- tions)	View and update Questions assigned to this category.
(Delete)	Delete this category. This option will only be available if there are no questions assigned to this category.

Maintain Options

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.

Manage Questions

```
Control Panel > Website Tab > Website Modules > FAQ
```

To manage questions within an FAQ category, click the **Questions** icon. You will see a screen similar to the following:

Home > Contro	l Panel 🔸	FAQ CategoryAdministration > FAQ Administration					
FAQ Adm	FAQ Administration						
		is or issues, each with a defined answer. Click "Add Question" to create a new question and answer, or "Edit" to edit lick "Delete" to remove a question. Questions can be moved to a different category on the Edit screen.					
Category:	Annua	l Auction					
Add Questio	on I	Display Sequence					
Question Title	Active?	Maintain 💼					
Last Year	Yes						
Target	Yes						
		Return to Previous Page					

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** icon; the same popup window is displayed. To delete a question from the system, click the **Delete** icon; 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:

dd/Edit	FAQ 🕒 😧
explored by th Use the Active	Title is used internally only; readers will see the actual Question, which should be phrased carefully to convey the issue being is question and answer. If you change the category assigned to a question it will disappear from the current list when you save. e flag to control the visibility of the question without having to delete it. The advanced Content Editor is available to create a rich cluding images, linkns and complex formatting. Click "Save" to save and return to the FAQ list, or click "Cancel" to return without
Question Title	Floating?
*Question	What makes it float?
*Category	Maintenance \$
Active	
Answer	
🔏 🖻 🖺 (🖫 🛍 🔊 • (° •) ≣ ≣ ⊒ ⊒ 🧱 (≇ ≇ 💷 • 🌭 😣 🖬 🖄 🖺 Ω • 🙂 • ★ •
Styles	▼ Font Name ▼ Rea▼ B Z U A 3 A × × A • ⊗ • A 등 등 등 ⊗ • ♥ A
✓ Design	♦ HTML Q Preview
Words: 2 Char	
	Save 🖌 Cancel 🗶

For each question, specify the information shown. Required fields are shown with an asterisk. The Question Title field is never shown to users; it is used on the administration screens only. The Active field controls whether the question is visible or not. Although you are working within an FAQ category, any category can be specified; this feature allows you to move a question from one category to another without rewriting it.

The advanced Content Editor is used to specify the answer to each question.

Click Save or Cancel to close the window and return to the previous screen.

Gift Memberships

Purchase a Gift Membership	882
Gift Membership Administration	883

The Gift memberships module allows administrators to create a gift membership amounts that administrators, members and non-members can purchase and send to other members and non-members.

Gift memberships can be used immediately, or saved for future use. For example, if an existing member receives a gift membership they can save the gift until their current membership expires and use the gift for their membership renewal.

Purchase a Gift Membership

Click the **Add Gift** button to purchase a gift membership. Logged in members will see a screen similar to the following:

Gift Men	nbership	?
	ation of the person who you would like to gift a membership to. Enter in your information below and select an amount to gift. When you're finished, click on the ie" button to proceed to payment to finalize the gift or click on "Cancel" to return to the previous page.	
Gift Recipi	ent	
First Name		
Last Name	•	
Email Address		
Phone		
Mobile Phone?		
Your Infor	mation	
First Name	Samantha •	
Last Name	Elizabeth •	
Relationship		
Email Address	samantha@gmail.com	
Phone	8475554100	
Anonymous	OYes ●No	
1	Do you want this gift to be delievered anonymously?	
Gift Amou	nt	
Amount	< Select > V	
Send Date		
Message	HEC.	
	0 of 1000 characters used	
	Complete Purchase 🖌 Cancel 🗙	

Enter the contact information for the gift recipient. Fields with a red circle are required fields.

Your name and contact information will be filled in based on the information entered in your member profile. Decide whether the gift should be given anonymously. If you elect to have the gift membership given anonymously, the contact information you provide will not be shared, it will be stored for administrative purposes only.

Select the gift amount, the date you want the gift membership sent to the recipient, and enter an optional message to the recipient.

Once you have completed your purchase, the recipient will receive an email with a link to the club website Member Signup page. Once the recipient reaches the payment page of the Member Signup Wizard, the gift membership coupon will automatically be entered into the payment screen.

Gift Membership Administration

Control Panel > People > Website Modules > Gift Memberships

There are two ways to manage gift memberships

1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

Administrators: Don't see the module in the People Tab? Enable the module.

2. Edit When viewing any screen in the Gift Memberships function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following Gift Membership Administration screen is displayed:

Gift Me	mbers	ship Man	age	er				?
			i can sea			Memberships by spe	Aemberships by clicking on the "Amount" button. You can also run a ccifiying your search critera to manage existing Gift Memberships.	1
<u>Search Crite</u> Giver Nan Start Da Stat	ne	Used	inish Da	nte Reset	Search 🗲	1 5		
Search Res (27 gift(s) found)	ults						Page 1 of 2 •	
Giver Name	Date Created	Recipient Name	Status	Amount (\$)	Date Used	Maintain 💼		
John Adams	3/30/2020	Tommy Kerrington	Open	1.00		<i>i</i>		
Anonymous	3/30/2020	Samantha Elizabeth	Open	2.00		<i>i</i>		

The Search Results are displayed in a grid with columns for the giver name, date created, recipient name, gift status, date used (if the gift membership has been applied), and maintain options.

Icon	Description				
(Edit)	Click this icon to edit the existing gift membership.				
(Resend recip- ient email)	Click this icon to resend the welcome email to the gift recipient.				
(Payments)	If this icon appears, the giver has not yet paid for the gift membership. Click to go to the Pending payments page.				
(Delete)	Click this icon to delete the gift membership if payment has not been received by the giver.				
Maintain Options					

Edit an existing membership

Clicking the edit icon will display the following pop-up:

Add/Edit G	ift Membership	?
	rship as yourself, for a member, or for a non-member. Adding a Gift Membership from this page will not send any emails to the Membership Director nor the that you may be recording this Gift Membership for.	
Gift Giver		
Gift Giver:	Martin Smith	
Anonymous Do j	Yes No You want this gift to be delivered anonymously?	
Gift Recipie	nt	
First Name	Lilith	
Last Name	Alexander	
Email Address	Lilith@email.com	
Phone	745-555-9874	
Mobile Phone?	Yes No	
Gift Amoun	t	
Amount	\$60 Individual Gold Membership Gift 🔻	
Message	Here's your gift Lil!	
	21 of 1000 characters used	
	Save 🖌 Cancel 🗶	

If a gift membership has been created but not yet paid for, administrators and coordinators may change the amount, the message, and the recipient information.

If a gift membership has been paid for, only the message and recipient information can be edited.

If a membership has been paid for and used pr redeemed, no information can be changed.

Amounts

Use this page to define the recommended gift amounts your users will see when they are purchasing a gift membership.

Amount M	anag	er		0
Use this page to define t	the recommen	ded gift a	amounts that your u	isers see when they are gifting a membership.
	play ience			
Description	Amount (\$)	Active	Maintain 💼	
3-month trial membership	50.00	Yes	V 🙀	
GM Membership	100.00	Yes	🤌 🙀	

Note: Gift Membership categories are configured in Discount Coupons.

Enter in the description and recommended amount, discount coupon category and corresponding financial account.

Add Gift Membership

Click the Add Gift button to purchase a gift membership. You will see a screen similar to the following:

Add/Edit G	ift Membership	?
Add/Edit a gift member Member/Non-Member	rship as yourself, for a member, or for a non-member. Adding a Gift Membership from this page will not send any emails to the Membership Director nor the that you may be recording this Gift Membership for.	
Gift Giver		
	 Record a gift membership from you Record a member gift purchase Record a existing non-member gift purchase Record a new non-member gift purchase 	
Anonymous Do y	Yes No vou want this gift to be delivered anonymously?	
Gift Recipie	nt	
First Name	•	
Last Name	•	
Email Address	•	
Phone	•	
Mobile Phone?	Yes No	
Gift Amoun	t	
Amount	< Select > v	
Message	ALC:	
	0 of 1000 characters used	
	Save 🖋 Cancel 🗶	

Select the appropriate option for gift giver, and whether the gift should be given anonymously.

Enter in the gift recipient information.

If you have created a gift on behalf of another member or non-member, the gift membership will be saved and the giver will be invited to complete the outstanding payment. Once payment has been completed, the recipient will receive an email with a link to redeem their gift membership.

Reports

Report	Description	Filter Options
Gifts Purchased	Giver and recipient name, gift information (description, message), date	Date
By Date Range	used (if applicable), date created, date sent and gift amount	range
	Gift Membership Reports	

Interests

Register for an Interest	
Manage Categories	
Interests Administration	
Interest Coordinator Special Functions	

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 think of interests as **informal** sub-groups of members that grow and shrink over time based on member preferences.

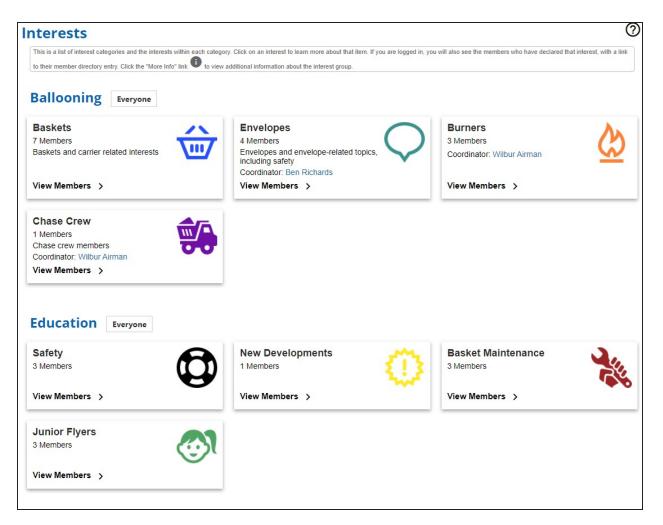
Interest categories can have one or more coordinators who are responsible for managing that interest and the underlying activities around that interest. You can also create a discussion forum around an interest and forum membership will be automatically maintained as interest members come and go.

When the Interests function 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.

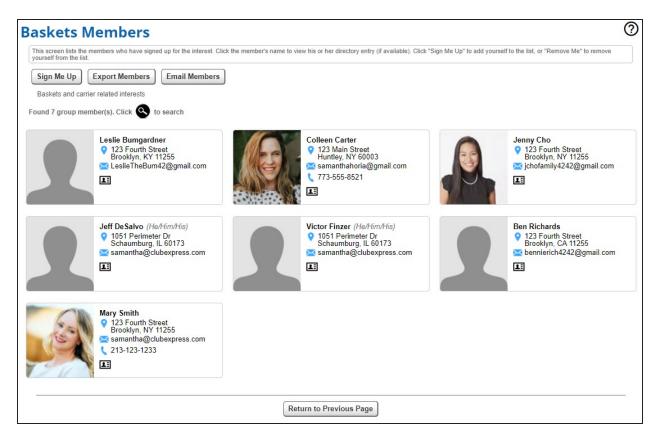
Administrators can send emails to members of an interest group, both from the Interests module and from the Control Panel – Emailings option. And with the visibility options at the Interest Category level, you can use this module to create ad hoc lists within your club or association that are visible to admins only.

Register for an Interest

Members register for an Interest by navigating to the Interests module from their website menu, if available.



Select the interest, then on the screen listing members for the interest you will see a Sign Me Up button. Select the button to be added to the interest.

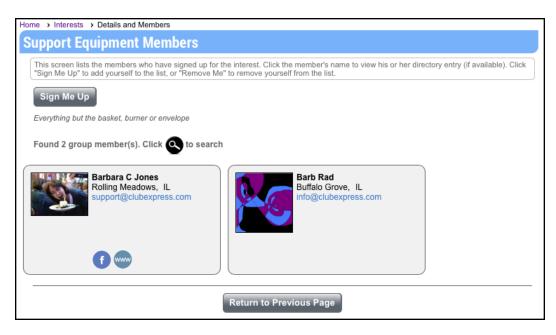


Members can also register for an Interest from their **MemberProfile**. A screen like the following is displayed:

Home > Member Profile > Interests	
Interests	
Select the Interests in which you would like to participate.	
Safety	
Teaching and reinforcing the important safety considerations in our hobby/pastime.	
You may select any number of interests in this category	
Rules	
Safety rules and sanctions you need to know.	
Education and Inspection	
Updates on newer equipment and classes involving ballooning	
Equipment	
Everything to do with ballooning equipment You may select any number of interests in this category	
C Envelopes	
If you have to ask, then your not a ballooner	
Baskets	
Suspended beneath is a gondola or wicker basket (in some long-distance or high-altitude balloons, a capsule), which carries passengers and (usually) a source of heat, in most cases an open flame.	
Cases or open rante.	
Various single and double burner topics.	
Support Equipment	
Extra equipment you need to support your hobby.	
Electronics and Navigation	
Various electronics and navigation devices for your balloon.	
Flying Let's go fly balloons!	
Let s grup balancers: You may select up to 0 interests in this category	
Piloting	
- nong	
Are you a pilot, or thinking about becoming one? You have come to the right place. Chase Crew	
Mobile ground support U Junior flyers	
_	
Launch Sites	
Save 🖋 Cancel 🗙	
Save 🖋 Cancel 🗶	

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.

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 you are not logged in, the Login screen will first be displayed. Visitors will then click their back button to return to the previous screen while members will log in to view the screen above.



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 you are not on the list, the **Sign Me Up** button at the top allows you to join the Interest list. If you are already on the list, the **Remove Me** button at the top allows you to leave the Interest list. Note that the **Sign Me Up** button will not appear if your club or association has set a maximum number of interests that you can sign up for within a category and if you have reached this maximum.

You can also specify your Interests using the Profile - Interests screen.

Manage Categories

Control Panel > People > Website Modules > Interests

There are two ways to edit Interests:

1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

Administrators: Don't see the module in the People Tab? Enable the module.

2. Edit When viewing any page in the Interests function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Interests

remove								Category" to add a new category. Click "Edit" to change an existing category, its description and its coordinator. Click "Detele" t lick "Display Sequence" to change the order in which categories appear. Click "Interests" to view and edit the specific interests
Add Catego		1 2 3 Display Sequence		P Report	s	Export Members	Interest Options	
Category	Interests	Visibility	Maint	in j	1			
Ballooning	4	Everyone	Ø	a (2			
Education	4	Everyone	Ø	a f	2			

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.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit this interest category. You will see the Add/Edit screen described below.
Linterests)	View and update individual Interests within this category.
(Delete)	Delete this interest category. You will be prompted to confirm this action, then the category and its interests, plus any member registrations for these interests will be deleted.

Maintain Options

To add an Interest Category, click the Add Category button. You will see the following popup screen:

select in this	therest category and a description if appropriate. You can limit the number of interests that a member can category by checking 'Limit Interests per Member'. You must also set the visibility for this interest ck "Save" or "Cancel" to return to the category list screen.
Category	Maintenance
Description	
	Max 1000 characters - 999 characters left
nit Interests er Member	
ax. Interests er Member	3
Visibility	Everyone ‡
	Save 🖌 Cancel 🗶

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.

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.

Interest Options

Clicking this button displays the following screen, to allow you to set options in this module:

ome Control Panel Interests Manager Interests Options Interest Options	
These are the default Interests values for your organization.	
iow Non Members to View Interest Members	
Use Accordion for Categories	
Notify on membership change? • Yes 🛛 No	
Notify on: Join Leave Expire/Drop	
Save 🖌 Cancel 🗙	

One option allows non-members to view Interest members. Another option displays interests within a category using an accordion control; this option is suitable for clubs that have many interest categories and interests.

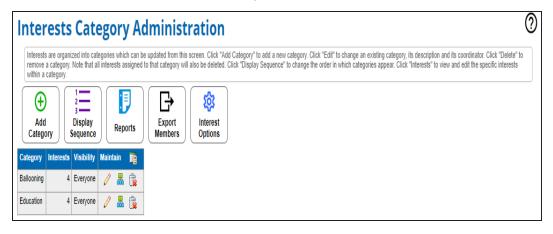
You can also configure the system to notify an Interest coordinator when a member joins or leaves an interest group, either voluntarily (Leave) or as a result of a system action (Expire/Drop).

Click **Save** to save these options and return to the Interests Category Administration screen, or **Cancel** to close this form without saving.

Interests Administration

Control Panel > People > Website Modules > Interests

To manage Interests within a category, click the Interests link. The following screen is displayed.



Maintain Options

The following options can be found in the Maintain column:

Interests

Icon	Description
(Edit)	Edit this interest. You will see the Add/Edit screen described below.
(Mem- bers)	View and update Members who have registered for this interest. See below.
(Email)	Send a simple text Email to everyone registered for this interest.
(Delete)	Delete this interest. You will be prompted to confirm this action then the interest and any member registrations for this interest will be deleted.

Maintain Options

Click the Add Interest button to add an Interest. You will see the following screen:

Enter the Interes Interests list.	t name, description and coordinator. Click "Save" or "Cance	el" to return to the manage
Name Description	Basket Maintenance	•
	0 of 1000 characters used 0 of 1000 characters used	
	Education 👻	
Channel	Create Channel	
Club Web Page	< None > 🗸	
Coordinator	Not Selected Select	
Share Image	× Remove Image	
	Select Image	
	Save	

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.

If your club or association has activated the mobile app, you will see a **Create Channel** option, allowing you to automatically create a mobile channel based around this interest group. Members who join the interest group will automatically be added to the channel.

Click the **Display Sequence** button to change the order in which the Interests are displayed within a category.

Interest Members

When you click the Members	s icon, you will	l see a screen sir	nilar to the following:
----------------------------	-------------------------	--------------------	-------------------------

Enter a full or partial last name in the text box above you may add a comma after the last name and enter the field, and then entering a full or partial first name	r all or part of a first name. You n	o select all members whose last names match your entry. To further i nay also search by first name alone by entering a comma as the first	restrict the lis character in
Search For	Search 🛷		
vailable Members	Sele	cted Members	
Abanti, Audrey (5)	▲ Car	ter, Colleen (10)	
Airheart, Amy (18 - Prospective)	Che	o, Jenny (2)	
Blackerer, Judy (11 - Trial)	→		
Bumgardner, Leslie (4)	4		
Carter, Carol (24)	••		
Cho, Larry (7)			
Diaz, Manny (3)			
lizabeth, Samantha (9)			
Richards, Ben (6)	-		

This screen shows the list of available members to add to the interest on the left, and the members with this interest on the right. Use the list of members on the left and arrows to select a member, or search for a member by last name. You can select multiple members at once by holding down the Control key. To remove a member from the interest, select the member from the column on the right and move the member to the column on the left using the left arrow.

Concept Information

Interests 88	38

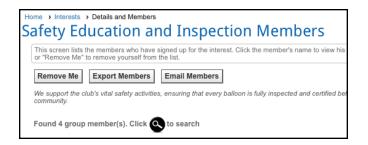
Reference Materials

Member Signup / Renewal	
Add Forum	
Emailings	
Your Website Functions	

Interest Coordinator Special Functions

Control Panel > People > Website Modules > Interests

When an interest coordinator or module coordinator or full administrator goes to the main Interest members **user** page, he or she will see two special functions:



Click the **Export Members** button to export the members of this interest group to a CSV file in your browser's Downloads folder.

Click the **Email Members** button to send a quick email to the members of this interest group.

Email Sa	fety Education and Inspection Members
	bject and message for the email that you want to send to the members of your group, and then press Send. Note ail will not reach members who have opted out of receiving emails.
Subject	Safety Education members - Quick Reminder
Message	
16px - E	: / 単 A・ ③・ 影 軸 😤 🤊・ 🦭 卓 譚 雲 🧕 🧏 Δ・ 語 田 亜 🌮
	Northwestern Balloon Chrb e not already done so, be sure to register for the Safety Seminar coming up in a couple lick <u>here</u> to register now!
🥜 Design	♦ HTML
DIV > DIV >	RemoveElement
	Send 🖌 Cancel 🗶

Enter the Subject and content of the message. A simplified version of the content editor is provided. Click **Send** to send your email immediately, or **Cancel** to close the dialog without sending an email.

The email should be sent to each interest member who has an email address and who has not opted out of receiving club emails. It will also be sent to the Interest coordinator, even if he is not a member of the interest.

Note that these emails are not saved and cannot be retrieved once sent.

Member Signup / Renewal

The Member Signup function is a wizard with between three and ten pages. There are five versions of this wizard, three (3) if the member is signing up or renewing, and two (2) if an administrator is adding or renewing a member on their behalf.

Select which membership pages should appear on your membership signup and renewal wizards for both members and ad cannot be bypassed. Also, some pages are not applicable to certain page and wizard combinations.	ministrators	Note: S	ome page	s are not	optional,
Enable First Login? First login allows you to configure a membership wizard for members who are logging in for their first time. After they credentials and updated their username and password, they will see the enabled wizard pages and will have to step					login.
	New Member Signup Wizard		Membership Renewal Wizard		First Login
	Member	Admin	Member	Admin	Member
1. Member Type	all a	1	A.	1	-
2. Privacy Agreement	4	1	-	-	1
3. Contact Information	1	1	1	1	
4. Additional Member Data Questions requesting Additional Member Data 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.					
 Member Attachments Attachments must be defined and active, for this page to appear. 			1	\$	
Member Interests The interests module must be enabled, with visibility set for any web site visitor, for this page to appear.			4	4	
7. Chapters/Additional Members The appearance of this page will be primarily controlled by the settings in the selected member type. The settings made here will apply only if the items on the page are made optional in the member type.	•	4	1	4	
8. Username/Password	1	-	-	-	-
 Additional Charges Additional charges must be set up in advance, for this page to appear. 		-	v	1	-
10. Joining Agreement A joining agreement must be created, for this page to appear.	•	-	•	-	
11. Summary	1	1	1	1	1

For Administrators

• For members logging in to the site for the first time. If enabled, this version requires new site users (whether they are a new member, an existing member, or a member up for renewal, and whether they are a primary member or a secondary member) to review and update their information. Completing this review will be required to use the website. Enabling this option will affect all members added to your database, regardless of whether or not you had the feature enabled before they were added (any members in the system prior to enabling the feature who have not logged in will be brought to the first login wizard). If the member is renewing their membership at the time of first login, the wizard the member sees will contain the pages you selected for both first login and

membership renewal 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. (There is no point in placing it on the members' menu; if someone can login, they are by definition already a member!) It can also be activated from the Benefits module.
- For admins adding a new member, accessed by clicking the **Add Member** button in the People Manager. This version handles memberships that arrive in the mail or that are submitted 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 renewing an existing member by clicking the **Renew** link beside a member's name in the People Manager.

Specific pages are controlled using the **Control Panel – People Tab – Admin Functions Panel – Membership Wizards Setup** screen.

Member Type

Note: Required for both new and renewing members

Home > New Member Sign Up	
Member Sign Up	Step 1 of 10 🕐
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 or 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 entered.	
Already a member? Click here to login and renew your membership.	
Membership Type Family Membership 🔻	
Family membership	
This membership type may include one or more secondary & tertiary members	
This membership type auto-renews and pays using a saved credit card.	
New Expiration Date 2/23/2020	
How did you hear about us?	Current Total \$ 464.00
Cancel X Next D	

Example: 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.

For new members signing themselves up, the Expiration Date field is calculated based on the duration of the chosen member type. For admins signing up a new member, the Expiration Date is calculated but it can also be modified.

If the membership type includes secondary or tertiary members, or if the membership type is set to automatically renew, the member will see a message below the selected type.

This screen may ask new members how they heard about your club or association.

Administrators: 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.

Business Memberships

New members signing themselves up may also have the ability to add themselves to an existing business membership with a unique code provided to the primary member contact for the membership.

If your organization has at lease one active business membership, you will see a screen similar to the following:

Member Si	gn Up	Step 1 of 6	?
Select the type of memb bottom of the page to co	ership 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 ntinue 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.	. Then click the "Next" button at the	•
Already a membe	r? <u>Click here</u> to login and renew your membership.		
Signup Type	I want to join the club as a new member I want to add myself to an existing business membership. This club allows members to sign up through their Company. Signing up through a Company requires approval by that Company's coordinator.		
Membership Type	< Select > V •		
New Expiration Date		Current Total US\$ 0	.00
	Cancel 🗶 Next 🕨		_

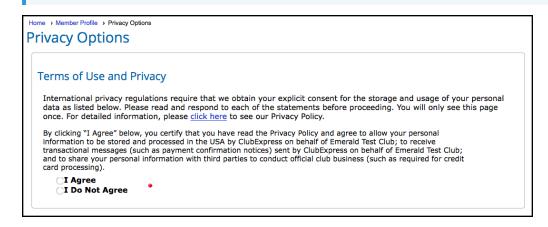
Selecting I want to add myself to an existing business membership opens a new field where you will enter the unique code provided to you by the primary member contact for your business.

Member Sign Up	Step 1 of 6	?
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 to 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.	ype. Then click the "Next" button at th	e
Already a member? <u>Click here</u> to login and renew your membership.		
Signup Type I want to join the club as a new memeber I want to add myself to an existing business membership.		
This club allows members to sign up through their Company. Signing up through a Company requires approval by that Company's coordinator.		
Enter Authorization Code provided by your coordinator:		
Cancel 🗙 Next 🕨		

Enter the code and proceed through the Membership Signup Wizard.

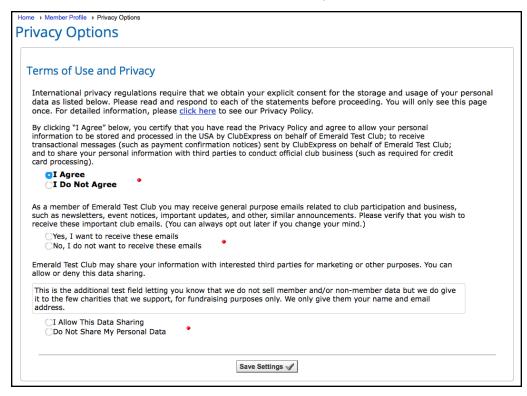
Privacy Agreement

Note: Required for new members, not shown for renewing members. It is optional for administrators signing up on behalf of a member, as the member will still need to agree to the statement.



In accordance with international privacy regulations, new members must certify that they have read the Privacy Policy and they must agree to have their personal data stored and processed in the USA; to receive transactional messages from the organization (such as payment confirmation notices); and to share their personal data with third parties for the official business of the organization, such as for credit card processing (see "Compliance" on page 38).

If they do not agree, they will not be permitted to continue the sign-up process. If they do agree, the screen will be updated to show at least one and possibly two additional questions:



Members also may receive general purpose emails from the organization, such as newsletters, event notices, etc. They have the option to receive or decline these important emails.

Some organizations may display a third question. This question deals with sharing member personal information with third parties for marketing or other purposes. Members have the option to be included in this data sharing.

This third question is defined on the Privacy Options page. On this page, organizations can also enter custom text to be shown as part of this question, perhaps explaining how and why personal data is shared for marketing or other purposes.

Basic Contact Information

Note: Required for new memberships, optional for renewals.

Member Signup / Renewal

Home Member Profile	New Member Sign Up
Member Sign	Up Step 2 of 9
possible. Required fie	collect the information needed for your membership. Please complete each page as accurately as Ids are marked with an asterisk. Please note that, in accordance with the Privacy Policy, your email old or distributed to anyone. When you have finished with this page, click the "Next" button.
\Lambda Already a memi	ber? <u>Click here</u> to login and renew your membership.
Salutation	Mr. Select
First Name	Martin 🔹
Middle Initial	
Last Name	Smith
Nickname	Marty
Spouse First Name	Barbara
Spouse Last Name	
Sponsor	
Address Line 4	E005 Newport Drive
	5005 Newport Drive
Address Line 2	
-	Rolling Meadows
State/Province	
Zip/Postal Code	
	847-255-0210 ● 224-558-6348
	847-255-0273
Email Address	info@clubexpress.com 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	www.clubexpress.com
Work Information	
Company	ABC Manufacturing
Occupation/Title	
Phone	
Toll Free Phone	866-457-2582
	✓ Back Cancel X Next ▶

A different version of this page, designed for organizations with company or business memberships, is also available and shown below.

Member Signup / Renewal

Home • New Member Si Member Sign	
The following pages c possible. Required fiel	ollect the information needed for your membership. Please complete each page as accurately as ds are marked with an asterisk. Please note that, in accordance with the Privacy Policy, your email Id or distributed to anyone. When you have finished with this page, click the "Next" button.
Already a memb	er? <u>Click here</u> to login and renew your membership.
Salutation	
First Name	
Middle Initial	
Last Name	Smith
Nickname	Marty
Spouse First Name	Barbara
Spouse Last Name	
Cell Phone	224-558-6348
Email Address	info@clubexpress.com @
	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	Harry Sutton
Company / Primar	y Address
Company	ClubExpress
Occupation/Title	СТО
Address Line 1	5005 Newport Drive
Address Line 2	Suite 203
City	Rolling Meadows
State/Province	Illinois 🗸
Zip/Postal Code	60008
Country	UNITED STATES V Show All Countries
Phone	847-255-0210
Toll Free Phone	866-457-2582
Fax	847-255-0273
Website	www.clubexpress.com
	✓ Back Cancel X Next ►

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.

Administrators: An option on the Control Panel – People tab – Setup panel – People Options screen allows you to select which version to use.

Additional Member Data

Administrators: Additional Member Data 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.

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?
23
✓ Back Cancel X Next ►

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 the **People tab**;
- 4. In the Setup panel, select Additional Member Data.

Member Attachments

Note: Displayed for new and renewing members if enabled.

Attachments that administrators define are displayed here. You can upload attach that placeholder. Click the view link to download a version of a previously uploads replace the version of the file. Documents may be required or optional. Versioning Depending on the settings made by the administrator, some options may or may	d file. Click the delete icon to remove the file. Clicking the edit icon wil may be enabled for some files, allowing you to upload or view multipl	I enable you to
Required attachment Optional attachment Uploadec	Add	
Copy of your current boat insurance endorsement. Dan_Insurance_Cert.pdf Addedt6/19/2019		
Boat photo Photo of your boat for reference purposes.	⊕ Add	

Some clubs or associations require members to upload files or images as part of their membership signup or renewal. These files may or may not require administrative approval.

Files or images can be required (indicated with a red icon) or optional (yellow icon).

Files can be in any standard document format such as PDF, Word, or Excel. Images can be in any standard image format such as JPEG, GIF, or PNG.

Read more about "Attachments" on page 1342 in your profile.

Member Interests

Administrators: The Interests module must be configured to be visible to "Any Website Visitor" in order for this page to appear in the wizard.

Home Member Profile New Member Sign Up
Member Sign Up
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
C 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
Uncheck All
◄ Back Cancel X Next ►

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 – People tab – Admin Functions– Membership Wizard Setup**.

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.)

Home Member Prof	ile 🔸	Chapters/A	dditional Members	0	
Chapters/Additional Members					
This page allows y enabled).	ou to a	dd family &	child members (if enabled) to your account, and/or to add chapters (if		
Name / Chapter Martin D Smith	Tool	S			
Family Members	Add				
John Smith	<u>Edit</u>	Remove			
Mary Smith	<u>Edit</u>	Remove			
Children	Add				
Bobbi Smith	<u>Edit</u>	Remove			
			Done 🖋		

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 People Options screen.

Add Associate 🕢 🕢 🤪	8
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.	
Relationship Child 🗧 🔶	
First Name Bobbi 🔷	
Last Name Smith .	
Gender 💽 Female i 🔾 Male 🔺	
Save 🖌 Cancel 🗶	_
	1.,

Add Family Member	8 (
Specify the name and contact information for this additional member attached your account. Click "Save" to save your changes and return to the list of additional members, or "Cancel" to return without saving.	d to
Relationship <select> +</select>	
Salutation Select	
First Name 🖉	
Last Name 🧳	
Address	
<u>Click here</u> to copy address and contact info from the primary member.	Y
City	
State/Province < Select > \$	
Zip/Postal Code	
Country UNITED STATES + Show All Countries	
Email	
Phone	
Cell Phone	
Company	
Title	
Birthday	
Gender 🔵 Female 🔵 Male 🔶	
Save 🖋 Cancel 🗶	

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.

Note: Chapters which are pending at the time of member signup or renewal will not be displayed.

Home Control Pane	el • Member Manad	<u>ger • Me</u>	mber Profile	Chapters//	Additional Members	0
Chapters/A	dditional Me	ember	s for Eri	c Abrar	ns	
This page allows y enabled).	vou to add family & c	hild membe	rs (if enabled)	to your acco	ount, and/or to add chapter	's (if
Name / Chapter	Tools					
Eric M Abrams						
Chicago	Remove					
Family Members	Add					
Callie Abrams	Edit	Remove				
Chicago	Remove					
Lisa Abrams	Edit Add Chapter	Remove				
		D	one 🖌			

Note: Chapters must be enabled for this page to appear with chapter options. The "Additional Members" selection depends on the member type.

Administrators: If secondary members are added, the confirmation email at the end of the process will include temporary usernames and passwords for each secondary member, to allow the primary member to communicate this information to these members. (By definition, tertiary members cannot login so they don't get usernames and passwords.)

User ID and Password

Note: Required for new members who will specify their own username and password. Not shown for renewing members and not shown for administrators signing up on behalf of a member (the system will generate a temporary username as password).

Member Signup / Renewal

Home New Member Sign Up	0
Member Sign Up	Step 6 of 9
Some areas of our web site are only available to n that you can access these features. The name you	nembers. Your username and password are used to log into the site so u choose must be unique within the club.
When you have finished with this screen, click the button to return to a previous step if you need to u	"Next" button at the bottom of the page. You can also click the "Back" pdate information already entered.
Create a user name and password to use The following name is being suggested as	on this site. s your user name; you may change it if you like.
User Name [msmith 🔹
Password	•••••
Re-enter Password	•••••
Passwords should be from 5 - 10 characters long a underscore character.	and may only include letters, numbers and the
Sack	Cancel 🗶 Next 🕨

This screen is always shown in the member version of the wizard for new members.

Administrators: This screen is 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.

Additional Charges

Note: Displayed if enabled and if any additional charges are defined.

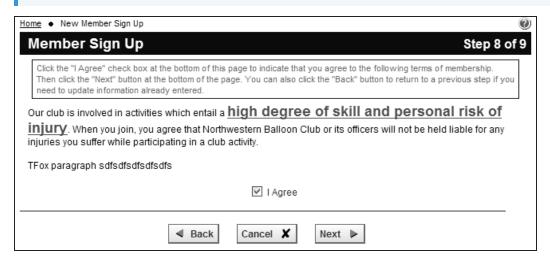
th	his screen allows you to sign up for additional charges and membership options. e default fee. Click the "Next" button to continue to the next step or the "Back" but to the next step or the step or the "Back" button to continue to the next step or the "Back" but to the next step or the ste			
Addi	itional Charge Item	Quantity	Price	Total Price
V	Annual Racing Fee	N/A	30.00	30.00
	Printed Newsletter 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.	N/A	10.00	
	Season Ticket Pass Season Ticket pass to all home games. Finals are not included.		25.00	
	T-Shirt		9.00	
	Team Pictures 1 8x10 team picture	N/A	12.00	
	Donation Are you willing to make an additional donation to help club activities?	N/A	\$	
	Club Key Fob A engraved key fob showing the club logo		11.00	
	test bill		50.00	
¥	Application Fee	N/A	25.00	25.00
	Bar Tab	N/A	0.00	
V	Building Restoration Fee	N/A	100.00	100.00
	Small Mooring Fee		540.00	
	Large Mooring Fee (Please use Quantity field to enter the length of your vessel)		54.00	
	mug coffee cup		5.00	
		Total Addit	ional Charges	\$ 155.00
			Current T	otal \$ 530.0

Administrators: This is an optional page. The actual page layout will vary based on the charges that you configure.

Joining Agreement

Note: Displayed for new and renewing members if enabled and defined. Not shown for administrators signing up on behalf of a member. If members are signing up or renewing using a printed form, they

are assumed to have "signed" an agreement already.



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.

Administrators: Follow these steps to define this text:

- 1. Login in as an Administrator;
- 2. Select Control Panel from the menu;
- 3. Select the Club tab
- 4. Select Joining Agreement from the Setup panel. A popup window will be displayed.
- 5. Enter the text from your paper sign-up form and click **Save**.

To define visibility, go to Control Panel – People tab – Setup 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.

Summary

Note: Will be displayed if the membership fee > 0, and if the "Board Approval" option is NOT enabled.

tome New Member Sign Up Member Sign Up Thank you for your interest in Northwestern and Proceed to Payment" button to process			,		f 9
You can also click "Back" to modify informa					
Personal Information					
Member Name Martin Smith					
Address 5005 Newport D Apt. 203	Irive				
•	s, IL 60008 (USA)				
Telephone 847-255-0210 224-558-6348 (0	cell)				
Email Address info@clubexpres	ss.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	Charg	e \$ 530.00		
◀ Back Can	cel 🗶 📝 Finish an	d Proce	ed to Paymer	nt	

Clicking the **Finish and Proceed to Payment** button adds the member to the database with a membership status of "Pending". A confirmation email is sent to the member confirming the new membership. The payment page is then displayed to complete payment (after which the membership status is changed to "Active" and a second email is sent to confirm payment.)

Note that if there is no charge for the membership, the **Finish and Proceed to Payment** button is replaced by a **Done** button. The member is added to the database with a membership status of "Active" and a confirmation email is sent.

Also note that if the Nominate / Approve option is enabled, 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.

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.

Pending Payment

Note: Will be displayed if the membership fee > 0, and if the "Board Approval" option is NOT enabled.

Home > Control Panel >	Maka Baumant				
	•				
маке Раут	ent for Sue Ande	rson			
dropdown list. Make a s nbsp;	utstanding payments due for the current me selection and follow the instructions. ent on any of the items, click 🖉 to change		select which payments to mak	ke. The available payment options are in the "Payment Method"	
🔽 Sign Up					
(12/1/2017 Ref # 3777)		Due 40	0.00 Pay 40.00 🥜	
Membership (Individ	lual Member - Active)	40.00			
			Transa	action Total: 40.00	
		Total Selecte	d For Payment	\$ 40.00	
		Total Gelecte		\$ 40.00	
	Have a coupo	Apply			
Payment Method	< Select Payment Method >	\$)		
Review the payments instructions provided.	due, and select the items you wish to	pay for now. Then, select	a payment type and follow	the	
Refund Policy					
	We do not provide refunds for membersh c. charges. Please carefully review the c				
The refund policy is set - they cannot be handle	by Northwestern Balloon Club. If refunds d by ClubExpress.	s are available, requests mu	st be directed to Northweste	ern Balloon Club	
	Print Invoice (Report)	Print This Page	Submit Payment 🖋	Cancel Payment 🗶	

The payment options are different depending on who is displaying this screen.

- If credit cards are enabled, members will see the option to pay online securely by credit card.
- Members may also see PayPal as an option if your club or association has enabled PayPal integration.
- Administrators see additional options to record a check or cash payment, record a "comp" or bad debt, and a payment processed separately from ClubExpress. Administrators will not see PayPal.
- 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.

Discount Coupons

If you have a discount coupon, it can also be applied on the Payments page. If there are published coupons that apply to the transaction(s) on the page, you will see a field to enter the coupon code:

Total Selected For Payment	\$ 50.00
Have a coupon? Enter the code: Apply	

Once the code has been entered, the screen changes as follows:

Total Selected For Payment	\$ 50.00
Any event Coupon Applied	\$ 5.00
Net Payment	\$ 45.00

Paying by Credit Card

When credit card is specified as the payment method, the screen is refreshed to show the following options:

Select Payment Method Credit Card Processed On This Web Site +
· ·
Do you want us to retain your credit card information on file? O Yes 💿 No
If you choose No, you will need to re-enter it for each transaction. Credit card information is fully encrypted when stored in our system.
Please note that for additonal security, the validation code is not stored - it must be entered each time you use your card.
There is no credit card on file. Please specify the information below.
Credit Card Type < Select Card Type > +
Card Number
Expiration < Select Month >
Name on Card First: Last:
For a business or organization name, just use the last name field
Validation Code How do I find this?
This is the address we have on file for you. If it is not the billing address for this credit card (where the monthly credit card statement is mailed), 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
The address which will be saved.
Address 5005 Newport Drive Suite 203
City Rolling Meadows
State/Province Illinois +
Zip/Postal Code 60008
Country UNITED STATES
Credit Card Note
This charge will appear on your credit card statement as CLB*NW Balloon Club
C Refund Policy
All payments are final. We do not provide refunds for membership signups and renewals, event registrations, donations, storefront purchases, or other misc. charges. Please carefully review the charge(s) checked above and be sure you know what
you are paying for.
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 Payment 🗶

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.)

For organizations with their own merchant account instead of the built-in one, the CVV code can be skipped.

When you have entered the card information (which is not saved in the system), the **Submit Payment** button is enabled. Click to submit the payment to your club's merchant processor. After a couple of seconds, a page will usually appear confirming that your payment was processed. Click the **Done** button to return to the starting page

If there was a problem processing your payment, an error message will be displayed and you'll be returned to the payment page to fix the problem.

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.

Paying using PayPal

Your club or association may also have enabled PayPal, allowing you to pay using funds accessible through your PayPal account. If you select this option, you will then see a PayPal popup window to login to your PayPal account. You can then pick the source of funds (a bank account, a credit card, or even a PayPal balance.) The funds then flow into your club's or association's PayPal account. Once the transaction is complete, you are returned to your ClubExpress website and to the payment summary page. PayPal will send you a separate receipt.

Paying by Check or Cash

If your club allows you to print an invoice and mail a check, click the **Print Invoice (PDF)** button at the bottom of the screen. It will display a PDF invoice in a new tab of your browser.

Admins will instead see a **Print Invoice (Report)** button at the bottom of the screen, which allows them to print an invoice formatted for a standard #9 or #10 double window envelope.

There is also a simpler **Print this Page** button to print the page in a default layout.

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.

Click the **Pay Later** button to close this screen and return to the previous screen without making a payment. Note that if there is an "Immediate Payment Required" transaction on the page (a special option available for event registrations), the Pay Later button will not be displayed. An immediate payment must be made in order to secure the event registration.

Receiving a Check or Cash Payment

When you receive a check in the mail or at an event, you can go to the Pending Payment page and select the appropriate payment method:

Payment Me	thod Received Check
Use this option	n only if the payment was made directly to the club by check.
Payment Dat	
Payment Note	35

Enter the check number, payment date (defaults to today) and any notes, and click the **Record Payment** button at the bottom of the screen.

When you receive cash in the mail or at an event, and you select the appropriate payment method, you will see a similar screen to the one above, except without the Check Number field.

Membership Directory

Member Directory Options	924
Advanced Topic – Creating Custom Directories	. 927

Administrators: 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 – People tab – Setup panel – People Options** screen.

ClubExpress provides an online member directory, allowing members to locate and contact other members. This function is usually placed on the members-only side of the website, so that confidential and personal information is only made available to organization members.

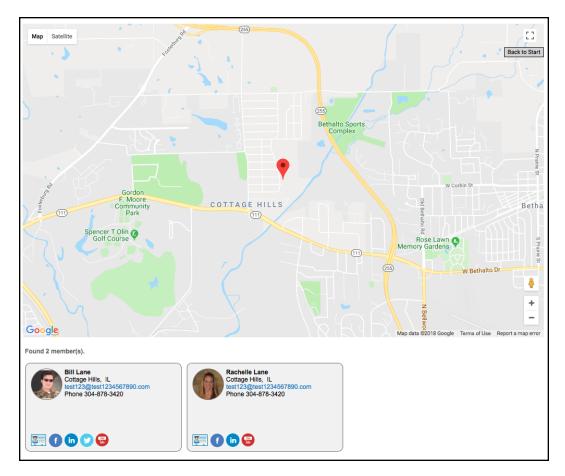
Selecting this choice from the menu displays a screen similar to the following:

	Member Dire				0
button. The system will member's photo or nam names from this list.) If	display matching members. If no to see the bio for that member	 search values are specified, (Some members have bio in nose cards appear on the screet) 	all members will be displayed. If ther formation that can be viewed by click en and that have valid address inforn	e are more one page of results, ng on their name or bio image. I	In text or select from any available lists and click the "Search" use the Paging controls to see additional pages. Click the Note that members can also chocose to completely remove their on the map. Users with certain visibility restrictions will be
Q ▲ Hide					
Search					7
Search Text					
	Search by member name (first na			Show All	
Interests	< Any >	✓ Count	ry <all></all>	Show All	
Chapter	All Members	▼ Sta	te <select a="" country=""> 🗸 🗸</select>		
Recent Membership	<any date="" join=""> 🖌</any>	С	ty		
		Addres	1		
		With	in <any distance=""> 🗸 of zip:</any>		
				Reset Search 🞸	
Search for member	s by entering criteria	above			

When you first come to the screen, the search panel will be displayed. Select a search field and enter a value, then click **Search.** If no search value is specified, all members will be shown. The results are sorted by the search field.

The results are shown below on a Google map and also as a series of "cards", including a photo, the member name, city and state, email address, and phone numbers. Along the bottom of each card are icons to save a vCard, jump to the website, and jump to various social networking services. The directory will respect a member's visibility setting, showing only that information that the member wants to display.

30 cards are shown at a time and the standard paging icons will be shown if there are more than 30 matching values. Use the arrows or drop-down list to navigate through the pages. The map will show the results displayed on the current page, not all members.



If your club or association does not support chapters, the "Organizational Tree" option will not be shown.

Administrators will see all members; non-administrators will only see members who agree to be shown in the directory; members can opt-out of the directory completely.

If you allow members to limit the information shown in the directory and a member has not set his or her visibility level, the system will use the default visibility configured in the membership directory options. Otherwise, the system will respect a member's preference.

Clicking the photo or member's name displays the Bio page, shown below. This option is only available if members have agreed to display more than the lowest level of information (name, city and state only.)

Member Bio	Star and	
		Contact Info Personal Info Additional Info Bio Photo Albums Interests Blogs Achievements Collectibles
Martin Smith Smith and Compa Chicago, IL		⊠ marty_smith42@gmail.com ᢏ 630-555-1212 ⊑ vCard ⑦
💼 💟 🗗 🖗 Contact Informa		/
Member Number	1	
Location	Chicago, IL	
Email Address	marty_smith42@gmail.com	
Phone	630-555-1212	
Mobile Phone	555-555-1212	
Vork Phone	333-555-2345	
Company	Smith and Company	
litle	President	
Address	123 Fourth Street Chicago, IL 60601 USA	
Alternate Address	1313 Mockingbird Lane New Orleans, LA 70112	

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.

Some clubs may also have custom versions of this module and screen, showing different fields and/or a different layout.

Member Directory Options

Control Panel > PeopleTab > Website Modules > Standard Member Directory

There are two ways to configure options for the Member Directory:

1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the options screen.

Administrators: Don't see the module in the People Tab? Enable the module.

2. Edit When viewing any page in the Member Directory, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Home Standard Member Directory Standard Member Directory Options	
Standard Member Directory Options	3
This page defines what search options will be displayed on the member directory search page, and whether or not the map will be shown with the results.	ih
Member Info Options	
Allow members to limit the information shown in the member directory (including opting out of the directory completely) Default visibility for new members Show name, city and state only; no work, bio or contact information	
Show member's birthday	
Show spouse's birthday	
Show member's wedding anniversary	
Show year for birthday and anniversary	
Chable Social Networking Links	
Map Display Option	
✓ Display Map	
Search Options	
Search by Interest Groups	
Search by Metro Area	
Search by Chapter	
Search by Country / State	
Search by Postal Code / Radius	
 Search by Recent Membership Show Secondaries in Results 	
 Show Secondaries in Results Show Tertiaries in Results 	
Save 🖌 Cancel 🗙	

Member Info Options

Can Members Limit 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.

Default Visibility - If the previous option is selected, then a new option appears to control the default visibility for new members. When new members add themselves to the database, or when a new member is added by an admin, you can control that member's initial visibility in the directory.

Note: If you change the default visibility settings to a higher level, it will **not** automatically show information for members who previously selected a lower visibility setting. The setting will only affect members who sign up after the change has been made.

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, and Twitter.) If you select the option, 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.

Note: The options shown in this drop-down list will be different based on whether members join through the personal lives or through their business / professional lives. This option is ignored for administrators; all member contact information is shown in the Membership Directory and in the People Manager.

Map Display Option

Check the box to display the Google Map. If this box is unchecked, only the "cards" will be shown.

Search Options

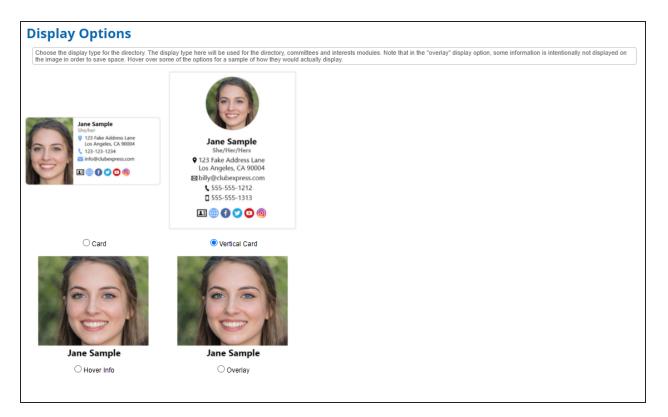
You can also enable or disable some of the fields in the Search panel.

Example: A local club might turn off searching by metro area or by state because everyone is in the same area!

The last two options control whether secondary and/or tertiary members should be included in the search results.

Click **Save** to save your changes and return to the main Directory screen, or **Cancel** to return without saving.

Display Options



Administrators have four (4) display options for member directory cards: Card, Vertical Card, Hover Info, Overlay. To view a preview of Hover Info (card expands to include text underneath the photo) or Overlay (a grey shadow overlaying the photo, with white text), hover over the image with each option.

Advanced Topic – Creating Custom Directories

The Standard Member Directory module can be called with a number of search options preloaded.

Example: You might want to highlight all members in a specific interest group or all members in a chapter or district.

When you create a link from a page to the Member Directory, you can reference the built-in function directly. But to use this feature, you need to create an "External Link", similar to the following:

https://democlub.clubexpress.com/content.aspx?page_id=78&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=78 references the Member Directory.

The following options are then specified as part of the URL link:

&int=<interest id> - use this option to pre-specify an interest group. Interest lds can be found in parentheses after each interest name on the admin screen.

&sub=<subgroup id> - use this option to pre-specify a subgroup (chapter, district or region.) Subgroup Ids can be found in parentheses after each subgroup on the Organization Data admin screen.

The angle brackets are not specified. In place of these, use the relevant ID values.

Example: The following link opens the Standard Member Directory showing all members in Support Equipment interest group: ...content.aspx?page_id=78&club_id=245449&int=17897

Example: The following link shows all members in the Illinois chapter: ...content.aspx?page_id=78&club_id=245449&sub=7347566

News / Articles

Searching and Sharing	
Searching News Articles	
Share News Articles	
News and Article Administration	
News Widget	
Manage News and Articles	

The News / Articles function is used for two purposes: To communicate *announcements* and other information 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. To serve as a *library* or repository of articles that can then be placed on the website or in new emails sent to members and non-members.

Searching and Sharing

Searching News Articles

A typical news screen is shown below:

News / Articles Search News / Articles \wp		(
News		
Club Elections Published On 9/18/2020 It's that time of year again, time to look at the candidates and cast your ballot Read More > Announcements	New Safety Rules Published On 9/15/2020 The NWBC has ratified new rules to increase safe behavior for pilots, crew and passengers. Read More	New Balloon Pilot Program Announced Published On 7/18/2020 For immediate release: The NorthWest Balloon Club will be hosting a series of balloon safety workshops at this year's Fly-In event. Read More >
Balloon Repair Workshop Rescheduled Published On 9/16/2020 Keep an eye out for an upcoming balloon repair workshop. Read More >	Help us update the club by-laws Published On 9/11/2020 It is time for a new set of bylaws and we are looking for a subcommittee to help. Please contact the ByLaws Rewrite committee with your intent and experience Read More >	

Items are organized by category. Each item within a category is shown with a heading, the published date, and a summary. Clicking the **Read Article** icon displays the complete news item.

There is also a Search function. Click the heading and search icon to see the following screen:

	es Search itle, article content, or tag	s. You must enter either se	archable text or tags, or both to p	perform the search. Articles are returned by the search. Click the view icon i
-Search Criteria				
Search Text Sear	ches article title, descripti	on, and author		
Category <	II Categories > \$			
Article Tag(s)	alloons X		\bigcirc	
			Search	
	article(s) fou	nd)		
Search Results (1	es for 2018 Ann	Martin Smith	Published Date: 8/12/2017	

Enter text, a category, and/or one or more tags. Search text will be found anywhere in the article title, description, and author fields. Click the **Search** button to display a list of matching results. Click the **View** (eye) icon to jump to that specific news item or article.

Click Return to Previous Page to return to the main News screen.

Share News Articles

Click the **Share this News Item** icon to share a new or updated news item on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:

to. Your Cust to recent priv	ists supported Social Networks. Click com Page can be shared to the selec racy changes, you must manually ent se make sure that Popups are ena	ted network by c ter the share det	completing the following dialogs. Due ails for each network in following
Which Ne	twork(s)		
f	Share to Facebook	Y	Share on Twitter
Links To:	Custom Page: 00 - Demo Cu	stom Calenda	r

Select the social network on which to post. You will see a new popup that allows you to connect to the social network, enter some text describing your post and, in some cases, specify where the post should be made.

Example: On Facebook, you can post to a group, your personal timeline, the timeline for another page you manage, and some other options.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

News and Article Administration

Control Panel > Communications > Website Modules > News/Articles

There are two ways to manage News / Articles:

1. Administrators and Function Coordinators can select the module in the Control Panel (Communications tab) to access the admin side of the function.

Administrators: Don't see the module in the Communications Tab? Enable the module.

2. Edit When viewing any page in the News/Articles function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

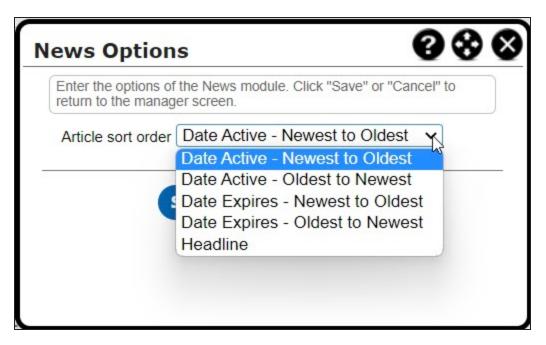
Home Control Pa News M				
Q Hide Search		Add Article	Options	Manage Categories
<u>Search For A</u> Headline Author	Articles			
Category Tags	All Categories	v		0
Status (Active Date F	O Active O Futu	ure O Expired		
	By Headline		ete O By Exp	iration Date Search 🞸

This screen begins with a search panel that allows admins to find news items or articles. You can search by Headline, Author, Category, Tags, a Date Created range, and/or Status. Click the **Search** button to initiate a search.

Up to 30 entries are shown on each page, with the standard paging controls at the top and bottom. Each entry displays the headline, author, category, status visibility, and date created.

Select **Add Article** to add a new news article to your website. Learn how to "Manage News and Articles" on page 936.

Select **Options** to determine the sort order of news articles displayed on your website. Articles are displayed first by category sequence, then within the category by the sort order selected.



Select Manage Categories to add and manage News Article categories. These categories can be used

- 1. As search filters by your website visitors,
- 2. By administrators filtering their searches on the News Articles Administration screen,
- 3. To control the display sequence of news articles (articles are displayed in category order, then based on the sort order selected in Options)
- 4. To control which articles are shown in the Newsfeed widget (choose all categories, or specific categories)

Maintain Options

The following options can be found in the Maintain column:

lcon	Description						
🥟 (Edit)	Edit the content this news item. You will see the advanced content editor.						
(Con- figure)	Configure this news item. You will see the dialog described below.						
👼 (Delete)	Delete this news item. You will be prompted to confirm this action.						

Icon	Description					
(View)	View this news item.					
Share)	Share this News Article on your club's social networks, including Facebook and Twit- ter. This option will only appear if the News Item / Article is active.					

Maintain Options

Click the **Manage Categories** button to specify categories into which items are organized. You will see a standard ClubExpress view screen with options to add and edit categories, and to delete a category if it's not being used. If your organization has subgroups, where each subgroup has its own website, you'll see the option to share articles in the category with lower-level subgroups. Select the checkbox to share articles in that category.

The Maintain column also includes a Sequence icon, allowing you to reorder the news items with a category.

Categories can be used to organize the different kinds of news items or articles, such as regular notes from the club president, items from nearby clubs or others in the same "industry", member updates, formal press releases etc.

There is a system-level "News" category that cannot be deleted. But if it's empty, it will not be shown in the user screen.

News Widget

News items are available from the **Insert Widget** option in the editor. Select **Insert News / Articles Item** to find a news item and paste it into the current editor session.

A common use for this function will be to create a blast email for sending to a distribution list. Many clubs and associations send a regular email to members, updating them about recent developments in the club. This email can be constructed from a series of news items.

You can also use this function to have officers and members "feed" content into the home page or an event report or a separate club news page. These members can be given coordinator rights over the News / Articles function so that they can add and edit articles, without also needing coordinator or admin rights over the home page or other places where this contact may be used.

Another editor widget allows you to display a live view of recent News / Articles posts on a custom page or the home page of your website. You can tell the widget how many days back to look and which categories to include (all or selected ones.)

Manage News and Articles

Control Panel > Communications > Website Modules > News/Articles

When you click the **Add Item / Article** button to create a new item, or the **Edit** link to modify an existing item, the following screen is displayed:

Editing AS	K-21 Arriv	es				ଡ ଓ ଓ	
automatically b		mmary	should be a	a short synopsis of		ayed, and the Expiration date controls when it will which will be displayed on the main News web	
Category	Announcemen	ts 🔻					
Active Date	6/6/2018		Expires				
Headline	e ASK-21 Arrives 😻 🔸						
Author	Martin Smith						
Summary	Py BSA's new ASK-21 arrived at the field today. FAA paperwork and inspections are being completed and transition training will begin to allow members to use our beautiful new ship.						
	181 of 1000 characte	ers used					
Tags						\bigcirc	
Visibility	⊘ To Everyone	ОТ	o Member	rs Only 🔿 Hid	den		
Options	Show on Ma	in Ne	ws Page?				
	Show Active	Date	on News S	Story?			
	□ Show Autho	r on N	lews Story	?			
Share Image 🕢	Browse						
			Sa	ave 🖌 Ca	ncel 🗙]	

For each item, specify the following items of information:

- Category, selected from the drop-down list;
- Active Date. This feature allows you to pre-load an announcement before releasing it. Defaults to today's date.
- Expiration Date. After this date, the item will no longer be shown.
- Should this item be shown on the main News page? Many articles are not intended as press releases or announcements; instead, they are intended for use in emails or on the home page.
- Should the "Active Date" be shown on the News story. Check this box for a formal press release.
- Headline, Author name (who may not be the current admin) and Summary text (limited to 1000 chars.) Author defaults to the current user but can be changed to any name.
- Share Image allows you to upload an image that will be used if you share this news item on social networks such as Facebook.
- One or more tags. The tag field allows you to enter multiple words or phrases. Press [Enter] to add each word or phrase as a tag. If it matches one or more master tags, you will see a drop-down list to

select that tag. You can also click the drop-down arrow to see a list of master tags, and the "x" on each tag to remove it.

Note: You may add a maximum of five (5) tags to any single news article.

• Visibility. Should this news item be visible to everyone or just members, or hidden completely.

Click Save or Cancel to close the window.

Once the article or news item has been created, click the **Edit** icon to edit the item's content. You will see the advanced content editor.

Photo Albums

Photo Album Index	939
Photo Album Administration	942

ClubExpress supports custom photo albums 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.

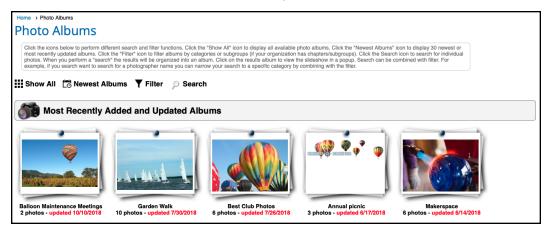
Note: You may add a maximum of five (5) tags to any single photo album.

Photo albums are organized into categories that can be anything you want, as general as "Events" or as specific as "Summer Picnic 2012". Individual photo albums can be placed on the menu.

Photo Album Index

ClubExpress includes a Photo Album Index function that collects all defined photo albums onto a single screen. This function can easily be placed on the menu as a single entry point into your organization's photos.

Clicking the Photo Album Index link displays a screen similar to the following:



The initial view shows the 30 newest and most recently added or updated photo albums. For each album, the system will display the album title, number of photos, and when the album was last updated.

Click the photo to display the album. You will see a popup window similar to the following:



The photo album title is displayed at the top left, with the photographer's name top right.

The photo itself is displayed in the middle, with navigation arrows on the left and right. Thumbnails of each photo in the album are displayed along the bottom. Click the navigation arrows to move to the previous or next photo, or a thumbnail to select a specific photo. If there are more photos in the album than can be displayed across the width, the thumbnail section will have its own navigation arrows.

Photo Album Options

The tab in the top right corner shows the current photo and total number of photos, then four icons:

- Download hi-res (if enabled)
- Full-screen view
- Play/Pause slideshow mode
- Share via social networking

To close the album, click the **X** icon in the top right corner.

When you hover over the **Share** icon, the following popup is displayed:



These options allow you to share a photo to your Facebook or Twitter feeds or via other services.

Top Panel Options

🔛 Show All [🔂 Newest Albums 🍸 Filter 🔎 Search

Click Show All to show all photo album categories and the albums within each category.

Click **Newest Albums** to see the albums added or updated in the past 30 days.

Click **Filter** to display the following filter panel, which allows you to show only albums within a specific category and/or a specific subgroup (chapter, etc.)

Filter					
Category	All Categories	By Subgroup	Select a subgroup	•	Filter 🔗

Click **Filter** again to hide the filter panel.

Click **Search** to display the following search panel, which allows you to search for photos that match a specific criterion.

Search	
Search By < Select > 🗘 🍳	
Containing	Search 🔗

You can search by the following options:

- Image title (anywhere in field)
- Album title (anywhere in field)
- Photographer name (anywhere in field)
- Photo tag (exact match, including the option to select from the tag list)
- Member name (anywhere in the first name or last name)

When you click the **Search** button, the system creates a temporary album containing all photos that match your search criteria.

Photo Album Administration

Control Panel > Website Tab> Website Modules > Photo Albums

There are two ways to manage photo albums:

1. Administrators and Function Coordinators can select the module in the Control Panel – Website tab to access the admin side of the function.

Administrators: Don't see the module in the Website Tab? Enable the module.

2. When viewing the Photo Album Index screen, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

In both cases, the Photo Album Manager is displayed.

Photos are uploaded using the Photo Manager (see below) and organized using their tags (see "Photos" on page 321). When you want to display these photos, use Photo Albums. Photo albums can be created at both the club and member levels (see "Photo Albums" on page 1355).

When you select **Control Panel – Photo Albums**, you will see a screen similar to the following:

		Photo Album Manager m Manager			
club-level album.	Select		options app	lying to a	d a photo album based on its name, category and/or whethe all photo albums. Select 'Photo Album Categories' to manage
		Search			Photo Album Options
Album Name					Photo Album Categories
Category	Balloon	ing 🛟			Add Photo Album
Subgroup				•	
	Includ	e Member Photo Albums			Search 🔣
	S	earch Results (4 p	hoto alb	oum(s)) found)
Title	Туре	Level	Category	Status	Maintain 💼
Balloons in Flight	Club	Club	Ballooning	Visible	🥟 💌 🦑 📄 🕄 🙀
Best Club Photos	Club	Club	Ballooning	Visible	🧷 💿 👆 🥕 🗎 🕄 🙀
Launching	Club	Club	Ballooning	Visible	🧷 👁 👆 🥕 🗎 🔇 🔂
NWBC Fly-In	Club	Club	Ballooning	Visible	🧪 💌 👆 🥕 🗎 🔇 🙀
					Page 1 of 1 💠
					Return to Previous Page

The search panel allows you to limit the list of photo albums by page name (title) and/or category. You can optionally include member photo albums. Click the **Search** button to display a list of matching albums. 30 photo albums are shown at a time; use the standard paging controls to move through each screen of photo albums.

Note that the practical size limit for each photo album is 300 photos. If you have more photos you want to display, spread them across multiple albums.

Subgroups: If your club or association has subgroups, you can also filter by them. Administrators and module coordinators can view any photo album, including filtering by any subgroup. Subgroup administrators will only see photo albums belonging to the subgroup(s) they administer.

The following options are available in the right-side buttons:

Photo Album Options

Click this button to display the following dialog:

Photo Albums

Sector 1			
Alternia	 21	10.10 10110	
hoosia			
125.37		e-	

The following options can be set:

- Allow member photo albums controls whether members can create their own photo albums and upload photos into them. If this option is set to Yes, members will see a **Photo Albums** option in their Profile screen.
- Include the member's name in the photo album title set this option to No if you want to allow members to create photo albums but without their name in the title, perhaps for confidentiality or privacy reasons.
- **Display member photo albums on the photo album list** controls whether member photo albums are included in the Photo Album List module and, if so, whether they are placed at the top or the bottom.
- 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 photo album 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 Album Manager, or **Cancel** to return without saving.

This button does not appear for Subgroup Administrators.

Photo Album Categories

Click this button to maintain the list of photo album categories. You will see a screen similar to the following:

Home Control	Panel	Photo	Album Manag	er	0	
Photo Alb	Photo Album Categories					
	Photo albums 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. Click "Display Sequence" to change the order in which categories are displayed. Click "Delete" to remove a category.					
Add Category	Disp	olay Sec	luence			
Category	Pages	Status	Maintain			
Ballooning	3	Visible	Ø			
Cruises	1	Visible	Ø			
Social Events	1	Visible	Ø			
Test Category	0	Visible	N 🙀			
				Return to Previous Page	_	

Click **Add Category** to add a new category. You will see a standard popup dialog. A **Visible** checkbox allows you to turn individual categories on or off.

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 pencil (Edit) icon to modify an existing category.

Ê.

If the trash can (Delete) icon is displayed, the category has not been assigned to any photo albums, and it can be deleted.

Click Return to Previous Page to go back to the main list of pages.

This button does not appear for Subgroup Administrators.

Add Photo Album

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

noto Album	Configuration	@ & &
Edit the properties o	f your photo album.	
Album Name	Burner Maintenance Class	
Menu Text	Burner Maintenance	
Category	Misc •	
Availability	Any Web Site Visitor •	
Visible	>	
Quick Link Name		
Description		
	0 of 200 characters used	

Specify the album name and text that can be used if the album is placed on the menu (which is often shorter.) You can also specify whether the album will be available to all website visitors or whether it should only be visible to members.

The album 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 album visible.

You can also enter a short description.

Subgroups: If you belong to any subgroups, you have the option of linking this album and any photos added to it to one of those subgroups. If you do, only photos that are linked to the same subgroup can be added. If you don't, the album will be linked to your membership only, and any photos can be added.

Click Save or Cancel to return to the Photo Album Manager screen.

Maintaining Photo Albums

The following options are available in the Maintain column:

Icon	Description
(Edit)	Click the Edit Content icon to manage the photos placed on the album, as well as a detailed description of the album.
(View)	Click the View icon to display the photo album, even if it's not on the menu.
(Coordin- ators)	Click the Manage Coordinators icon to add one or more coordinators who have administrative rights over this album. You will see the screen for built-in functions. This option is not available for subgroup administrators.
Configure)	Click the EditConfiguration icon to display dialog allowing you to change name, menu text, category and visibility.
Long (Long Desc.)	Click the Long Description icon to display a text editing tool, allowing you to create a more detailed description of the album. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.
(Share)	Share this new or updated photo album on your club's social networks, including Facebook and Twitter. (See below.) This icon will only appear if the photo album page is active. It does not need to be visible to everyone; it's only members can access it, clicking the social networking link will first require members to login. This option is not available for subgroup administrators.
(Delete)	Click the Delete icon to drop the album. You will be asked to confirm this action, which cannot be reversed; the album is completely deleted. Note however that any photos placed on the album are not deleted; they are still stored in your website and can be placed on other albums or pages. Maintain Options

Maintain Uptions

Share this Photo Album

Click the **Share this Photo Album** icon to share a new or updated album on your club's Facebook page or Twitter feed. You will see a dialog similar to the following:

This screen I to. Your Cust to recent priv	tom Page can be shared to the select vacy changes, you must manually en	cted network b nter the share	working button to post the Custom Page by completing the following dialogs. Due details for each network in following browser or enable them for this site.
Which Ne	twork(s)		
f	Share to Facebook	y	Share on Twitter
Links To:	Custom Page: 00 - Demo Cu	istom Calen	dar
		Done	

Select the social network on which to post. You will see a new popup that allows you to connect to the social network, enter some text describing your post and, in some cases, specify where the post should be made.

Example: On Facebook, you can post to a group, your personal timeline, the timeline for another page you manage, and some other options.

Note: When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

Storefront

Purchase Products	
Download Digital Products	
Product Manager	
Configuring the Storefront	
If you selected Flat Rate	
If you selected Advanced	
Manage Products	
Pricing	
Quantity	
Manage Digital Products	
Storefront Maintain Options	
Edit	
Description	
Photos	
Physical Product – Inventory	
Manage Download Bank	
Download Bank Manager	
Manage Orders	

The ClubExpress Storefront is a powerful E-Commerce module which allows you to purchase club and association merchandise through the website. You can sell physical products, such as a club t-shirt, cookbook or keychain, or digital products like an eBook, stored in your Document Library.

Each product has its own specifications, description, photos and inventory tracking. Physical products can have variations, like size, weight and color. Digital products are stored in and downloaded from your builtin Document Library. Each of your Storefront products are categorized, and website visitors can search through your catalog by category, product title and description.

Pricing is configured for each product, with the option to set separate prices for members and nonmembers, and even set a sale or discount price. Storefront users can purchase and pay for their products on your website using the same payment tools they'd use to pay for an event or make a donation. Storefront visitors can also purchase items as a gift.

Administrators and Storefront coordinators can manage orders, including fulfillment and shipping, partial fulfillment and backorders. You can also configure your own shipping prices and methods.

The module includes the following features:

Important Note - "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.

Orders created while you are in test mode will be deleted when you move into live mode, so that you start with a clean slate.

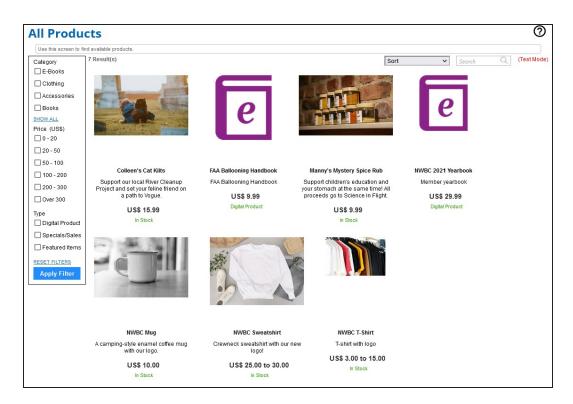
Purchase Products

When users open the storefront, they will usually see a screen similar to the following display:

9

-

40



If the club has more than one category of products, you'll see a list of categories on the left side of the screen. You can use these categories to filter your product result list. You can also filter your search by price and product type (for example, sale items). Use the Sort drop-down on the right side of the screen to sort your result list by name or price. You can also use the search bar to search through products by title and description.

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 product to display more information, including product variations (for example, clothing in different sizes and/or colors.) A screen similar to the following will be displayed:

Product Details NWBC Sweatshirt Crewneck sweatshirt with or Small - Black - USS 20.00 Add-on? @ Yes please	r new logo!	(Test Mode) Check	② put
	Total Cost: US\$ 34.99		
	Return to Previous Page		
Product Details			0
NWBC Mug In Stock US\$ 10.00		(Test Mode)	cout
A camping-style enamel cof	ee mug with our logo. Total Cost: US\$ 10.00 Add To Cart		
50	Copyright 2004-2023- Gembroo	ok Systems, LLC – All	Rights Reserved

Storefront

This screen displays a larger version of the main product photo. Products can have multiple photos that are shown below the main one. Clicking one of the smaller photos displays it in the larger panel.

The product title and a full description are shown on the right. If the product has variations, these are shown in a drop-down list below the description. Variations can be by color, size or other property. Once you've selected your product, click the **Add to Cart** button to add this product to your shopping cart

or **Cancel** to close the dialog without adding the product.

Some products may have the option of add-ons, like a monogram.

Example: Your club might offer a sweatshirt with optional embroidery for an extra fee. If this is the case, the dialog will have additional options:

Product Details		0
	NWBC Sweatshirt Crewneck sweatshirt with our new logo! Small - Black - USS 30.0 • Add-on? • Yes please O No thanks Please enter your monogram as you'd like it on your sweatshirt. Additional USS 4.99 per item • 1 • Total Cost: US\$ 34.99 Add To Cart	(Test Mode)
	Return to Previous Page	

Add-ons can be optional or required. A question will be asked and the system will provide a field for the answer. In the above example, customers have the ability to have up to 3 letters embroidered on each item.

Proceed to Checkout appears when you have added at least one product to your shopping cart.

For **digital content** that is downloaded rather than shipped, the Quantity controls are grayed out; you cannot buy multiple copies of a digital product.

Click the **Storefront Policy** button to display a popup screen showing your club's storefront policies. Click the **Close** button to close this dialog.

Viewing the Shopping Cart

-

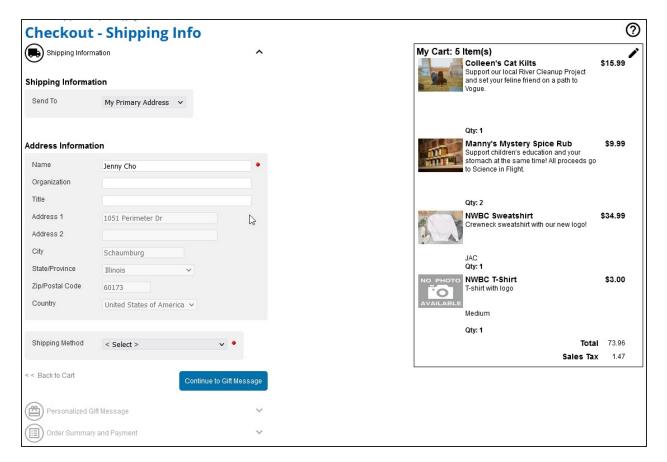
Г

When your shopping cart has products ready to be ordered, you will see a shopping cart icon in three places:

- Within the module on the right side;
- · Beside your name, usually in the top right corner;
- On the personal drop-down menu when you hover over your name.

Item		Price	Weight - This is for teeling and media to be nerrowed before final build	Quantity	Ext. Price
	Colleen's Cat Kilts Support our local River Cleanup Project and set your feline friend on a path to Vogue. Size: Unknown Color: Unknown	15.99	0.1701	1	15.99 Kemove
	Manny's Mystery Spice Rub Support children's education and your stomach at the same time! All proceeds go to Science in Flight. in Stock	9.99	0.4536	2	19.98 🔀
50	NWBC Sweatshirt Crewneck sweatshirt with our new logo! Size: Unknown Color: Unknown JAC	34.99	0.2835	1	34.99 🗙
NO PHOTO	NWBC T-Shirt T-shirt with logo Size: Medium Color: Unknown	3.00	0.1701	1	3.00
			Total: 1.0773	Total:	US\$ 73.96

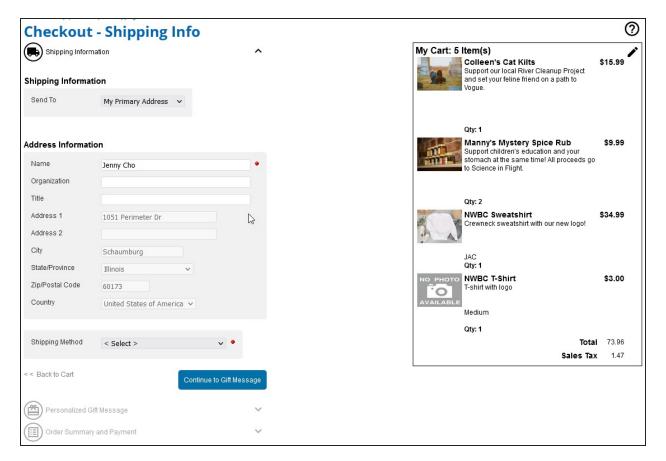
The products in your cart will be displayed in horizontal panels. To edit the quantity of a product, enter a number in the quantity field, then select the Update icon which appears. To remove a product from your cart, select the Remove icon. To checkout, select the Checkout button at the top of the screen. Click **Continue Shopping** to return to the storefront to add more products to your cart. Click **Clear Cart** to empty the cart completely; you will be prompted to confirm this operation. Click **Checkout** to begin the checkout process.



Products are listed on the right, with checkout steps on the left. To edit your shopping cart, select the edit icon above the products.

Checking Out as a Member

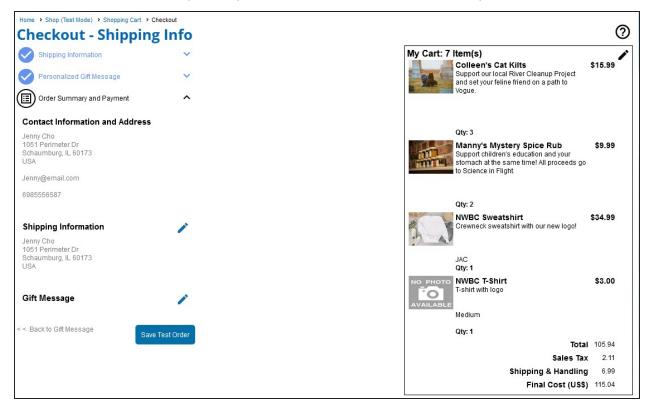
When members begin to check out, the system already knows who they are, since they logged in to receive member pricing.



First, specify a shipping method and destination. The system allows members to select their primary address, their alt-address if one is defined, and a completely different address. Select the desired shipping method from the list of options in the drop-down menu. You'll see your total update automatically under the list of products. Select Continue to Gift Message.

Home > Shop (Test Mode) > Shopping Cart > Checkout			0
Checkout - Shipping Info			0
Shipping Information	~	My Cart: 7 Item(s)	ľ
Personalized Gift Message	^	Colleen's Cat Kilts Support our local River Cleanup Project and set your feline friend on a path to Vogue.	\$15.99
Gift Information			
Is this a gift? O Yes O No		Qty: 3	
< < Back to Shipping Continue to Order Summ	ary	Manny's Mystery Spice Rub Support children's education and your stomach at the same time! All proceeds go to Science in Flight.	\$9.99
Order Summary and Payment	✓	Qty: 2	
			\$34.99
		JAC Qty: 1	
		NO PHOTO T-shirt With logo	\$3.00
		Medium	
		Qty: 1	
		Totai Sales Tax	105.94 2.11
		Shipping & Handling	6.99
		Final Cost (US\$)	115.04

If the order is a gift, select Yes, then enter a special gift message. If the order is not a gift, select No and Continue to Order Summary. Finally, review the order and continue to payment.



Clicking **Continue to Payment** creates the order and takes the member to the standard pending payment screen to complete payment. An order confirmation email will be sent but the order is not complete and ready to be filled until payment is recorded.

Checking Out as a Non-Member

When non-members (or members who have not yet logged in) create a shopping cart and then check out, they will see a four-step process, with the first screen being different:

Iome > Storefront > Shopp	ing Cart > Checkout				
Checkout					
Customer Information	Shipping Informatio	g on	Personalized Gift Message	Order Summary and Payment	
Please enter your contact shipping, or ship to differe		Continue with Check	out" button. On the next	page, you will be able to use this a	address for
Club Member? Log	<u>in to check out w</u>	vith member	<u>pricing</u>		
lave you previously pla	ced an order or are v	ou on our mailing	g list? Click here	to search	
In addition to your name,	please enter your address, j	phone number and er	mail address. This will al	low us to contact you if necessary.	
Contact Informatio					
	""				
First Name	•				
Middle Initial					
Last Name	•				
Address 1		۹			
Address 2					
City		٠			
State/Province	< Select >				
Zip/Postal Code	•				
Country	UNITED STATES	Show All Cou	untries		
Phone	•				
Email Address					
Organization					
Title					
	Ca	ncel Checkout 🕽	Next 🕨		

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 non-member who might have previously placed an order or registered for an event or made a donation, so that you're in the club's non-member database, you can find yourself using the search function. The following panel will appear:

Storefront

E	Enter the foll	owing
E	Email Address	
L	ast Name.	Search 🔧

Enter your email address and last name and the system will attempt to locate you in the non-member database. If found, your contact information will be filled in.

New customers will fill in the required contact information and click Nextand continue through the wizard.

Payment Screen

When you click **Continue to Payment**, you will see the standard ClubExpress Payment screen, similar to the following:

ome > Make Payment							
Make Payment for Ma	artin Smith ((101	5)				
The list below shows outstanding p "Select Payment Method" dropdow Please allow a minute or so for you	n list. If you elect to p	ay by c					
If you prefer to pay by check, select the page will be displayed which in						same name. A prin	table version of
Fields marked require an entry.							
Purchase Product (2/4/20	15 Ref # 2847)		Due \$ 46.60	Pay \$	46.60		
Club T-shirt (Small, Blue) (2	3 12.50)	25.00					
How to Build & Fly Hydrogen	& Hot Air Balloons	10.00					
Sales Tax		2.10					
Shipping/Handling		9.50					
	Transaction Total:	46.60					
elect Payment Method	<pre></pre>			`	\$ 46.60 •		
Review the payments due, and sele provided.	ct the items you wish	to pay i	for now. Then, se	lect a paym	nent type and foll	ow the instructions	
Refund Policy							
All payments are final. We do donations, storefront purchas above and be sure you know	ses, or other misc	c. char	rges. Please				
The refund policy is set by N Northwestern Balloon Club -					lable, reques	ts must be dired	cted to
	Submit Pa	ymen	nt 🖋 🛛 Ca	ncel Pay	ment 🗙		

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.

Download Digital Products

If you have ordered digital content, the confirmation email you receive will include a link to your **Download Bank** (see "Download Bank" on page 1363). 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:

Ho	Home Member Profile Download Bank									
Download Bank										
	The following documents the Download link to the	s are available in the dov right of the document's ownload programs to vie	name to download the d w files in various standa	double arrows to the left of the document's name to view its details. Click document. The 'File Readers and Utilities' section at the bottom of the ard formats. These links will display the vendor's web site in a new						
*	Name	Status	Links							
*	Club Bylaws	Available	Download	Edit						
	Description	The rules by which organized, includir procedures.								
	Format	Acrobat (PDF)								
	File Size	22								
	Downloads	0								
	Clear Click this button to clear all documents which can no longer be downloaded									
*	Click to view File Readers and Utilities for download Return to Previous Page									

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.

Product Manager

Control Panel > Money/Website Tab> Website Modules > Storefront

There are two ways to manage Storefront Products and Orders:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Money tab) to access the admin side of the function.
- 2. Edit When viewing any page in the Storefront function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

Administrators: Looking for something? Tax Rates are no longer added within the Storefront module. Instead, you'll configure your tax rates in Control Panel > Money > Setup > Tax Rates. You can select a tax rate from the rates you've configured for each product, or select a default rate to use for all products in Storefront Options.

The Storefront function has two main admin screens, one for Products and the other for Orders. You can specify which should initially be displayed on the Storefront Options page.

Produ	ct Man	age	r							(3
Specify filter	r parameters and o	click the "S	Search" b	utton to disp	ilay ma'	tching	g produ	ucts, (or sele	t an administrative option from the buttons on the right.
Q A Hide Search	Orders		i gure	Repo		Ad				dd Digital Product
	riteria									
Cate	egory < All Ca	tegories	> ¥							
	Title									
	Show Show			ts Only becials On	ly					
Product S	Status < All Sta	tuses >		~						
Which Pro	ducts ⊘ Physic ○ Physic		ital							
	() Digital	Only		Search	4					
Search F	Results				_					
SKU Title		Туре	Status	Featured	Maint	ain			ħ	
FAA Ball	ooning Handbook	Digital	Active	No	Ø		Ø	ľ	•	
NWBC N	Aug	Physical	Active	No	Ø			٨	Ξ	
NWBC T	-Shirt	Physical	Active	No	Ø	6	0	٨	•	
										Return to Previous Page

Specify the appropriate options in the Search panel and click the **Search** button. You can filter your product list by category, title, product type, status, and optionally show only featured and/or special products.

The results grid shows matching products, including the title, type, status and last update. You can also create "specials" but this is done at the Inventory level.

At the top of the Product Manager screen

- Select Hide Search to hide the search panel
- Select Orders to switch to the Order Manager screen
- Select Configure to set up the Storefront module and configure options
- Select **Reports** to view inventory, product and sale reports
- Use the Add Product and Add Digital Product buttons to add items for sale in your Storefront

Configuring the Storefront

Clicking the **Configure** button displays a drop-down menu of configuration choices.

roduct Mana	ger	0
Specify filter parameters and di	I the "Search" button to doplay matching products, or select an administrative option from the buttors on the right.	
Q 🔺 🍰 Hife Seach Orless	Cortigue Reports Add Product	
Search Criteria	Product Categories	
Category < All Cate	Predict Colors	
Tde	Product Size Categories	
Show Fe	Shipping	
Show P	Storehant Policy	
Product Status < All State	Featured Product Sequence	
	Specials inventory Sequence	
() Physical () Digital C		

Product Categories

Product categories are used by administrators and coordinators to organize products, and by Storefront visitors to view and search for products.

Categ	gorie	s		?
Specify c	ategories fo	or the products in y	your club store. These category headers will be displayed when the user selects Category listing from your storefront page.	
Add Cate	gory	Display Seque	nce	
Category	Visibility	Maintain 📑		
E-Books	All	V 🗟		
Clothing	All	0		
Accessories	All	0 👔		
			Return to Previous Page	

Click the Add Category button to create a new category. The following screen is displayed:

Add or modify the c	ategory. Click "Save" or "Cancel" to return to the	
category list screen		
Category	•	
Visibility	Inactive V	

Enter a category and its visibility. Click **Save** to save your changes and close the dialog or **Cancel** to return without saving.

Note: Selecting Inactive as the visibility setting for a product category will remove all products in that category from the user side of the Storefront. These products will only be visible to administrators and coordinators.

Click the **Edit** icon to edit a category and visibility, or the **Delete** icon 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.

Note: You can only delete a category if no products are assigned to it.

Note: If you change the visibility settings of a category to Members Only, but a product with that category is set to be available to non-members, you will see an error message next to the name of each product.

Product Colors

Use this screen to create and manage the list of colors you'll choose from when adding products to your Storefront.

Product Color Admin	0
This screen allows you to manage the colors that will be used for your products.	
Add Color Display Sequence	
Color Maintain 📭	
Black 🧷 🙀	
Blue 🤌 🔂	
Green 🧷 🛱	
Red 🧷 🝺	
White 🧷 🙀	
Return to Previous Page	

Select **Add Color** to enter in a color, then **Save** to save your changes and add the color to your list. The list you create here will appear as a drop-down menu when selecting a color variation for your products, if applicable. The color selector will not appear if your product is not configured to have color variations.

Note: If you were already using the Storefront module prior to this enhancement and have selected colors for your products, those colors will automatically be added for you.

Product Size Categories

Use this screen to configure categories of sizes used to describe your products. You can create several different size categories, each with their own specific sizes. For example, you might have an Adult category, with adult sizes ranging from Small to X-Large, and a Youth category, with sizes ranging from Youth Small to Youth Large.

Size Category Admin	?
This screen allows you to manage the categories of sizes that will be used for size variations of your product.	
Add Size Category	
Size Category Maintain	
Default 🖉 🏯	
Return to Previous Page	

Select Add Size Category to add a new category of sizes.

ld or modify the size reen.	category. Click "Sav	e" or "Cancel" to return	to the category list
Size Category			•
	Save 🖌	Cancel X	

Once you've added a category, select the Sizes icon to add and manage the specific sizes associated with that category.

This screen	allows you to m	anage the c	egories of sizes	that will be used f	or size variation	is of your product.
Add Size C	ategory					
Size Category	Maintain	-				
Default	0 👗					
Youth	1	î.				

On the Size screen for the category you selected, select Add Size to add a new size in this category.

Size Admin - Youth	0
This screen allows you to manage the sizes that will be used for size variations of your product.	
Add Size Display Sequence Size Maintain No sizes have been created.	
Return to Previous Page	

Like product colors, categories and sizes you add will only apply if you configure your product to have size variations. The list of sizes will be available as a drop-down list when configuring the product.

Shipping Methods

This screen will differ based on the Shipping Pricing Method selected in Storefront Options.

If you selected Flat Rate

Use this screen to create and manage shipping methods used by 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: "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.

Shippir	ng N	lethods				0
Specify Shippi	ng Metho	ds for orders placed via	your club sto	refront.		
Add Shipping Method	1 2 3 Disp Seque					
Description	Status	Order Amounts (US\$)	Fee (US\$)	Maintain		
Default Shipping	Active	N/A	0.00	Ø		
					Return to Previous Page	-2

Select Add Shipping Method to add a new shipping method.

	pping method description, status, \$ limits, and fee. ncel" to return to the Shipping Method list screen.
Description	•
Tax Rate	▼
Active	
Amount Limits	
Fee	US\$

Enter a description and select the appropriate tax rate. Select the **Active** check box to allow Storefront visitors to select the shipping method at checkout. When editing an existing shipping method, de-select the Active check box to remove the shipping method as an option for Storefront visitors.

If the shipping method has amount limits (for example, shipping for purchases \$0.00-15.00 is \$5.00, shipping for purchases \$15.00-\$40.00 is \$10.00), select the **Amount Limits** check box. Two new fields will appear: the **Lower** and **Upper** limits. Enter in the parameters for the shipping method. Finally, enter the fee for this shipping method and select **Save** to save your changes.

	ping method description, status, \$ limits, and fee. Click "Save" or the Shipping Method list screen.
Description	Standard Shipping
Tax Rate	▼
Active	
pply Amount Limits	
Lower	US\$ 🥥
Upper	US\$ •
Fee	US\$ •

If you selected Advanced

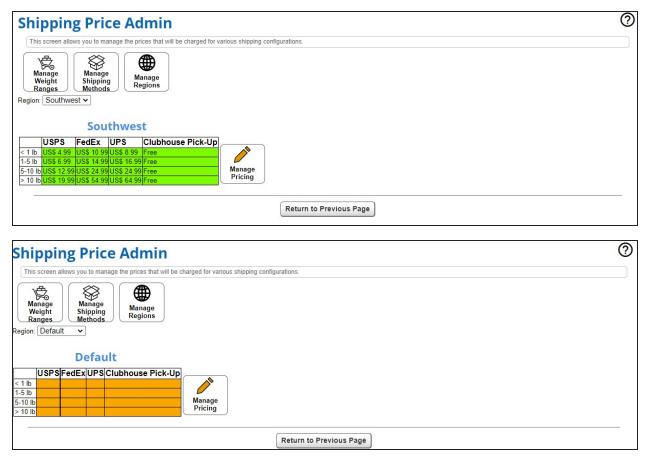
Use this screen to create and manage shipping methods used by your organization based on where the item is shipping to and the weight of the shipment. Don't forget to include methods such as "Pick Up from the club office" that don't actually involve handing a package over to a delivery service.

Advanced shipping methods each have pricing based on the shipping method, weight and region. First, you'll configure a shipping method (for example, Domestic shipping, International shipping, or shipping for special items, such as framed artwork or a fragile vase). Once you have a shipping method defined, you'll set weight ranges in either grams, kilograms, ounces or pounds. Next, you'll configure regions your organization will ship to (for example Southwest US, Midwest US, Eastern Europe, etc.). Last, you'll add pricing information for each weight range within each region and shipping method.

Note: "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.

The Shipping Price Admin screen is where you will configure and manage your shipping methods. The grid will show shipping methods and prices for the region selected (displayed at the top of the grid), if you have more than one region defined.

If you have more than one region defined already, your screen will include a Region drop-down list and the grid listing prices will be green. When prices for a region and weight range have not been configured, the grid will be orange.



Manage Shipping Methods

Select this option to configure the shipping methods used by your organization. These shipping methods can be based on the delivery service used, the type of packaging applied, etc.



Enter a description and select the appropriate tax rate. Select the **Active** check box to allow Storefront visitors to select the shipping method at checkout. When editing an existing shipping method, de-select the Active check box to remove the shipping method as an option for Storefront visitors.

	t the shipping method description, status, \$ limits, and fee. Click	
"Save" or	"Cancel" to return to the Shipping Method list screen.	_
scription	•	
Tax Rate	< No Tax > 🗸	
Active		
	Save 🖌 Cancel 🗙	

Manage Weight Ranges

Select this option to configure weight ranges for shipping prices. The weight ranges you define here will be used for each region and each shipping method. You are not able to define separate weight ranges for separate shipping methods or regions.

	e weight range low and high values for shipping cost calculation. Click ncel" to return to the Weight Range list screen.
Weight Unit	Ounce 🗸
Lower Limit	Upper Limit
0	8
8	Unlimited
- +	
	Save X Cancel

Select the unit of measurement to use (grams, kilograms, ounces or pounds), then enter in your first upper limit (the initial lower limit will always be zero). Once you've entered your first upper weight limit (for example, 10 g), the system will add a new row, using the upper limit you entered as the next lower limit. To quickly increase weight units by one, select the blue plus sign. To remove the last entered row, select the red minus sign.

	weight range low and high values for shipping cost calcul "Cancel" to return to the Weight Range list screen.
Weight Unit	Gram 🗸
Lower Limit	Upper Limit
0	10
10	15
15	Unlimited
+	Save Cancel

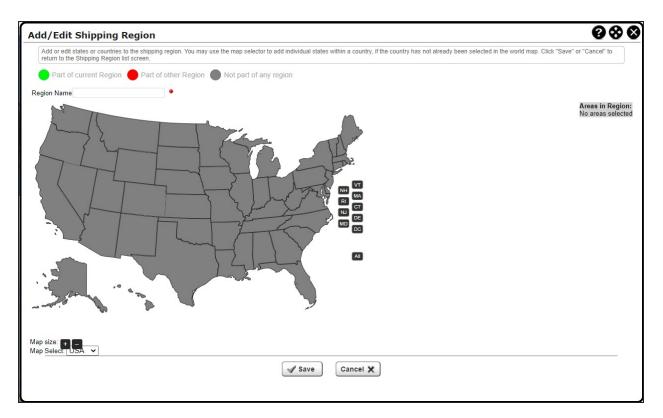
Select Save to save your changes and return to the Shipping Price Admin screen. The screen will refresh to include the weight ranges you entered. Remember, your grid will remain orange until you add pricing information.

Manage Regions

Select this option to configure the regions your organization will ship your products. To add a region, select **Add Region**.



Use the Add/Edit Shipping Region pop-up window to select and define shipping regions.

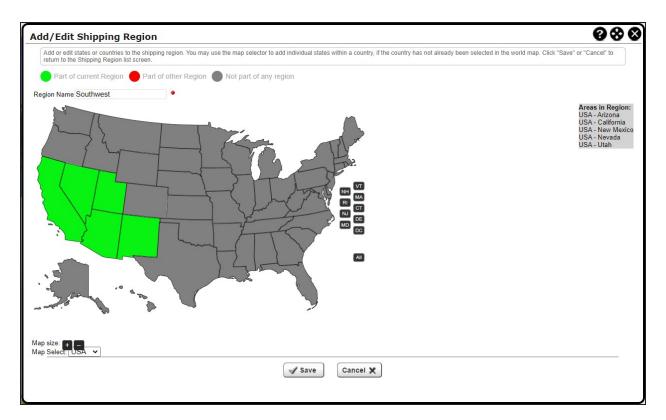


If your organization is in the United States, the default map will be the US map. To select a country outside of the United States, use the Map Selector at the bottom of the pop-up window to select World.

The legend at the top of the map shows what each map color represents: green indicates the state or country has been selected as part of the current region you are configuring, red indicates the state or country was selected as part of another region, and gray indicates the state or country has not been selected as part of any region.

Enter the title for the region you are about to define, for example, Southwest. Next, select the states and/or countries included in this region. Selected states and countries will appear green. Remember, if you have previously defined a region, states and countries which are part of another region will appear red. Countries and states not selected as part of any region will appear gray.

As you add states and countries to your region, the list on the right side of the pop-up window will update to include your selections.



Select Save to save your changes and return to the Shipping Region Admin screen.

Manage Pricing

Once you've added shipping methods, weight ranges and regions, configure your prices. Select Manage Pricing to show the Manage Shipping Prices pop-up.

Manage Shippi	ing Prices for Southe	east	0
Enter the price for eac Leave the respective e	ch applicable weight and shipping me entry blank to disallow that option for	thod combination for the selected that combination.	region. Enter a price of zero for free shipping.
		Southeast	
USPS	FedEx	UPS	Clubhouse Pick-Up
< 1 lb			
1-5			
lb			
10 lb			
>			
10 lb			
	Save	Cancel 🗶	

Enter the prices for each weight range and shipping method in the region.

Once you've configured pricing, select Save to save your changes.

Storefront Policy

Select this option to define a policies page for your storefront. This page is available from a button on the main storefront pages (Specials, Categories, etc.) You will see the following screen:

Storefront Policy	ଡିଚ୍ଚତ
You can enter your storefront policy here. A button will appear on the storefront home page so users can view it.	
↓ ▲ ●	- * 1
All orders are final once shipped. Please carefully check your sizes and quantities to be sure you are of the correct items.	ordering
Orders containing multiple items may be shipped in more than one package depending on availability shipment source. You will not charged additional shipping or handling fees if this occurs.	and
Com	
Words: 30 Characters: 189	
<u>DIV</u> > RemoveElement	
Save Cancel X	

This is the standard content editor; it allows you to create a fully formatted policy page, including images, links and other special items. Click **Save** to save your changes and return to the Manager, or **Cancel** to return without saving.

Special Inventory Sequence

Select this option to define the display sequence of inventory items in the "Specials" list.

Storefront Options

Click the **Configure – Storefront Options** choice to modify general configuration settings for the storefront module.

The following options can be configured:

General

- 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 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 the **sort order** of your products, either by product name, price, or date added.

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 limit for this field is 365 days, or one year.

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.

- 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? Select "No" or one of the active rates defined on the Control Panel Money options Setup section Sales Tax Rates screen.
- Should a quantity limit be applied (max. number of a product that a user can order. For some highdemand 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 you navigate to the Storefront: the Products manager or the Orders manager?
- Should a notification email be sent whenever an order is placed and, if so, to whom?
- Which forms do you want to print when shipping an order: Packing List and/or Shipping Label?

Shipping

Specify which shipping price method to choose: Flat Rate or Advanced. Flat Rate shipping prices will offer a specific price per shipping method for all overs. Shipping rates you configure will be based on the total order amount. Advanced shipping allows you to configure shipping prices and methods based on weight ranges and regions.

Ship From Name and Address

Specify the default address used on Ship From panel. This address will be used for all new orders placed, where the address is not modified during the fulfillment process.

Click **Save** to save your changes and return to the Storefront Manager screen, or **Cancel** to return without saving.

Manage Products

Control Panel > Money/Website Tab> Website Modules > Storefront

Adding a Product

Click the **Add Product** button to add a new product to your storefront. You will see the following screen:

Add/Edit Produ	ict (?
Use this screen to specify the prod	uct's characteristics. The values you enter determine how the product will appear in your storefront.
Partial SKU	
Title	•
Short Description	•
	0 of 200 characters used
Product Category(s)	< Select at least one > ▼
Weight	Pound V •
	Being Defined v
Has Variations	
Featured	
1 ditarda	
Pricing	
Prices set at the Inventory level	0
Member Price	US\$
	Default Only
Available to Non-Members	
Product has additional information	
Tax Rate	< Select Tax Rate > •
Financial Account	< Select Account >
Quantity Has Quantity Limit	No Limit 🗸
2	Save 🖌 Cancel 🗙

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. In the storefront itself, products can be displayed in SKU order so you can also use this field to control sorting.
- **Title** this field is required.
- Short Description is used on the index, search results and shopping cart pages. The fully formatted **Description** is also shown to Storefront users but is edited in a different place.
- Choose at least one **Product Category** from the list of categories configured by your organization. Storefront users can search through your inventory by category. Remember, when you created Product Categories you noted whether they were available to members only or everyone. When you add a product that is available to non-members, you must select at least one Product Category which is available to non-members.
- Weight can be specified in ounces, pounds, grams or kilograms. If you selected the Advanced Shipping Method in Storefront Options, this product weight will be used to calculate shipping costs.

Description
The product and its inventory items are still being built. It will not appear in the storefront.
Active in the storefront for admins only. Use this option to review the product in the store- front before making it available to be ordered.
Available to everyone to be ordered.
Product is active but can only be selected by administrators or Storefront module coordin- ators.
Shown on the admin side of the module only. Cannot currently be ordered.
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.

• Status is one of the following values:

Product Status

- 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 styles for women and men. If you check the main box you can then check options for size, color and other. If you select size or color, you will choose from the list of sizes and colors you configured using the Configure options back on the Product or Order manager screen.
- Check the **Featured** box if this is a "featured" product, to add a banner to the product information.

Here's an example of a Featured product page:

Product D	Details	0
0	NWBC 2021 Yearbook Digital Product	(Test Mode)
FEATURED	US\$ 29.99	
FEA	Member yearbook for 2021. This year's yearbook includes highlights from each of our rallies, our great Science in Flight program and more! As a bonus, we're including a free digital download preview of our 2021 Member Cookbook!	
	Add-on? 💿 Yes please 🔘 No thanks	
	Please enter the monogram for the cover. Cover is green, monogram is gold. Additional US\$ 4.99 per item	
	0 of 3 characters used	
	- 1 + Limit 1 Total Cost: US\$ 34.98 Add To Cart	
		12
	Return to Previous Page	

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.)

If the **Additional Information** option is checked, this product has additional information that must be specified when ordered.

Example: Some items can be personalized with a name, initials, or a message. When this option is selected, more fields appear:

Product has additional information	
Additional information is optional	0
Additional Information Question	
Additional Information Fee \$	
Max. chars. in additional info	

You can define whether the additional information is optional or required, the question that is asked of customers ordering this product, the fee to be charged (if any) for specifying additional information, and the maximum characters allowed in the response.

Tax Rate determines whether a defined tax rate should be applied to this charge. The default tax rate specified in Storefront Options will be shown but can be changed. You can select "No" or one of the active rates defined on the Control Panel – Money tab – Setup section – Sales Tax Rates screen.

Specify the financial account into which orders for this product should be aggregated. The default financial account specified in Storefront Options will be shown but can be changed.

QuickBooks: If QuickBooks®is enabled, specify the item name into which this product will be categorized when you export transactions.

Quantity

You can specify whether to enforce a maximum quantity and also whether to apply this limit to everyone or just to non-members.

Click **Save** to save your new product and return to the Products manager screen, or **Cancel** to return without saving.

Long Description

Select this option to display a text editor allowing you to specify a full description of this product, including formatting, images, links and other elements. The long description will be visible on the individual product page. The short description of your product will automatically load into the editor and can be deleted.

					10101	te dia	-					cubing news
		Defad		-	-	-	-	-	-	-		-
			~	~		-	10		•	-	-	etita
			~	*	c		E	e	-		14	elits
							12	e				din
				*	c	-	E	e	•			dib

Photos

Select this option to upload one or more photos of this product. You will see a screen similar to the following:

Maintai	n Produ	uct P	hoto	os (
This screen allow	vs you to manage i	the photos d	isplayed fo	or your product. Click 'Add Photo' to add a picture to the product's display.
NWBC N	lug			
Photo	Main Pictur	re Maintain		Add Photo
	•		Ø	
mug	0	<u>i</u>	Ø	
mug	0	î,	Ø	
				Return to Previous Page

Click the **Add Photo** button to upload a photo from your local hard disk. You can also specify a title for this specific photo (for example, "Back View".) Once you have added more than one photo, check the radio button in the Main Picture column to designate this as the main or starting picture. Click the standard **Delete** icon to remove a photo.

Inventory (Physical Product)

On the Storefront Manager – Products screen, in the grid of products, click the **Inventory** icon to see a list of inventory items for a physical product. If the product has variations, you will be taken to the Inventory Administration page.

uct l	nve	ntor	y fo	r NV	BC T-Shirt
filter parame	ters and	click the "Se	arch" but	ton to displa	matching inventory, or press the Add button to add an Inventory record.
Available Inactive			Searc	ch 🛷	Add Inventory Display Sequence
		29	No		
lable X-Sm	all Blue	30	No	1. The second	
ilable X-Sm	all Blac	k 30	No	Ø	
ilable Sma	I Red	30	No	Ø	
lable Sma	I Blue	30	No	0	
lable Sma	I Blac	k 30	No	Ø	
ilable Mediu	m Red	30	No	Ø	
lable Mediu	m Red	30	No	Ø	
	Available Inactive Inactive Result Inactive Inactive	Available No Inactive Dre Construction Con	Available Not Available Inactive Dropped Inactive Dropped Inactive Dropped Inactive Strate Inactive Otopped Inactive Dropped Inactive Otopped Inactive Otopped Inactive Strate Inactive Strate	Available Not Available Inactive Dropped Searce Inactive Dropped Stree Color Quantify Special Iable X-Smail Red 29 No Iable X-Smail Blue 30 Iable X-Smail Black 30 No Iable Smail Black 30 No	Available Not Available Inactive Dropped Search 4 Inactive Dropped Search 4 Inactive Dropped Search 4 Inactive Oropped Search 4 Inable X-Smail Blue 30 No 0 Inable Smail Blue 30 No 0 1 Inable Smail Black 30 No 0 1 Inable Medium Red 30 No 0 1

If the product does not have variations, you will be taken directly to the Inventory Add/Edit screen.

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:

Inventory A	Add / Edit - NWBC Mug	?
Use this screen to specify	y inventory information for your product. The values you enter determine how the product variations will appear in your storefront.	
Basic Inform	mation	
SKU		
Weight	0.00 Kilogram V	
Quantity	100 🗒	
Quantity in Carts	0	
Reorder Point	20	
Cost	US\$	
	This is the cost to stock the product, not the price charged to customers. This is only used for reports. Available	
Allow Backorders		
Pricing		
Member Price	US\$ 10.00	
Use special price instead	0	
Special Member Price	USS 10.00	
	Save 🖌 Cancel 🗶	5

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:

- 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 this product has "color" properties, select a color from the master list of colors.
- 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:

Status	Description
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 back-ordered, based on the quantity.
Not Avail- able	This inventory item is not currently available but you may want to show it in the store- front. 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.

Inventory Status

• Check the **Allow Backorders** box if users can order available inventory items that are not currently in stock.

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.

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** icon to modify the properties of a specific inventory item. Click **Return to Previous Page** to return to the Storefront Manager – Products page.

Documents (Digital Product)

On the Storefront Manager – Products screen, in the grid of products, click the **Document** icon to see a list of inventory items for a digital product.

				ument" 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 t. Click "Return to Previous Page" to return to the previous screen.
Add Document	bload Documen	t) Dis	splay Seq	uence
litle	Format	Size	Maintain	
	Acrobat (PDF)	214424	1	
WBC 2021 Yearbook				
	Acrobat (PDF)	222004	R	
WBC 2021 Yearbook 2021 Yearbook Bonus		222004	î.	

For more on how to add a digital product, go here.

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 binder for members to carry to meetings. If it's available in vinyl and leather 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 and then decide whether the regular (member or non-member) or special price (member or nonmember) 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.

Manage Digital Products

Control Panel > Money/Website Tab> Website Modules > Storefront

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:

Add/Edit Digita	l Product	0
Use this screen to specify the prod	uct's characteristics. The values you enter determine how the product will appear in your storefront.	
SKU		
Title	•	
Short Description	•	
	0 of 200 characters used	
Product Category(s)	< Select at least one >	
Status	Being Defined V	
Featured		
Pricing		
100		
Member Price		
Available to Non-Members		
Product has additional information		
Tax Rate	< Select Tax Rate > •	
Financial Account	< Select Account >	
	Save 🖌 Cancel 🗙	

Digital products share many of the same fields as physical products, including title, descriptions, status, and price. 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 or **Cancel** to return without saving. When you save a new digital product, you are taken to the **Product Documents** screen to link this digital product to one or more actual files already uploaded to your website (using the Documents Library function.)

Digital 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 digital product might include multiple documents. After defining a digital product, you will see a screen similar to the following:

Product Documents C	?
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.	
Add Document Upload Document Display Sequence Title Format Size Maintain	
No documents found.	
Return to Previous Page	

This screen shows one or more documents belonging to this digital product. Click the **Add Document** button to add a document. You will see the following screen:

Add Docu	ment	
Category	< Select > \$	
Document	< Select a Category > \$	
	Save 🖌 Cancel 🗶	

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. Click **Save** to save your addition and return to the Product Documents list, or **Cancel** to return without saving.

Note: Documents for purchase should be stored in a folder with the options "Show this folder on the website" turned **off**. This will prevent the documents from appearing in search results within the Document Library.

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 . Once you upload the document, select Add Document to add the document to the product. You can add multiple documents to a single purchase, for example multiple volumes of a journal. 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 Maintain Options

Control Panel > Money/Website Tab> Website Modules > Storefront

The following actions are available by clicking icons in the Product Manager – Maintain column of the Search Results grid:



Edit properties for this product. One of the popup windows for physical or digital products is displayed.

Description

Select this option to display a text editor allowing you to specify a full description of this product, including formatting, images, links and other elements. See "Content Editor" on page 103





Select this option to upload one or more photos of this product. You will see a screen similar to the following:

Maintai	n Produ	uct P	hoto	os (
This screen allow	vs you to manage i	the photos d	isplayed fo	or your product. Click 'Add Photo' to add a picture to the product's display.
NWBC N	lug			
Photo	Main Pictur	re Maintain		Add Photo
	•		Ø	
mug	0	<u>i</u>	Ø	
mug	0	î,	Ø	
				Return to Previous Page

Click the **Add Photo** button to upload a photo from your local hard disk. You can also specify a title for this specific photo (for example, "Back View".) Once you have added more than one photo, check the radio button in the Main Picture column to designate this as the main or starting picture. Click the standard **Delete** icon to remove a photo.



On the Storefront Manager – Products screen, in the grid of products, click the **Inventory** icon to see a list of inventory items for a physical product. If you have not added inventory for the product, you will be taken directly to the Inventory Add/Edit screen where you will add your first item of inventory (see the instructions at the end of this section for more details). If you have added at least one inventory item, you will see a screen similar to the following:

Pro	oduc	t In:	ve	ntor	y fo	r NV	VBC T-Shirt	0
Sp	ecify filter (parameter	rs and c	lick the "Se	arch" but	ton to displa	ay matching inventory, or press the Add button to add an Inventory record.	
Show	V 🗹 Ava		✓ Not	Available oped	Searc	sh 🛷	Add Inventory Display Sequence	
	rch R			1				
SKU	Status Available		Color Red	Quantity 29	Special No	Maintain		
	Available			30				
			1000		No	6		
	Available	X-Small	Black	30	No	Ø		
	Available	Small	Red	30	No	0		
	Available	Small	Blue	30	No	Ø		
	Available	Small	Black	30	No	0		
_	Available	Medium	Red	30	No	()		
	Available	Medium	Red	30	No	Ø		
_							Return to Previous Page	_

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:

Inventory Add / Edit - NWBC Mug	0
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	
Dasic Information	
SKU	
Weight 0.00 Kilogram 🗸	
Quantity 100	
Quantity in Carts	
Reorder Point 20	
Cost US\$	
This is the cost to stock the product, not the price charged to customers. This is only used for reports.	
Status Available	
Pricing	
Member Price US\$ 10.00	
Use special price instead	
Special Member Price US\$ 10.00	
Save 🖌 Cancel 🗶	

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 this product has "color" properties, select a color from the master list of colors.
- 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:

Status	Description
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 back-ordered, based on the quantity.
Not Avail- able	This inventory item is not currently available but you may want to show it in the store- front. 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.

Inventory Status

• 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.

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** icon to modify the properties of a specific inventory item. Click **Return to Previous Page** to return to the Storefront Manager – Products page.

Manage Download Bank

Control Panel > Money/Website Tab> Website Modules > Storefront

Download Bank Manager

When you click the **Download Bank** button, the following screen is displayed:

Use this page to man	age the do	wnload	banks of your me	mbers.	
Search Download	Bank				
Last Nam	e				
Available Docs Onl	y 🗌				rch 🔧
Name	Member	Docs	Available Docs	Maintain	
Barbara & Cliff C Jones	Yes	1	1	۲	
Martin Smith	Yes	4	4	۲	

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.

Manage a User's Download Bank

In the grid listing the customer's available downloads:

Click the **double blue arrow icon** to the left of the document's name to view its details.

Click the **Edit** link to the right of the document's name to view the download details.

Click the **Clear** button to clear all documents which have been downloaded at least once or which can no longer be downloaded

Click the **double-blue arrow** next to "Click to view File Readers and Utilities for download" to download programs to view files in various standard formats. These links will display the vendor's web site in a new window.

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:

Date Expired 5/9/2013 Downloads Left 0 Status Available Save Cancel X	Edit Downloa	nd	0	68
Status Available \$	Date Expired	5/9/2013		
	Downloads Left	0 🔶		
Save 🖌 Cancel 🗶	Status	Available \$		
		Save 🖌 Cancel 🗶		

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.

Manage Orders

Control Panel > Money/Website Tab> Website Modules > Storefront

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.

Specify filte	er parameters and cl	lick the "Se	earch" button to dis	play ma	tching orders,	or select an adminis	strative	option fr		
Q A Hide Search	Download Bank	Exp	ports		Configur	e Products				
- Search C	Criteria									
Star	rt Date	6								
Finish	h Date	6								
Order	Status ○ Ready , ○ Unship ⊘ All		Filled d / Partially Fille	ed)						
Pr	roduct < All Pro	ducts >	~							
	roduct < All Pro	ducts >	~							
User			✓ ○ Payment E	Date	O Last Na	me				
User S	Name	Date			_	me Search 🛷			l⊋	
User S Sort	Name Sort By ⊘ Order I	Date	O Payment D		_				6	
User S Sort earch	Name Sort By \oslash Order I Order \oslash Ascence	Date	O Payment E O Descendin	ng			laintair		6	
User S Sort earch	Name Sort By ⊘ Order I : Order ⊘ Ascence Results	Date ling	O Payment E O Descendin	ng		Search 🛷 Payment Date M	laintair	-	6	
User S Sort Cate Re	Name Sort By ⊘ Order I : Order ⊘ Ascenc Results ef # Name	Date ling Member	O Payment D O Descendin	ng Items	Price (US\$)	Search 🗲	î,		6	
User Sort Cearch Date Re /5/2021	Name Sort By \oslash Order I c Order \oslash Ascence Results ef # Name Martin Smith	Date ling Member Yes	O Payment E O Descendin Status Cancelled (Test)	Items 1	Price (US\$) 10.18	Search 🗲	î,	•	Ľ≱	
User S Sort Cearch /5/2021 [/5/2021]	Name Sort By \oslash Order I c Order \oslash Ascence Results ef # Name Martin Smith Martin Smith	Date ling Member Yes Yes	O Payment D Descendin Status Cancelled (Test) Pending (Test)	Items 1	Price (US\$) 10.18 10.18	Bearch ∳ Payment Date M i i i	i. R .	•	L₹	
User Sort Cearch /5/2021 /5/2021 /9/2021	Name Sort By \bigcirc Order I c Order \bigcirc Ascence Results Martin Smith Martin Smith Martin Smith	Date ling Member Yes Yes Yes	O Payment E O Descendin Status Cancelled (Test) Pending (Test) Pending (Test)	Items 1 1 2	Price (US\$) 10.18 10.18 25.48	Bearch ∳ Payment Date M i i i i i			D≥	

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 order reference number, the user who placed the order and whether this person is a member, the order status, number of items and order value.

The **Configure** button displays a popup menu of configuration options.

The **Reports** button displays a list of available Orders reports. Additional filtering options may be available.

The **Exports** button displays a small drop-down menu with two available exports:

The Open Orders export generates a CSV of all orders, eon row per line item with the order information duplicated as necessary, with the following status values:

- Ready to Ship (paid)
- Partially Shipped (paid and some items have already been sent)
- Pending (not yet paid)

The Filled Orders export shows all orders that have been filled within a specified date range.

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.

Maintain Options

The following actions are available by clicking icons in the Maintain column of the Search Results grid:



Click the **Details** link to view the details of an order, including the order reference number and status, ship to and from addresses, line-items, sales tax, and shipping and handling. You will see a screen similar to the following:

Order Details					
View details for the selected order.					
Order reference number: Order for: Jenny Cho Order Status: Pending (Not Paid)					
SHIP TO: Jenny Cho 1051 Perimeter Dr Schaumburg, IL 60173 USA SHIP FROM:					
, -1 USA					
SKU Title	KU Title Status Shipped Price (US\$) Quantity				
Colleen's Cat Kilts (X-Small, Blue)					47.97
Manny's Mystery Spice Rub	Open	No	9.99	2	19.98
NWBC Sweatshirt (X-Small, Black)	Open	No	30.00	1	30.00
NWBC T-Shirt (Medium, Green)	Open	No	3.00	1	3.00
				Base	105.94
			Shipping 8	& Handling	6.99
				Sales Tax	2.11
				Total Price	115.04
					Return to P

This is a read-only display. Click **Return to Previous Page** to return to the main orders screen.



Click the **Shipments** icon to fulfill an order, or if the order has already been filled, to view <u>previous</u> shipments. If you are filling an order, you will be taken to a screen similar to the following:

Orde	er Fulfillment						(
Order fo Shipping Order D	iference number: ir: Jenny Cho g To: Jenny Cho ate: 2/24/2022 tatus: Pending (Not Paid)						
Please r	note that digital items cannot be "shipped" a	nd therefore you ar	e not able to change their sh	nipping quantity here.			
Ship	ping						
Ship To							
elect Pro	oduct	Qty Ordered Qty	Shipped Qty To Ship				
	Colleen's Cat Kilts (X-Small, Blue)	3	0 🛋				
	Manny's Mystery Spice Rub	2	⁰ 2 ▲				
-	NWBC Sweatshirt (X-Small, Black) JAC	1	0 1				
	NWBC T-Shirt (Medium, Green)	1	0 1			L ₂	
Ship wit	h Quantities Shown					, , , , , , , , , , , , , , , , , , ,	
Print Pa	icking List						
Print Sh	ipping Label						
			Retu	urn to Previous Page)		

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.)

If all items have been shipped, only the bottom part of the screen is shown.

Click the **Ship To / From** button to review and adjust the ship to and from values. You will see a screen similar to the following:

View and / or modify Previous Shipments	/ order shipping information. NOTE: Changes made here do not affect	
Shipping Method	USPS	
Ship To:		
Name	Jenny Cho	
Organization		
Address1	1051 Perimeter Dr •	
Address2		
City	Schaumburg	
State	Illinois 🗸	
Zip/Postal Code	60173 •	
Country	United States of America Show All Countries	
Email Address	samanthahoria@gmail.com	
Ship From:		
Name		
Address Line 1	•	
Address Line 2		
City	•	
State/Province	< Select > V	
Zip/Postal Code	•	
Country	United States of America Show All Countries	

You can adjust both addresses. Click **Save** to save your changes and return to the Order Fulfillment screen, or **Cancel** to return without saving.

Click the **Gift** button to adjust whether or not this is a gift. You will see a dialog similar to the following:

Previous Shipments!	NOTE: Changes made here do not affect
his a gift? OYes	No
Message	
	•
400 characters used	/
Save 🗸	Cancel 🗙

If this is a gift, click **Yes** and enter the gift message. Click **Save** to save your changes and return to the Order Fulfillment screen, or **Cancel** to return without saving.

Click the **Pick List** button to display a form showing the items selected for this shipment. Your computer's Print dialog will also be shown.

Click the **Ship with Quantities as Shown** button to generate a new shipment. Check or uncheck the boxes for the Packing List and Shipping Label as needed.

- The first screen shows the Packing List, including the ship to address, a gift message, and the order details. It's designed to be included inside the carton or envelope.
- The second screen shows a Shipping label, including the ship from and to addresses. It's designed to be affixed to the outside of the carton or envelope.

Once both screens have been closed, the Order Fulfillment screen is refreshed and a new shipment record is created in the bottom part of the screen.



The **Cancel** link is shown for pending, ready-to-ship, and partially-filled orders. 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.

For cancelled orders that were previously pending, and for test orders, clicking this icon completely deletes the order.

Previous Shipments

The Previous Shipments panel shows the date of each shipment created and whether it has actually shipped. This information is usually added after the fact, if you want to record a tracking number and the actual shipping cost. The following icons are available in Maintain column:

lcon	Description
<pre>(Edit)</pre>	The Edit link displays the Shipment Status dialog (shown below) that allows you to record the actual shipping method, date, tracking number, and cost. You can also flag this shipment as having been "shipped".
(Print)	Clicking the Print icon allows you to reprint the packing list and/or shipping label
(Delete)	Clicking the Delete icon allows you to cancel the shipment and restore these items to the top part of the Order Fulfillment screen, ready to be shipped another time. You will be prompted to confirm this action. This icon is not shown if the order has shipped.
(Email)	Click the Send Email icon to send the customer an email to let them know the order has been shipped. If an email address was not provided with an order, the icon will not appear.

Maintain Options

Here is the Shipment Status dialog, displayed when you click the **Edit** icon.

Shipment Sta	Shipment Status							
Shipping Method	UPS	٥						
Shipped								
Shipping Date	3/27/2015							
Tracking No.	1Z23798971249714971							
Actual Shipping Cost	\$ 0.00							
Save	Cancel 🗶							

Click **Return to Previous Page** to return to the main orders screen.

Pick List

Use your computer's print window to select the printer and print the pick list.

Click the X in the top right corner to close the popup when you are done printing.

Surveys

Take a Survey	
Surveys Administration	
Survey Categories	
Add Survey	
I've made a Survey, so now what?	
Add Poll	
I've made a Poll, so now what?	
Pages / Questions - Pages	
Preamble and Postamble	
Pages / Questions – Add Question	
Results and Exports	
Copy/Delete a Survey	

Surveys

The Surveys function allows clubs 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 function 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.

ClubExpress also supports Polls, a single question, radio button, survey that can be placed anywhere on your website via the content editor (home page, custom web pages, content boxes, page header, etc.) Polls are available to members only and enforce one vote per member. Once members have voted, they can immediately see the results.

A typical Surveys screen is shown below:



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.

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, or the area under the menu on some templates.

Take a Survey

A typical Surveys screen is shown below:

Home > Control Panel > Surveys	
Surveys	
This page shows the surveys available to you. If there are open surveys, click the green	arrow button to begin the process.
Ballooning Preferences (Test Mode)	
	Take This Survey
This is a survey to collect basic info on what people like to do with their balloons	
2007 Elections	
2007 Class A Dog School Officer Elections.	Take It!

This screen shows the surveys available to you. Clicking the **Take this Survey** button launches the survey wizard, presenting the first page of the survey.

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.

At the end of the survey, you will see a Response Summary screen listing your answers to each question. There is also a Print Summary icon to allow you to print your answers. Click the **Submit Response** button to submit your response, **Cancel** to cancel the survey without submitting your response, or **Back** to return to a previous page to edit responses to one or more questions.

Elections

Please note that a survey can be configured as an "Election". When this is done, all votes are anonymous and who you voted for cannot be viewed by an administrator under any circumstances. Also, only members can vote, and then, only once.

Surveys Administration

Control Panel > Communications > Website Modules > Surveys

There are two ways to manage Surveys:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Communications tab) to access the admin side of the function.
- 2. Edit When viewing any page in the Surveys function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Use this screen to manage surve create a new survey. You will see "Pages/Questions" to build out th	the propert	ties screen which	h allows yo	ou to define ger	neral su	Irvey	proper	ties. C	Click "	Edit" t	o mod	lify the	se pro	perties f
Search For Surveys Category Active Only		earch 🛷	Su	rvey Catego Add Survey Add Poll	0.02.000									
Search Results						-								
Search Results	Category	Last Updated	Status	Resp. Count	Maint	tain								•
	Category Elections	Last Updated 8/27/2020	Status Closed	Resp. Count	Maint	ain 2						Î.	<u> </u>	
Title					Maint	tain 2						Î <u>,</u>	ž E	F
Title 2020 Board President Election	Elections Polls	8/27/2020	Closed	0	Maint O	tain ?							<u> </u>	3
Title 2020 Board President Election Burner Type (Poll)	Elections Polls	8/27/2020 9/19/2020	Closed Active	0	Maint O O O									2
Title 2020 Board President Election Burner Type (Poll) Cabin/Room Stay Survey	Elections Polls Feedback	8/27/2020 9/19/2020 4/13/2022	Closed Active Inactive	0	Maint P P P									 Image: Constraint of the second second

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.

Polls

This grid will also show Polls, created via the editor or the **Add Poll** button. Polls are quick surveys, with just one radio button question. So the **Pages/Questions**, **Preamble**, and **Postamble** options are not available. Polls are automatically placed in a "Polls" system category. They do not appear on the main surveys page but they are available through the editor to be placed anywhere the editor is used (home page, custom web pages, page header, content boxes, event descriptions, and photo albums.)

Survey Categories

Control Panel > Communications > Website Modules > Surveys

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:

Home > Control Pane	el 🔸 Surveys Ma	anager > Surveys Category Administration			
Surveys Cate	egory Adı	ninistration			
	Surveys can be organized into categories, especially useful for larger clubs. Click the "Add Survey Category" button to create a new category; "Edit" and "Delete" perform the expected functions.				
Add Survey Cate	Add Survey Category				
Category	Maintain				
Ballooning Questions	🧷 🙀				
Board Elections	Ø				
General Opinions	Ø				
Members Only	Ø				
Public Surveys	Ø				
		Return to Previous Page			

Click the **Add Survey Category** button to add a category. Click the standard **Edit** icon to edit the text of an existing category. A standard **Delete** icon is also shown if the category is not currently in use.

There is also a system category, not shown on this list and not editable, for Polls.

Add Survey

Control Panel > Communications > Website Modules > Surveys

Click the **Add Survey** button to create a new survey. You will see the following popup dialog. Click on the screen sections below to learn more.

To an
-

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, to members with a specified member type only, or to members of a specified chapter only.

- If you select the Committee option, a new field will be displayed, allowing you to select the committee.
- If you select the Member Type option, a new field will be displayed, allowing you to select the member type.

• If you select the Subgroup option, the subgroup selector will be displayed, allowing you to select a subgroup at any level (region, district, or chapter); only members of that subgroup can take the survey.

In all cases, you can also optionally limit the survey to primary and solo members only. Use this option for situations where each membership (individual or family, for example) gets only one vote.

Survey Status

If you subsequently click the **Edit** link in the Survey Manager, one additional option is shown: Status. The following options are available:

Status	Description
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	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.
Test Mode	Select this option when you want to test the survey. It won't be available to users, just admins and coordinators. 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.

Survey Status

"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 (the survey is closed at 11:59:59 PM.) 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.

Allow 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 Voting

You have the option of allowing or blocking multiple votes by the same person¹. 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.

Contact Person

Click the **Select** link to add a contact person to this survey. You will see the standard ClubExpress member selector. When a contact person is defined, an additional option appears: Notify on completion. When this option is checked, the contact person will receive an email whenever a survey is completed.

Note that this email will preserve the survey's anonymity settings. If responses are required to be anonymous, or if anonymity is optional, the respondent's name will not be included in the email. Otherwise, the notification email will include the respondent's name.

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.

Configure as Election

When you check the Configure as Election option, you will see a warning message that this setting cannot be changed once you save the dialog. The following settings are configured automatically:

1

- Availability is set to "Members Only" and cannot be changed.
- Close Method is set to "End Date" and cannot be changed. However, the actual End Date can be changed if you need to extend the survey's availability.
- Allow Anonymous Responses is to set to "Required" and cannot be changed.
- Allow members to vote multiple times is set to "No" and cannot be changed. Only one vote per member!

These settings are designed to protect the integrity and privacy of an election vote. All votes will be recorded as anonymous and there is no way for an administrator to determine who voted and how they voted.

I've made a Survey, so now what?

Survey links can be added to many places on your website using the Link Builder, including emails, custom pages and your home page, event descriptions, donation fund descriptions, storefront product descriptions. In each case, the link will take users to the first page of your Survey (usually the Preamble).

Add Poll

Control Panel > Communications > Website Modules > Surveys

Note: Polls are available to logged-in members only and responses will always be anonymous.

Click the Add Poll button to add a poll. You will see the following screen:

Edit Pol	
reached the	oll by modifying the fields below and pressing the 'Save' button. If you have his page by clicking the poll button in the html editor, the modified poll will be to the page you are working on.
Poll Name	Types of Ballooning
Question	What types of ballooning do you enjoy the most?
	47 of 500 characters used
Answers	
	Competition Distance Flying
	Teaching Riding with Family and Friends
	Taking Joyrides
	Going Where the Wind Takes Me!
	Enter each answer on a separate line. 114 of 1000 characters used
Button Text	Vote Now 🗧
Status	Active Closed
	Save 🖌 Cancel 🗶
	//

The Poll Name is used as the heading. The Question is displayed above the choices. In the Answers box, enter the actual poll choices, one per line. You can also specify the text for the voting button. When you click **Save** the poll is created and the dialog disappears.

The same dialog is shown for polls when you click the **Edit** link in the Maintain column.

Maintain Options

The following actions are available by clicking icons in the Maintain column:

lcon	Description
(Edit)	Edit properties for this survey.
(Pages/Ques-	Select the Pages/Questions icon to edit the pages on which the survey is organ- ized and displayed, and the questions shown on each page. Not available for

lcon	Description				
tions)	polls.				
(Preamble)	Select Preamble to define an opening page and edit the text for this page. You can also remove an existing preamble. Not available for polls.				
(Postamble)	Select Postamble ¹ to define a closing page and edit the text for this page. You can also remove an existing postamble. Not available for polls.				
 (Take Survey) 	Select Take Survey to launch the survey. Not available for polls.				
(Results)	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.				
(Reports)	Run 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.				
(Delete)	Select Delete to completely remove a survey. All questions and responses will be deleted and cannot be recovered.				
Сору)	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. Not available for polls. Maintain Options				

I've made a Poll, so now what?

Polls can be added to custom pages, your home page, and your website template using the Poll widget in either the Page Builder or the Template Builder. In some cases, you may have the option to insert a Poll using the widget in the Advanced Content Editor. In each case, the Poll will display in full, not as a link like a Survey. If your club or association has the mobile app, you can also add Polls through the app, which display for all app users. You cannot add a Poll to an email, or the formatted description of an event.

Pages / Questions - Pages

Control Panel > Communications > Website Modules > Surveys

Select the **Pages/Questions** icon to define survey questions and the pages on which they appear. (This option is not available for polls.) You will see a screen similar to the following (assuming some questions have already been defined):

¹If "preamble" is a word, why not "postamble"? Consider it invented!

Home > Control Pa	Home > Control Panel > Surveys Manager > Pages/Questions for 2015 Board Elections							
Pages/Questions for 2015 Board Elections								
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 Sequenc	e (Add Questio	n Add S	Scale Question	Copy Question		
Page Question(s)	Question Type	Required	Maintain					
Scratch Pad (Not S	hown)							
No questions found	for this page.							
Page 1			D 🛱 🗄					
President	Select List	Yes	🧷 🛱 🗉	0				
Vice President	Radio Buttons	Yes	🧷 🛱 🗈	0				
Treasurer	Radio Buttons	Yes	🧷 🛱 🗈	0				
Page 2			D 🛱					
Further Comments	Long Text	Yes	🧪 🔂 🕕					
					_			
Return to Previous Page								

The first page (page "0") is the Scratch Pad. 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 Scratch Pad are 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.

Add/E		
Edit the	survey page	
Name	Page 2	
Heading	Page 2	۵
	Save 🖌 Cancel 🗶	

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.

Click the **Page Sequence** button to change the order of pages. The standard ClubExpress sequence dialog will be displayed.

Maintain Options

The following options are available in the Maintain column for pages:

Icon	Description
(Edit Page)	Edit the name and heading of this page.
(Delete)	Delete this page. If it has questions, they will be moved to the Scratchpad.
(Question Sequence)	Modify the sequence of questions on this page. The standard dialog will be displayed.

Maintain Options

Preamble and Postamble

Control Panel > Communications > Website Modules > Surveys

These options allow you to define a custom 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 Preamble is typically used for instructions on how to complete the survey. It may also tell people how many pages or questions to expect and give an estimate of how long it will take to complete the survey.

dit Prear			atrodu	atoru		for the output	Vau might	t upp thi			avalai	in the			the ev	 and wi	hatwi	ll bo d	 e ith the) (3
Specify the te Heading 1																				A
Each vote is	an	onym	ious,	and	you r	nay only vo	te once.													
														_						
						R	emove	S	ave	1)	Car	ncel	×						

The Postamble is typically used to thank people for completing the survey and to remind them to click the **Submit Response** button!

E	dit Posta	am	ble																			e	8	8
	Specify the te	ext fo	or a co	nclud	ing pa	age foi	r the survey. Ye	ou might us	e this pa	ige t	to tha	ank us	ers fo	r takir	ng the	surve	ey.)
	Heading 1	ŧ	в	I	<u>U</u>	S	Default 🖨	Arial		ŧ	<u>A</u>	A		≣	₫	F.	=	B	1	ō	<u></u> ×	۲	A BC	
	Thanks for v	votin	ng!																					
							Re	move	Sa	ve	1) (Car	ncel	×									
												, (

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 **Submit Response** button is clicked.

Note: These options are not available for polls.

Pages / Questions – Add Question

Control Panel > Communications > Website Modules > Surveys

Click the Add Question button to add a new question. You will see the following dialog:

Select a question ty type cannot be char	pe, and t nged). Als	he ap io, se	ppropresented	iate da ne sur	ata fields will be vey page wher	e displayed (n e the question	ote that will app	ifan e ear, c	existin or assi	g que gn it te	stion h	nas be scratcl	een an h pad	nswere page	ed by a for fut	any user, ti ure use.	he
Page	Board	Pre	side	nt	~												
Question Name	Presid	lent	Choi	ces					٠								
Answer Type	Radio	But	tons			~											
Question Text	в	I	U	S	Default \$	Arial	ŧ	<u>A</u>	A	Ē	≔	€	Þ	1	<u></u> ×	A BC	
	202	0 Bo	ard F	Presio	dent Candida	tes											
Notes	for t	wO) char	(2)	year used	idate will s. ill appear unde			d Pr	resid	lent	0	A BC					
Item List	Jenny Manny	Ch Di	o az								,	•					
		e iten	ns to t	e disp	l blayed in the lis er, add a ~ to th												
Response Required	🔘 Ye	s C) No														
Allow 'Other'	⊖ Ye	5 🤇	No														
Allow Comments	⊖ Ye	5 🧿	No														
					Sav	e 🖌 🌔	Cance	×									

- Specify the **Page** on which the question should be placed. You can specify the Scratchpad, or any page you have defined.
- Question Name is used on the manager grid only; it is never shown to users.
- Select the **Answer Type** from the drop-down list. The screen will refresh to show additional options.
- The Question field contains the actual text that will be shown to users. This is a miniature version of
 our advanced content editor, with options to control fonts, lists, and alignment, and to display photos
 or images. Line breaks are supported in this field. The actual question text can be of virtually unlimited length. (Note that a simple text box replaces this editor for a Scale question, where the question
 itself uses a different answer type.)
- The **Notes** field allows you to enter additional text that will be shown under the question and in a smaller font. It is usually used for prompts or hints on how to answer the question. There is a limit of 250 characters.

Surveys

- Some answer types require that a list of options be specified, including allowable values or a range or text to be used. The prompt under the field will tell you what should be entered. If an item list must be specified, put each item on a separate line.
- Some answer types allow for a **Default Answer** that will be pre-filled in but which can be changed. Some answer types (for example, radio buttons) allow you to designate an option as the default answer using a ~ at the beginning of the line.
- Some answer types support **Minimum** and **Maximum Answer** values. Specify one or both values based on the answer type.
- Some answer types support a **Max Length**, to control how much text can be entered.
- Most answer types also support a **Response Required** option. Select "Yes" if an answer **must** be provided.
- Some answer 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.
- Some answer 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.

Answer Types

The following answer types are available:

Note: To designate a **default** answer, add a ~ to the beginning of the line. To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.

Туре	Display Format	Additional Values	Options
Heading/ Instruction Text	Question text only, no response is allowed	Any formatted text, including images and photos	N/A
Short Text	Text field	Default answer, Max length	
Formatted Text	Text Field where the answer must be in a spe- cified format	Answer format • Numbers only (plus space and hyphen) • Letters only (plus space and hyphen) • Numbers and Letters (plus space and hyphen) • Email Address • Web Address (URL) • US Phone Number • US Zip Code • Canada Post Code	Required: yes/no Allow comments: yes/no

Туре	Display Format	Additional Values	Options
		 Australian Post Code UK Post Code Custom – Enter a Regular Expression and test the expression <u>Regular Expres</u>- sions are a powerful format string using dot characters, alternation, group- ing, character classes, quantifiers, word boundaries, anchors, and lookaheads. 	
Long Text	Large text block	N/A	Max length required: yes/no
Date Year	Drop-down list showing 4-digit numbers	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Date Month	Drop-down list showing the months of the year	Default answer	Required: yes/no Allow comments: yes/no
Date Day	Drop-down list showing the numbers 1-31	Default answer	Required: yes/no Allow comments: yes/no
Date Full	Text field with a popup date- picker icon	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Day of Week	Drop-down list showing the days of the week	Default answer	Required: yes/no Allow comments: yes/no
Time of Day	Time selector	Earliest time, latest time	Required: yes/no Allow comments: yes/no
Integer	Text field	Default answer, minimum value, max- imum value	Required: yes/no Allow comments: yes/no
Number	Text field	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
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 [Enter] to move to the next line as you're entering the items. A minimum of two (2) items must be specified.	Required: yes/no Allow other: yes/no Allow comments: yes/no
Check box List	Vertical list of check boxes;	Enter the items to be displayed in the list, each on a separate line.	Specify the minimum

Туре	Display Format	Additional Values	Options		
	any and all can be selected		and maximum selec- tions that can be made. Allow other: yes/no Allow comments: yes/no		
Radio Buttons	Vertical list of radio buttons; only one can be	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter some- thing different (i.e. a write-in candidate for an election)	Required: yes/no Allow other: yes/no Allow comments: yes/no To define an initial		
	selected	Note: To designate a correct answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.	default answer, add a ~ to the beginning of that line		
True/False	Radio button	Specify "True" text Specify "False" text Select an initial default, or no default	Required: yes/no Allow comments: yes/no		
Multiple Text Boxes	Vertical list of text fields; any- thing can be entered into each field	Enter the number of text boxes to be displayed. Specify the maximum length of each answer. Specify the minimum number of values that must be entered.	Allow comments: yes/no		
Scale	Horizontal list of radio but- tons rep- resenting the "strength" of the respond- ent's opinion	Enter text to be displayed above each radio button, each entry on a separate line. The number of lines determines the number of radio buttons. A min- imum of two (2) items must be spe- cified.	Required: yes/no Store numbers: yes/no (If no is specified, val- ues will be stored)		

Question/Answer Types

More About Formatted Text Questions

When you select "Formatted Text" for the answer type, an additional option appears to define the answer format. The following predefined formats are available to select:

- Numbers Only (plus space and hyphen)
- Letters Only (plus space and hyphen)
- Numbers and Letters (plus space and hyphen)
- Email Address
- Web Address (URL)
- US Phone Number
- US Zip Code
- Canada Postal Code
- Australian Postcode
- UK Postcode
- Custom

When you select the "Custom" option, another field appears to allow you to define a custom format. This option uses a feature of many programming languages called a **Regular Expression**. With this feature, you define a format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. At runtime, this format string then defines what users can enter into the field.

Regular expression syntax is subtly different in different programming languages. ClubExpress uses the syntax defined by JavaScript.

Note: Regular Expressions are for experienced software developers only. They can be as simple or as complex as you want them to be, but there is a significant learning curve. ClubExpress cannot provide support for individual regular expressions that are not working as you might want them to work.

For more information about regular expressions, see the following websites:

Basic Reference: http://www.w3schools.com/jsref/jsref_obj_regexp.asp

A site with more detailed info, examples, and specifics of javascript support: <u>http://www.regular-expressions.info/</u>

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 follow	How important are the following factors in your enjoyment of ballooning?									
	Unimportant	Neutral	Somewhat Important	Very Important						
Safety	\odot	\bigcirc	\odot	\bigcirc						
Government regulation	\odot	\odot	\bigcirc	\odot						
Education	\odot	\bigcirc	\odot	\bigcirc						
Open skies	$^{\circ}$	\odot	0	0						
Equipment	0	$^{\circ}$	0	0						

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.

Example: In the figure below, there is a typo in the value block for the last question ("Neutrall"), so it is separated out.

How important are the	follow	ing factors in y	our enjoyment	of ballooning?	
		Unimportant	Neutral	Somewhat Important	Very Important
:	Safety	\circ	\circ	\circ	\circ
Government regu	lation	\circ	\circ	\circ	\circ
Edu	cation	\circ	\circ	\circ	0
Open	skies	\circ	\circ	0	0
	Unim	portant	Neutrall	Somewhat Important	Very Important
Equipment		0	\circ	0	\circ

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:

by any user, the typ	
Question Name	
Answer Type	Scale
Question Text	
3 Ι <u>U</u> "Tim	ies New 🔻 16px 👻 🗚 🔹 🐎 💙 🔚 🗮 🏣 🏣 📷 🖾 🐡 🕗
	žt.
uestion Prompts	•
	0 of 4000 characters used
	Enter question prompts, each on a separate line
Column Headings	
	0 of 4000 characters used
	Enter the scale values (column headings), each on a separate line.

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/Instruction Text" 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 ad hoc form, 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 "Heading/Instruction Text" 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 heading.

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.

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 and Reporting 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.

Example: "Poor,Fair,Good,Excellent" will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.

Copy Question

Select this option to copy a question from this survey or another survey into the Scratch Pad of the current survey. You will see the following dialog:

Copy Ques	stion 🛛 🖓 😵 🤇
	r, then select a question from that survey. Click "Save" to add a stion to your scratch pad page.
Select Survey	What do you think of this site?
	Active Surveys Only
Select Question	Membership ᅌ
	Save Cancel X

Select the other survey and then a question from that survey. When you click **Save**, the question (and all its settings, but no answers) is copied from the other survey into the Scratch Pad of this survey. Or click **Cancel** to close the dialog without performing a copy.

Viewing Answers

Click the **Reports** icon to see a list of available reports at the question level. You will see a dialog similar to the following:

Survey Q Select Repo	uestion Reports 🕞 🖗 &
Many reports your needs.	s have two or more variations. Select the one which meets
	Answer Summary Answer Detail Answer Detail w/Comments
	Cancel 🗶 Next 🕨

Select the report and click **Next**. Then specify the output options and click **Run Report**. The report will display in a popup window.

Click the **Detail** icon to see the actual answers provided to that question so far. You will see a dialog similar to the following:

Answer Detail Survey: 2015 Elections Question: President					
Name	Date	Answer			
Anonymous	11/26/2012	Jones			
Barbara & Cliff C Jones	1/20/2008	Blackman			
Barbara & Cliff C Jones	3/18/2008	Adams			
Barbara & Cliff C Jones	10/23/2008	Smith			
Barbara & Cliff C Jones	12/24/2008	Smith			
Barbara & Cliff C Jones	7/26/2008	Smith			
Barbara & Cliff C Jones	9/10/2008	Wilder			
Barbara & Cliff C Jones	10/14/2008	Smith			
Barbara & Cliff C Jones	12/21/2008	I chose not to vote			

Click the **Summary** icon to see a summary or aggregate of the answers provided so far. This option is not available for all answer types, only those where users choose one of a set of options (as opposed to freeform text.) You will see a dialog similar to the following:

Total Answers: [/]		B	
Answer Adams	Count 28	Percentage 15.22	
Benoit	14	7.61	
Blackman	21	11.41	
I chose not to vote	16	8.70	
Jones	27	14.67	
Smith	60	32.61	
Tomson	8	4.35	
Wilder	6	3.26	
Williams	4	2.17	

Results and Exports

Control Panel > Communications > Website Modules > Surveys

Select this option to view detailed results for the survey or poll. You will see a screen similar to the following:

	Adme > Surveys > Surveys Manager > Results for 2015 Elections Results for 2015 Elections					
This page	ge shows a list	t of the respo	onses to t	he survey. Click the "View Response" button to see the details of each response.		
185 resp	onses 🔇	Page 1 of	7 ᅌ	Export Response Details		
Date	Name	Member?	View	Delete All Responses		
6/23/2007	Anonymous	Yes	2			
6/23/2007	Anonymous	Yes	0			
6/23/2007	Anonymous	Yes	2			
6/23/2007	Anonymous	Yes	2			

This grid lists each person who responded to the survey, including the date of the response and whether he or she is a member or not. Click the **View Response** icon 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.

Click **Delete Test Responses** (if shown) to delete any test responses. This button only appears if there are test responses.

Click Delete All Responses if you need to make significant changes to a survey that's been active

Select this option to download a CSV file including the responder's member number, name, contact information, status, membership type and responses.

Copy/Delete a Survey

Control Panel > Communications > Website Modules > Surveys

Select this option to copy a survey (but not a poll.) 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.

📓 Select this option to delete the survey or poll, 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.

Volunteering

Sign Up for Volunteering Opportunities	1023
Volunteering Administration	
Add Volunteering Opportunity	
Volunteering Slots	

Volunteering

The Volunteering function allows a club to post volunteering opportunities for which members (and optionally, non-members) can sign up.

A volunteering opportunity might cover multiple days, with multiple "slots" within a day, each of which needs multiple people, each of whom might be doing different tasks.

Example: Opportunity = Jumble Sale from Thu-Sun Slot 1: Thu from 9-12: 4 people needed for setup Slot 2: Thu from 12-3: 4 people needed for setup Slot 3: Fri from 9-11: 2 people needed at the registration desk Slot 4: Fri from 9-11: 2 people needed on the floor to help Slot 5: Fri from 9-11: 1 person at the checkout and payment table etc.

You can link a volunteering opportunity to an event in the calendar. When such a link is specified, two things happen:

- A "Volunteer!" button appears on the Event View details page. Clicking this button jumps over to the volunteering opportunities page to show needs and available slots for that specific opportunity.
- The event title appears as a link on the Volunteering Opportunities page. Clicking this button jumps to the event that the opportunity is linked to.

A volunteering opportunity can be made available to non-members. If the function is on the public side of the website, they can sign up on their own. At a minimum, they need to enter first and last name, phone and email address; they will be added to the non-member database with a new "Volunteer" system category, or another category if specified. Within an opportunity, you can also make selected slots available to members only or to non-members as well. The slot can be visible to everyone, or only to members.

Clubs can also use this module to track required work hours each year (for example, some clubs require members to volunteer for X hours each year on club tasks.)

Sign Up for Volunteering Opportunities

When you click Volunteering on the menu or a link, you will see a screen similar to the following:

Home > Volunt	eering		
Voluntee	ring Opportunities		
you see by s value is spe pages.	unity Listings page allows you to view the volunteering opportunities that specifying one or more search values and clicking the "Search" button. I cified, all current opportunities will be displayed. If there are more than Left' may include volunteers that are needed for some slots that are no	The system will display matching opportunities. If 10 matching items, use the Paging controls to se	no search e additional
Found 1 oppo	ortunity(s). Click 🔍 to search again		
Upcoming	g Opportunities		
Starts: Frid	lay, May 02, 2014 Finishes: Sunday, May 04, 2014		
¥ view more	Mountain Rally Event: <u>Mountain Rally</u> Spring balloon races	Volunteer Yourself Volunteer Others	2 SPOTS LEFT
)
	Return to Previous P	age	

This screen shows upcoming opportunities, including the opportunity title and date, links to volunteer, and how many spots are available. Up to 10 opportunities are shown at a time; if there are more available, paging controls will be displayed. If the opportunity is linked to an event in the calendar, you can click the link to jump to that event. Opportunities are shown in ascending date order based on the start date. A club can also define opportunities not linked to a date (for example, "Paint the Clubhouse"); these will be listed first.

Click the magnifying glass icon on the Page Tools Widget to search through a longer list of opportunities. You will see the following dialog:

	Search For Opportun	ities 🚫
Start Date		
Finish Date		
Category	< All Categories > \$	
Name]
Sort by	 ● Date ○ Name 	
Search 🗳	Use the search tool	to display this box

Searches can be performed by date, category, and name, and the results can be sorted by date or name.

When you click the **View More** link, the opportunity expands to show the location (including an optional Google map link) and contact information for the opportunity coordinator, as well as individual slots:

	<mark>g Opportu</mark> lay, May 02, 2	nities 2014 Finishes: Se	unday, May 04, 2	2014			
≳ view less		intain Rally on races	Volunteer Yourself Volunteer Others	2 SPOTS LEFT			
	Date	Time	Task	Required	Assigned		
	05/02/2014	06:15 AM - 10:00 AM	Registration Desk	3	2		
	05/02/2014	10:00 AM - 12:00 PM	Refreshment Tent	3	2 Who		

Each slot has a date and time range, the specific task that needs to be performed, how many people are required and how many people have already volunteered. Optionally, you may see a **Who** link, allowing you to popup a list of the people already assigned.

Voluntee	ers 888						
Opportunity:	Mountain Rally						
Slot:	Refreshment Tent						
When:	05/02/2014 10:00 AM - 12:00 PM						
Who:	Barb Rad Mary Johnston						
	Done						

You can also click **View Less** to hide this detailed information.

When the volunteering opportunity is open to non-members, and you are not logged in, clicking the **Volunteer Yourself** option displays the following screen:

Volunteering

Home > Volunteer sign					
I want to Volu	inteer!				
Enter your information	on, including a	preferred phone number	r and email where we	e can reach you regarding this opportunity.	
First Name		•			
Last Name		٥			
Preferred Phone	Other ‡	•			
Preferred Number					
Preferred Email				•	
	What is your	T-shirt size?			
Answer					
	Date	Time	Task	Register	
	05/02/2014	06:15 AM - 10:00 AM	Registration Desk	0	
	05/02/2014	10:00 AM - 12:00 PM	Refreshment Tent		
		c	ancel 🗙 🚺	Vext 👂	

The system prompts for your first name, last name, phone and email address. It may also ask you a question that's unique to this volunteering opportunity (in this example, your T-shirt size.)

Below that is a grid showing available opportunity slots. Click the **Register** checkbox to register yourself for this slot.

When you are logged in, the system already knows who you are. Your first name and last name are already filled in. You can choose any of the phone numbers already stored with your profile or enter another number. Your preferred email is filled in although it can be changed.

The grid of available slots may be slightly different depending on which slots are available for members and non-members.

When you click the **Next** button, you will be taken to the following summary screen:

Home > Signup Summary	
I want to Volunteer - Summary	
Important Note: You must click the finish button within 30 minutes of starting the volunteer registration process, otherwise your assignments will be cancelled	Add Another Member Add Family Member Add Non-Member
Barbara Jones - 847-255-0210 support@clubexpress.com	0 🛱
05/02/2014 from 06:15 AM to 10:00 AM - Registration Desk	
)
Cancel 🗶 🛛 Finish 🗳	

At this point, your volunteering is not yet complete. You still need to click the **Finish** button to complete the process. This must be done within 30 minutes otherwise your assignments will be deleted. This provision protects popular opportunities and allows all members the chance to volunteer. Each person in your group will receive a confirmation email with their assignments, and another reminder email the day before any assignments.

For each volunteer, click the **Edit** (pencil) icon to modify that person's slots, or the **Delete** (trashcan) icon to remove that person and his or her slots.

Three buttons in the top right corner allow you to volunteer another member, a family member, or a nonmember (such as a friend who might be interested in joining you.) Whether these buttons appear or not depends on various settings for that opportunity:

- Add Another Member only appears if the opportunity has been configured to allow members to sign each other up. It does not appear when a non-member is signing up.
- Add Family Member only appears for members and then only if the current member has a membership that includes additional people.
- Add Non-Member only appears if the opportunity allows non-members to volunteer.

Clicking one of these buttons jumps back to a version of the first screen, allowing you to add the appropriate person. When adding another member, you are first prompted for the first name and email address; this information is checked against the database and if a match was found, the other fields are displayed. When adding a family member, you will see a drop-down list of members attached to your membership; select one and the other fields are displayed.

As noted above, if your group is volunteering together, the whole process must be completed within 30 minutes of starting, otherwise any slot assignments up to that point are deleted.

Volunteering Administration

Control Panel > People > Website Modules > Volunteering

There are two ways to manage Volunteering opportunities:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.
- 2. Edit When viewing any page in the Volunteering function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:

Home > Volunte	Home > Volunteering > Volunteering Administration												
Voluntee	Volunteering Administration												
volunteering The "Configu to edit the op	Use the criteria shown in the search box to find the Volunteering opportunities you want to see. Click the "Add Vol. Opp" button to add a volunteering opportunity. NOTE: You cannot add a new Opportunity until you have defined at least one Volunteering Opportunity Category. The "Configure" button has a menu for Locations, Volunteering Categories and Slot Categories. Click an icon next to an existing opportunity to edit the opportunity, maintain the slots for the opportunity, comportunity, email the volunteers assigned to the opportunity, or delete the opportunity (available if no slots have been defined for the opportunity).												
Search for Volu	unteering Oppo	rtunities]	Co	nfigure	∇	
Show	 All Dates 	Future D	ates Only								Report	s	
Category	<all categor<="" th=""><th>es> ‡</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>d Vol. C</th><th></th><th></th></all>	es> ‡									d Vol. C		
Status	<all status="" th="" va<=""><th>lues></th><th>\$</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>_</th><th></th></all>	lues>	\$									_	
Name					Sea	arch	\$						
Opportunity	Category	Start Date	Status	Visibility	Mainta	in				ī			
Rummage Sale	Fundraisers	04/15/2014	Published, Open	Everyone	Ø		i (<u>,</u> I					
Mountain Rally	ally Racing Events 05/02/2014 Published, Open Everyone 🧪 🏢 📋 🖼 🗊 🕥												
						_							 _
			Retur	rn to Prev	vious P	age							

This is a standard ClubExpress administrator screen. A search panel at the top allows you to filter the list of volunteering opportunities by all dates or future dates only, category, status, and/or name (anywhere in the field.) Click the **Search** button to refresh the grid.

For each opportunity, the grid shows the title, category, start date, status and visibility. These options are described in more detail below.

The grid provides the following options for each volunteering:

Icon	Description
(Edit)	Edit basic information on this volunteering opportunity.
(Slots)	Manage individual slots.
道 (Сору)	Copy this volunteering opportunity, including all settings and slots.
(Delete)	Delete this opportunity, all slots, and all registrations.
(Reports)	Run reports for this specific opportunity.
(Download)	Export this opportunity, its slots, and volunteers.

lcon	Description
(Email)	Send an email to everyone registered for this opportunity.
	Maintain Options

Clicking the **Configure** button displays the following options in a drop-down menu:

Locations

Selecting **Configure –Locations** displays the same locations list as can be found in the Event Calendar. It allows you to maintain a list of standard locations where events and volunteering take place.

Standard locations can be selected when you are defining volunteering opportunities and for each slot.

Volunteering Categories

Selecting **Configure – Volunteering Categories** displays a standard lookup screen similar to the following:

Home > Volunt	ng > Volunteering Administration > Volunteering Category Administration	
Volunte	ring Category Administration	
These are th category, or	olunteering categories in the system. Click "Add Category" to create a new category. Click the Edit icon to edit an existing Delete icon to delete a category (available only if there are no volunteering opportunities in the category).	
Add Catego		
Category	intain 🔳	
Fundraisers		
Racing Events		
Social Events		
		_
	Return to Previous Page	

This list allows you to organize volunteering opportunities into categories.

Example: A running club might have "Race Support" as one category and "Office Time" as a separate category.

Click **Add Volunteering Category** to create a new category. You will see a standard popup dialog. Click the **Edit** icon to edit an existing category or the **Delete** icon to remove a category (as long as it's not in use.)

Slot Categories

Selecting **Configure – Slot Categories** displays a standard lookup screen similar to the following:

Home > Volunteer	ing > Volunteerin	g Administration > Volunteering slot category Administration
Voluntee	ring Slot	Category Administration
		gories. Click "Add Slot Category" to create a new slot category, or "Edit" to edit an existing slot category. y if no volunteering slots have been defined in the category.
Add Slot Cate	gory	
Slot Category	Maintain 🔳	
Finish Line	N 🙀	
Refreshments	🥟 🙀	
Registration Desk	🥟 🙀	
		Return to Previous Page

This list allows you to organize volunteering slots into categories. For example, the running club "Race Support" opportunity might define the following slot categories:

- Registration desk
- Start line
- Water stations
- Finish line
- Awards
- Etc.

These slot categories can then be used over and over again for each slot.

Click **Add Volunteering Slot Category** to create a new slot category. You will see a standard popup dialog. Click the **Edit** icon to edit an existing slot category or the **Delete** icon to remove a category (as long as it's not in use.)

Email Reminders

The system can send out one volunteer reminder email. Select the **Configure – Event Reminders** option to customize it. You will see the following screen:

Home > Volunteering > Volunteering Administration > Volunteering E Volunteering Email Reminders		s		
ClubExpress sends reminder emails, which you may optionally customize. Email reminders marked with 🖌 have been customized.				
Email	Customized	Maintain	R.	
Volunteer Reminder Email Template Sends reminder email(s) to volunteers of the upcoming engagement		Ø		
		Retur	n to P	revious Page

Click the Edit (pencil) icon to edit the reminder. You will see the following screen:

Email Edit: 00 S)(
Use this page to customize your email. The drop down list at the top of the page includes all the tags available for this email.	
We recommend that you do not use a word processor or other external tool to edit this email - it is likely to produce text which cannot be properly displayed and formatted in an email, and to break any links you have added.	
< Select Tag >	
[16px • B Z U] ¶ 書 書 著 [A • ⊗ •] ※ чь 🖭 ୭ • ୯ •] 導 律 學 🧕 🖄 Ω • 註 註 🚍 🗳	•
A message from ~~club_name~~:	
A gentle reminder about this upcoming event:	
~~event_title~~ ~~event_date_and_time~~	
~~event_location~~	
~~short_description~~	
~~event_url~~	
Don't forget to check the website and calendar for future events, schedule changes, and cancellations.	
Contraction Contra	
Save 🖌 Cancel 🗶	

Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

Replaceable tags are available from a drop-down list in the top left corner. Select a ~~tag~~ and click the **Insert Tag** button to add that tag at the cursor position. Tags are replaced with their actual values at runtime.

Click **Save** to save your changes and return to the Volunteering Administration screen, or **Cancel** to return without saving your changes.

Options

Selecting **Options** displays the following screen, with just one initial option (more may be added in the future):

Volunteering

Home > Volunteering > Volunteering Manager > Edit Volunteering Def Volunteering Defaults	aults
Organization Defaults	
These are the default Volunteering values for your Organization.	
Track Hours for each Volunteer O Yes 💿 No	
Save 🗸	Cancel 🗙

Select **Yes** to track hours **actually** worked for each volunteer. This option is for clubs where members must volunteer a fixed number of hours each year to remain in good standing. Click **Save** to save and return to the Volunteering Administration page, or **Cancel** to return without saving.

Add Volunteering Opportunity

Control Panel > People > Website Modules > Volunteering

Click the **Add Vol.Opp.** button to create a new volunteering opportunity. (Note that this button is grayed out until you have added at least one Volunteering Category.) You will see the following screen:

Home > Volunteering > Vo	lunteering Administration → volunteering opportunity add/edit
Add/Edit Vo	lunteering Opportunity
	Mountain Rally
Description	
	opining ballouin races
	20 of 250 characters used
Category	
	5/2/2014
	5/4/2014
Available to non-members	
Mailing List Category	
Link to Event?	
Event	
Eligible for Required Hours	
Visibility	
Status	
Contact Person	
	Show Email 🕐 Show Phone 🖉 Notify on Registration 💟
Ask volunteers a question	
Question	What is your T-shirt size?
Location	
Location	Flying Field Locations V
Address	1000 Forest Drive
City	Anywhere
State/Province	(Illinois ¢)
Zip/Postal Code	60101
Country	United States of America + Show All Countries
Show Map Link	0
Location Phone	
Location Website	Not Selected Select
	Save 🖌 Cancel 🗶

- Specify a title, description and category for this opportunity.
- Start and Finish dates are optional. Some volunteering opportunities happen on a specific date or across a series of dates. Other opportunities might be open-ended ("Paint the Clubhouse").
- Specify whether the opportunity is **available to members only or also to non-members**. If you place the Volunteering function on the public side of your website, this option determines whether a specific opportunity will be visible. Note that a similar option is available at the slot level, so that some slots can be restricted to members only while others are available to non-members.
- Specify the **Mailing List Category** into which volunteers (both members and non-members will be saved. This allows you to export their information or to send a blast emailing just to these volunteers.
- You can optionally **link a volunteering opportunity to an even**t. If you click **Yes**, a drop-down field appears showing future events. When you enable this option, users can easily jump between the volunteering opportunity and its linked event.
- If your club or association **tracks required hours**, an option allows you to make this opportunity eligible to be counted.

Visibility is one of the following:

- Visible to everyone
- Visible to members only

Note that a volunteering opportunity can be visible to members only but still allow non-members to sign up. You might configure it this way so that the person signing up is a member but he or she can bring friends who are not members.

Status is one of the following:

- Closed (not shown in the list)
- Published Not Yet Open for signups
- Published Open for signups
- Cancelled

Specify a contact person, whether his or her email address and phone should be shown, and whether he or she is notified by email whenever someone signs up for a slot.

Note: If the contact's email is not shown, the confirmation email sent to the volunteer(s) will replace ~contact_email~~with the email of the club's membership director.

Specify the general location for this opportunity. Click the **Locations** button to display and select from the list of standard locations. Or you can enter a completely different location. Note that individual slots can have a different location from the opportunity as a whole.

Click **Save** to save your changes and return to the Volunteering Administration, or **Cancel** to return without saving.

When you edit an existing volunteering opportunity, if you change the status to Cancelled, a cancellation email will be sent to everyone who had volunteered for this opportunity.

Volunteering Slots

Control Panel > People > Website Modules > Volunteering

Each volunteering opportunity can have multiple slots, representing a specific block of time and a specific task being performed. Click the **Slots** icon to view and edit volunteering slots for an opportunity. You will a screen similar to the following:

until y maint (only a	ou have defin ain the list of	ed at least one volunteers ass volunteers ha	e Volunteering Slot (ined to the slot, mar	Category. Cli k attendanci	ick one of the e for the slot	e icons i , email t	next to an ex he volunteer	isting s assi	slot t gned	o edit th to the s	cannot add a new slot e slot, copy the slot, lot, or delete the slot that the slots are show
Opportun Add	ity: Mountair Slot	n Rally Display Sec	uence								
	Date Start Time Finish Time Name Status Positions Filled Maintain										
Date	Start Time	Finish Time	Name	Status	Positions	Filled	Maintain				
Date 5/2/2014		Finish Time 10:00 AM	Name Registration Desk			Filled 3	Maintain	<u>.</u>		₽	

The grid shows each slot, including its date, start time and finish time, name, status, how many positions are needed and how many have been filled. The following options are available in the **Maintain** column:

Icon	Description
(Edit)	Edit basic information on this volunteering slot.
📁 (Сору)	Copy this volunteering opportunity, including all settings and slots.
(Volun- teers)	View and update the list of people who have signed up for this slot.
(Attend- ance)	Record attendance after the fact. Who showed up and how long did they work.

Volunteering

Icon	Description
🖂 (Email)	Email just the people registered for this slot.
(Delete)	Delete this slot and all registrations. This option will only appear if no-one has signed up for this slot.

Maintain Options

Click the **Add Slot** button add a slot. (Note that this button is grayed out until you have added at least one Volunteering Slot Category.) You will see the following screen:

Add/Edit Volunt	eering Slot 🛛 🖓 🗞 🔊
Specify information about required.	the slot, including its date, start and end times and the number of volunteers
Opportunity: Mounta	in Rally
From	7:00 AM 🔯 to 10:00 AM 🔯
Date	5/2/14 📖 🧕
Number Required	3
Name	Registration Desk 🔷
Description	Help register participants; ensure that all necessary forms are signed and received. Collect fees, Direct people to parking and the launch field. Answer questions.
Category	Registration Desk 💠
Available to non-members	O Yes 💿 No
Visibility	Visible to everyone 💠
Status	Published +
Volunteer List Visibility	Members Only 🗘
	Save 🗸 Cancel 🗶

- Specify the date, start time and finish time, number of people required, name and a brief description.
- Select a **volunteering slot category** from the drop-down list. Just as opportunities can be grouped into categories, so can individual slots. This allows you to run reports on the different types of tasks for which people have been volunteering, across all opportunities.
- Within an opportunity, individual slots can be **available to non-members** or not. The slot can be visible to everyone, or only to members.

You can also control the visibility of individual slots, as well as their status:

- Closed
- Published (available for signups)

- Full (no more signups allowed)
- Cancelled

You also control who can see who else has signed up (no-one, members only, or everyone.) Many clubs find that people are more likely to sign up if they can see who they will be working with (friend? enemy? etc.)

Click **Save** to save your changes and return to the Volunteering Slot Administration screen, or **Cancel** to return without saving.

Click the **Display Sequence** button to change the order in which slots are shown. This button if grayed out until more than one slot has been defined. You will see the standard ClubExpress display sequence dialog.

Volunteers

Select this option to view and update the list of people who have signed up for this slot. You will see a screen similar to the following:

Home > Voluntee	ring → Vo	lunteering Admir	nistration > Volunteering	Slot Administratio	n > Volunteeers				
Voluntee	ers								
	This screen shows the volunteers who have already signed up for the slot, and allows you to edit volunteer information, remove a volunteer from the slot, or assign members or non-members to the slot.								
Opportunity: Registration Desk									
Slot: 5/	2/2014 07	2:00 AM To 5/2	/2014 10:00 AM - Regis	stration Desk					
Name	Member	Phone	Email	Maintain 🔳					
Abby Bamberger	Yes	312-555-3333	Abby@abc.com	🧪 🙀					
Martin Smith	Yes	847-255-0210	info@clubexpress.com	🧷 🛱					
<vacant></vacant>				& &					
			Return to	o Previous Pag	e				

This grid has exactly the number of rows as people required. For each person, you will see their name, phone number, and email address, and whether they are a member. The **Edit** (pencil) icon allows you to modify someone's phone and email address. The **Delete** (trashcan) icon allows you to remove someone if they have canceled out.

For <Vacant> slots, click the **Assign Member** or **Assign Non-Member** icons to add a member or nonmember to that slot. For members, you will see the member selector:

number and ema	r by clicking the Select Member link. Enter the phone ail that this person would like you to use for communication s volunteering slot.	8
Name	Bamberger, Abby(2215) Select Member	
Preferred Phone	123 456 7890 (main) ‡	
Preferred Email	Abby@abc.com	
	Save 🗸 Cancel 🗙	

Click the **Select Member** link to view the standard member selector. Once a member has been selected, his or her phone number and email address will be filled in but you can change them for this slot.

For non-members, you will see this screen instead:

Add/Edit Volunteer							
Select an existing non-member by clicking the Select Non-Member link, or enter a new non-member by typing in his or her first and last names. Enter the phone number and email that this person would like you to use for communication pertaining to this volunteering slot.							
	Select Non-Member						
First Name	Mary						
Last Name	Johnston						
Preferred Phone	Other ‡						
Preferred Number	847-455-6677						
Preferred Email	marx_johnston@me.com						
	Save 🗸 Cancel 🗙						

Click **Select Non-Member** link to view the standard non-member selector. You can also directly type in someone who's not in the non-member database. For a non-member already in the database, the phone number and email address will be filled in but you can change them for this opportunity.

Record Attendance

After the volunteering opportunity is complete, this screen allows you to record who showed up and how long they worked. Click the **Record Attendance** icon to see a screen similar to the following:

rionia - Voluntee	ring > Vo	lunteering A	dministration >	Volunteering Slot	Administration	>	Volunteering Slot - Record Attendance	
Voluntee	Volunteering Slot - Record Attendance							
If the volunteer worked in the opportunity slot, check the Attended box ad enter the number of hours he or she worked. Press Save to save attendance for all the volunteers on the list.								
Opportunity: R	Opportunity: Registration Desk							
	Slot: 5/2/2014 7:00:00 AM to 5/2/2014 10:00:00 AM							
			1					
Name	Member	Attended	Hours Worked					
Abby Bamberger	Yes	Ø	3.00					
Abby Bamberger Martin Smith	Yes Yes	I I I	3.00					

Check off the names for who showed up. The specified hours for that slot are filled in but can be changed if someone left early or stayed late. Click **Save** to save your changes and return to the Volunteering Slots screen, or **Cancel** to return without saving.

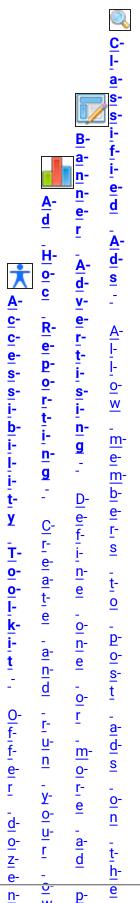
Extra Cost Features

Welcome to ClubExpress, the most powerful tool on the Internet for managing clubs and associations.

ClubExpress was designed to allow membership-based organizations to move their administration entirely online. ClubExpress handles your organization's membership database, signups and renewals, committees, documents, discussions, event calendar and registration and financial management using the Internet.

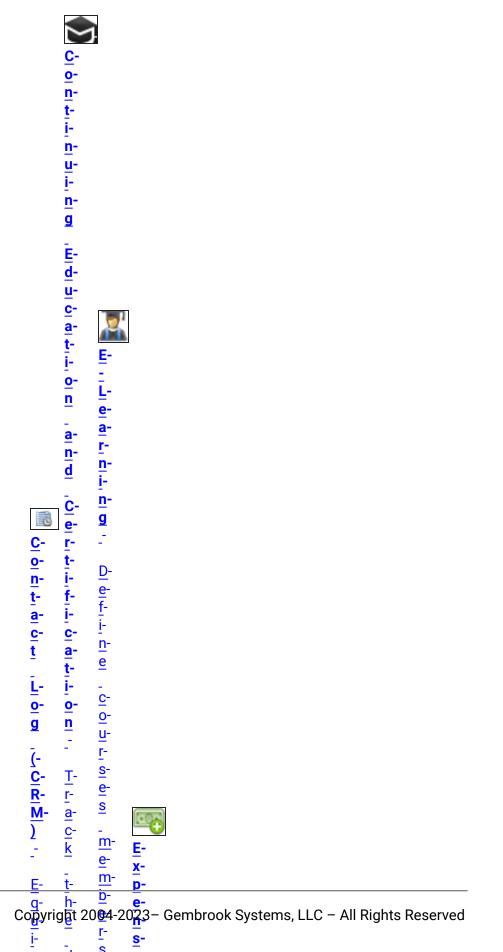
Over the years, we've built a number of modules to handle special or unusual club and association needs. Many of these modules were actually paid for by other clubs and associations. These modules are not part of the basic ClubExpress product but they can be enabled at any time for your club or association for an additional one-time setup fee. Half of this setup fee is rebated to the other club or association, to reimburse them for fronting the initial investment. (The other half is retained by ClubExpress to cover our time to install and configure the module for your club or association.)

And please note that this option is available for any kind of customization. If your club or association needs a special function and you think that clubs with a similar purpose might also be interested, we can build this module for you, for a fee, then make it available to other clubs for a fee that is then partly remitted back to you to reimburse you for initially sponsoring the development cost. Who knows: if enough other clubs are interested, you end up getting the feature for free, which is exactly what happened with some of these modules!

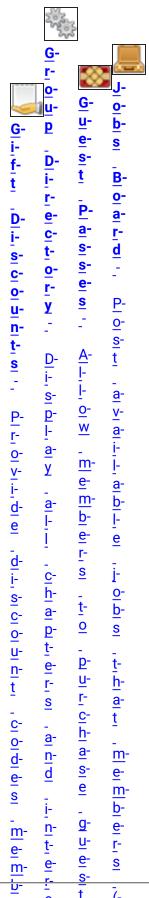


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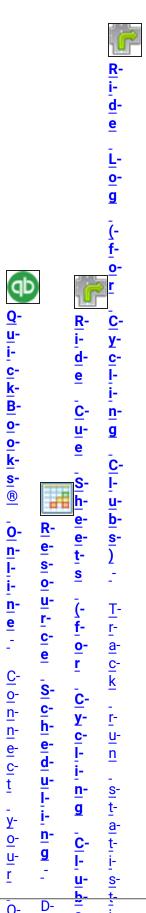
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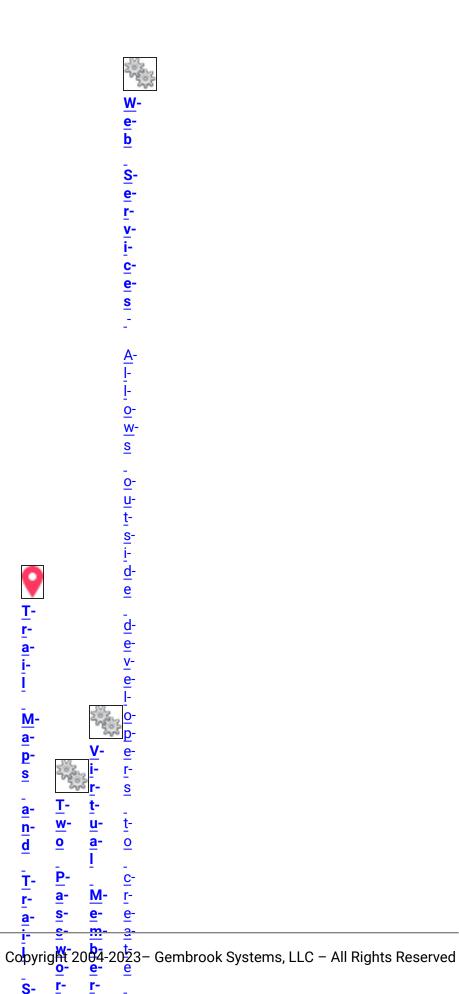
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Enabling Ad Hoc Reports	
Free Trial	
Paid Subscription	
Opening Screen Orientation	
Report Types	
Create an ExpressView Report	
Creating an Advanced Report	
Creating a Crosstab Report	
ClubExpress Filters	
Ad Hoc Reports Data	
Common Data Categories	
Special Data Categories	
Organization Info in Formulas	
Multi-Tier Organizations	
Scheduling Reports	

The Ad Hoc Reporting module allows you to create and run your own reports. When you enable this module, a new option on the **Control Panel – Club tab – Admin Functions** section will take you to a new browser tab for the module that has been integrated with ClubExpress. From there, you can use the **ExpressView** option to quickly create reports that can then be further customized, or use the **Advanced Reports** function to create a complex report from scratch. Ad Hoc Reports also supports CrossTabs (pivot tables), Dashboards, and Chained Reports (multiple reports output as a single report.)

Ad Hoc Reports can use data from many parts of ClubExpress, including member and non-member information, transactions and payments, events (including individual events), donations, the E-Commerce storefront, committees, member interests, etc. We have organized this data into views that make it easy to select only the relevant fields. The reporting engine gives you full control over report and page headers and footers, groups, subtotals, formatting, and formulas. Advanced users will find an endless set of options.

You can create and save as many reports as you want and organize them into separate folders. We have also built a collection of shared reports that are available for you to run, or to copy into your private area to modify. An optional enhancement allows you to schedule reports to run automatically and be delivered by email to a pre-defined set of users.

ClubExpress is using a 3rd-party business intelligence tool called Exago to handle Ad Hoc Reports, so we are charging an annual fee to enable this functionality.

In addition to our documentation, Exago has an extensive library of documentation and video tutorials to help users master its reporting environment and powerful capabilities. These are available from the Ad Hoc Reports home screen, or on the Exago Support website.

Note: Ad Hoc Reporting is available for a free one-month trial. See <u>Enabling Ad Hoc Reports</u> for more information on activating your free one-month trial.

Activation: The *ANNUAL* fee to activate this powerful module for your website is \$200. The *ANNUAL* fee to activate the optional report Scheduling function is an additional \$100 for a total of \$300. Please note that we cannot provide refunds for partial years.

Ad Hoc Reporting is done using a separate program from Exago, Inc. We will not attempt to explain all the options and capabilities within the Exago Reporting Engine; Exago provides dozens of video tutorials and online help materials to learn their powerful product.

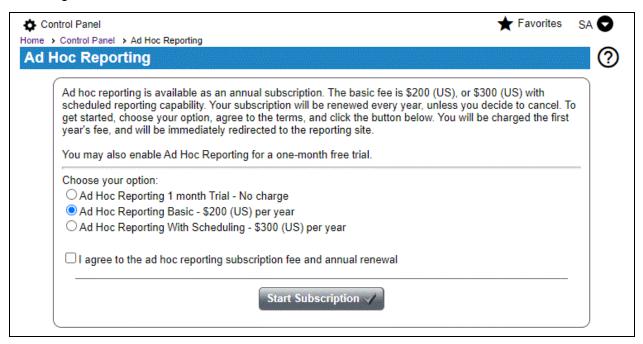
These sections will describe some of the basic capabilities of Exago, including ExpressView, creating a more complex Advanced Report from scratch, and charts. We have also created a couple of our own videos to show how Exago works within the context of your ClubExpress data.

We encourage you to use these materials to get started and then to rely on the Exago materials to explore more advanced concepts.

Enabling Ad Hoc Reports

Free Trial

To start your free one-month trial, go to Control Panel – "Club" tab – Admin Functions – Ad Hoc Reporting. First click the **Setup** (wrench) icon to enable the module, then click the **Edit** (Pencil) icon. You will see the following screen:



Select One Month Trial to start your free trial. The administrator activating the free trial will receive an email confirmation which includes the expiration date of the free trial.

During your free trial you will have access to the entire module and all reporting capabilities (except scheduling). The free trial will end on the expiration date and will not automatically charge you for the full module. To enable the module either after your trial period, or without a free trial, see below.

Paid Subscription

To enable Ad Hoc Reports as a paid feature, go to Control Panel – "Club" tab – Admin Functions – Ad Hoc Reporting. First click the **Setup** (wrench) icon to enable the module, then click the **Edit** (Pencil) icon. You will see the following screen:

🔅 Control Panel 🔶 Favorites SA 🕤
Home > Control Panel > Ad Hoc Reporting
Ad Hoc Reporting
Ad hoc reporting is available as an annual subscription. The basic fee is \$200 (US), or \$300 (US) with scheduled reporting capability. Your subscription will be renewed every year, unless you decide to cancel. To get started, choose your option, agree to the terms, and click the button below. You will be charged the first year's fee, and will be immediately redirected to the reporting site.
You may also enable Ad Hoc Reporting for a one-month free trial.
Choose your option:
Ad Hoc Reporting 1 month Trial - No charge
Ad Hoc Reporting Basic - \$200 (US) per year
○ Ad Hoc Reporting With Scheduling - \$300 (US) per year
I agree to the ad hoc reporting subscription fee and annual renewal
Start Subscription

Select the Subscription option you want, check the "I agree" box and click the **Start Subscription** button. You will be charged an annual fee of either \$200 for basic Ad Hoc Reporting or \$300 for Ad Hoc Reporting with Scheduling.

Once you are a subscriber, the screen changes to the following:

	reporting subscription is active through 6/19/2020. In below to access ad hoc reporting.
	Go To Ad Hoc Reports 🛷
rated or refun	rge your subscription, to add or remove scheduled reporting (note that the \$100 (US) difference in annual fee is not pro ded if you change this option). cancel your subscription - ad hoc reporting will be disabled, and your subscription will not be renewed.
-	
Choose your	

Click **Go To Ad Hoc Reports** to open the Ad Hoc Reporting program in a new tab. You can also bypass the above screen by clicking the **View** (eyeball) icon in the Control Panel.

You can also change or cancel your subscription at any time. If you upgrade from the Basic option to include Scheduling, a \$100 fee will be charged; note that we do not prorate this fee. And please note that there are no refunds for canceling or downgrading in the middle of a period. Renewals are handled 7 days before the expiration, with an emailed note that the charge has been run.

Opening Screen Orientation

When Exago opens in a new tab, you will see a screen similar to the following:

CE Yacht Club		Filters ▼
Home ×		0 0
Image: Constraint of the second s	CubExpress Ad Hoc Reporting There are some resource to get you darked with a face reporting. Some added press videos, and a user manual. Note that there is also a help link in the help difference of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product share face in the resource of the spage wide product of the resource of the resource of the spage wide product of the resource	
Report Description	Meetabolity to use the advice in sporting bod with your ClubEppress data. Inter as a bit of decen which focus on some detailed functions. These videos are supplied by Esags, the company which meeted the reporting isotheres. © Express Views ○ Of Advanced Reports ○ Of Formatting ○ Of Sections and Groups ○ Of Formulas ○	

The title will be the name of your club or association.

The **Filters** button allows you to limit a report to just a single event, or survey, or donation fund, or subgroup. This option is described in more detail below.

Immediately below the heading line is the **Tab Bar**, currently showing the "Home" tab only. As you create and view reports, they will appear as additional tabs. On the far-right side of the Tab Bar are icons to customize your user preferences and to display the Exago help system. Help screens also appear as a tab.

Action Icons

The following icons appear on the left side:

Icon	Description
(Create New Report)	Create a new report from one of the available wizards or options.
(Browse Exist- ing Reports)	View the list of existing reports, including shared reports. Also provides a search function.

lcon	Description
(Data Sources, aka Categories)	Enabled when you have an open report design. Displays data sources and indi- vidual data elements that you can place on reports.
(Manage Scheduled Reports)	If this option is enabled for your organization, it allows you to schedule reports to be run and emailed to a predefined list of recipients.

Action Icons

The initial view is **Browse Existing Reports**. Use the search panel to locate a report by part or all of its title. The list will be filtered dynamically as you type. Clear the search phrase by clicking the "x" icon. Click the : icon to include report descriptions in the search.

The Reports list starts with **Shared Reports**, organized into folders by report type. These are read-only reports (indicated by the lock icon) created by ClubExpress to get you started. They can be run but they cannot be modified in place. However, you can duplicate them to your club-specific space if you want to customize them.

The **Reports** option at the bottom is your club-specific space. You can create folders and sub-folders to organize your own reports.

When you select a folder, a menu icon appears on the right with the following options:

- Add Root or Child Folder
- Create a new report using one of the five options
- Rename the folder
- Delete the folder (it has to be empty first)
- Expand or Collapse all sub-folders

When you select a report, the menu icon has the following options:

- Run Report. You can also click the arrow icon.
- Export the report to Excel, PDF, RTF (Word), or CSV
- Schedule Report (if the scheduler is enabled)
- · Email Report to a specific address in the specified format
- Duplicate the report to create a slightly different version or to experiment.

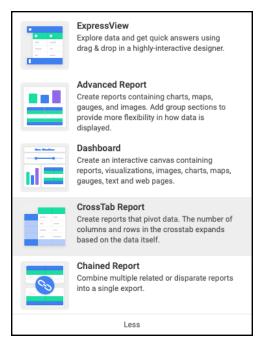
You can also drag-and-drop reports and folders around this tree to organize it any way you need. Within a folder, reports are always listed alphabetically by title.

The main workspace is in the center. On the Home page, it provides links to ClubExpress video tutorials, this manual, the Exago User Guide, and a new ClubExpress Online Help system that's currently under development. Below the divider are links to some excellent Exago video tutorials.

If you have uploaded a Club Logo for the built-in ClubExpress reports, that logo will be available to place on your Ad Hoc Reports. It is included in the empty Template report and in the shared reports we have created to get you started.

Report Types

Click the **Create New Report** "+" icon in the top left corner to see five options:

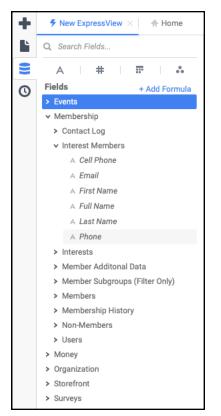


- **ExpressView** uses an interactive designer and a drag-and-drop interface to quickly create tabular reports. ExpressView is both a reporting tool and a data exploration tool; it allows you to explore your data in real time, where you can dynamically regroup, sort and get totals on an as needed (ad hoc) basis.
- Advanced Report is more sophisticated designer that supports multi-section reports, where each section can contain tabular output, charts, maps, gauges, and other output types. It also supports grouping and other advanced features.
- **Dashboard** is an interactive canvas with multiple elements all updating at the same time. See the Exago documentation for examples.
- **CrossTab Report** (aka Pivot Table) displays aggregate data in a format to analyze a dependent variable based on two or more independent variables (for example, the count of members at each intersection of a member type and a state of residence.)
- **Chained Report** combines multiple reports into a single report which can be displayed, exported, or emailed. See the Exago documentation for examples.

Create an ExpressView Report

Click the **ExpressView** option and the screen changes to the report designer. A tutorial dialog pops up and you should watch it at least once. For now, click the *Skip Tutorial* option.

The left side of the screen looks like this:



The database icon is now active. It shows a list of data sources, organized into general categories (Events, Membership, Money, etc.) The Membership category has been expanded to show various types of member data (Contact Log, Interest Members, etc.) The Interest Members sub-category has been expanded to show individual fields that are available from the database.

We have created these data sources and field lists to shield you from the internal complexity of the database. Where information must be collected from multiple sources, this work has been done for you. We have also hidden the internal information used by ClubExpress so that you only see your actual data.

The icons at the top allow you to filter the available field list to show only alpha, number, date/time, or other fields. Each icon is a toggle. Click once to activate and highlight; click a second time to deactivate.

You can select data fields from multiple categories and sub-categories and drag them over to the workspace.

To begin, let's create a simple tabular report about your members' interests. Click on the arrow to the left of Membership to see a list of available fields and drag over Interest Category name and Interest Name. Then pull down the Interest Members fields and drag over the Member's Full Name, Mobile Phone and Email. The workspace now looks like the following:

Category Name ^1	Interest Name ^2	Full Name	 Cell Phone 	Email
Category Name 1	Interest Name 1	Full Name 1	Cell Phone 1	Email 1
Category Name 2	Interest Name 2	Full Name 2	Cell Phone 2	Email 2
Category Name 3	Interest Name 3	Full Name 3	Cell Phone 3	Email 3
Category Name 4	Interest Name 4	Full Name 4	Cell Phone 4	Email 4
Category Name 5	Interest Name 5	Full Name 5	Cell Phone 5	Email 5
Category Name 6	Interest Name 6	Full Name 6	Cell Phone 6	Email 6
Category Name 7	Interest Name 7	Full Name 7	Cell Phone 7	Email 7
Category Name 8	Interest Name 8	Full Name 8	Cell Phone 8	Email 8
Category Name 9	Interest Name 9	Full Name 9	Cell Phone 9	Email 9
Category Name 10	Interest Name 10	Full Name 10	Cell Phone 10	Email 10
Report Totals				
Count: Count for Intere	Count: Count for Intere			

The ExpressView Designer is showing a column for each data element. It displays a Totals panel at the bottom, showing "Count" formulas only because this is text data that cannot be aggregated any other way. The following icons are available in the toolbar:

Icon	Description
(Run)	Switch to Live Data mode, where the report is designed using actual data rather than placeholders. In Live Data mode, the categories and fields panel on the left is unavailable.
(Save – [Ctrl-S])	Save this report. A panel appears on the right side allowing you to enter and name, description, and folder for the report. Click Save Report Info to complete the save.
(Export)	Export this report. A drop-down menu appears to select the format and to cus- tomize settings.
C (Refresh – [Ctrl-R])	Refresh the data shown. Only active when Live Data is enabled.
(Report Sec- tion Display Options)	Control how report sections are shown in Live Data mode.
(Show Visu- alization)	Display a visualization chart based on the data added to the report.

Expressview Toolbar

When you select Live Data mode, all panels disappear or are grayed out and the actual report appears. You may also see page navigation controls and a Search option at the top:



Click a heading to see options to edit the heading text or change the sort order. You will also see the Style panel on the right side of the screen, to change the appearance of this heading. (See below for more info.)



Note that these choices are also available by right-clicking on the column heading.

Click an item in the Report Totals section near the bottom of the report to see a drop-down menu like the following, which allows you to change what total value appears.

When you create groups, arrows on the right side of each group allow you to collapse that group, hiding the details and showing totals only, or to expand the group and show all detail rows.

🗸 Detail Rows 🔽 🤇	Group Totals 🛛 🔽 Rep	ort Totals				
Category Name 1	Interest Name	Full Name	:	Cell Phone	:	Email
abc	abc	abc		abc		abc
Group Totals	Add Total	Add Total	•	Add Total	•	Add Total 💌
Report Totals	Add Total	Add Total	•	Add Total	•	Add Total 🔻

On the right side of the screen are a series of icons which, when clicked, open different configuration panels. These options may also be selected when you select a section of the report itself or one of the options in the popup wheel.

- Style the Selected Section
- Style the Overall Report
- Sorts
- Filters
- Visualizations

Selected Section

When you select a section, the Style panel allows you to change the appearance of that section:



All the basic style options are available, including font, text color, background color, size, attribute, vertical and horizontal alignment, underline, and word-wrap. If you change the format type to number or date, additional options appear.

	Number	
	0	
	Use 1000 Separator	,
	Use Currency Symbol	\$
	Append Percent Sign (%)	
	Blank When Zero	
	Negative Numbers	
	Show Negative Symbol	
	Show Parenthesis	
ample:	Color	

Select Formula and you can build a calculation using any of dozens of built-in functions:

Selected	Section
Style	Formula
Q, Search	
Arithmetic	
Database	
Date	
Financial	
Formatting	
Logical	
Organization Info	
▶ Other	
▼ String	
Concatenate Contai	ns Left Len
Lower Mid New	Line Replace
Right Trim Uppe	er Value
Parameters	

Explaining when and how to build formulas is beyond the scope of this introduction but Exago provides a video tutorial and help system to guide you.

Report Style

Select the Report Style icon to change the appearance of the report as a whole:

Style
▼ Theme
Theme Selector
Emerald Forest 💌
▼ Row Shading
Alternate Shading Colors
▼ Group Colors
Radial Menu Group Colors

You can select from a number of built-in themes, configure row shading, and configure group colors.

<u>Sorts</u>

Select the Sorts icon to configure how the report will be sorted:

	Sorts		
	Interest Category	asc	desc
:	Interest	asc	desc

For each sort, click "asc"ending or "desc"ending. The three dots symbol on the left is a drag-and-drop handle to change the sort order.

Filters

Select the Filters icon to filter the values shown in the report.



You can drag fields from the designer into the filter panel, then click the small arrow to the left of the filter title to see options, including the filter control and filter value.

Fi	Filters									
Standard	Standard T									
Limit the report	Limit the report to the top/bottom values									
Di	Display									
Тор 🔻	10	Values 🔻								
	0f									
Field (type here to se	arch)	•								
+ Add Group	+ Add Group									
Display the highest 10.										

Use the Top/Bottom Filter options to limit how many rows are shown.

Top/Bottom filters are often applied to numeric or date columns (for example, "Show the 10 Biggest Invoices" or "Show the 5 Earliest Orders".)

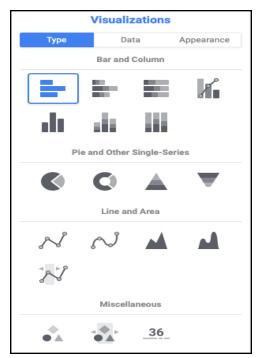
After applying some of the effects above, here is a sample of the ExpressView report now:

			Q (« <
bbies			٥	
Bicycling			٥	
Full Name	Cell Phone	Email		
Valerie F Frizzle		Frizzle_Valerie_F@gmail.com		
Michael Fisher		onepercent2@gmail.com		
Count: 2				
Bird Watching	_		\$	
Full Name	Cell Phone	Email		
Charles E Fromage	(630) 289-6700	chuck@devinspeople.com		
Alyssa Jaden		Ryan@clubexpress.com		
Valerie F Frizzle		Frizzle_Valerie_F@gmail.com		
Gizmo Howell-Eames		rikkie267@aol.com		
Count: 4				
Board Games			¢	
Full Name	Cell Phone	Email	•	
Charles E Fromage	(630) 289-6700	chuck@devinspeople.com		
Darius Fray	()	Ryan@clubexpress.com		
Valerie F Frizzle		Frizzle_Valerie_F@gmail.com		
Emily Mones	8153542103	emily@clubexpress.com		
Erika Howell	217-693-2199	rikkietikkietavi@gmail.com		

Visualizations

Select this icon to visualize your data as a chart. Visualizations apply specifically to numeric or aggregate data, which can be shown in different kinds of bar, column, pie, line, area, and other chart types.

When you select Visualizations, the first option is to pick the chart Type:



Next, specify what data should be shown in the chart:

Visualizations										
Type Data Appearance										
Drag items from the report into the 'Labels' and 'Values' fields below										
Labels										
Interest	Interest									
+ Add Label										
	Values									
Enter Series Nar	ne									
Count: Member	Count: Member Name									
+ Add Value	+ Add Value									

In the above example, we count how many members are in each Interest group.

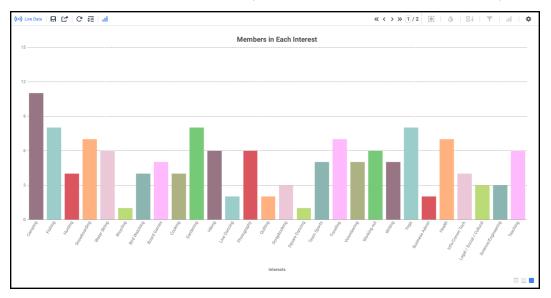
Finally configure the appearance of the various chart elements, including titles, colors, and data. Most of the options on these panels will be self-evident so they are not described separately.

Visualizations										
Туре	Data	Appearance								
Chart Titles	3									
▼ Chart Colors										
• Theme	Linear Range	O Custom								
Default		•								
Use 3D Styl	le									
Chart Data										

In the lower right corner of the chart panel are three icons that control where the chart appears in reference to the tabular data:

- Show the chart above the data
- Show the chart below the data
- Show only the chart

The result will be something like this (further customized to use slant labels):



If the chart and report are both visible on the screen at the same time, you can click one of the bars and the report will dynamically filter to show just the data on that bar! In the example below, we clicked Camping to show just the members in that interest group.

(•) Live Data 🖪 😭 C 🚎 ul				٩	😟 0 24 Y al 🌣
15		Members in Eac	h Interest		
	Contraction of the second s	Contraction of the second seco		Contraction of the second	
× Clear selected points					= = =
	Traveling Groups		٥		
	Camping		0		
	Member Name	Cell Phone	Email		
	George Admino		george@theadminos.com		
	Mark Vester		mark@vester.com		
	Greg Grant	847-555-3332	greg.grant@gregggrantinc.com		
	Carol C Brady	818-555-1213	michelle@clubexpress.com		
	John Kowalski		johnkowalski@clubexpress.com		
	Charles E Fromage	(630) 289-6700	chuck@devinspeople.com		
	Alyssa Jaden		AlyssaJ@JadenLTD.com		
	Valerie F Frizzle		Frizzle_Valerie_F@gmail.com		
	Emily Moores	8153542103	emily.moores21@gmail.com		
	Emily Mones	8153542103	edigiuli@yahoo.com		
	Erika Howell	217-693-2199	rikkietikkietavi@gmail.com		
	Michael Fisher		onepercent2@gmail.com		
	Count: 12	Count: 12	Count: 12		
	Count: 40	Count: 40	Count: 40		

Click the same bar, or the *Clear Selected Points* option in the lower left corner of the chart to clear this dynamic filter.

Note that you can maximize the area shown for live data by clicking the **Choose Data** icon on the far left to hide the Data panel.

Be sure to save the ExpressView report when you are done configuring it, by clicking the Save icon in the top left corner, or the Settings icon in the top right corner and then the **Save Report Info** button.

Close the report by clicking the "X" beside this tab in the tab bar.

Advanced Reports can be created from scratch or you can convert an ExpressView report to an Advanced Report by selecting the option on the **Settings** panel.

Creating an Advanced Report

Advanced Reports provide a complete and powerful section-oriented report designer. When you create an Advanced Report, a wizard appears to set the initial report properties:

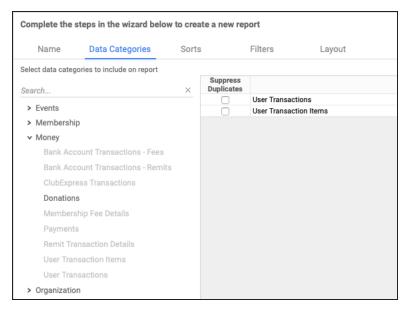
Complete the steps in the wizard below to create a new report							
Name	Data Categories	Sorts	Filters	Layout			
Enter the report na	me						
DE Transaction	History						
Select folder for the	e report						
> 🖿 Shared Rep	ports						
🗸 🖿 Reports							
> 🖿 Events							
> 🖿 Executiv	e Dashboards						
> 🖿 Financia	1						
> 🖿 Member	ship						

Enter the report name and the folder where it should reside. You can also enter a more detailed description (not shown.) Click the **Next** button in the lower right corner to continue.

(Note that at any time, you can also click **Finish** in the lower right corner to jump immediately into the Advanced Report designer and specify sort orders, filters, etc. without using the wizard.)

The next step is to select Data Categories to appear on the report. You will see a list of general categories. Double click a source to add it to the report. When you do so, other categories will be disabled if they are not related to the one(s) already selected.

Note that these Data Categories can be changed at any time; the wizard is simply giving you a head start on building the report.



In the above example, we have added User Transactions and User Transaction Items to the report. Click **Next** in the lower right corner to continue.

The next step is to specify the initial sorts for your advanced report.

Complete the st	Complete the steps in the wizard below to create a new report								
Name	Data Categories	Sorts	Filters	Layout					
Select sort fields									
User Transactions	•	User Transaction	ons.Date						
Amount		User Transaction	ons.Trans. Type						
Balance Due									
Date									
Description									
Ref. Number									
Status									
Trans. Type	→								
Transaction ID									

The available fields in each Data Category are shown. Double click or click and drag to move fields into the sort list. In the above example, we have added Date and Transaction Type as initial sorts. Click **Next** in the lower right corner to continue.

The next step is to specify Filters, to initially limit the report based on the data you want to display. Double click a field from the list on the left to move it into the filter panel, then specify filter properties at the bottom.

Complete the ste	eps in the wizard bel	low to create a n	iew report	
Name	Data Categories	Sorts	Filters	Layout
Select filter fields to	include on report			
User Transactions	•	User Transaction	ions.Date	
Amount		•		
Balance Due				
Date	→			
Description				
Ref. Number				
Status				
Trans. Type				
Transaction ID				
		Greater Than O	r Equal To 🔻 1/1	/2019
		AND With Next	Filter 🔻	
		Group With	Next Filter	
Add	Add Formula	Prompt For	Value	
SUMMARY				
User Transactions	s.Date >= '1/1/2019'			

In the above example, we are filtering the report to show only transactions in 2019. The reporting engine supports many filtering options as well as AND and OR options to create compound filters. You can also

tell the engine to group filters together and to prompt the user at runtime for the filter value(s). Filters can also make use of formulas and built-in functions.

Click **Next** in the lower right corner to continue.

The next and final panel allows you to define the initial report layout. Double-click fields in the selection panel to add them to the report. On the right, you can specify summary functions, and change the initial column order (you can also drag-and-drop the arrows to the left of each field name.) Below are options to add a Page Header, Page Footer, and Grand Total sections to the report.

As you select various options, an initial mockup of the report is updated in the panel below. This is a time to experiment with different options and orders.

Note that at any time in the wizard, you can also click the **Previous** button to move back to an earlier panel and make changes.

Here is the full and final screen before we finish and enter the interactive designer.

Complete the steps in the wizard below	ow to create a new report									
Name Data Categories	Sorts Filters	Layout								
Select fields to include on report										
User Transactions					Data Field					ry Function
User transactions •	User Transactions. Trans. Type								fx None	▼ ^ ∨ X
Amount	C User Transactions.Date								fx None	• ^ V X
Balance Due 🔶	User Transactions.Ref. Number User Transactions.Status								fx None fx None	• ^ V X
Date	User Transactions. Status								fx None	• ^ ` X
Description	User Transactions.Balance Due								fx None	V A V X
Ref. Number										
Status										
Trans. Type										
Transaction ID	Summarize By									
	User Transactions									
- Add	🗹 Page Header 🛛 🔽 Page Footer	Grand Total								
• • • • • • • • • • • • • • • • • • • •										
				DE Transac	ction Histo	ry				
		Trans. Type	Date	Ref. Number	Status	Amount	Balance Due			
		Trans. Type 1	Date 1	Ref. Number 1		Amount 1	Balance Due 1			
		Trans. Type 2 Trans. Type 3	Date 2 Date 3	Ref. Number 2 Ref. Number 3		Amount 2 Amount 3	Balance Due 2 Balance Due 3			
		Trans. Type 3 Trans. Type 4	Date 4	Ref. Number 3		Amount 3	Balance Due 3			
		Page Number	Date 4	Hel. Humber 4	Status 4	Amount 4	Datarice Due 4			
								Previous	Next Canc	el Finish

Click the **Finish** button to complete the wizard.

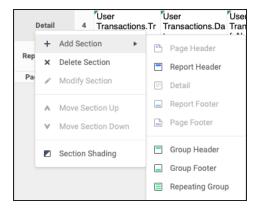
Advanced Report Designer

Section		A (Trans. Type)	B (Date)	C (Ref. Number)	D (Status)	E (Amount)	F (Balance Due)						
	1		DE Transaction History										
Page Header	2					•							
	3	Trans. Type	Date	Ref. Number	Status	Amount	Balance Due						
Detail	4	User Transactions.Tr ans. Type		User Transactions.Re f. Number	User Transactions.St atus	User Transactions.A mount	User Transactions.Ba lance Due						
Report Footer	5					=aggsum({User Transactions.A mount})	=aggsum({User Transactions.Ba lance Due})						
Page Footer	6	=@pageNumber	·@			=@pageNumber@							

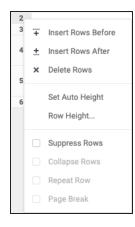
The interactive designer shows you the various report elements. Each cell, row, or column represents a portion of the report with unique properties. Row and column edges can be clicked and dragged to make them wider or narrower, taller or shorter.

You can select any header, footer, or data cell and modify its properties using the toolbar icons, most of which should be self-evident. If you double-click on a header, footer, or data cell, you can modify the text or formula in that cell.

You can also right-click on any cell or section to see a list of options for that cell or section. Here are some examples:



Right click on the **Detail** row to add or delete that section or to control section shading.



Right click on row #2 to see options for that row.

		-		'on H	listor	y
		*				
Trans. Type	Date	_	0	Sta	atus	
User	User	đ	Сору	er		Use
Transactions.Tr ans. Type	Transactions.D te	Ð	Paste	insac Is	tions.St	Tra moi
		×	Clear			=ag
			Format Cells			Tra moi
=@pageNumber	r@					
			Insert		Image	
				ch	Gauge	
				fx	Formula	1

Right click on the Page Header itself to see options for the header, including inserting an image, gauge, or formula.

Report Sections

Advanced Reports are initially created with the following sections:

- Page Header appears at the top of each page
- Detail the body of the report
- Report Footer appears to the end of the whole report
- Page Footer appears at the bottom of each page

You can also add the following sections by right clicking anywhere in the Section column:

- Report Header appears at the top of the report on the first page only, but below the Page Header.
- Group Header when you want to group and organize data by a single column. You can have as many group levels as you need.
- Group Footer appears at the end of each group. Generally used to provide sub-totals for that group.

Individual sections can be expanded with multiple rows.

Example: A Group Header can have two rows, one for the group title and one for the column headings: This layout:

Header: User Transactions.Trans.	2	User Transactions.	Trans. Type	
Туре	3	Transaction Type	Date	Ref.#

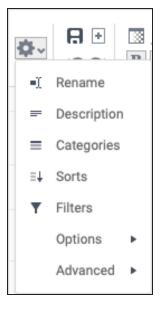
Results in this output:

Renew Membersh	nip	
Transaction Type	Date	Ref.#

You can also use blank rows in any section to control spacing.

Report Options

Click the "gear" icon on the left edge of the toolbar to see the following popup menu:



Rename, Description, Categories, Sorts, and Filters replicate the five screens in the original wizard.

Select **Options – General** to see the following dialog:

Report Options	
General Options	
Allow Execution in Viewer True 🔻 Include Setup Info No 🔻	
Allowed Export Types: 🖉 Excel 🖉 PDF 🖉 RTF 🗭 CSV	
Default Export Type Default Report Tree Shortcut Default	
Filter Execution Window Default	
No Data Qualify Display Mode Show Message▼	
Excel Options	
Suppress Formatting	
✓ Show Grid	
Freeze Rows 0	
Freeze Columns 0	
-Page Options	
Page Size Letter Page Orientation Portrait	
Fit to Page Width	
Okay Cancel	

Most of these options can be left at their defaults. The Page Options section at the bottom of the dialog allow you to change page size and orientation.

Select **Options – Report Viewer** to control what options appear on the right side in the Report Viewer (not the designer.)

Example: You can enable dynamic filters and sort options to allow users to play around with the report while they are viewing it. A panel like the following will appear in the Report Viewer:

•	Filters		+
User Trar	nsactions.Balar	nce Du	×
0.00			
10.0	0		
100.	00		
•	Sorts		
User Transact Type	ions.Trans.	t	Ť
User Trar	nsactions.Date	t	1
•	Columns		
Trans. Ty	rpe	~	
Date			7
Ref. Num	nber		7
Status			7
Amount			~
Balance	Due		

Format Cells

Select one or more cells, then click the **Format Cells** icon to control formatting for these cell(s). You will see the following dialog:



This panel allows you to control every aspect of a number or date format.

Click the **Border** tab to see the following screen:

Format Cells	×
Number Border Conditional Select color and width for each side of the cell. Check 'Make Borders Uniform' to apply color and width to all sides. Make Borders Uniform	
0	
Okay Cancel	

For each edge, you can specify the thickness and color of the border. Or check the **Make Borders Uniform** option to see only 1 thickness and color control (instead of 4) to make all four edges automatically the same.

Click the **Conditional** tab to see a screen similar to the following:

Fo	rmat Cells									×
	Number		Во	order	Cond	litio	nal			
	Action			Attribute						
	Foreground Color	٠	#FF0000			fх	^	~	×	
	1.00									
	- Add		Okay	Canc	el					

Click the **+ Add** icon to add a conditional row. Specify an Action and a value for the Attribute, which will change depending on which Action is selected.

Click the fx column to specify a formula or rule that will govern whether the conditional formatting is triggered.

Example: If the Balance Due > 0, show text in red.

Here is what the report definition might look like before you run it:

¢~ ⊟⊡ ⊮⊃	B	Calibri ▼ I U ▲ ▲ 18			Run Report Export Excel		
Section		A (Trans. Type)	B (Date)	C (Ref. Number)	D (Status)	E (Amount)	F (Balance Due)
Report Header	1			Transac	ction History		
Header: User ransactions.Tr	2	User Transactions.	Frans. Type				
	3	Transaction Type	Date	Ref.#	Status	Amount	Balance Due
Detail	4		User Transactions.Da te	User Transactions.Ref. Number	User Transactions.Status	User Transactions.Amount	User Transactions.Balance Due
Footer: User ransactions.Tr Type	5	Subtotal				=aggsum({User Transactions.Amoun t})	aggsum({Us) Transactions.Balance Due})
Report Footer	6	Grand Total				=aggsum({Us	=aggsum({User
Page Footer	7			="Page " 8	& @pageNumber@		

Note that the conditional formatting in the Balance Due column, Detail row, is indicated by an A icon, which you can click to adjust the formatting definition.

Outputting the Report

Click the **Run Report** button to output the report. A new tab will appear in the tab bar to show the report as defined:

		7	associan Watery			 Here 	
Adding forms						 100, Robel	
	1000	8.02	Ruba Lot	ARGUN .	Report Rep		
			200 5 200				
	12/2/2			12			
	ACCURATE OF		A			Fast loss have been been	
	A REAL PROPERTY.	100	Test Part	100	500		
						frame lipse	
Contruing Educe						Date Sector	
			Ruba Lot				
	11000	1110		200			
	******		Contraction Contraction				
	a function of		2011				

Options in the top **left** corner allow you to save the report or export it in Excel, PDF, RTF (Word), or CSV formats.

Options in the top **right** corner allow you to navigate through the report. You will also see the total number of pages and a Find box to locate specific text.

If you defined Report Viewer options such as Filters, Sorts, or Column Visibility checkboxes, these are displayed in a vertical panel on the right side.

To close the report view, click the "X" on that tab. Note that the report definition screen will still be open in another tab. If you switch to it and modify the report, then click **Run Report** again, a second viewer tab will be created; the original one is not updated to show your change; it shows a snapshot of the report data when you initially ran it.

You can also click the **Export...** drop-down list to select one of the export options. The Ad Hoc Reporting system will generate the report in the appropriate file and save it into the Downloads folder on your local computer.

Creating a Crosstab Report

Crosstabs or Pivot Tables allow you to track two or more independent variables and see how another value aggregates based on these independent variables.

Example: Let's build a crosstab that shows the count of member types by state in our sample database.

When you create a Crosstab Report, a similar wizard appears to the one we saw above for an Advanced Report.

- 1. Start by specifying the name and folder.
- 2. On the Categories tab, select Membership, then Members
- 3. Optionally select Filters.

You will next see the Layout tab when you can specify the row and column values, and the aggregate value. The screen will look similar to the following:

Complete the steps in the wizard I	below to create a new report							
Name Categories	Filters Layout							
			Row Header Sou	urce				
Members	Members.State						fi	x 🖌 🔨 🗙
Mailing Name								
Member Level								
Member Number			Column Header S					
Member Type	Members.Member Type		Column Header S	ource			6	× / ^ × ×
Metro Area	Member 2. Member 1996							
MI	1							
Newsletter?								
Nickname			Tabulation Data S	ource				
Phone	Members.Member Number						fi	x 🖍 🔨 🗙
Postal Location								
Requires Renewal								
Salutation + ≡ + III + ⊞								T Options
+= +111 +8	Theme: Basic	*						Options
			Type Member Type 1 Mem					
		State 1	74	3				
		State 2	92	70				
					Prev	ious Next	Cancel	Finish

On the left is a list of columns in the selected data source. You can select a value and drag it to the Row Header Source, Column Header Source, or Tabulation Data Source sections. Each section can include more than one data source.

Click the Edit (pencil) icon for the Row or Column Header source to change the label and sort order:

General Options	
abel	
itate	
fethod	Direction
leader Value (Text)	 Ascending
reader value (Text)	• Ascending •

Click the **Edit** (pencil) icon for the Tabulation Data Source to change the aggregation formula and display value:

General Optic	ons
Label	
Tabulation O	ptions
Method	Value
Count	 Aggregate

For the tabulation, a label is generally not specified. The tabulation method is one of Sum, Count, Average, Min, or Max. The value can be the aggregate value or a percentage of the row or column.

Click the **Options** button on the right side, about half-way down the screen to display the following dialog:

General	
ow Headers Pla	acement
Columns	•
Grand Total R	ow Label
Bottom V	Total
bottom v	Total
Grand Total C	olumn
Placement	Label
Right 🔻	Total

This screen allows you to control how row headers are placed and whether you want totals at the row and column levels. Note that if you specify both, a total will also be calculated across all cells.

When you click **Finish**, you are taken to the Report Designer, which will look similar to the following:

¢-						Run Report
Section		A	В	с	D	
	1	S	Sample Cros	stab Repo	rt	
Page Header	2		•	•		
	3					
	4	State	Member Type	Members.Mem ber Type	Total	
Report Footer	5	Members.State		Members.Memb er Number		
	6	Total		Members.Memb er Number	Members.Memb er Number	

When you are working with a crosstab, only one row and one column are shown to represent multiple rows and columns in the final report. And because crosstabs show aggregate data, the whole report is defined in the Report Footer section.

When you run the report as designed, you will see output like the following:

	Count of Membe	r Type by St	ate	
State	Member Type	Family	Individual	Total
CA		11		11
IA			1	1
IL		23	32	55
MI		5		5
тх			1	1
Total		39	34	73

If you add another value to the Row Header Source list, your results will be subdivided into smaller aggregates, such as the following:

State	City	Member Type	Family	Individual	Total
CA	Los Angeles		3		3
	Studio City		8		8
IA	Skokie			1	1
IL			2	8	10
	Arlington Heig	hts	1	1	2
	Chicago		3		3
	Chicago			1	1
	Crystal Lake		4	2	6
	Hoffman Estates			1	1
	Lake Bluff			1	1
	Lake In The H	ills	4		4
	Marengo			2	2
	Northbrook		1	2	3
	Schaumburg		3	3	6
	Skokie		5	10	15
	Wonderlake			1	1
MI	Walkerville		5		5
тх	Irving			1	1
Total			39	34	73

<u>Notes</u>

When you are tabulating text values, Count is generally the only aggregation that makes sense, and it's important to pick an aggregation field that we know to be unique. In this example, we are using Member Number.

When you are tabulating numbers or currency, you can use any of Count, Sum, Average, Min, or Max. You can even show more than one value at the same time, such as Total Revenue (Sum) and Largest Purchase (Max).

When you are tabulating dates, Min and Max are generally the only aggregations that make sense.

ClubExpress Filters

ClubExpress provides an alternate way to filter certain types of data. In some instances, this will be easier to use and more efficient than using the built-in filters within the Exago report designers.

Example: Many clubs have hundreds of events, often with the same name. When you use Exago's built-in filters, you will only see the first 100 unique entries and then only the event name. This doesn't help if you want to run a report on "Lunchtime Lecture Series", of which many could be listed.

When you use the ClubExpress-provided filters, all matching items will be shown (not just the first 100) and we will show more information to help you pick the correct item. It's also more efficient behind the scenes because of how the filter list is generated.

ClubExpress provides special filters that allow you to limit

- An event report to just one event;
- · A donations report to just one donation fund;
- A member report to just one chapter, district, or region; or
- A survey report to just one survey.

(Other pre-filters may be added in the future.)

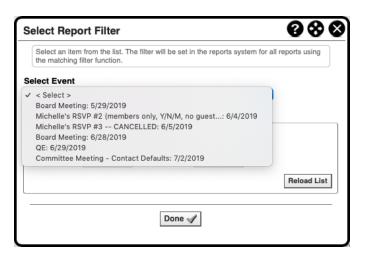
This is accomplished using the **Filter** button in the top right corner of the screen. Click it and you will see a drop-down menu like the following:

	Filters ▼
Event	
Fund (Donatio	on)
Survey	
Subgroup	

When you select an option, such as **Event**, you will see a popup dialog like the following:

Select Report Filter
Select an item from the list. The filter will be set in the reports system for all reports using the matching filter function.
Select Event
< Select >
Filter function name: CurrentEventId
Modify Select List
Show Items In Category: Monthly Meetings
Dates From: 1/1/2019 Through: 12/31/2019
Reload List
Done 🖋

Select Event will show a list of all events. But you can use the options in the Modify Select List panel to filter the items in the list by category and a date range. Click the **Reload List** button repopulate the drop-down list. Note that we also show more information about each event to help you pick the right one:



Note that when you select an event, the dialog box will refresh once again and show you the internal ID matching the event you choose. Make a note of this number, then click **Done** to save the report filter.

In order for this filter to work, you also need to apply the Filter value to the report itself. To do this:

- 1. Open the report in design mode.
- 2. Select the Filter option on the right.
- 3. In the Field list on the left, select and drag the "Event ID (for filter)" into the Filter condition box on the right.
- 4. Select "Equal To" as the option
- 5. Click the "*fx*" option and select the appropriate ID (in this example, "CurrentFundID") from the dropdown list. You will see your internal ID.

B C. Sant Sale				X 0 D T	
A P A O Max Columna O Name Columna I Image Columna	E Bartine Bart			Then .	

When you run the report, the ClubExpress filter is automatically applied.

Ad Hoc Reports Data

Note: Watch the Getting Started video for helpful tips before creating a report.

In this section, the data categories are listed using the original name of the category, however the names may be different than what you see on your website if you have renamed the related website modules.

Some of the data described here (Special Data Categories) may not be available if you have not enabled or purchased the related website modules on your website.

In some cases, the report system will allow you to add a combination of data categories which do not belong together and can cause your report to take a long time to run or fail entirely. Several important

notes related to this are included in the instructions below; please read and follow these warnings to get the best results. If you find that you need to ignore a warning in order to get a certain field on a report, please let us know so we can resolve the issue.

Common Data Categories

<u>Membership</u>	
Category	Description
Members, Sub- Members, Non- Members, Users	These all have the same set of fields, with different filters. Members includes all members, whether active, expired, or dropped. Sub-Members includes only secondary and tertiary members – primary members are excluded. Non-Members includes all active non-member records. Users includes all members and non-members. You will generally use the Users data category when reporting on transactions, events, or anything where members and non-member alike can be involved. If you are creating a report where only Users data is available, but you want to limit the report to members only, or non-members only, you can apply a filter (true or false) to the 'Is Member?' field. In Members data, you can limit the results to primary, secondary, and/or tertiary members by applying a filter on the 'Member Level' field. You can also select only active members, and/or expired members, or any combination of status codes by applying a filter on the 'Status' field. Some data categories are linked to both User and Members data. Linking to User data will give you a complete report of all data. Linking to Member Additional Data in the report (which is not available for non-members). <i>Please do not include both Members and Users</i> (or Non-Members and Users) in the same report – this can cause the report to attempt to access, and possibly display, more data than is necessary, and will take longer to run.
Members, Sub- Members: <i>Vis-</i> <i>ibility Code</i>	 The Visibility Code field contains the member's choice for how their directory information is displayed. For more information on what information is displayed at each level, <u>go here</u>. The values are: 0 = Do not list me in the directory 1 = Show name, city and state only; no bio or contact information 2 = Show name, city, state and bio only; no contact information 3 = Show name, city, state, bio and email; no address, work info or phone 4 = Show name, city, state, bio and email; no address, work info or phone 5 = Show name, city, state, bio, email, phone and work info; no address 6 = Show all information, except email 7 = Show all information
Mailing List Cat-	Includes all mailing list categories. Linked to Members, Non-Members, and Users

Category	Description
egories	<i>data</i> . We suggest putting the category name in a group header. If you put it in the details section, you may want to use the 'Suppress Duplicates' feature on that cell. There are a number of mailing list categories which are built-in to the system, and you can also create your own. The 'System or Local?' field allows you to see or select which type of category you want.
	Note: Categories which do not have any users attached will not appear on your reports.
Member Addi- tional Data	This includes the additional data you defined for your membership, beyond the basic contact info. <i>Linked to Members data.</i>
Member Addresses	This includes both the primary and secondary addresses for members (and nothing else). This is <i>different from the regular member data</i> , which includes only the address which the member has designated as current.
Achievements	A simple list of achievements and dates. Can be used with Members data.
Interests and Interest Mem- bers	Interests includes the interest and categories you have defined for your members to join. Interest Members is a list of the members within each Interest, including basic contact info. If you need more than the basics, you can include Members data to get everything.
Check-in Desk	Includes the check-in date and time, the name of the person doing the check-in, and whether or not the checked-in person is an active member or not. <i>Linked to Users data to get details</i> .
	Includes fields for contact category, type, description, etc.
Contact Log	Note: Only available if you have purchased the contact log module.

Membership Data Categories

Events

Category	Description
Events	Includes data about events – name, date and time, location etc. The 'Event Id (filter only)' field is available to easily select a single event to report on. Use the 'Filters' button at the top right corner of the page to select the event you want. On the report, set a filter using the 'CurrentEventId' filter function. Several of the data categories for events have the 'Event Id (filter only)'. Use them all in the same way (note that you only need one per report). Please see the 'ClubExpress Filters' section of the Ad Hoc Reporting Manual for a more detailed explanation and demonstration of how this works.
Activities	The activities and items within the event. Also includes the internal event id field to use for filtering. This is used to create a list of activities to document events – <i>it should not be used with registrations or registrants</i> .
Registrations	The registrations for events, including the date and time, the registration fee, status,

Category	Description
	and the name of the primary registrant. Also includes the internal event id field to use for filtering.
Registrants	The registrants contained in a registration, including the name, registrant type, and a couple of other basic info fields. Linked to the <i>Registration</i> and <i>Event data</i> categories. Can also link to <i>Users</i> data to get more detailed personal and contact info.
Registrant Activ- ities	The activities and items selected by each registrant. This includes activity/item info and is linked to Registrants and Activity Registrants. This is used when you want to see registrants with a list of their activities/items (sort-of the opposite of Activity Registrants).
Activity Regis- trants	For each registrant signed up for an activity/item, this includes the fee info and the 'Attended?' flag. This is used when you want to see activities/item with a list of registrants (sort-of the opposite of Registrant Activities).
Registration Answers, Regis- trant Answers, Activity Regis- trant Answers	Contains answers to questions set up at the registration, registrant, and activity regis- trant levels. These are linked to the corresponding data categories (<i>Registrations</i> , <i>Registrants, and Activity Registrants</i>).
Event Coordin- ator	Contacts assigned to an event, including name, email and cell phone number. Links to the Events data category and can also link to users if you require more detailed information on the event coordinator(s).

Events Categories

Money

Category	Description
	Includes info on <i>transactions with ClubExpress</i> – fee collection, credit card fees, logistics, etc.
ClubExpress Transactions	Note: Transactions remitting credit card payments we have collected on your behalf with our merchant account are not included here – see 'Bank Account Transactions – Remits'.
Bank Account Transactions – Fees	Includes withdrawals from your bank account covering <i>ClubExpress fees</i> : monthly membership, credit card processing, logistics, etc. Linked to ClubExpress Trans- actions for detailed info.
Bank Account Transactions – Remits	Includes <i>deposits to your bank account(s)</i> for money collected from credit card trans- actions or check processing.
	Note: If you have your own merchant account or do not accept credit card payments, and do not use our check processing service, there will be no data here.

Category	Description
Remit Trans- action Details	Details for bank account deposits: transactions, payments, and financial account.
Remit Pay- ments With CC Fees	Details on credit card fees for bank account deposits.
ClubExpress Billing	Includes ClubExpress <i>fee transactions</i> for customers who are not able to use a bank account. Linked to ClubExpress Transactions for detailed info.
Membership Fee Details	A history of your membership billing, by month. Includes member counts, fees charged, and non-member fee info.
User Trans- actions	Includes all transactions from members and non-members: date, amount, descrip- tion, status, etc. Linked to Users data.
User Trans- action Items	Items list for User Transaction data.
User Trans- actions By Account	A different view of transactions, including item details and financial account. <i>Linked to Users data</i> .
User Payments	A different view of user payments, including financial account. <i>Linked to Users data.</i>
User Payments By Account	Another view of user payments, linked with the related transactions. <i>Linked to Users data</i> .
Payments with Transactions	Another view of user payments, linked with the related transactions. <i>Linked to Users data</i> .
User Credits	Includes all credits issued to members and non-members: date, amount, description, etc. <i>Linked to Users data</i> .
User Credit Usage	Details on how user credits were applied to other transactions, or otherwise resolved. <i>Linked to User Credits data.</i>
Donations	Detailed info on donations received by your organization. Linked to Users and User Transactions.

Money Categories

Organization

Note: Other organization data can be found in the formulas section below.

Category	Description
Committees and Committee Mem- bers	Includes data on committee and members. <i>Linked to Users data for detailed info on members</i> .
Officers	List of organization officers (president, treasurer, etc). <i>Linked to Users data for detailed info.</i>
News	All news articles including headline, summary, post and active dates, etc. Linked to Users data to include contact information for the member who posted the article.
Organization Categories	

Surveys

Category	Description
Survey Ques-	List of surveys and questions, including survey name, question name, question type,
tions	etc. This is used to document what is included in a survey.
Survey Responses	User responses to a survey, including survey name, question name, question type, answer, user comments, etc. <i>Linked to Users data</i> .
	Note: If a survey response is anonymous, no user data will be found.
Survey	A summary of answers which have a defined set of possible responses (select list,
Answer Sum-	true/false, checkbox, radio buttons). Includes the question name, the answer value, and
mary	the number of responses received.

Survey Categories

<u>Blogs</u>

Category	Description
Blogs	Includes a list of all blogs define on your site with their interesting properties. <i>Linked to Blog Posts and Users (for blog author info)</i> .
	Note: A blog may have multiple authors. If you run a report, you will see repeated rows for each blog which has more than one author.
Posts	Includes all posts with title, date, and summary info. There is a 'Tags' field, which includes a comma-separated list of tags attached to the post. You can use this for filtering your post report by using a 'Contains' filter. <i>Links to Blogs, Tags, Comments, and Users (for author info).</i>
	Note: The full text of the blog posts is not included.
Post Tags	An individual list of tags attached to each post. This provides an alternate way to filter your posts by tags. When filtering on this field, you can use the dropdown list to see a list of the individual tags available. <i>Links to Posts.</i>
	Note: A post may have multiple tags. You will see multiple rows on your report if you join this to the Posts data without filtering or grouping.
Post Com- ments	Includes all comments made on a post. Since a post may have many comments, we suggest using this only when you have a report filtered to a single post, or else grouping by post. <i>Links to Posts and Users (for comment author data, when available).</i>
	Blogs Categories

Documents

Category	Description
Documents	Includes all uploaded documents, including title, description, file name, file format, average rating, etc. There is a 'Tags' field, which includes a comma-separated list of all tags attached to the document. You can use this for filtering your post report by using a 'Contains' filter. <i>Links to Document Folders, Comments, Ratings, Tags, and Users (for detailed info on the member who uploaded the file).</i>
Document Folders	Includes all folders (or categories) with name, description, and various properties. The Visibility field tells you how the folder visibility is configured. If you are using committee or subgroup visibility, the Visibility Selection field includes the name of the committee or subgroup selected. The Calculated Visibility Selection field shows the actual visibility on the website. A folder's configured visibility may be modified by its parent folders, so this field (and the Calculated Visibility Selection field) show this. <i>Links to Documents</i> .
Document Folder Struc- ture	Shows the document folder structure as displayed on the website. Sort by the Path field to see the proper display order (there is no need to place the Path field on your report – it will be meaningless to users). Use the Spaces function with the folder name field to create indentation to see the structure. See the Document Folders shared report to how this is done. <i>Links to Document Folders</i> .
	Note: To match the structure you see on the website, you will need to explicitly set a display sequence for all folders.
Document Comments	Includes all comments entered by members for each document. <i>Links to Documents and Users (for comment author data, when available)</i> .
Document	Includes detailed ratings entered by members for each document. Links to Documents and Users.
Ratings	Note: Documents data includes the average of all rating.
Document Tags	An individual list of tags attached to each document. This provides an alternate way to filter your documents by tags. When filtering on this field, you can use the dropdown list to see a list of the individual tags available. <i>Links to Documents</i> .
	Note: A document may have multiple tags. You will see multiple rows on your report if you join this to the Documents data without filtering or grouping.

Documents Categories

Special Data Categories

This includes data used by only certain customers, or in extra-cost modules. If these data categories are not relevant to your organization, they will not be included on your ad hoc reports page.

Ad Hoc Forms

Category	Description
Forms	List of surveys and questions, including survey name, question name, question type, etc. This is used to document what is included in a survey.
Questions	User responses to a survey, including survey name, question name, question type, answer, user comments, etc. <i>Linked to Users data</i> .
Questions	Note: If a survey response is anonymous, no user data will be found.
User Responses	Users who have completed a form, including the response date, status, and review com- ments. This data category does not include the user's answers; to include user answers select User Answers.
	Note: If using User Responses, do not include Answer Summary Response or Questions in the same report.
User Answers	The answers attached to each response – each answer includes the question name and the user's comments (if any). <i>Linked to User Responses</i> .
Answer Sum- mary	A summary of answers which have a defined set of possible responses (select list, true/false, checkbox, radio buttons). Includes the question name, the answer value, and the number of responses received. <i>Linked to Forms data</i> .
Answer Sum- mary Response (Old Version)	The original data category for user responses which includes the data from both User Responses and User Answers. Using two separate data categories allows for a more flexible way to report on Ad Hoc Forms, however this options was left in place to ensure older reports could still function.
	Note: If using Answer Summary Responses, do not include User Responses or Questions in the same report.

Ad Hoc Forms Categories

Collectibles

Category	Description
Collectible Items	General info on collectible items, including owner name, date purchased, item name, etc. <i>Linked to Users data</i> .
	Note: Some collectibles may not be assigned to a member or non-member, so no additional user data will be available.
Collectible Details	The detailed fields you have defined for collectible items. <i>Linked to Collectible Items.</i>
Collectibles Categories	

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Category	Description
Certificates	General info on the certificates available – name, description, points required, etc.
Certificate Fees	The fees charged to members and non-members for new and renewed cer- tificates. <i>Linked to Certificates</i> .
Course	The courses available to users to take and earn points. Includes name, descrip- tion, location, provider, etc.
Point Type and Point Type Cat- egory	The types of points available to be earned by users. Includes name, prompt text, etc. The Category data is used to organize point types.
Points	The points earned by a user. Includes the number of points and how they were earned. <i>Linked to Users, Course, and Point Type.</i>
Applicant Cer- tificate	The certificate applied for and earned (or declined) for users. Include certificate name, dates, certificate number, etc. <i>Linked to Certificate and Users</i> .
	Continuing Education Categories

Continuing Education

Resource Scheduler

The two data categories are nearly identical. Resources can inherit properties from their categories, but they can also override certain properties if needed. The resource data here will include the category values unless they have been overridden by editing the individual resource. These two data categories are linked together. Resources are also linked to Reservation items.

Category	Description
Resources	The two data categories Resources and Resource Categories are nearly identical. Resources can inherit properties from their categories, but they can also override cer- tain properties if needed. The resource data here will include the category values unless they have been overridden by editing the individual resource. These two data categories are linked together. Resources are also linked to Reservation items.
Resource Cat- egories	Includes the inividual items within reservations, the resource, time period, and fee. Linked to Reservations and Resource data.
Reservations	Includes dates, fees, registrants, etc. for resource reservations. Each reservation may contain one or more items. <i>Linked to Users data and Reservation Items</i> .

Category	Description
	Includes the individual items within reservations, the resource, time period, and fee. There are six fields related to the start and end of the reservation:
Reservation Items	 Setup Start Time - the time of day the setup period (if any) for a reservation begins Reservation Start Time - the time of the day the reservation begins Reservation Start Date/Time - the time of day and date the reservation begins Reservation End Time - the time of day the reservation ends Reservation End Date/Time - the time of day and date the reservation ends Cleanup End Time - the time of day the schedule cleanup period (if any) ends The report designer will not allow you to filter by the "time" fields. If you do need to filter by time of day, use the fields which include dates. <i>Linked to Users data and Reservation Items</i>.

Resource Scheduler Categories

Category	Description
Reservations	Includes dates, fees, registrants, etc. for resource reservations. Each reservation may contain one or more items. <i>Linked to Users data and Reservation Items</i> .
Reservation	Includes the inividual items within reservations, the resource, time period, and fee.
Items	Linked to Reservations and Resource data.
Resource Scheduler Categories	

Each type of organization has some special data categories available.

Storefront

Category	Description
Products	Includes product data: name, price, status, etc.
Inventory	Product inventory data: quantity, color, size, etc. Linked to Product data.
Orders	Order placed in the storefront, including date, status, etc. Linked to Users data.
Order Items	Items on storefront orders. Linked to Orders and Inventory.
Storefront Categories	

<u>Villages</u>

Category	Description
Services	Available services, including name, category, notes, etc.
Service Pro-	Service providers, including contact info, provider type, vetting status, etc. Linked to
viders	Users data for detailed contact data.
Service Pro-	
vider Vet-	Vettings done for each service provider. Linked to Service Providers data.
tings	
Provider	The services which are available from each service provider. Linked to Services and Ser-

Category	Description
Services	vice Providers data.
Service Requests	Services requested by members, including service type, date-time, address, etc. Linked to <i>Members data</i> for detailed info on the requesting member. Linked to <i>Services data</i> for info on the service type.
Service Request Providers	Links service requests to the provider(s) filling the request. Includes status, rating, expenses, etc.

Village Categories

Volunteering

Category	Description
Opportunities	Includes info on opportunities: name, address, contact, status, etc. <i>Linked to Events data, for opportunities that are tied to an event.</i>
Opportunity Slots	The slots to be filled in each opportunity. Linked to Opportunities data.
Opportunity Volunteers	General info on volunteers attached to an opportunity, including name, email, phone, etc. Use Slot Volunteers to see the actual slots that these volunteers are filling. <i>Linked to Users data to get more detailed info.</i>
Slot Volunteers	Volunteers attached to a specific slot within an opportunity. Includes name, contact info, hours, etc. <i>Linked to Users data to get more detailed info</i> .

Volunteering Categories

Organization Info in Formulas

Some info on your organization is available in formulas. To access in an advanced report, right click on the report cell, and select Insert > Formula. In the function popup, scroll down in the list of functions until you see 'Organization Info'. In an ExpressView, right click on a column and select 'Convert to Formula'. The available fields are:

- Currency Symbol (as defined on the Money Options page on the website)
- Logo (as set on the Club Logo page on the website)
- Member Name the name of the member currently running a report
- Organization Name the public name of your organization
- Tax ID (as defined in Money Options)

Multi-Tier Organizations

ClubExpress supports two types of multi-tier organizations. If you have a single website and ClubExpress account, and have your membership assigned to multiple chapters (or subgroups, regions, or whatever you call them), then you have what we call a 'Model One' organization. You may have a single level of chapters,

or you may further organize your chapters into higher groupings (up to three levels under your main account level. We refer to all three levels generically as 'subgroups'. The lowest level group, we often refer to as 'chapters' (though you are free to name them as you wish).

If you have multiple websites and ClubExpress accounts, but still organize into a hierarchical grouping, you have what we call a 'Model Two' organization. We refer to the lowest level as 'affiliates'. This is typically where the vast majority of the membership is found. The higher level(s) we refer to as 'parents'.

Each type of organization has some special data categories available.

Category	Description
Member Sub- groups (Filter Only)	You can include this data category in a report to enable you to filter results by a spe- cific subgroup (chapter, district, or whatever designations you use), or to connect users to their subgroups (see the 'Chapters' item below). This does not include any data by itself – it is just used to select (or filter) the subgroup(s) you want to include. The Chapter Id field refers to the chapter to which the member actually belongs (the lowest level). The Subgroup Id field refers to higher level groupings above the chapter level. For organizations with only one level, Chapter Id and Subgroup Id are the same thing. Note that in some cases, <i>members may belong to multiple chapters</i> . This can some- times result members appearing more than once in a report. Depending on the report, you may be able to resolve this by grouping on member, or by using the suppress duplicates feature. You will find this in the 'Membership' section of data categories on your report.
Subgroups	This includes all your sub-level entities, with name, address, and contact info. This can be joined to Members and Users data by linking through the Member Subgroups (Filter Only) data (in the Membership section – see that section for more detailed info on this). <i>Linked to Subgroups and Organization Hierarchy data</i> . You will find this in the 'Organization' section of data categories on your report.
Organization Hierarchy	This includes all subgroups and levels, and a path field used to sort to produce a hier- archy chart. The category does not includ e the top level (the ClubExpress account level). Linked to Subgroups data for more information on each subgroup, and to Sub- group Fees. See the Organization Hierarchy shared report for an example using this data.
Subgroup Fees	Includes member type and fee amounts for primary, secondary and tertiary members for each subgroup. <i>Linked to Subgroups and Organization Hierarchy data.</i> Model One Categories

Model One

Model One Categories

Model Two

You will find all of these data categories in the 'Organization' section. Note that these data categories are available only to the upper levels of the organization. If an affiliate signs up for ad hoc reporting on their

own, they will have access only to their own local data (as described in the sections above).

Note that the lower level data available is limited to people, affiliates, and officers. You will not be able to access transactions, event data, committees, etc which are available solely at the lower levels.

Category	Description
Affiliates	Affiliates are the lowest level accounts in your organization. Includes name, address, contact info. This category also includes the higher level groups in your organization, so that you can get full reports of membership if needed. Use the 'Org. Level' field (values 'Affiliate' or 'Parent') to distinguish.
Organization Members, Organization Non-Members, Organization Sub-Member, Organization Users	These are identical to the Members, Sub-Members, Non-Members, and Users data categories described in the Membership section above, except that they include all people in your organization, at your level and below. When you run reports on transactions, or events, and whatever else that can include people from lower levels, use these data categories. If you want to limit you report strictly to people at your own level, use the Members, Sub-Members, Non-Members, and Users data categories in the Members, Sub-Members, Non-Members, and Users data categories in the Membership section.
Organization Officers	Similar to the 'organization' data categories above, this category gives you access to the officers of the affiliates below your level. If you want to see offices at your level only, use the 'Officers' data category.

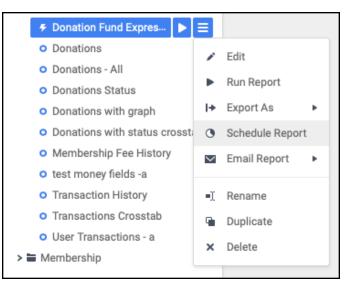
Model Two Categories

- 0 = Do not list me in the directory
- 1 = Show name, city and state only; no bio or contact information
- 2 = Show name, city, state and bio only; no contact information
- 3 = Show name, city, state, bio and email; no address, work info or phone
- 4 = Show name, city, state, bio and email; no address, work info or phone
- 5 = Show name, city, state, bio, email, phone and work info; no address
- 6 = Show all information, except email
- 7 = Show all information

Scheduling Reports

If you have enabled the Scheduled Reports option, you can schedule reports to be generated and emailed automatically, on a schedule and to a distribution list that you define.

Once a report is created and saved, select the report and click **Schedule Report** from the menu:



You will see the Scheduling wizard with the following options:

Complete the step	ps in the wizard below to schedule a report	
Recurrence	Filters Recipients	
Schedule Name Donation Fund	•	
Export Type PD	DF Password (optional) Confirm Password	
Execute Imm Schedule Tim		
Schedule Time		
-Recurrence Pa	attern	
 Once Daily 	Recur every 1 week(s) on:	
 Weekly Monthly Yearly 	□ Sunday ☑ Monday □ Tuesday □ Wednesday □ Thursday □ Friday □ Saturday	
-Range of Recu	surrence	
Start	End after 50 occurrences	
	C End by	

Define the Schedule Name and export type. For some formats, you can specify a password to encrypt the file.

Use the "Execute Immediately" option to test the report and distribution list. Once you have verified that it's working correctly, uncheck this box then specify the actual schedule you want.

Specify when during the day the report should be generated, and the recurrence frequency:

- Once, on a specified date in the future
- On a Daily basis (for example, every other day, or every weekday)

- On a Weekly basis (for example, every other week, on one or more days)
- On a Monthly basis (for example, on the second Monday of every month)
- On a Yearly basis (for example, on a specific date, or on the last Thursday of a specified month.)

You can also specify a start date and when to end, after a specified number of occurrences or on a specified date.

Click **Next** to move to the Filters panel. There, you can specify one or more filters that will be applied to the report before it is sent out. (This screen has already been described above.)

Click **Next** to move to the Recipients panel.

Complete the	steps in the wizard	below to schedule a report
Recurrence	Filters	Recipients
To:	info@clubexpress.co	om; support@clubexpress.com; ideas@clubexpress.com
Cc:		
Bcc:		
Subject:	Donations Fund Rep	ort
Here is you	ur scheduled Donat	ions Fund ¦eport

Specify a list of recipients in the To:, CC:, and/or BCC: fields. Specify a subject and email body. When you click the **Finish** button, the report is added to the scheduler and will be sent out as defined.

Banner Advertising

This module allows you to define one or more panels that appear on every public and member page of the website (but not admin pages). These panels can be horizontal or vertical and placed anywhere in your website layout, using one of the panels already defined in your layout file. The banner advertising panel can only be placed in a content box that is allowed by your template and layout. If you need a different position, a custom layout will be required for an additional one-time fee.

Advertisers then provide a banner ad in a pre-defined size that is then installed in the system and will then display in the designated panel as pages are viewed.

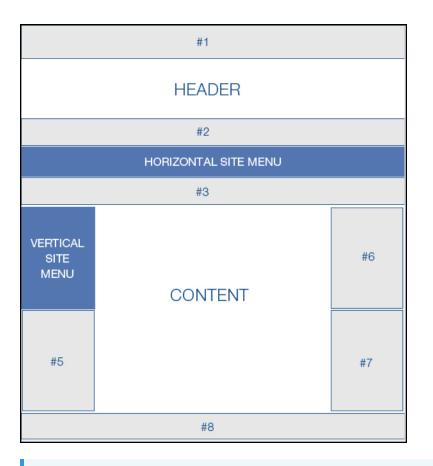
Activation: The one-time fee to activate this module for your website is \$300.

Note: You can find Banner Advertising in the Website Tab > Admin Functions.

About Ad Panels

Ad panels can be vertically oriented (for example, in the area under a left side menu) or horizontally oriented (for example, in the area above the page footer.)

	#1	
	HEADER	
	#2	
	#3	
#4	CONTENT	#6
#5		#7
	#8	



Note: Not all panels shown are available for every layout. To see which panels you can use in your current website layout, navigate to Website Tab > Setup > Website Look & Feel and select the Layout option on the Site Editor Toolbar.

Note that a layout should include a horizontal menu or a vertical menu but not both. The left and right edges can include none, one, or two content boxes. Box #8 appears above the standard page footer, which is always at the very bottom.

You should determine the size you want for each ad and then ensure that every image provided by an advertiser or sponsor matches that size. A typical size for vertically oriented ads is 150px wide by 600px high. A typical size for horizontally oriented ads is 600px wide by 150px high.

You can also have more than one ad panel in an area; the default size would then be adjusted to ensure that there is room for the panels to sit side-by-side or one above the other.

Ads are displayed at random based on the number of ads uploaded to an ad panel. One way to control display frequency is to have more than one ad panel. The first panel could have a small number of ads so each one is displayed more often; let's call these the "gold" sponsors. The second panel could have more ads so each one is displayed less often; let's call these the "silver" sponsors.

You also have the ability to determine panels displayed for specific custom pages. You may choose to do this based on the content of the page and content of ads, or based on the layout of your page.

Managing Panels

Note: For clubs with existing banner ads, those content boxes have been converted to panels. The content boxes are titled "Converted Content Box X", with "X" referring to the panel position. To remove ads from a Converted Content Box, select the Edit icon. In the Advanced Content Editor you will see a widget titled Advertisement. Right click the widget and select the Delete option.

Select Banner Advertising to navigate to the Banner Ads Manager screen.

Banner Ads Mana	ager							?
This screen allows you to maintain the panels can be either active or inactive. to display one image per page load, or the panel. If you want to delete a pane	You can ad multiple im	ld multij ages in	ple ads to panels a scrolling form	ls. Panels nat. If a pa	can then b	be inserted	into content are	eas
Add PanelImage: Constraint of the second								
Panel Title	Ad Count	Active	Maintain 💼					
Bronze Level Sponsors	3	V	<i>i</i> 🖉					
Silver Level Sponsors	4	V	Ø 🗊					
Converted Content Box 1	1	1	Ø 🗊					
Converted Content Box 3	1	V	<i>i</i> 🖉					
Converted Content Box 8	4	1	<i>i</i> 🖉					
TBD New Name - Converted Content Box 4	5	V	<i>i i</i>					
Gold Level Sponsors	1	×	<i>i</i> 🖉					
	R	eturn t	o Previous Pa	age				

The screen contains a grid listing all panels currently being used on your website, whether or not the panels are active. The grid contains:

• **Panel Title** - The panel title is for administrative purposes only and configured when a new panel is added. Common content boxes used for banner ads are titled "Converted Content Box X", with

"X" referring to the panel position. Select the Edit icon to edit the name of the panel.

- Ad Count the number of active ads displaying in the panel. This number does not include inactive ads stored in the panel. To add additional ads, or edit existing ads, select the Manage Advert-isements icon.
- Active whether or not the panel is an active panel displaying ads. To change the status of a panel, select the Edit icon.
- Maintain Column The options in the Maintain Column are:

lcon	Description
(Edit)	Select the Edit icon to edit the name of a panel and change the status (Act- ive or Inactive).
(Manage Advert- isements)	Select the Manage Advertisements icon to manage the individual ads displayed within the panels.
	Maintain Options

Note: To delete a panel, you must delete all ads within the panel first.

The buttons at the top of the screen allow you to add additional ad panels and run reports on the number of clicks advertisements receive.

Adding a Panel

Select the Add Panel button to add an ad panel.

In the *Add/Edit Advertising Panel* popup, you will see an automatically assigned panel number. Any newly created panels will follow the sequence of panels not being used.

Add / Edit Advertising Panel)
This screen allows you to add or edit an advertising panel. You can add advertisments to a panel after it's been created. You are allowed a maximum of 8 panels. A panel can be set to active or inactive. Panels must be active to be used as widgets in content areas. Titles are only used for administrative purposes.	
Panel # 7	
Title	
Active	
Save 🖌 Cancel 🗶	

Example: If you currently are using ad panels 1, 2, 4 and 7, the next new panel will be #3.

Enter the **title** of the panel. The title is for administrative purposes only. Finally, determine whether the panel is active by checking the **Active** box. Active panels will display ads on your website. Deactivating a panel will not delete the ads contained in that panel, the panel simply will not display on your website.

Adding an Advertisement

Select the **Manage Advertisements** icon in the Maintain Column to view the *Manage Panel Advertisements* screen.

This scree	n allows	you to add or edit images for an advertising panel.			
Auto M	aker	rs World			
Ð					
Add Ad	ļ				
Title			_		
nue	Active	URL	Maint	ain	
	Active	URL https://www.bmwusa.com	Maint	ain ()	<u>î</u>
BMW Stores			Maint	ain	1
BMW Stores Chevy Autos	1	https://www.bmwusa.com	Maint	ain	
BMW Stores Chevy Autos Ford Dealers	✓✓	https://www.bmwusa.com https://www.garylangautogm.com/	Maint	ain	î.
BMW Stores Chevy Autos Ford Dealers Lux Cars Nissan Dealer	* * *	https://www.bmwusa.com https://www.garylangautogm.com/ https://www.ford.com/dealerships/dealer-details/il/schaumburg/bob-rohrman%27s-schaumburg-ford/	Maint	ain	

The screen contains a grid listing all advertisements in the panel, whether or not the ads are active. The grid includes the:

- **Title** The title of the individual ad on the panel. This title is for administrative purposes only. Select the Edit icon to edit the title.
- Active Whether or not the ad is active within the panel. An active ad will display as long as the panel is also active. To change the status of a panel, select the Edit icon.
- URL The URL a user navigates to by clicking the ad.
- Maintain Column The options in the maintain column are:

lcon	Description
(Edit)	Select the Edit icon to edit any property of the advertisement, including title, status, URL and the image used for the ad.
(View)	Select the View icon to view the ad.
(Delete)	Select the Delete icon to delete an ad from the panel.

Maintain Options

Select the **Add Advert** button to add a new advertisement to the panel in the *Add/Edit Advertisement* popup.

-	you to upload advertisements to display on your site.
Title	•
Active	
URL	
Select Image	Choose File No file chosen Max file size 70 MB
	Save 🖌 Cancel 🗶

Enter the **title** of the ad. The title is for administrative purposes only. Next, determine whether this ad will be **active** and display within the panel (if the panel is also active). Enter the **URL** a user should navigate to when they click on the ad. Finally, select the **image** to be used for the ad.

Configuring Ads on Custom Pages

When you have enabled Banner Advertising, you will see an additional widget for the module in the list of widgets available in the Page Builder Toolbar.



To configure a panel to be displayed for a custom page, select and drag the **widget** to the *Page Builder Canvas*.

In the *Cell Tools* menu, select the **ad panel** to display on this page from the list of ad panels created on the Banner Ads Management screen. Ad panels must be configured prior to adding a panel to a custom page. Next, select the **display type**, either one ad per page load, or scrolling ads. One ad per page load will show the user one ad each time they navigate to a new page on your website. Scrolling ads will display all ads in a scrolling format; when a user hovers over an ad, the scrolling will stop and the user can click on the ad.

Classified Ads

User Interface	
In the Member Profile	
Classified Ads Manager	

The Classified Ads module allows members to post ads on the website for items they want to sell to other members (or non-members, depending on whether the module is visible on the public side of the website.) Ads can be organized into categories and can include full descriptions, location and condition information.

Other features include:

- · Clubs can optionally charge a fee to post and renew a classified ad;
- · Ads can include one or more photos to display the item;
- Ads can be renewed a defined number of times;
- Ads may require approval before they are posted.

This module has three components:

- Public side, where ads are displayed.
- The Member Profile screens, where members manage their own ads.
- The standard module admin screens, where admins manage all ads and configure the module.

Activation: The one-time fee to activate this module for your website is \$300.

User Interface

When users access Classified Ads, they will see a screen similar to the following:

arch	ntrols to see additional pages. Click on an image to	Classified Ads Policy
Category < Keyword	Any > v	\$
arch Results (1 cla	ssified ads found) 50 foot of rope	💟 Email Seller 🛕 Report Ad
Click to vie	Merchandise 25.00	
photo(s)	Posted: 7/28/2016 By: Paul Aaronson	

A small search panel at the top allows users to filter the ad list by category and keyword. There is also a button to view the club's policies regarding classified ads posted by members.

Each ad is shown with a photo, title, description, pricing, and the member name who posted the ad. Click the photo or prompt under the photo to display a popup screen showing one or more photos of the item(s) for sale. If multiple photos are available, the popup display will switch into slideshow mode after a couple of seconds to scroll through the available images. When users hover over an image, icons will appear allowing them to pause and resume the slideshow.

Click the **View More** button/icon to view more detailed information. Select the **Email Seller** option to send the seller a message. Select **Report Ad** to report the ad for content or policy violations.

In the Member Profile

When the Classified Ads module is enabled, members will see a new option on their personal Profile screen:

-	Website
ι	Jser Name / Password
l li	nterests
F	Photo Albums
Q	Classified Ads
	Download Bank

Selecting this option displays a screen to allow members to manage their own classified ads (the ones they have posted on the website. A screen similar to the following is displayed:

cancel the ad	ria shown in the searcl I, or navigate to the pa	h box to find the Classi ayment page if paymen	fied Ads you want to see. The main term of the sec. The sec. The main term of the sec. The sec	intain column	next to a classifie	d ad giv	es you o	ptions to	dit the classified ad, ren	ew the ad, delete o
Search	Title			assified Ad	v					
			Oldssille		,					
	legory Merchandis									
5	Status (< Any >	\$]								
Date Posted F	Range	То	Search 🔗							
Oranah Daar										
Search Resi	ults (10 classified a	ads found)								
	,	,	Title	Evolution	Demourale L off	Bill a landa	-	-		
Date Activated	Category	Status	Title		Renewals Left	Mainta				
Date Activated 6/5/2018	Category Merchandise	Status Active	Some Ad	7/5/2018	2	Ø	a 🛛	•		
Date Activated 6/5/2018 10/25/2017	Category Merchandise Merchandise	Status Active Expired	Some Ad Kayak	7/5/2018	2	0	a (2 a (5	•		
Date Activated 6/5/2018 10/25/2017 4/7/2016	Category Merchandise Merchandise Merchandise	Status Active Expired Expired	Some Ad Kayak Coffee Maker for Sale	7/5/2018 12/27/2017 11/7/2016	2 1 0		a (2 a (6 a)	•		
Date Activated 6/5/2018 10/25/2017 4/7/2016 4/7/2016	Category Merchandise Merchandise Merchandise Merchandise	Status Active Expired Expired Expired	Some Ad Kayak Coffee Maker for Sale House for sale	7/5/2018 12/27/2017 11/7/2016 9/5/2016	2 1 0		a (2 a (5	•		
Date Activated	Category Merchandise Merchandise Merchandise	Status Active Expired Expired	Some Ad Kayak Coffee Maker for Sale	7/5/2018 12/27/2017 11/7/2016	2 1 0		a (2 a (6 a)	•		
Date Activated 6/5/2018 10/25/2017 4/7/2016 4/7/2016	Category Merchandise Merchandise Merchandise Merchandise	Status Active Expired Expired Expired	Some Ad Kayak Coffee Maker for Sale House for sale	7/5/2018 12/27/2017 11/7/2016 9/5/2016	2 1 0			•		
Date Activated 6/5/2018 10/25/2017 4/7/2016 4/7/2016 4/7/2016	Category Merchandise Merchandise Merchandise Merchandise Merchandise	Status Active Expired Expired Expired Expired	Some Ad Kayak Coffee Maker for Sale House for sale 1997 GMC Utility Van for sale	7/5/2018 12/27/2017 11/7/2016 9/5/2016 8/24/2016	2 1 0 0 0	0 0 0 0 0 0		•		
Date Activated 6/5/2018 10/25/2017 4/7/2016 4/7/2016 4/7/2016 5/15/2016	Category Merchandise Merchandise Merchandise Merchandise Merchandise Merchandise	Status Active Expired Expired Expired Expired Expired Expired	Some Ad Kayak Coffee Maker for Sale House for sale 1997 GMC Utility Van for sale Laptop	7/5/2018 12/27/2017 11/7/2016 9/5/2016 8/24/2016 8/9/2016	2 1 0 0 0 0			•		
Date Activated 6/5/2018 10/25/2017 4/7/2016 4/7/2016 4/7/2016	Category Merchandise Merchandise Merchandise Merchandise Merchandise Merchandise Merchandise	Status Active Expired Expired Expired Expired Expired Cancelled	Some Ad Kayak Coffee Maker for Sale House for sale 1997 GMC Utility Van for sale Laptop Boat For Sale	7/5/2018 12/27/2017 11/7/2016 9/5/2016 8/24/2016 8/9/2016 5/27/2016	2 1 0 0 0 0 0 2	0 0 0 0 0 0 0 0		•		

Use the Search panel to filter the ads shown in different ways. Title will find the value anywhere in the field.

This screen lists the ads posted by this member, sorted by expiration date and title. Buttons at the top allow members to create a new ad (described below) and to view the club's Classified Ads Policy.

The system supports a number of status values for each classified ad, with programming and screens to support each value:

- Draft The ad is being created but has not yet been finalized or submitted for approval or payment.
- Submitted The ad has been submitted to the club for review and approval.
- Approved, Pending Payment The ad has been approved by the club but cannot be activated until the specified payment is made.
- Active The ad is showing on the website.
- Declined The ad was declined by the club, but it can be edited and resubmitted.
- Expired The posting period for this ad has run out so it's no longer showing on the website. If allowed by the club, it can be renewed.
- Renewed, Pending Payment The ad has been renewed but it cannot be activated until the specified payment is made.
- Canceled The ad was canceled by an administrator.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
🥟 (Edit)	Edit the ad, including its title, description, pricing, etc. Note that for Cancelled and Expired Ads, the resulting screen is read-only.
(Pic- tures)	Upload one or more pictures to describe the item being advertised.
ा (Delete)	Delete the ad completely. This icon is only shown for Draft and Approved, Pending Pay- ment ads.
図 (Cancel)	Cancel the ad so that it's no longer shown. This icon is only shown for Active and Renewed, Pending Payment ads.
S (Make Payment)	This icon is only shown for ads that require payment before they can be activated. Click- ing it takes you to the standard Pending Payment page.
(Renew)	Renew this ad. This icon is only shown for Active and Expired ads that have one or more renewals allowed by club policy.

Add Classified Ad

Click the Add Classified Ad button displays the following screen:

Required Information-			
Ad Owner	Paul Aaronson		
Title	50 foot of rope		•
Asking Price	25.00	•	
Classified Ad Category	Merchandise 🗸 🔮		
Reply Via	Use mobile phone from Pro	ofile	
	Email address: scott@cl	ubexpress.org	
	Free Form Text:		
Status	Renewed, Pending Payment		
Hidden	🔿 Yes 💿 No		

This screen has two panels, one for required information and the second for optional additional information. A couple of notes:

- Asking Price is a free-form text field, to allow more than jut a currency amount (for example, "\$1500 OBO" or \$1200-1500 depending on options"). When you select Email Address or Free Form Text as a Reply Via option, a text box will appear to allow you to specify the required information.
- Status is managed by the system and is shown for information purposes only.
- **Hidden** is available for administrators and module coordinators only, allowing them to hide or show a classified ad. For example, if the content of the ad is inappropriate.

-Optional Information-		
Description		
в I <u>U</u> S De	fault 🕈 🔺 🎆 🗄 🗮 🎞 🖻 🖻 🕤	<u>T</u> _x BC
50 ft of nylon rope. yel	w	
Additional Information		
	0 of 8000 characters used	1
Price Note:	\$25 plus actual shipping	1
Condition	24 of 1000 characters used	
Condition	never used 10 of 100 characters used	ĥ
Location	Chicago, illinois 17 of 200 characters used	/
Additional Information URI		

The Description field uses a text editor to allow you to create formatted descriptions, including font attributes, alignment, text size, links, bullets and numbering, and indenting.

In the Additional Information box, paragraph breaks will be retained.

The buttons at the bottom of the screen will vary depending on the status.

Example: When you are creating a new classified ad, click **Save as Draft** to save the ad with a status of Draft, or **Submit** to submit the ad to the club.

Ads can optionally require approval and/or payment.

- If a submitted ad requires neither approval nor payment, it will immediately be Active.
- If a submitted ad requires approval but not payment, a club admin or module coordinator will be notified by email that an ad has been submitted. If it's approved, it is immediately Active and you will be notified. If it's declined, the status is changed to Declined and you will also be notified by email, including an explanation of why the ad was declined.
- If a submitted ad requires payment but not approval, you will be taken immediately to the payment page to complete payment. The status is Approved, Pending Payment until payment is received.
- If a submitted ad requires both approval and payment, a club admin or module coordinator will be
 notified by email that an ad has been submitted. If it's approved, the status is changed to Approved,
 Pending Payment and you are notified by email that the ad has been approved and you must login to
 the payment page to complete payment. Once payment is received, the status is Active.

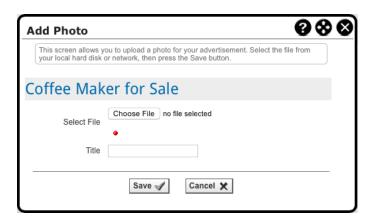
Ads have a defined posting period (for example, 30 days.) Clubs can also define whether an ad can be renewed and for how many times. Renewals may require another payment. The above screen shows the current expiration date for each ad and also how many renewals are left.

Pictures

Click the **Pictures** icon to add or remove one or more photos from the ad. You will see a screen similar to the following:

Home > Member Profile > Classified Ads Manager for Martin Smith > Maintain Classified Ad Photos Maintain Classified Ad Photos								
This screen allows you to manage the photos displayed for	r your classified ad. Click 'Add Photo' to add a picture to the ad's display.							
Coffee Maker for Sale								
Photo Main Pictur	Maintain Add Photo							
	Return to Previous Page							

The grid lists one or more photos linked to the ad. Click the Add Photo button to see the following screen:



Select a file from your local hard disk and optionally add a title. Click **Save** to add the photo or **Cancel** to close the dialog without saving.

In the main screen, check **Main Photo** for one of the uploaded photos to designate this as the photo shown immediately with the ad. You can also click the standard delete icon to remove a photo.

Click Return to Previous Page to return to your main Classified Ads screen.

Classified Ads Manager

There are two ways to access the admin screens for this module:

- 1. When looking at the main public screen, click the admin (pencil) icon on the floating Page Tools widget on the right side of the screen.
- 2. Go to the Control Panel Club tab Website Modules section Classified Ads.

You will see a screen similar to the following:

Classifie	d Ads N	lanager									C
delete or cancel th	he ad, or navigat	e to the payment p	age if payment	is pending	see. The maintain column for the ad. The "Configure" up a list of Classified Ads	button has a c					
Q ▲ Hide Search	Add Classified	Ads Requiring Approval	Reports	र्छि Configur	e						
- Search For Clas)								
Member Last Na	ime										
Categ	ory All			~							
Sta	atus < Any >		~								
Date Activated Rar	nge	То									
Descriptive T	Text										
Expires	ву										
			S	earch 🤣							
Search Results	(37 classified ad	Is found)								Pag	e 1 of 2 🗸
Member Name	Date Activated	Category	Statu	5	Title	Expiration	Renewals	Maintain	6	n	
George Admin	10/16/2019	Default Category	Cance	lled	My Ad	2/13/2020	3	0 6	p		
Seorge Admin	1/17/2020	Default Category	Expire	d	Newer Ad	1/18/2020	0	0			
eggy Carter	4/6/2016	Default Category	Expire	d	Artist(Painter) "hello"	12/25/2020	8	0 💼	•		
Peggy Carter		Baby-Sitting	Appro Pendir	ved, g Payment	Experienced Baby-sitter		0	0	1 📬	S	

The search panel allows admins to filter the ad list in multiple ways. The grid will show up to 30 ads at a time; the standard paging controls will be displayed if there are more than 30 ads shown.

The Search Results grid is similar to the one shown for each member on his or her Profile screen, with the addition of a Member Name column on the left. The icons are also the same. As with the member screen, ad status is fully managed by the system.

For ads that require approval, click the **Edit** (pencil) icon to review the ad content. Click the **Approve** or **Decline** buttons as appropriate. If you decline an ad a small popup screen will appear where you can specify the reasons why the ad was declined. This information is included in the notification email sent to the member. (Note however, that it is not saved anywhere in the system.)

Clicking the **Configure** button displays a drop-down menu with the following options to configure:

Configure – Classified Ad Categories

Select this option to create categories for ads. You will see a screen similar to the following:

	Home > Classified Ads Manager > Classified Ad Category Administration Classified Ad Category Administration								
Classified Ads 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's description. Click "Delete" to remove a category.									
Add Category									
Category	Active	Maintain 💼							
Default Category	Yes								
Merchandise	Yes	Ø							
Services	Yes	Ø							
Parts	Yes	Ø							
·									
			Return to Previous Page						

This is a standard ClubExpress category screen. Click **Add Category** to create a new category. Click the **Edit** (pencil) icon to edit a category, including the ability to deactivate a category permanently or temporarily. A **Delete** icon will appear if there are no ads assigned to a category.

Configure – Classified Ads Policy

Select this option to define club policies for posting and responding to classified ads. You will see a standard popup screen with the advanced content editor, allowing you to create fully formatted text, including sections, lists, etc.

Configure - New Member List

	maintain the list of me line to remove the m		sified Ads need to be approved before they can be listed. Click "Add Member" to add a member to the list. Click the "Delete"
Add Member	Date Added to List	Maintain 📻	
Darcy Donner (1160)	11/11/2021	tî:	

Note: This option will only appear if you have selected Add New Members to "Ads Must Be Approved" list in Options.

Select this option to manage the list of members whose ads must always go through your administrators for approval. Members can be added to this list in two ways: 1) automatically by submitting an ad as a new member, or 2) by an administrator on this screen.

Select Add Member to search your member database for the appropriate member to add to the list.

Configure – Options

Select this option to configure how the Classified Ads module behaves for your club or association. You will see the following screen:

Classified Ads Option	IS	0
This screen shows the club's Classified Ad op	tions. We have defaulted the settings to those that are most commonly used.	
Classified Ad Fee	US\$ 5.00	
Fee charged for renewal		
Renewal Fee	US\$ 5.00	
Tax Rate	10% tax (10.00) 🗸 •	
Financial Account	Misc. Charges	
QuickBooks Item Name	ClassifiedAds	
Ad Active Days		
Days Before Reminder		
	Set the value to '0' if you want to turn reminder emails off.	
Ad Requires Approval		
Member can edit ad after approval / once active		
Maximum Renewals	2 •	
	The maximum times a member can renew a ad. Admins can override this for any given ad.	
Maximum Active Ads per Member		
dd New members to "Ads Must be Approved" list	A value of 0 means that there is no limit to the number of active ads per person.	
	-	
	Mod True Select Remove	
cc Email for Ad Deletions	martin@email.com	

The following options can be configured:

- The initial fee to post an ad.
- Whether renewals are allowed and the fee to renew an ad (which can be different than the initial posting fee.)
- The tax rate to be used (if general sales tax is enabled.)

- Which financial account should be used for classified ad revenue. If QuickBooks®is enabled, you can also specify the QuickBooks®Item name.
- For how many days ads will be active.
- How many days before a reminder email is sent to members regarding an expiring ad. If you do not wish to send reminder emails, set the days to "0".
- Do ads require approval before becoming active on the website.
- Can members edit the text of an ad after it is has been approved.
- The maximum number of renewals allowed.
- The maximum number of active ads allowed per member (enter "0" if there is no limit).
- Add New members to "Ads Must Be Approved" list this option automatically requires approval for ads submitted by members who joined within the last three months.
- The contact person who will receive notifications that ads require review, including ads which have been reported. This person will need to made a coordinator of the Classified Ads module so that he or she can access these admin screens.
- CC Email for ad deletions enter the email address for the person who should be notified when an ad is deleted.
- User response option either allow the ad poster to determine their preferred contact method or use a response form. If Response Form is selected, the poster will receive an email when a user responds to an ad. Ad posters must have an email address listed in their member profile.

Click **Save** to save your changes or **Cancel** to return without saving.

Approving Ads

Select Ads Awaiting Approval to view classified ads that must be approved by an administrator before being visible on your website.

ad.											sing the checkboxes to the left of each will be asked to provide a reason for yo
Ch	pprove lecked Ads										
		-								_	
	Member Name	Date Joined	Date Posted	Title	Category	Asking Price	Mainta	ain		Ē	
	Member Name Audrey Abanti	Date Joined 12/3/2020	Date Posted 1/3/2020	Title Envelope: Aerostar S71	Category Merchandise	Asking Price \$5,500	Mainta	ain Èt	a 4	11 1 1	
						1. A.		ain Èt	a 4 a 4		-
	Audrey Abanti	12/3/2020	1/3/2020	Envelope: Aerostar S71	Merchandise Merchandise	\$5,500		ain Èt Èt	a 4 a 4	1	

If you opted to require ads from new members to always be approved, you will see an additional column noting whether or not the member is a new member.

ad.					ed by an administrator. You may e, decline, or delete the ad. If yo							
CI	pprove hecked Ads											
-	Member Name	"New Member"?	Date Joined	Date Docted	Title	Categon	Asking Drice	Maint	ain		-	ĺ
	Member Name					Category	Asking Price		ain		Ē	
	Member Name Audrey Abanti	"New Member"? No	Date Joined 12/3/2020	Date Posted 1/3/2020		Category Merchandise	Asking Price \$5,500	Maint:	ain) 🖗	•	
					Envelope: Aerostar S71				ain 💼 💼	p 🗭 p 두	1997	
	Audrey Abanti	No	12/3/2020	1/3/2020 1/28/2020	Envelope: Aerostar S71	Merchandise Merchandise	\$5,500		ain trai	p 🐓 p 🐓	1	

The grid displays the member name and join date, ad post date, title, category and the asking price. Select the check boxes in line with each ad, then select **Approve Checked Ads** to approve the ads you selected. To quickly approve all ads, select the check box in the header to select all ads, then select **Approve Checked Ads**. The following are options in the Maintain column:

lcon	Description
(Edit)	Click the Edit icon to view or edit the classified ad listing.
👌 (View)	Click the Approve icon to approve the ad.
(Pic- tures)	View uploaded Pictures for the ad.
(Reports)	Click the Decline icon to decline the ad. When you select the Decline icon, a popup appears requiring a reason for declining the ad. The original poster will receive an email noting that their ad has been declined along with the reason specified.
(Delete)	Click the Delete icon to delete the ad. When you select the Delete icon, a popup appears requiring a reason for deleting the ad. The original poster will receive an email noting that their ad has been deleted along with the reason specified. If a contact has been designated to be CCed in Options, they will receive a copy of the email containing the reason.
L	Maintain Options

Iviairitairi O

Declining or Deleting an Ad

When you select the Decline icon,

When you select the Delete icon, a popup appears requiring a reason for deleting the ad.

Enter Reason
Enter the Reason you are deleting this ad. This will be sent in an email to the person who posted the ad.
Ad Title: AeroStar Propane tanks
Reason
0 of 1000 characters used
Save 🖌 Cancel 🗶

THe original poster will receive an email noting that their ad has been deleted along with the reason specified. If a contact has been designated to be CCed in Options, they will receive a copy of the email containing the reason.

Contact Log (CRM)

Member Contact Log	
Open Contact Log Entries	
Non-Member Contact Log	

This section describes the Contact Log function, which allows club or association administrators to manage every contact with members and non-members. It provides the equivalent functionality of a Customer Relationship Management (CRM) system.

To access the Contact Log for members, go to **Control Panel – People Manager**. To access the Contact Log for non-members, go to **Control Panel – Non-Member Database**.

Activation: The one-time fee to activate this module for your website is \$1000.

Member Contact Log

When you search for a member in the People Manager, you will see a screen similar to the following:

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 OLast Name First Name City State Member Number Company Name Email Address Phone Outside USA only
Search For smi Search 🗲
Advanced Options
Member Status All (except Dropped) Active Pending Trial Prospective Expired Frozen Bulk Loaded Dropped
Member Type All Member Types
Member Level All Members
Add Member Primary/Secondary/Tertiary Changes Open Log Entries
Search Results (1 members found)
Member Membership Maintain
67890 Martin Smith (msmith) Individual Renewal-2 (Primary) Chicago, iL P. Date 11/28/2020 Active
Return to Previous Page

Beside each member in the Maintain column, one of the options is **Log**. It allows you to view and maintain log entries for each member. When you select this option you will see a screen similar to the following:

	tact Log shows previous contacts for this member. Yo can be edited or deleted by clicking the appropriate li		y all contacts, only closed, or	only open ones. New con	tacts can	be added	by clicking the 'A	dd Contact Log Entry' bu	itton. Existing
Searcl	h Contact Log								
	Open Contacts Only Closed Contacts Only Al Contacts Only	′ I	Add Contact Log Entry						
	Last Name Date/Last Name Priority/Last Name Priority/Date/Last Name	Search 🞸	Exports						
				-					
earch R	esults (25 contact(s) found)			-				K [Page 1 of 1 🔻
	esults (25 contact(s) found) Subject	Responsible Staffer	Туре	Category	Status	Priority	Maintain 📑	K [Page 1 of 1 🔻
Date		Responsible Staffer Martin Smith	Type Letter/document received	Category Networking	Status Open	Priority High	Maintain 📑	< F	Page 1 of 1 🔻
0ate //25/2019	Subject					· · ·		< [Page 1 of 1 ▼
25/2019 /25/2019	Subject CL F/U:CL F/U:CL F/U:Information on sponsorship	Martin Smith	Letter/document received	Networking	Open	High	1	< [Page 1 of 1 ▼
Date 1/25/2019 1/20/2019 1/18/2019	Subject CL F/U:CL F/U:Information on sponsorship CL F/U:CL F/U:Information on sponsorship	Martin Smith Martin Smith	Letter/document received Letter/document received	Networking Networking	Open Closed	High High		< E	Page 1 of 1 ▼
Date 9/25/2019 9/20/2019 9/18/2019 9/11/2019	Subject CL F/U:CL F/U:CL F/U:Information on sponsorship CL F/U:CL F/U:Information on sponsorship CL F/U:Information on sponsorship	Martin Smith Martin Smith Martin Smith	Letter/document received Letter/document received Letter/document received	Networking Networking Networking	Open Closed Closed	High High High		E	² °age 1 of 1 ▼
earch Re Date 9/25/2019 9/20/2019 9/18/2019 9/11/2019 1/11/2019	Subject CL F/U:CL F/U:CL F/U:Information on sponsorship CL F/U:CL F/U:Information on sponsorship CL F/U:Information on sponsorship Information on sponsorship	Martin Smith Martin Smith Martin Smith Martin Smith	Letter/document received Letter/document received Letter/document received Letter/document received	Networking Networking Networking Networking	Open Closed Closed Closed Open	High High High High		K E	Page 1 of 1 v

Use the Search options at the top to filter the list by Open Contacts Only, Closed Contacts Only or All Contacts. You can also control the sort order from among four options. Click the **Search** button to refresh the list.

For each contact, the screen shows the date, title, responsible staffer, contact type, category, status, and priority. Responsible staffers and categories can be configured for each village. The system will show 30 contacts on each page; if a member has more than 30 contact log entries, the navigation buttons allow you to move from page to page. Click the **Edit** (pencil) icon to modify an existing contact. Click the **Delete** (trash bin) icon to remove a contact entry.

Click the **Exports** button to export a CSV list of closed contacts within a specific date range for this member.

Add Contact Log Entry

Click the **Add Contact** button to add a contact entry. You will see the following screen:

Add / Edit Co	ntact Log Entry	ଡ ଓ ତ
Add or edit the Cont	act Log Entry. Then click "Save" or "Cancel".	
Member	Nick Hamilton	
Initial Log Date	3/25/2014 💷 🎍	
Follow-up Date		
Contact Type	Other ᅌ 🗕	
Contact Category	Service Request	
Subject	Medical Trip	
Description	Nancy from 8-8:30 to take Susan from 1 - 1:30 to bring Nick home Parking around the back.	
Status	 Open ○ Closed 	
Priority	◯ Urgent ◯ High O Medium ◯ Low	
Responsible Staffer	Steve Cole	
Last Edited	Geoffrey Walsh on 12/7/2014	
	Save 🗸 Cancel 🗙	

Because you created this contact from a member's Profile, the member name is already filled in. The following additional fields are available:

- Initial contact log date (required).
- Followup date. When you enter a date here, the system will create an open followup entry in the contact log. It is coded as "CL F/U" to indicate that it came from the Contact Log (versus a service request followup, which is coded as "SR F/U" to indicate that it came from the Service Request function.) If you leave it blank a followup entry is not created.
- Followup date. When you enter a date here, the system will create an open followup entry in the contact log. It is coded as "CL F/U" to indicate that it came from the Contact Log (versus a service request followup, which is coded as "SR F/U" to indicate that it came from the Service Request function.) If you leave it blank a followup entry is not created.
- Contact Type (required). Select an option from the drop-down list. All basic contact types should be available but let ClubExpress know if you need an additional type added.
- Contact Category (required), Used for reports. The system includes a number of built-in categories but you can add your own categories.
- Subject (required) and Description. Click the Spellcheck button to check your spelling in the Description field.
- Status either Open or Closed.
- Priority Urgent, High, Medium or Low.
- Responsible Staffer. Use this option to track who is responsible for handling this issue or for following up with the member.

Click **Save** to save the new contact log entry and return to the main listing, or **Cancel** to return without saving. When you click save using the above example, two contact log entries are created, one for the initial log entry, which is flagged based on the Status; and another for the followup entry (flagged as "CL F/U" for "Contact Log Follow Up") which is always Open.

Date	Subject	Responsible Member	Туре	Category	Status	Priority	Maintain 🕎
11/5/2013	CL F/U:Prowler in the are area	Steve Cole	Phone Call	Member Danger	Open	Urgent	🧪 違
10/30/2013	Prowler in the are area	Steve Cole	Phone Call	Member Danger	Closed	Urgent	🧷 🙀
9/28/2013	SR F/U:Plumber	Martin Smith	Other	Service Request	Closed	Medium	🧷 違
9/25/2013	Plumber	Martin Smith	Other	Service Request	Closed	Medium	🧷 違
10/31/2012	Medical Trip	Maureen Curran	Other	Service Request	Open	Medium	🧷 🙀
5/22/2012	SR F/U: Facebook Help		Other	Service Request	Open	Medium	🧷 🙀
5/18/2012	Facebook Help		Other	Service Request	Closed	Medium	/ iz

When you click the **Edit** link, the same screen is shown, with the additional information of when the contact was last edited.

Click Return to Previous Page to return to the People Manager.

Open Contact Log Entries

The People Manager also has an **Open Log Entries** button. Clicking this button displays a similar grid screen showing all open contact log entries, together with some additional functions. You will see a screen similar to the following:

Open Log En	tries shows nre	vious contacts for all members th	nat currently have an or	nen status. You ca	n choose to filter t	he results h	ov a variety of fields	New
contacts can	be added by cli	cking the 'Add Contact Log Entry and the shortlist of responsible	/ button. Existing conta	cts can be edited	or deleted by click			
Search Co	ontact Lo	a		Con	ntact Categorie	s		
	Start Date			Resp	oonsible Staffe	rs		
	Finish Date			Add C	Contact Log En	itry		
Respo	onsible Staffer	Steve Cole			Reports			
	Category	All Categories	٢		Exports			
					Exports			
	Priority	All Priorities ᅌ						
Sort By				_				
ULa	ist Name	All Priorities O Date/Last Name Priority/Date/Last Nam	e Search ∳	3				
ULa	ist Name	 Date/Last Name 	e Search 2	3				
) Pr	ist Name iority/Last Nar	Date/Last Name Priority/Date/Last Nam	e Search ∳	3				
ULa	ist Name iority/Last Nar	Date/Last Name Priority/Date/Last Nam	e Search 2	3			< Page	1 of 1 🗘
earch Resu	ist Name iority/Last Nar	Date/Last Name Priority/Date/Last Nam	e Search 4	Туре	Category	Priority	Y Page	1 of 1 🗘
earch Resu	ist Name iority/Last Nar	Date/Last Name Priority/Date/Last Nam t(s) found)	e		Category Service Request			1 of 1 🗘
earch Resu Member Nick Hamilton	ist Name iority/Last Nar Its (4 contact	Date/Last Name Priority/Date/Last Nam t(s) found) Subject	e Responsible Staffer	Туре			Maintain 💼	1 of 1 ♀
) Pr	ist Name iority/Last Nar Its (4 contact Date 3/25/2014	Date/Last Name me Priority/Date/Last Nam t(s) found) Subject Medical Trip	e Responsible Staffer Steve Cole	Type Other	Service Request		Maintain E	1 of 1 ≎)
earch Resu Member <u>Nick Hamilton</u> George Smith	Its Name iority/Last Nar Its (4 contact 3/25/2014 11/16/2013 11/5/2013	Date/Last Name Priority/Date/Last Nam t(s) found) Subject Medical Trip CL F/U:Snow removal	e Responsible Staffer Steve Cole Steve Cole	Type Other Email Received	Service Request Service Request	Medium Urgent	Maintain 💼	1 of 1 ≎)
earch Resu Member Nick Hamilton George Smith Rod Houser	Its Name iority/Last Nar Its (4 contact 3/25/2014 11/16/2013 11/5/2013	Date/Last Name Priority/Date/Last Nam Priority/Date/Last Nam t(s) found) Subject Medical Trip CL F/U:Snow removal CL F/U:Prowler in the are area	e Responsible Staffer Steve Cole Steve Cole Steve Cole	Type Other Email Received Phone Call	Service Request Service Request Member Danger	Medium Urgent	Maintain E	1 of 1 0

The search panel has some additional options to help narrow the list, but otherwise it behaves the same way as the search panel for an individual member. The grid has the same columns with an addition in column 1: the member for whom the contact log entry was created.

Note that only open contact log entries are shown. In the above example, an email received from George Smith, the original log entry is not shown because it has been closed; only the open followup entry is shown.

If you click the **Edit** link for a "CL F/U" entry, the Contact Log Add/Edit screen is displayed.

The non-member database screen also has an **Open Log Entries** button. Clicking it displays a screen showing open log entries for non-members. All other buttons and functions are the same.

Contact Categories

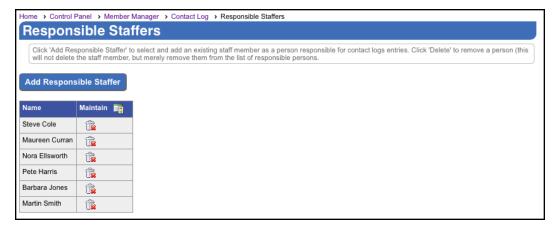
Click Contact Categories to modify your contact categories. You will see a list similar to the following:

Home > Control Panel > Me	mber Manager 🔸	Contact Log > Contact Log Categories					
Contact Log C	ategorie	s					
an existing category; you c NOTE: System categories	Contact Categories are used to sort entries within your contact log. Click "Add Contact Category" to add a new category; click "Edit" to modify an existing category; you can only click "Delete" if there are no entries assigned to that category. NOTE: System categories were created by ClubExpress and cannot be modified or deleted.						
Contact Category	Maintain 📻						
3rd party notification	System						
Credit	System						
Donation	System						
Event Registration	System						
Logging In	System						
Miscellaneous Charge	System						
New Membership	System						
Payment	System						
Refund	System						
Renewal	System						
Service Request	System						
Storefront Purchase	System						
Unknown	System						
Member Danger	🧷 🙀						
National gathering messages	V 👔						
Special	2 îs						
		Return to Previous Page					

The system includes a number of built-in categories that cannot be changed. You can also add your own categories by clicking the Add Contact Category button. It will display a simple popup to enter and save a new category. These categories can be edited and deleted if they have not been used.

Responsible Staffers

Click **Responsible Staffers** to define the list of members (usually staff people or volunteers) who are responsible for following up on open log entries. (In the ClubExpress model, everyone who needs some level of admin access to member data must be in the membership database, perhaps with a special member type—for example, "Staff".) You will see a list similar to the following:



Click the Add Responsible Staffer button to display the standard ClubExpress member selector. You only need to enter the first few letters of the last name and press [Enter] to see a list of matching members. Select one and click **Select** to add that staff member, or click **Cancel** to close without making a selection.

Add Contact Log Entry

Click the Add Contact Log Entry button to add a new contact log entry. Because you displayed this dialog from the Open Log Entries screen, the member name is not pre-filled and you need to select it.

Non-Member Contact Log

To view contact log entries for non-members, go to Control Panel - Non-Member Database. Use the Search options to limit which non-members are shown, or just click the **Search** button to display the whole list.

To display the Contact Log screen for a non-member, click the **More Options** icon and select **Log** from the popup menu (it's near the bottom.) The resulting screen is identical to the Log screen for a member.

Subgroups: For multi-tier organizations using the Multiple Websites model this screen will show the subgroup selector.

Continuing Education and Certification

Continuing Education for Users	
Continuing Education in the Member Profile	
Continuing Education Manager	
Reports	
Exports	

The Continuing Education and Certification module allows professional associations to track the different ways in which members (and, optionally, non-members) can maintain certifications by earning CE credits/units/points.

The module begins by **defining one or more certifications** and the units necessary to earn and maintain a certification. You can define fees for exams, renewals, study materials, and classes. You can also define the length of time a certification is valid before it needs to be renewed. Then you define the different ways in which members can earn units/credits/points, including attending classes, working in their professional field, writing papers or books, presenting at conferences, volunteering on association committees, etc. You can <u>configure events</u> to carry continuing education credits which get added to registrants credits when they've been marked "attended".

Once the module is configured, **members sign up for certifications**. They can enter their professional activities in the various categories for review by the association. Supporting documentation can also be uploaded. Once a sufficient number of units/credits/points have been earned, the certificate is awarded or renewed and can even be printed from within the software.

These various elements can be used in different combinations.

Example: Some associations do not require an initial exam but rather just provide classes that members must take to earn and maintain a certification. The system supports this option.

The module provides a full suite of tools to allow administrators to review and approve certifications and print certificates, welcome letters, and mailing packets.

It also provides a full suite to tools to allow administrators to review and approve continuing education credits/units/points. These can be earned in different ways, including through the attendance of pre-approved classes.

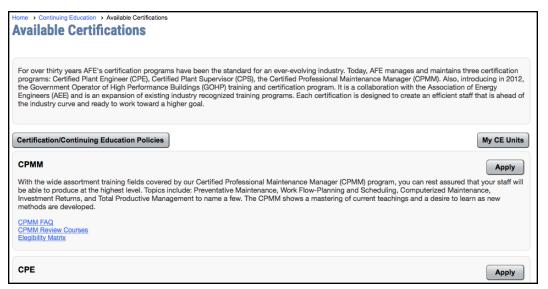
Note that the system allows you to change the keyword used by your association for continuing education credits, units, or points. We will use "credits" in these instructions.

Activation: The one-time fee to activate this module for your website is \$1000.

Continuing Education for Users

The Certification / Continuing Education module also includes a public or user side. This page allows associations to define preamble text, policies related to certification and continuing education, and a detailed description of each certificate offered.

The advanced content editor is available for each of these panels, allowing a full range of formatted text, images, links, and other elements. Here is an example of this page on the website of an association using ClubExpress.



The first panel is configured on the admin side of the module by selecting **Configure – Program Description**.

The Policies popup is configured by selecting **Configure – Program Policies.**

The description of each certificate is defined by selecting **Configure – Certificates**, then clicking the **Description** icon for that certificate.

If the person viewing this page is a logged in member, the **My CE Units** button will be displayed. Clicking this button displays that member's Profile screen.

Also for logged in members, the system will detect the status of each certificate for that member. If the member does not hold a certificate, an **Apply** button is displayed. If the member does hold a certificate, or it's up for renewal, or it has expired, this will also be indicated.

Continuing Education in the Member Profile

When the Continuing Education module is enabled, members will see a new choice on their Profile screen to manage their own certifications and credits.

Continuing Education and Certification

Personal Info

Contact Info Additional Member Data Standard Member Directory Additional Members in Your Account Continuing Education

Selecting this option displays a screen similar to the figure below, showing the available certification(s), the member's status for each one, and credits.

	uing Education for	or								
	creen to search for points	which will be applied toward	s your certif	ications. You ma	ay filter by the acti	ive months for	certificat	ons, all dates a	nd a custom da	ate range. In addition,
		e to see your current Unit sco	re, and ther	click the "Add"	button to add mo	re Units to tha	t type.			
Certific	ations									
СРММ		You do not hold this cert	ificate							
CPE		User can renew this certi	ficate	a (Renew					
CPS		You do not hold this cert	ificate	l						
CFEA		You do not hold this cert								
Units										
J nits Search	Add Units									
Search Search	Results									
Search Search	Results	Description	Status	Units Applied	Units Approve	d Maintain	Ē			
Search	Results	Description Korea District Heating Corp		Units Applied		d Maintain 2 🔗 🙀				
Search Search Date Entere	Results	Korea District Heating Corp								
Search Search Date Entered	d Type Employment	Korea District Heating Corp	Approved	2		2 🤌 🙀				

If the member holds a certificate and it's time to renew, a **Renew** button will appear beside this certificate. Clicking this button launches the renewal wizard for that member. If the association has configured the system so that renewals cannot be done until credits are entered and approved, the system will show this warning message.

If the member has registered for an **event** which carries continuing education credit and the member has been marked as "attended", the credit will appear in their list of credits.

Clicking Add Credit will display the following screen:

Add Credit 2 😵 🗞
Add or Edit the answers to the following questions. These questions must be completed in order to submit this Credit. Click "Save" once completed, and this Credit will be submitted for review.
Credit Type < Select > •
Date Entered 12/30/2019 Add/Upload Document
Title Admin Only?
Choose File No file chosen Max file size 80 MB

Select the credit type from the pre-configured drop down list. Optionally, you may add supporting documentation for the selected credit choice.

Continuing Education Manager

When administrators open the Continuing Education Manager, they will see a screen similar to the following:

Home > Cor	trol Panel > Continuing Ed	lucation M	anager					
Contin	uing Educat	ion N	lanad	er				
Use the cr certificatio approved	iteria shown in the search b ns, see the user's activities,	ox to find t and run re n, program	he Certification ports related	ns you want t to the certifica affidavit, and	ation. The "Confi General Options	gure" button has a 3. The "Reports" bu	menu for Certificatio tton brings up a list o	you options to edit the certification, see all the users ns, Credit Type Categories, Credit Types, pre- f reports for your Continuing Education program, the
Search						Configure 🗸		
Ce	rtification All		٥			Reports		
	Status < Any >	tatus < Any >						
Applicant La	ist Name					Export		
Dat	e Range < Select >	٥				Approvals <i>▼</i>		
					_	Add Applicatio	n	
	Company							
	Jonipany							
				Searc	:h 🗲			
Name	Certification	Status	App. Date	Grant Date	Last Renewal	Next Expiration	Maintain 💼	
Bud Fox	Certified Financial Planner	Expired	08/17/2015	10/01/2015	10/02/2015	10/01/2015	🤌 🗄 🗈	
Martin Smith	Certified Financial Planner	Active	08/17/2015	10/01/2015	10/02/2015	10/30/2018	🤌 🗄 🗈	
					Return to P	revious Page		

This screen shows individual members (and optionally, non-members), the certificates they have applied for and their status. Associations can offer—and members can hold—more than one certificate at a time.

A search panel at the top allows administrators to search for applicants based on certification, status, last name, different date ranges, chapter, or company where the member works.

The results panel shows individual combinations of a member or non-member and the certificate held, including status, application date, grant date, last renewal date and new expiration date.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit properties for this user's certificate. Go here for more information.
(Cred- its)	List the continuing education Credits earned by this member towards this certification. (This keyword can be changed.)
(Reports)	Run Reports for this member – certification combination.
(Reports)	Maintain Ontiona

Maintain Options

Editing Certification Status

Select the Edit icon to edit the status of any user's certificate.

Edit Certification		ଡ ଓ ଓ
Enter certification notes and / c certifications admin page.	or change the certification st	atus. Click "Save" or "Cancel" to return to the
Jonathan Broo	ks Small-M	idsize Business
Marketing Cert	tification	
Original Application Date	1/17/2022	
Original Grant Date		
Most Recent Date Applied	1/17/2022	Last Application By: Jonathan Brooks
Last Approval Date		
Next Expiration Date		
Certification Status	Pending	~
Certificate Number		
Notes		
	0 of 100 characters used	<i>h</i>
Suppress Confirmation Emails		
	Save 🖌	Cancel 🗶

Edit the grant, approval and expiration dates, certification status and add administrative notes.

Understanding Certification Status

The system supports a number of status values for each certification, with programming and screens to support each value:

- Applied The member or non-member has applied for a certification but has not yet paid the defined application fees.
- Pending The member or non-member has applied for a certification and has paid the defined fees, but has not yet been approved by an administrator. Approval may entail passing a test or submitting

sufficient continuing education credits. This application will appear on the Certification Approvals screen.

- Active The member or non-member has applied and paid and has been approved by an administrator.
- Active Renewal Applied The member or non-member has applied to have his or her certificate renewed but has not yet paid the defined renewal fees. He or she may also not yet have entered the necessary continuing education credits.
- Active-Renewal Pending The member or non-member has applied for a certification renewal and has paid the defined fees. This application will appear on the Certification Approvals screen.
- Expired The certification has expired and needs to be renewed. Members can renew online. Nonmembers need to be renewed by an admin.
- Expired-Renewal Applied The member or non-member has applied to have his or her expired certificate renewed but the defined renewal fees have not yet been paid. The necessary continuing education credits may also not have been recorded.
- Expired-Renewal Pending The member or non-member has applied to have his or her expired certificate renewed, and the defined renewal fees have been paid. This application will appear on the Certification Approvals screen.
- Cancelled/Declined This certificate application has been cancelled or declined.

Configure

When you click the **Configure** button, you will see a drop-down menu with the following options, each of which is described in detail. (Note that the menu may show a different keyword in place of "Credit".)

Certifications

Select this option to define the Certification(s) offered by your association. You will see a screen similar to the following:

Use this screen to maint information about an exi or renewing the certifica	sting certification	n. Click th	e Descrip	tion icon	to add or	edit a ful	ly format
Active Only OShow A	ll	Ado	d Certifi	cation			
Name	Abbreviation	Status	Credits	Period	Maintai	۰	
Series 7	Series	Inactive	100	60	0	à 🗾	-
Series 7 Certified Financial Planner		Inactive Active	100 100	60 36	-) 🗗	

This screen lists one or more certifications, including the status of each, credits required, and the period that the certification is valid before it needs to be renewed. The list can show only active certifications or all.

Click the **Add Certification** button to create a new certification. You will see the following screen:

nter the certification	on information. Click "Save" or "Cancel" to return to the manage certifications list
Name	Certified Financial Planner
Abbreviation	CFP 🔶
Active	
Credits Required	100 🔷
Period (months)	36 🔮

Enter the requested information and click **Save** to save your entry and return to the Certification Administration screen, or **Cancel** to close the dialog without saving.

The following options can be found in the Maintain column:

Icon	Description
(Edit)	Edit this certification. You will see the same screen shown above.
(Descrip- tion)	Create a detailed Description for this certification. You will see a popup dialog with our advanced content editor, allowing you to create a fully formatted description, including links, images, etc. This description is shown on the public side of Cer- tification and Continuing Education module.
(Fees)	Define different kinds of Fees for this certification. See below for a more detailed description.
(Reports)	Run Reports for this certification.

Maintain Options

Certifications - Fees

This module allows you to define various kinds of fees that apply to certifications, including application and renewal fees, study and training materials, exam fees, and classes that applicants can sign up for before taking a certification exam.

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

existing fee.	aintain fees belongir	ng to the	Continuing	Education	Certifications	selected. Click	"Add Fee" to	add a	ee. Click the Edit icon to change information about	an
Fees For: Co	ertified Fi	nanc	ial P	lanne	r					
Add Fee										
Name	Required	Active	Initial M	Initial NM	Renewal M	Renewal NM	Maintain			
	Required New and Renewal	Active Yes	Initial M 700.00	Initial NM 900.00	Renewal M 250.00	Renewal NM 350.00	Maintain	1		
Name										

The standard admin grid shows each fee, including who it applies to (new members and/or renewals) and the fee for members and optionally non-members. Click the **Add Fee** button to display the following screen:

Add / Edit Certifi	cation Fee 🛛 🕄 🗞 🛇
Enter the information for thi	s CFP fee. Click "Save" or "Cancel" to return to the manage certification fees list.
Name	Application/Exam Fee
Description	
	0 of 400 characters used
Active	
Show When	New Application Renewal OBoth
Required When	New Application Renewal OBoth
Show For	Members Non-Members Obth Admins Only
Initial Member Fee	700.00
Initial Non-Member Fee	900.00
Renewal Member Fee	250.00
Renewal Non-Member Fee	350.00 🔶
Variable Fee	⊖Yes ONo
Late Fee Applies	OYes ○No
Financial Account	Education Fees
	Save 🗸 Cancel 🗶

Specify the name and a description for each type of fee. Select the options to defined to whom this fee should apply (members and/or non-members), when it's required or optional, and the actual amounts.

The **Variable Fee** option applies only to admins entering a certification on behalf of an applicant. It allows the admin to adjust the fee being charged.

The **Late Fee** option applies only to certificate renewals. It defines whether a late fee should be applied if a certificate holder renews after his or her certificate has expired. The late fee itself is defined on the Options screen.

The **Financial Account** setting allows you to define the financial account into which these fees will be aggregated.

Click **Save** to save your changes and return to the Certificate Fee Manager screen, or **Cancel** to close the dialog without saving.

Credit Type Categories

The Continuing Education and Certification module supports different ways of earning credits. In some associations, members earn credits only by attending classes. But for others, members can earn credits through speaking at conferences, publishing papers or books, volunteering on committees, etc.

Select Configure – Credit Type Categories to see a screen similar to the following:

Credits Typ	e Ca	categories which car		ype Category Administration ration In this screen. Click "Add Category" to add a new category. Click "Edit" to change an existing category, its in this category. Click "Delete" to remove a category.
Add Category			can be awarde	in uns calegory. Unick Delete lo remove a calegory.
Category	Active	Maximum Credits	Maintain 📑	
Default Category	Yes	N/A		1
Education	Yes	50.00	Ø	
Employment Experience	Yes	50.00	Ø	
Webinars	Yes	N/A	V 👔	
		1		
				Return to Previous Page

This is a standard ClubExpress admin grid. Click **Add Category** to create a new category. You will see the following screen:

he maximum numb	rpe category name and a description if appropriate. You can also specity er of Credits that someone can earn in this category. A value of 0 or s no limit. Click "Save" or "Cancel" to return to the category list screen.
Name	Education
Description	Points awarded for Educational Experience.
	43 of 200 characters used
Active	
Maximum Credits	50.00

Specify the name and description and whether this category is currently active.

You can also specify the maximum number of credits that can be earned within this category. Some associations allow members to earn credits in general categories such as office management and accounting, separate from professional courses. But there might be a limit in how many credits can be earned from such general categories.

Click **Save** to save your category and return to the main screen or **Cancel** to close the dialog without saving.

The standard **Edit** and **Delete** icons are also available. You can only delete a category if no credit types are assigned to it.

Configure - Credit Types

Select this option to define the individual ways in which members can earn credits.

In the ClubExpress model, members submit requests to receive credits based on the classes they attend, the work they do, their publications or activities, etc. It's up to each association to define how members can earn credits. Submissions need to be approved before the credits are awarded.

Example: If your association allows members to receive 2 credits for publishing an article in a professional journal, you need to give them a way to enter the necessary information about this article. The system provides a highly flexible way to collect this information, including up to five descriptive prompts, start and finish dates, hours worked, the default credits awarded and whether members can request a different number of credits.

All requests need to be approved (see below for an explanation of this process) and associations are free to reject outlandish or unjustified requests.

information about an existin	g Credit, and the Delete ic				cation Certifica	tions. Click "Ad	d" to add a new Credit type. (Click the Edit icon t	to chang
Name	play Sequence	Default Credits	Active	Show Start	Show Finish	Show Hours	Show Credits Requested	Maintain 💼	
Bachelors Degree	Education	15.00	Yes	Yes	Yes	Yes	Yes	Ø	
Masters Degree	Education	20.00	Yes	Yes	Yes	Yes	Yes	Ø	1
1-2 Years of Work Experience	Employment Experience	5.00	Yes	No	No	No	No	Ø	
3-4 Years of Work Experience	Employment Experience	15.00	Yes	No	No	No	No	Ø	1
Published Books and Articles	Education	2.00	Yes	No	No	No	No	Ø	
Seminar	Education	3.00	Yes	No	No	Yes	No	Ø	

You will see a screen similar to the following:

The grid shows credit types, their category, default credits and various properties for each type (described below.) Click **Add Credit Type** and you will see the following screen:

chars

Specify the credit type and category and some descriptive text.

If the credit type is some form of training class, you can enable Pre-approved Courses, to allow members to select a class that has already been approved.

The system supports up to 4 prompts, each of 200 characters, and one longer text prompt of up to 1000 characters. Use these to collect the information on each request so as to allow you to properly evaluate the request.

Example: If a member is requesting credit for an article in a professional journal, you might collect the following information:

- Journal Name
- Year/Month or Issue Number
- Article Title
- Co-Author Names
- Abstract (in the long field)

For each credit type, you can also specify whether the start and finish dates should be shown. These might not apply to a published article but they might apply to work experience or service on a committee.

Another option is to allow members to enter the number of hours worked or attended. Again, this option might not apply to a published article but it might apply to a class attended (how long was it) or volunteer time spent educating students about careers in that professional field.

For some credit types, you can allow members to request a higher (or lower) number of credits than the default, perhaps based on the sophistication of a class or the time spent on a volunteer activity. As noted above, requests for credit are always subject to approval.

Note: If an <u>event</u> carries a continuing education credit, the event category is automatically added as a credit type under the Default credit type category.

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

The **Display Sequence** button allows you to control the order in which credit types are shown.

The **Edit** icon in the Maintain column allows you to update a credit type.

Pre-Approved Courses

Some associations allow (or require!) members to take pre-approved courses, offered by the association or third party vendors. Maintaining a list of such courses simplifies the approvals process for credit requests.

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

Home > Control Panel > C Approved Courses can be can be awarded for taking	urse	s Admini	stra	tion	ew course. Click the "Edit" icon to change an existing course, its description and the number of Credits that
Future Only Show Al		Add Cour			ouroo.
Name	Active	Maximum Credits	Mainta	in 📑	
Income Tax Planning	Yes	10.00	Ø	iz 🗈	
Financial Plan Development	Yes	10.00	Ø	iz 🗈	
Distribution Planning	Yes	5.00	Ø	i 🗈	
					-
					Return to Previous Page

You can show all courses of just ones in the future. Click **Add Course** to create a new pre-approved course. The following screen is shown:

nat someone can e	d course name and a description if appropriate. You can also specity the number of Credits and for taking this course. A value of 0 or blank means there is no limit. Click "Save" or b the course list screen.
Name	Income Tax Planning
Description	This course provides an overview of the federal income tax system, examining the income taxation of individuals, sole proprietorships, partnerships, LLCs and corporations.
Credits	10.00
Provider	Northwestern University
Location	Chicago, IL
Start Date	
Active	
	Save 🗸 Cancel 🗙

Enter the requested information and click **Save** to save the course or **Cancel** to close the dialog without saving.

Program Description, Policies, Affadavit

Each of these options displays a popup dialog with our advanced content editor. It allows you to define a description or policies for the program, or an affidavit that applicants must sign in order to be certified and in good standing.

The program description and policies are shown on the main public page for the Certification and Continuing Education module. The affidavit is shown as part of the application wizard.

Options

Select this menu choice to see the following screen:

Home > Continuing Education Manager	Continuing Education Options	
Continuing Educa	ation Options	\bigcirc
	-	<u> </u>
This screen shows the club's Continui	ng Education options. We have defaulted the settings to those that are most commonly used.	
Keyword	Credit •	
	For example: Point or Activity or Qualification	
Keyword Plural	Credits	
Active Months	For example: Points or Activities or Qualifications	
Active Month's	36 The number of months back that Credits are counted when a certification application is being approved or denied.	
Renewal Days		
	The number of days before a certification expires when members will see a renew link and get a reminder email.	
Applicant Mailing List Category	Continuing Education Applicant	
Member Late Fee	USD 5.00	
Non-Member Late Fee	USD 5.00	
Allow Extensions		
Extension Days	10 •	
	Number of days used to extend a Credit (add a 0 if you do not allow extensions).	
Allow Rollovers	Ø	
Rollover Months	12 •	
	Number of months used to rollover certificates (add a 0 if you do not allow rollovers).	
Enable Pre-approved Courses	✓	
Show Certifications on Bio	✓	
Certification before profile access	✓	
	Will Continuing Education appear on a member's profile if the member does not have a certification?	
Next Certificate Number	34	
Approved Credits needed for renewal	✓	
	Does the applicant need sufficient approved Credits before she can initiate the renewal process?	
Applicable event categories	Balloon Rides	
	Conventions	
	Cruise 👻	
5	Select event categories of the events that can be used to accumulate Credits. Hold the contol key down to select multiple categories.	
Event Days Back		
Default Financial Account	How long ago (in days) can the events have been held? Master Education	
	ModCoord True Select Remove	
Tax Rate	10% tax (10.00)	
	Save 🖌 Cancel 🗶	
	ourou A	

The following options can be configured:

- Specify the **Keyword** in both singular and plural for points, credits, or units used in your association.
- Specify the number of **Active Months** back that credits are counted when a certification application is being reviewed.
- Specify the number of **Renewal Days** before a certification expires when members will see a renew link and receive a reminder email.
- Hide the **Expiration Date** for your Credits when users access them from their member profile.
- Display Admin Notes to users from within their member profile.
- When members and, optionally, non-members are certified through your association, select which **category** in the database they are assigned to.
- Specify the **late fee** for both members and non-members. This fee is applied whenever a certificate is renewed after it has expired.

- Specify whether **Pre-Approved Courses** should be shown.
- Decide whether certifications should be shown on the member's **Bio** screen.
- Check the **Certification before Profile Access** box if members must be certified before they will see the Continuing Education option on their personal Profile screen.
- The **Next Certificate Number** is incremented automatically as certificates are issued. You can specify the seed value.
- If the **Approved Credits needed for renewal** option is checked, members cannot renew their certification until they have entered sufficient credits and these credits have been approved. If this option is not checked, members can renew their certification before entering credits but it will not be approved by the association until the credits have been recorded.
- In the Event Categories list, click one or more event categories that can be used to accumulate credits. For example, credits might be earned by attending seminars and conferences but not by attending social events. You can use the [Ctrl] and [Shift] keys in the standard ways to select multiple entries.
- Specify how many **Event Days Back** that members can earn credit for attending an event in one of the permitted categories.
- **Default Financial Account** specifies the financial account that will be used for certificate application and renewal fees. This account can be changed for each fee type.
- Specify the **Contact Person** who manages your association's certification and continuing education programs. The system will send various confirmation emails to this person (for example, when a certificate application is filed or when members enter credits that need approval.)
- Select the applicable **Tax Rate**, if general sales tax is enabled.

Click **Save** to save your changes and return to the Continuing Education Manager or **Cancel** to return without saving.

Reports/Exports

Reports

If available, selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Certification Approvals

Certificates with the following status values need to be approved by an administrator:

- Pending
- Active-Renewal Pending
- Expired-Renewal Pending

In each case, the member (or non-member) has applied for a new certificate or to renew an existing certificate, and has paid any necessary fees. It's up to the administrator to review the appropriate criteria (whether these are test scores, classes taken, or other professional accomplishments) to determine whether the applicant is entitled to be certified.

On the Continuing Education manager screen, click the **Approvals** button and then select **Certifications** from the drop-down menu. You will see a screen similar to the following:

Hom	e > Control Pa	anel > Contir	nuing Education Manager >	Certificati	on Approv	vals		
Ce	rtificat	ion a	pprovals					
-			-					
								oxes to the left of the application lines to select applications to approve or decline. You you to make notes about the application and/or Approve or Decline it from that screen.
Sea	rch							
	0							
	Certificati	on All	<u> </u>					
	Stat	tus Pendi	na 🔼					Search 🗲
	Sta	lus Fellui	ng 🔽					Search 4
	Date Applied	Name	Certification	Status	Credits	Maintain		Approve Checked Items
	12/22/2015	Jack Welch	Certified Financial Planner	Pending	0	Ø		X Decline Checked Items
								A Decime checked items
								Start New Application
-								
					R	leturn to F	Provio	Page
							TOVIC	

The filter panel allows you to filter by certification and status. The grid will show matching pending certifications, each with a check box on the left. You can check one or more rows then click **Approve Checked Items** to approve them or **Decline Checked Items** to decline them. There is also a **Start New Application** button to do just that!

You can also click the **Edit** icon in the Maintain column to manually approve one certification, including making changes to other fields. You will see the following screen:

Edit Certification	1	0
Enter certification notes ar to the certifications admin		n status. Click "Save" or "Cancel" to return
Jack Welch C Certification	ertified Finan	cial Planner
Original Application Date	12/22/2015	
Original Grant Date]
Most Recent Date Applied	12/22/2015	Last Application By: Jack Welch
Last Approval Date]
Next Expiration Date]
Certification Status	Pending	
Certificate Number		
Notes	0 of 100 characters used	//
Approve 🗸	Decline 🗙 Re	eturn without taking action

On this screen you can adjust the original grant date, last approval date, next expiration date and the certificate number. You can also write notes and then **Approve** or **Decline** the application, or close the dialog without taking any action.

Add Application

Click the **Add Application** button to launch the certification application wizard as an administrator. (This version behaves slightly differently than when members or non-members apply.) The following screen is displayed:

Pplication Basic Info You can start your application on this page. Click the	radio button for which certification you want to apply for. If you currently have an certification, it will not display in the list.
elect Applicant	
• Apply for yourself	
Apply for member	
Apply for a non-member	
elect Certification ●CFP	
Skip Fees (Add application and save)	
	Cancel X Next

The **Select Applicant** panel allows administrators to apply for themselves, for another member, or for a non-member. When the member option is selected, a link will appear to select a member. When the non-member option is selected, the standard panel to select a non-member from the database or enter a new person will be displayed.

The next option is to select a certification. If your association only offers one certificate, it will be displayed and selected.

Finally, as an administrator, you have the option to not charge fees. When this option is checked, the buttons at the bottom of the screen change. Clicking the **Complete Application** button adds the certificate immediately, without charging fees or creating transactions. This option is useful for updating the database with certificates that were previously awarded.

When the Skip Fees box is not checked, click the **Next** button to move to the next screen in the wizard. You will see a screen similar to the following:

Home Certified Financial Planner basic info Application Fees	antinuing Education Fees
Please check the box next to the item you wish to include in your applicat the "complete application" button to be brough to the payment page (if a	on. If a fee is required, the box will automatically be checked and disabled. Other items may be optional. Click ayment is necessary) or cancel.
Certified Financial Planner Fees	
L Buffet, Warren (2)	
Application/Exam Fee (required)	\$700.00
Course Material Guide (required) Course Material Guide	\$25.00
Audio CD (required)	\$10.00
	Application Fee \$735.00
Cance	Complete Application <i>3</i>

This panel lists the fees appropriate for the current user and situation (member or non-member.) Required fees are checked and cannot be unchecked. Optional fees can be checked if desired. The system will maintain a running total of the application fee.

When you click **Complete Application**, a certificate record is created with an "Applied" status. An unpaid transaction record is also created and you are taken to the pending payment page to process the payment.

Credits

Click the **Credits** icon to view continuing education credits earned by this applicant or certificate holder. If your association offers more than one certification, credits apply to all of them.

Credits will have one of the following status values:

Status	Description
Draft	The item is recorded in the database but is not yet complete and ready to submit.
Submitted for Approval	The item has been submitted for approval by an administrator.
Approved	The item has been approved and is earning credits for the member.
Declined	The item has been declined as submitted and for the reason(s) specified. The applicant can modify it and resubmit it, which will change its status back to Submitted for Approval.

Credit Status

Credits are generally entered by members as the item is complete but they can also be entered by an administrator based on a printed form submitted by the member or non-member.

A screen similar to the following is displayed:

Home > Cont	Home > Control Panel > Continuing Education Manager > Continuing Education Credits						-	
Contin	Continuing Education Credits							
1 Continu	ing Education for Mar	tin Smith						
	reen to search for points which v arch by your point status or poin		cations. You	may filter by the a	ctive months for cert	ifications, all	dates and a custom date range. In addition,	
		see your current Credit score, and	d then click t	the "Add" button to	add more Credits to	that type.		
Certific	ations							
CFP	User	does not have enough Credit	s to renew	/				
Credits								
Search	Add Credits							
Search	Add Credits							
Search	Results							
Date Entered		Description	Status	Credits Applied	Credits	Maintain	F	
					Approved	A m		
9/2/2015	Published Books and Articles	Staging for Vintage Homes	Approved	0	0	2 🗟		
9/2/2015	1-2 Years of Work Experience	Staging To Sell	Declined	0	0	2 🗟		
9/2/2015	3-4 Years of Work Experience	-	Approved	0	0	🧪 違		
9/3/2015	Published Books and Articles	Financial Planning for dummies	Approved	0	0	🧪 💼		
12/22/2015	Seminar	Financial Planning	Draft	0	0	🧷 違		
					Total Points 0			
	Return to Previous Page							
				ugo				

At the top of the screen is a list of certification(s) held by this member and the current status of each. In the above example, the certificate is up for renewal and the association requires that members enter sufficient credits (and have them approved) before they can review. If this requirement is not present, the certification panel will include an icon for each entry to allow members to renew that certification.

In the Credits section, the system lists credits requested by the member, including the type and description, and the status of each one.

Click the **Search** button to filter the list. The following search panel appears:

Date Filter	Last 36 Months All Custom Range To	3
Status	< All >	
Credit Type	< All > Search Reset	

In the Date Filter section, the first radio button ("Last 36 Months" in the example above) will adjust based on how long certificates are valid as configured on the Options page. You can also filter by status and type of credit. Click the **Search** button to filter the results list or **Reset** to clear settings.

Click the Add Credits button to create a new credit entry. The following dialog is displayed:

Add Credit	ଡିଷ
	rs to the following questions. These questions must be completed in order to submit this cc completed, and this Credit will be submitted for review.
Credit Type	

Once you select a credit type, the dialog changes to prompt for the requested information, which will be different for each credit type.

Example: Here is a typical credit type based on Work Experience:

Add Credit	68	8
Add or Edit the answers to the following questions. These questions must be completed in order to su Credit. Click "Save" once completed, and this Credit will be submitted for review.	ubmit this]
Credit Type		
1-2 Years of Work Experience		
Attended Event		
< Select >		
Place of Employment		
0 of 200 characters used		
Dates of Employment		
•		
Duties/Responsibilities		
•		
		_
Save as Draft Submit for Approval 🗹 Cancel 🗙		

Credits can be saved as drafts or submitted for approval, or click **Cancel** to close the dialog without completing an entry.

On the same screen, upload any documentation required for the selected credit type. You may upload one or more supporting documents, but only one document at a time. Specify a title and a file from your local hard disk, then click **Save** to upload the file. Any previous uploads will be listed at the top of the dialog, each with a download icon for an administrator to review.

In the Maintain column, click the **Edit** (pencil) icon to modify an entry, or the **Delete** (trash can) icon to remove an entry.

Credit Approvals

Once members have entered credits, they must be reviewed and approved (or declined) by an administrator. Your association will only approve credits that directly relate to the profession and certification, and where the number of credits requested is reasonable.

Click **Approvals – Credits** to display a screen similar to the following:

	Home > Control Panel > Continuing Education Manager > Credit Approvals Credit Approvals							
	Select the Credit type for the submissions you want to see. Use the checkboxes to the left of the results lines to select submissions to approve or decline. You can also edit any given submission by clicking the edit icon in the Maintain column. This will allow you to make notes about your decision and/or Approve or Decline the request from that screen.							
Sea	Search Credit Type < Any >							
	Date Submitted	Name	Member	Туре	Description	Credits Requested	Maintain 🔳	Approve Checked Items
	09/03/2015	Barbara Jones	Yes	1-2 Years of Work Experience	Some kind of office	0	V 🗎	X Decline Checked Items
	12/22/2015 Warren Buffet Yes Published Books and Articles Financial Planning for Dummies 0 🧳 📄							
	Return to Previous Page							

This screen can be filtered by credit type, to allow the administrator to focus on one type at a time. Each entry has a check box on the left side, so that multiple credits can be approved or declined at one time.

For each credit, the administrator can click the **Edit** icon to view or update details, or the **Add Document** icon to view or update supporting documentation. Click **Approve Checked Items** to accept these items or **Decline Checked Items** to reject these items. Members are notified by email of either result. Declined items can be edited and resubmitted.

Approved items award that member the specified number of credits and count towards the total credits needed to renew a certification.

E-Learning

Courses	
Videos for Course	
E-Learning Administration	
Seats Administration	
In the grid listing organizations:	
Course Pricing	
Videos Administration	
Add/Edit Video	
Student Administration	
View Answers	

The E-Learning module was developed to allow associations to define courses that members can take to earn a certificate, generally by requiring users to view one or more videos and take a corresponding assessment.

Some courses and videos may be for informational purposes only and do not need to have an assessment associated with it.

Courses are presented online with a member side to select and pay for courses, view videos and take tests, and print a certificate upon completion of a course. The administrative side is used to manage courses, videos and assessments.

Quizzes are created in the built-in ClubExpress <u>Ad Hoc Forms</u> module. Once a quiz has been created, it can be linked to a video from the Video Add/Edit screen.

Activation: The one-time fee to activate this module for your website is \$200.

Courses

Each course is shown with a course code and title, along with a course description.

If a course has not been paid for, a *Purchase* icon is displayed.

If you are assigned to a "Seat", courses will be shown as if they were purchased.



Click the **Enroll** link to enroll for a course.



After someone has enrolled in a class, **In Progress** and **View Videos** links will appear.

• Click the **View Videos** link to view the videos for a course. You may watch videos as soon as a course has been paid for, and even once the quiz has been taken.



Evaluate Course

After a course has been completed, an **Evaluate Course** link may appear. Click the Evaluate Course link to evaluate the course you have taken.



When a course has been completed, a **Print Certificate** link will appear. Click the Print Certificate link to print a certification of course completion.

Videos for Course

Videos for Financial Planning for Seniors							
in order to pass the video lesson	To complete this course, select a video from the videos listed below. After watching the video, you must complete the quiz associated with that video. You must score and 80% or better in order to pass the video lesson. If there is no quiz to go along with the lesson, then the lesson will automatically be marked as "passed". You may review the answers to a quiz by clicking on the "Passed" icon if there was quiz for that lesson.						
Course Progress:							
	40%						
(5 videos found)							
Retirement Plans		0	Medicare	1111	0		
	Watch Video	Passed		Watch Video	Passed		
Medicaid			Senior Living Options				
	Watch Video	Take Quiz		Watch Video			
Discussing Life Expectancy							
	Watch Video						

Use this page to complete the course.

The course progress bar will indicate how much of the course you have completed.

- Click Watch Video to watch the course video.
- Click the **Finished** button when you have completed watching the video.
- If there is no quiz to accompany the video, the lesson will automatically be marked as "passed".

Take Quiz	@ & &
What is the capital of	Illinois?
Berwyn	•
Chicago	
Carbondale	
Springfield	
Lake Forest	
What is the capital of	Virginia?
Norfolk	•
Richmond	
Williamsburg	
Alexandria	
Portland	
Radio Button	
	Grade 🖌 Cancel

- Click Take Quiz to take the quiz.
- Answer the questions pertaining to the video.
- Click the **Grade** button to submit the quiz or the Cancel button to exit without submitting the quiz. A score of 80% is necessary to pass a quiz.

Click the **Passed** link to view your quiz answers.

Click the **Return** to Previous Page button to return to the list of courses to take.

E-Learning Administration

Home > Courseware > Courseware Administration Courseware Administration Use this page to administer your club's Courseware and Testing.			
Search Criteria Course Code Title Status Active Pending Closed Reset Search 4	Options Reports Seats Add Course Return to Previous Page		

Use this page to manage your club's E-Learning.

Specify the search criteria (or leave the search criteria blank to list all courses) and click the **Search** button. You can search by Course Code, Course Title and Status (active, pending or closed).

Click the **Reset** button to clear all search criteria. Click the Reports button to run module reports.

Click the **Seats** button to add organizations and the seats they purchase.

Click the **Add Course** button to add courses.

Options

Use this page to set the options for the E-Learning module.

Home > Courseware > Courseware Administration > Courseware Options	0
Set the options for the courseware module using this screen. You can configure on.	the names for your certificate types as well as set the tax rate if your club has general sales tax turned
Certification Type 1 Name For example: Physician, Creditied, etc. Certification Type 2 Name For example: Non-Physician, Non-Creditied, etc.	•
	< Select Tax Rate > Cancel X

Configure the names for your certificate types, as well as the tax rate, if sales tax is used. You can also define the certificate names used within the E-Learning module

Add/Edit Course

Use this screen to add or edit a course.

dd/Edit Course	688
Use this screen to add or edit a course.	
Course Code	
Course Title	•
CME Credits	
Status < Select > •	
Financial Account < Select Account >	▼ ◆
QuickBooks Item Name	
Description	
0 of 500 characters used	//
Evaluation Form < Select >	T
Accredited Certificate Select	
Non-Accredited Certificate Select	
Save 🖌 Cancel 🗶	

- Specify the **course code**.
- Specify the course title.
- Specify the number of **credits** for the course.
- Specify the course status
 - Active course videos can be viewed, tests can be taken, and certificates awarded;
 - Pending course is being developed (not ready to be taken);
 - Closed course has been retired and is no longer available
- Select the financial account for the course.
- If the QuickBooks® export feature is enabled, specify the QuickBooks® Item Name.
- Specify the course description.
- If applicable, select the **Evaluation Form** to be used by students taking the course. This form will be an evaluation of the course, this is not the assessment the student takes to pass the course. The evaluation form is only available once a student has completed the course. Create the form using the Ad Hoc Forms module. See "Ad Hoc Forms" on page 592
- Click the first Select button to upload the **first certificate image**. Click the second Select button to upload the **second certificate image**.

- Certificates are optional; they will not be uploaded if the value of Credits is zero.
- Certificates should be created with the template provided by ClubExpress. Take care not to
 obstruct the spaces designated for member name and course completion date; any other
 spaces can be filled with graphics or text. Download the template here.
- Click the Save button to save your changes or the Cancel button to exit without saving.

In the grid listing courses:

Courseware Administration Use this page to administer your club's Courseware and Testing. Search Criteria Course Code Title Title Status Active Pending Closed Reset Search Add Course	(
Search Criteria Course Code Title Status Active Pending Closed Reset Search 4 Add Course	
Course Code Title Status Active Pending Closed Reset Search 4 Add Course	
Status Active Pending Closed Seats Reset Search 4	
Search Results 12 courses found)	
Course Title CME Status Maintain	
111 111 11 Active 🧪 🖏 🗟 🍇	
101 Course 101 5 Active 🧪 🖏 🗟 🍇	
102 (P) Course 102 (pending) 5 Pending 🤌 🖏 🗟 🍇	
103 Course 103 3 Active 🧪 📆 🗟 🍇	
104 (C) Course 104 (closed) 5 Closed 🧪 🖏 🖪 🍇	
105 Course 105 4 Active 🥜 🖏 😼 🤱	
106 Course 106 5 Active 🥜 🖏 📑 🤱	
107 Course 107 5 Active 🧪 📷 🍓 🦓	
110 Course 110 5 Active 🧪 🖏 📑 🍇	
110 Course 110 5 Active 🥖 🖏 📑 🍇	

Results will show in the following columns:

- Course Code
- Title
- Credits (in courses where no credits are offered, this number will be zero)
- Status
- Maintain
 - Click the **Edit** link to edit a course.
 - Click the **Course Pricing** link to set the course prices for the various member types.
 - Click the Videos link to manage videos a the course.
 - Click the **View Students** link to view students taking a course.

Seats Administration

Use this page to manage your organizations. These are organizations that have paid a fixed fee to purchase a specified number of seats for a defined period of time.

Note: When an organization requests additional seats, they will be handled as a separate entry with its own expiration date.

Home Courseware Courseware Administration Seats Administration	?
Use this page to administer seats for your organizations.	
Search Criteria Add Seats Organization Reset Reset Search 4	
Return to Previous Page	

Specify the first few letters of an organization's name and click the **Search** button; or leave the organization field blank to list all organizations.

Click the **Reset** button to clear all search criteria.

Click the Add Seats button to add an organization and its seats.

Add/Edit Seats	8
Add/Edit seats from this page. Once a seat has been added, the seats purchased and the rate cannot be modifed.	
Organization	
Seats Purchased	
Financial Account < Select Account >	
QuickBooks Item Name	
Rate	
Expiration Date	
Member Not Selected Select Member	
Save 🗸 Cancel 🗙	

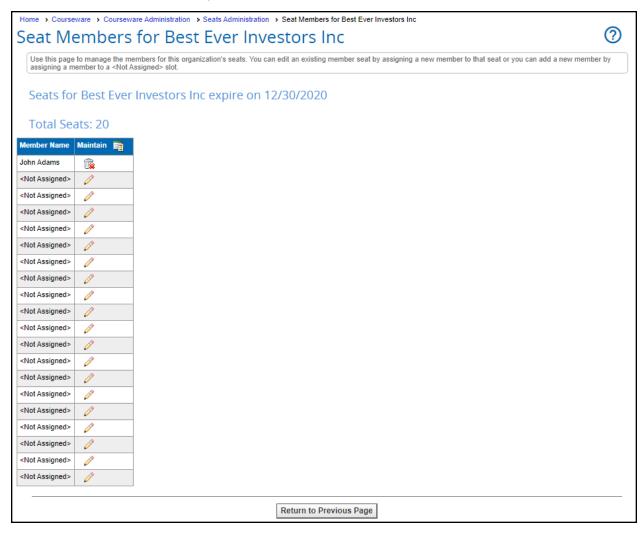
- Specify the organization name.
- Specify the number of seats purchased.
- Select the appropriate financial account.
- If the QuickBooks®export is enabled, specify the QuickBooks®Item name.
- Specify the rate for each seat.
- Specify the Expiration date. This date can be adjusted based on the date of payment
- Select a member associated with the organization.
- Click the Save button to save your changes or the Cancel button to exit without saving.

In the grid listing organizations:

The search result grid will list the organization name, the fee paid and the number of seats purchased and assigned.

Click the **Edit** link to edit an organization.

Click the **Members Assigned** link to assign members to the seats. This screen will show as many rows as seats were purchased, with any unassigned seats labeled "unassigned".



- Click the **Delete** link to remove a member from a seat.
- Click the Add link to assign a member to a seat.
- Click the Select Member link to select a member for the seat.
- Click the Save button to save your changes or the Cancel button to exit without saving.

Click the **Renew** link to renew an organization's seats.

Seats Renewal	3
Specify how many seats to renew. It could be more or less than the previous number of seats.	
Seats 15	
Renew 🖌 Cancel 🗙	

- Specify how many seats to renew. It can be either more or less than the previous number of seats.
- Click the Renew button to renew the seats or the Cancel button to exit without renewing.

Course Pricing

Course Pricing		@ & Ø
IND. KARMA COMMUNITY- Annual (\$25)	0	Accredited Non-Accredited
IND. COLLABORATOR- Annual (\$45)	0	Accredited Non-Accredited
IND. ALLIANCE- Annual (\$90)	0	Accredited Non-Accredited
FOR PROFITS- Semi-Annual (\$240)	0	Accredited Non-Accredited
NON PROFITS- Annual (\$270)	0	Accredited Non-Accredited
INTENTIONAL COMMUNITIES- Annual (\$180)	0	Accredited Non-Accredited
FOR PROFITS- Annual (\$360)	0	Accredited Non-Accredited
FOR PROFITS- Discounted til 2016 (\$280)	0	Accredited Non-Accredited
IND. ALLIANCE- Discounted til 2016 (\$70)	0	Accredited Non-Accredited
IND. ALLIANCE- Semi Annual (\$60)	0	Accredited Non-Accredited
IND. COLLABORATOR- Discounted til 2016 (\$35)	0	Accredited Non-Accredited
IND. COLLABORATOR- Semi Annual (\$30)	0	Accredited Non-Accredited

- Use this screen to set course pricing,

- Specify the fee for each member type.
 Specify whether it's for Credited or Non-credited certification,
 Click the Save button to save your changes or the Cancel button to exit without saving.

Videos Administration

(student's progress for a course from this pag	je.				
Search Criteria -						
Student Name	e					
Completion Stat	us In Progress Completed					
earch Rest	Reset Sear	Payment Status	Course Completion	Maintain	F	
	ults		Course Completion	Maintain	ħ	
itudent Name	ults Member Type	Payment Status			Ē	

Use this screen to manage videos for a course.

To search for a video specify the video name and click the Search button. To view archived videos in your search, click the checkbox "Include Archived Videos".

Click the Reset button to reset the search criteria.

Click the **Add Video** button to add a video to a course.

Click the **Video Sequence** button to set the display order for the course videos.

In the grid listing videos:

Click the **Edit** link to edit a video.

Click the **Delete** link to delete a video. This option will only appear if a student has not viewed the video.

Click the **Archive/Unarchive** icon to archive a video or remove a video from the archive. This option will only appear if the video has been viewed by a student.

Add/Edit Video

E-Learning

Add/Edi	t Video	0	88
Fill out the f	form to create a new video for this course.		
Title		4	
Length			
Video Type	External Video O Local Upload		
Embed Code		•	
	0 of 1000 characters used	_//	
Include quiz?			
	Save 🖌 Cancel 🗙		

Use this screen to add a video to a course.

- Specify the title of the video.
- Specify the length of the video.
- External video is selected by default. To add an external video, paste the embed code. An embed code can be obtained from any video hosting site (YouTube, Vimeo, etc.)
- Select Local Upload to upload a video. Click the Upload Video button to upload a new video or select an existing video.
- If there is a quiz to be taken for the video: Click the Include quiz? checkbox.
- Select an Ad Hoc Form from the Quiz dropdown field. See "Ad Hoc Forms" on page 592.

Ad Hoc Forms are used to create any assessments associated with the course or video. You can include a quiz with each video, or with select videos in a course. A passing grade for the quiz is 80% (this threshold cannot be changed).

Only radio button answers are supported for quizzes to be used in E-Learning.

Note: To designate a correct answer, use a % symbol ahead of the answer.

Example: What color is the sky?

%Blue Green Yellow

• Click the Save button to save your changes or the Cancel button to exit without saving.

Note: Embedded MP4 files (along with mpeg, AAC, and wav files) that have been uploaded to our site and used for the E-Learning module should work across all modern platforms/browsers (i.e. not internet explorer 8). Beyond that, if a video format is not supported, and the user goes to view the video, there will now be a download link where the user can download the video to watch it locally on their machine.

Student Administration

You can view all	student's progress for a course from this pa	age.				
- Search Criteria -						
Student Name	9					
Completion State						
	Reset Sea	arch 🛷				
Search Rest		arch 🞸				
Search Rest		Payment Status	Course Completion	Maintain	雨	
	ults		Course Completion	Maintain	Ē	
Student Name	Ilts Member Type	Payment Status			R.	

Use this screen to manage students for a course.

Enter or select the search criteria (or leave the criteria alone to see all students) and click the Search button.

Click the Reset button to reset all search criteria.

In the grid listing students:

Click the **Progress** icon to see a student's progress in a course. The progress screen will show a grid including all In Progress or Completed videos in a course, the accompanying assessment (if present) and the status for that member. If the student has not yet begun the course, but has paid for it, the progress page will be blank.

Click the **Edit** icon to edit a student's progress in a course. Change the status to Completed to mark the course as completed for the student. If there is an evaluation form for the course and/or a certificate, each will be available to the student once the course is marked as Completed.

Click the **Delete** icon to delete a student from a course.

E-Learning

View Answers

Use this screen to view your quiz answers.

Click the Cancel button when you are done.

Expense Reimbursements

In the Member Profile	
Expense Reimbursement Manager	
Reports	
Exports	

The Expense Reimbursement System provides a way for members to submit reimbursement requests on the club's website and for administrators to approve the requests and record payment information for them.

The Expense Reimbursement System is fully chapter-aware: requests are made for a specific chapter and a specific project or event. Each request consists of one or more detail lines and any number of supporting documents. Approvals can be configured for an officer or an administrator at the next highest level. Subgroup administrators and coordinators will only see reimbursement requests at their level and below.

Activation: The one-time fee to activate this module on your website is \$600.

In the Member Profile

When this module is enabled, a member's **Profile** screen will have a new "Expense Reimbursements" link in the Financial / Historical Data section. When members click this link, the following screen is shown:

		Add Reimbursement Request						
Date Title	ie	Club/Playgroup	Status	\$ Claimed	\$ Approved	Maintain	Ē	
03/25/2015 Pos	stcard Postage	Las Madres Neighborhood Playgroups, Inc.	Paid	221.00	221.00	۲		
05/05/2015 Ann	nual Luncheon	Las Madres Neighborhood Playgroups, Inc.	Paid	331.86	331.86	۲		
08/17/2015 LM	1 Tri-folds	Las Madres Neighborhood Playgroups, Inc.	Paid	208.39	208.39	۲		
08/23/2015 LM	1 Business Card	Las Madres Neighborhood Playgroups, Inc.	Pending	49.44	0.00	Ø 💿	1	

On this screen, members can view the status of their current reimbursement requests. Pending requests can be edited or deleted. Clicking the **Add Reimbursement Request** button displays the following screen:

Home > Contro	I Panel > Member Profile > Member Expense Reimbursement > Add/Enter Expense Reimbursement Request Add / Enter Expense Reimbursement Request
This screen Information"	allows you to view or edit your reimbursement requests. Enter the reimbursement request information in the "Reimbursement window. Required fields are denoted. You may also enter in an administrative note in the Notes box to the right.
Date Create	d 09/03/2015 Notes
Status	New
Title	Picnic Supplies
Subgroup	Club 2014
Project	Summer Picnic
Pay to	Test Person
Email	info@clubexpress.com
Phone	847-255-0210
Address1	1930 Thoreau Drive
Address2	Suite 155
City	Schaumburg •
State	Illinois OZip 60173 •
Date 📖	Vendor Description Category \$ Claimed PartyExpense Add
Date Ven	dor Description Category \$ Claimed Maintain
	ty Palace Paper goods PartyExpense 43.21 🧪 🙀
TOTAL	43.21
Add Suppor	ting Document
Supporting Do Party Palace Re	Cument Maintain
	Save (Pending) 🖋 Submit 🖋 Return to Previous Page

In the top left panel, members will enter basic information on the reimbursement request, including who the check should be made payable to.

The "Project" field is free-form text but members can also click Select Event to select a future event or one that happened up to 30 days in the past. (Reimbursement requests need to be submitted in a timely fashion!)

The top right panel allows general notes to be entered.

Below that is a panel that allows individual line items to be entered. A reimbursement request may include multiple line items. After each one is entered, the **Add** button is clicked and it appears in a grid below; the TOTAL link is also updated. Clicking the **Edit** (pencil) icon moves that entry from the grid back up into the add/edit panel to be modified. There is also a **Delete** icon to remove an entry.

The bottom of the screen displays a section that allows users to upload one or more supporting documents. Clicking the **Add Supporting Document** button displays a screen to enter a title for that document and to select it from your local hard disk. Almost any file type can be uploaded.

Click the **Save (Pending)** button to save the submission with a Pending status. It will not be submitted for approval. Click the **Submit** button to save and submit the submission for approval. Click the **Return to Previous Page** to return without saving any changes.

When members Submit the reimbursement request, the system sends a notification email to the designated chapter coordinator or the club's Treasurer that an expense reimbursement request is awaiting approval.

Expense Reimbursement Manager

When this module is activated, administrators will see an **Expense Reimbursements** link on the Money tab of the Control Panel. Clicking it displays a screen similar to the following:

	creen to search rein							
Search R	eimbursement	IS						
Date Range	06/03/	'2015 🛄 to	09/03/2015				Categ	ories
	Las N	ladres Neighbor	hood Playgroups, Inc.				Exp	oort
Project								
Status	Pend	ling 🗘						
				ſ				
Submitted E	By <u>Sel</u>	ect Member		(Search	4		
Submitted E		ect Member		Project	Search	\$	S	Maintain
	3y <u>Sel</u>			Project		<u></u>	\$ Approved	Maintain
Date			Las Madres Neighborhood Playgroups, Inc.	Project		s		
Date 08/23/2015	Submitted By	Title LM Business	Las Madres Neighborhood Playgroups, Inc. Club 2014	LM Business	Status	\$ Claimed	Approved	1
	Submitted By Gini Bossenbroek	Title LM Business Card	Playgroups, Inc.	LM Business Card	Status Pending	S Claimed 49.44	Approved 0.00	•

On this screen, administrators can search for and view current reimbursement requests. The search panel allows filtering by date range, subgroup, project name (anywhere in field), status and/or the person who submitted the request.

This screen will respect the subgroup level of the current user. Chapter coordinators can only see reimbursement requests for their chapter while a top-level administrator can see all requests.

The options in the Maintain column will be different depending on the request status:

- Pending View only; the member has not yet submitted the request for reimbursement.
- Submitted-0 View and Approve-1; the member has submitted the request for approval. It cannot be edited or deleted.
- Approved-1 View and Approve-2*; an administrator, usually the Treasurer at the same level as the request, has reviewed and approved the request. It cannot be edited or deleted.
- Approved-2* View and Pay; an administrator, usually the Treasurer at the next level up, has
 reviewed and approved the request. It cannot be edited or deleted. Please see the note below regarding additional approvals.
- Paid View and Edit only; the appropriate Treasurer has paid this request and the check number and date have been recorded on the system. It cannot be edited or deleted.
- Rejected View only; an administrator has rejected the claim. Reasons can be listed and the request can be edited and resubmitted (or its status changed to Pending and then deleted.)

Note: The number of approvals required will vary depending on the number of subgroup levels in your organization. For example, an organization without subgroups will only have one stage of approval, while an organization with three subgroup levels will have three stages of approval (Approved-1, Approved-2 and Approved-3).

The **Approve** screens allow administrators to write notes about the request, to specify an Approved dollar amount (which might be different from the claimed amount), and to view supporting documentation. The **Pay** screen allows administrators to record a payment, including amount paid, check number, and date paid. The **Edit** screen allows administrators to write payment notes only.

On these forms, the Submitted By, Pay To, and Approved- By fields are links that, when clicked, display the member's contact information.

Approvals and Payments

Members cannot approve their own requests, even if they are configured as administrators. Approvals must be handled by another administrator.

The system may require more than one approval before a payment can be made. The system does not require that these approvals be made by different people but each approver's name is recorded.

Note: Only the Treasurer is automatically notified when expenses are submitted for approval, and when expenses are ready to be paid. Coordinators for the Expense Reimbursements module will not be notified by the system.

When a request is Submitted, the Treasurer is notified that an expense reimbursement request has been submitted for approval. When a Submitted request is approved, the status changes to Approved-1 and the Treasurer is notified that an expense is ready to be paid. At the final stage of approcal, the request will include a Pay icon in the maintain column.

Clicking the icon displays the standard screen with a payment details panel enabled:

Expense Reimbursements

Date:		🍅	REMEMBER to mail the check!
Amount:	\$116.00	٠	
Check Number:		٠	

The approved amount is shown but cannot be changed. Admins will specify the date and check number and click **Save** to record this information. Once this done an email is sent to the original submitter to tell him or her that the request was approved and payment is on the way!

Categories

Click the **Categories** button to update the categories available to members for submitting reimbursement requests. This is a standard ClubExpress admin screen, with the additional ability to specify the display sequence.

Reports

If available, selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Exports

If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Group Directory

User Interface	
Group Directory Administration	

The Group Directory module displays chapters and interest groups in a single list, allowing members to sign up or leave a group.

For some clubs and associations, chapters are geographically based. But for others, chapters can serve like interest groups that charge a fee. So a club could have interest groups that members can join and leave at any time; it can also have chapters that members can join if they pay the chapter fee.

Administrators: This module does not have an admin side, only a user side that can be placed on the public or members' side of the website. On the public side of the website, it promotes the various groups within the club that members can join.

This module was developed for a large seniors community with thousands of members and dozens of interest groups and clubs within the community.

Activation: The one-time fee to activate this module for your website is \$500.

User Interface

Selecting the **Group and Club Finder** option from the menu displays a screen similar to the following:

The Group and Club Find "Search" button. The sys are more than 10 matchi	I Club Finder	clubs. If no search values are spe	fying one of the 3 search values and clicking the cified, all groups and clubs will be displayed. If there click the link on the club or group line to see more
information about the clu Find Groups and Clu Search by First Letter OR Search anywhere in Title OR Select Category	lbs		
Anyone can join.		n the Bronx, raised in th	No Fee Join
us. Ballroom Dance C (Music and Dancing Join this group to the following dan	iroup	na Preserve! We teach t the beginner level:	No Fee Join

This module provides three search options:

- By the first letter of the interest group or club (chapter);
- Anywhere in the title of the interest group or club;
- Based on the category.

Click the **Search** button to display matching interest groups and clubs, sorted in alphabetical order by group name. Each group is shown with its title and category, and a short description.

On the right side of each panel is one of 4 options:

- If the module is displayed on the public side of the website (the member is not logged in), it will be blank.
- If the member is logged in and:
 - They are a member of that group/club, the text says "You are a member of this group". An "UnJoin" button is also shown. Clicking the button prompts for confirmation and removes the member from that group/club.
 - They are not a member of an interest group, the text says "No Fee". A "Join" button is also shown. Clicking the button joins the member to that group and the screen immediately refreshes.
 - They are not a member of a club, the text says something like "\$20 fee to Join", pulling the fee information from the club's configuration. A "Join" button is also shown. Clicking the button

adds the member to that club and takes them to the Payment Page where a misc. transaction is waiting to be paid.

In both cases, the group coordinator receives an email notifying him or her that someone has joined the group.

Group Directory Administration

This module uses categories to organize both interest groups (no fee to join) and chapters (fee to join).

Interest groups already have categories. For chapters, the "district" is the category. So your club or association must be set up with a two level sub-group hierarchy where the top level is "Category" and the bottom level is "Club" or any other keyword that defines a group charging an annual fee.

Most importantly, the interest group categories and the chapter categories must have the same names, so that the groups can be shown together.

Example: Your club might have a "Cards and Games" category. Within that is a "Scrabble" interest group that does not charge a fee, and a "Poker" interest group that does charge a fee. If "Cards and Games" is common across both parts of the system, these two groups will be shown together in the search results.

Both interest groups and chapters allow you to create a short description of the group. Both also allow you to link to a custom web page with additional information. Some organizations using this module create a standard template for this page and then copy it for each interest group and chapter, to ensure a consistent format.

Jobs Board

User Interface	
In the Member Profile	
Jobs Board Manager	
Reports	
Member Fleet (for Sailing/Yacht Clubs)	

This module allows professional and trade associations to post available jobs that members (and optionally non-members) can view.

The system allows members to post jobs that may or may not immediately become visible. There may be a fee to post a job and jobs will be visible for a defined period of time, with the option to renew a listing. The module does not currently support non-members directly posting jobs.

The Jobs Board does not collect and distribute resumes, cover letters or applications. It does not serve as a clearing house or intermediary in any way. It does not provide an "anonymizing" service (to protect people against applying for jobs at the same company where they work.) It is not intended to replace Monster or Career Builder. Rather, it lists the jobs and provides the details on how to apply (usually the company's website or an email address.)

Activation: The one-time fee to activate this module for your website is \$300.

User Interface

When users access the Jobs Board they will see a screen similar to the following:

Home > Contro	ol Panel > Jobs Board	
Jobs Bo	pard	
The Jobs Bo system will d additional pa	bard page allows you to view the jobs that our members have posted. You can filter the jobs by specifying one or more search values and clicking t display matching jobs. If no search value is specified, all current open jobs will be displayed. If there are more than 10 matching items, use the Pag ages.	ne "Search" button. The ing controls to see
Search		
Ca	<pre>ategory < Any > </pre>	
	Title	
Cor	mpany Search 🜮	
Search Res	ults (2 jobs found)	
view more	Finance - Entry Level Accounting Chicago Association of Financial Planners Chicago	2 Positions Full Time
	Chicago Association of Financial Fiannets Chicago	APPLY
		1 Position
view more	VP of Finance	Full Time
	Finance Professionals, Inc.	APPLY
)
	Return to Previous Page	

The search panel at the top allows users to search for jobs by category, title (anywhere in the field) and the company posting the job (also anywhere in the field.)

The search results are sorted by the last name of the members who posted the job. For each job, you can see the title, status, category, member who posted the job, expiration date and number of times renewed.

Only active jobs are shown. Up to 10 jobs are shown at a time; if more jobs are available, paging controls will be displayed to navigate between pages. You will also see the company posting the job, the type of position (full time, part time, etc.), an Apply button and, on the left side, a **View More** icon. Clicking this icon expands that job to show more information:

view less	Finance - Entry L	evel Accounting	2 Positions Full Time
view less	Chicago Association of Fina	ancial Planners Chicago	APPLY
	Finance Department Head. corporate, legal, and regula management functions incl	required (Finance or Accounting or Economics related) Candidate will work directly with Duties: Effectively overseeing systems administration while meeting and adhering to tory policies, guidelines, and requirements regarding compliancePerforming personnel uding participating in recruitment of branch staff and providing training to employees regarding uency decisions, difficult account problems, and servicing accountsMonth end and close	
	Details		
	Required Qualifications	Candidates must have a degree (can be an Associates) in the finance/ accounting field. The degree is more important than the experience to the manager.	
	Salary	32,000	
	Travel %	10	
	Additional Info	Desire to gain product knowledge through training and apply that knowledge to assist clients with inquiries and problems. Good communication, problem solving and multi- tasking skills.	

The icon changes to View Less to collapse this job and view another.

Clicking the **Apply** button either launches an email in the user's email software or it jumps to the company's website page to apply online.

In the Member Profile

When the Jobs Board module is activated, a new **Jobs Board** option appears on the Member Profile screen – **Website** panel for each member. Selecting this option displays a screen similar to the following:

The maintain column next post.	to a job posting gives you	options to edit the pos	t, renew the p	post, delete or car	ncel the post	or navi	gate to the payment page if payment is pending for
Add Job F	Posting Policy						
Title	Category	Status	Expiration	Renewals Left	Maintain	1	
A Test Job	Default Category	Declined		0	🧷 違		
Controller	Financial Positions	Approved, Pending Payment		0	V 🛱	S	
Part Time Office Assistant	Entry Level Positions	Cancelled		0	Ø		
VP of Finance	Financial Positions	Active		0	é 😢		

The grid shows each job posted by this member, including its title, category and status, as well as the expiration date and remaining renewals (if allowed.)

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
(Edit)	Edit this job description. If members are not allowed to edit a posting once it's approved, the only thing that can change is the number of available positions.
(Renew)	Click this icon to renew this job posting for an additional time period. If payment is required, you are taken to the Pending Payment page to record the payment. If payment is not required, the status immediately changes to Active.
(Cancel)	Cancel this job posting. For audit purposes, it is not deleted but it will not be displayed.
(Delete)	Delete this job posting completely. This option only appears for jobs with a status of Draft, Declined, or Approved, Pending Payment.
S (Pay- ment Pend- ing)	This icon appears when a job has a pending payment. Click it to jump to the Payment screen to complete payment and activate the job posting.
	Maintain Options

Click the **Posting Policy** button to view your association's policies regarding job postings. Click the **Close** button to close the popup screen.

Click the **Add Job** button to create a new job posting. The following screen is shown:

Describe the job you are po press the "Save Draft" butto		ed on the Jobs Bo	ard, press the "Subn	nit" button. If you want to continue working on it before you submit it,
Required Infor	mation			
Title		۵	Positions	1 •
Job Category	<select></select>			
Posting For		۵	Apply Via	Email
	Name of Company or Person			
Status	Draft		Hidden	_Yes ⊛No
Optional Inform	nation			
 Description 				
Decemption				
Application URL	0 of 1000 characters used			
Contact Name			Contact Phone	
ontact / Application Email				
Job Type			Salary Range	
Commitment	Don't Show		Duration	
Communent	Full Time ᅌ		Duration	Months or Hours for part-time / contract jobs
Location			Travel %	
Required Qualifications				
	0 of 1000 characters used			
Required Experience				
	0 of 1000 characters used			
Additional Information				
	0 of 1000 characters used			
dditional Information URL	o or roop origidaters used			

Most options should be self-evident. Note that the **Hidden** field will be grayed out; it's only available to administrators. Note also that job **Status** is managed automatically by the system.

Click the **Save Draft** button to save the job as a draft. It is not submitted for approval but you can save and come back to it if you cannot complete the posting in one session.

Click the **Submit** button to submit the job posting. There are four possible scenarios:

- 1. If neither approval nor payment are required, the status will change immediately to Active and the job will be visible on the public side of the module.
- 2. If approval is required but payment is not required, the status will change to Submitted. It needs to be reviewed and approved before it will be Active.
- 3. If approval is not required but payment is required, the status will change to Approved, Pending Payment. Users will be taken to the Payment page to complete payment; once this is done, the status changes to Active.

4. If both approval and payment are required, the status changes to Submitted. Once the posting has been approved by an administrator, the status changes to Approved, Pending Payment and users will receive a confirmation email to login and complete payment. Once this is done, the status changes to Active.

Click the **Cancel** button to close the Add/Edit form without saving your changes.

Jobs Board Manager

There are two ways to access the admin screens for this module:

- When looking at the main public screen, click the admin (pencil) icon on the floating Page Tools widget on the right side of the screen.
- Go to the Control Panel Association tab Website Modules section Jobs Board.

You will see a screen similar to the following:

the post, or navigate to	in the search box to find the Je o the payment page if payment " button brings up a list of repo	is pending for the pos	t. The "Configure	n column next 9" button has a	to a post giv a drop-down	res you op menu wit	tions to (h links fo	dit the post, renew the post, delete or can Job Category maintenance and Jobs Boa
Search			Confi	igure 🗸				
Category	All		Re	ports	Ì			
Title			Ad	d Job	1			
Status	< Any >	٥						
Member Last Name								
Expires By		Search 🗳						
	obs found)	Search 🗳						
earch Results (5 j	obs found) Category	Search 🗲	Posted by	Expiration	Renewals	Maintair		I
Gearch Results (5 ji Itte inance - Entry Level			Posted by Don W Conner		Renewais 0		• •	
Search Results (5 j Itte inance - Entry Level ccounting	Category	Status				0 (0 f	-0	
Expires By Search Results (5 j Title inance - Entry Level ccounting VTest Job Controller	Category Entry Level Positions	Status Active	Don W Conner		0	0 (0 t	3 🕥	
Search Results (5 j Title Tinance - Entry Level Accounting	Category Entry Level Positions Default Category Financial Positions	Status Active Declined Approved,	Don W Conner Martin Smith		0	0 (0 f	3	

The **Search** panel allows administrators to find jobs in the system by category, title (anywhere in the field), status, member last name, or expiration date. The search results are sorted by the last name of the members who posted the job. For each job, you can see the title, status, category, member who posted the job, expiration date and number of times renewed.

Up to 30 jobs are shown at a time. If more than 30 jobs are returned by the search function, paging controls will appear to navigate between pages.

Job Posting Status Values

Job postings will have one of the following status values, maintained automatically by the system:

- Draft The job posting is still being defined by the member. It is not ready to be submitted for approval or payment, or to be displayed as an available position.
- Submitted When approval is required, the job posting has been submitted and is awaiting review.
- Approved, Pending Payment When payment is required (and if approval is also required, it has been received), the job posting cannot be switched to active until payment has been received/recorded.)
- Renewed, Pending Payment When payment is required (and if approval is also required, it has been received), the job posting cannot be switched to active until payment has been received/recorded.)
- Active The job posting is displayed as an available position. The job posting was active but is about to expire (or it has already expired.) It has been renewed by the member or an admin but it cannot be switched to active until payment has been received/recorded. Note that this job posting will still be shown in the listings as long as the expiration date has not passed.
- Declined The association has specified that jobs must be approved by an administrator or coordinator. The job has been reviewed and has been declined for a specified reason. It can be edited by the member, which will change its status to submitted.
- Expired The job posting has expired without being renewed. It will not be shown on the Jobs Board.
- Canceled The job posting was canceled by the member before it expired, perhaps because the position was filled or the position was removed before being filled.

Maintain Options

The following options can be found in the Maintain column:

lcon	Description
🥖 (Edit)	Edit this job description.
区 (Cancel)	Cancel this job posting. For audit purposes, it is not deleted but it will not be displayed.
(Delete)	Delete this job posting completely. This option only appears for jobs with a status of Draft, Declined, or Approved, Pending Payment.
S (Pay- ment Pend- ing)	This icon appears when a job has a pending payment. Click it to jump to the Payment screen to complete payment and activate the job posting.
Renew)	This position is eligible to be renewed for an additional time period (specified on the Options page.) Click this icon to renew it. If payment is required, you are taken to the Pending Payment page to record the payment. If payment is not required, the status immediately changes to Active.

Maintain Options

<u>Configure – Job Categories</u>

Select this option to define categories into which jobs can be posted. You will see a screen similar to the following:

	l into cat	egories whic		this screen. Click "Ad	dd Category" to add a n	ew category. Click "Edit" to change an exi	sting category's description. Click
"Delete" to remove Add Category	a catego	ary.					
Category	Active	Maintain					
Default Category	Yes						
Financial Positions	Yes	Ø					
Entry Level Positions	Yes	Ø					
			_				
				Retur	n to Previous Page		

This is a standard ClubExpress admin screen. Click **Add Category** to create a new category, or the Edit icon to modify an existing category. A Delete icon is only shown if no jobs are assigned to a category.

Individual categories can be activated or deactivated. Use this option if you no longer want a category to appear but it cannot be deleted completely.

Configure – Posting Policy

Select this option to define job posting policies for your association. You will see a standard popup form featuring our advanced content editor, which allows you to enter a fully formatted list of policies. Click **Save** to save the policy and return to the Jobs Board Manager, or **Cancel** to return without saving.

Configure – Options

Select this option to configure the Jobs Board module. The following screen appears:

Home > Jobs Board Manager > Jobs Jobs Board Opti	
This screen shows the association's	Jobs Board options. We have defaulted the settings to those that are most commonly used.
Job Posting Fee	\$ 75.00
Fee charged for renewal	0
Renewal Fee	\$ 25.00
Financial Account	Education Fees
QuickBooks Item Name	
Posting Active Days	21
Posting Requires Approval	0
Member can edit post after approval / once active	
Maximum Renewals	0
	The maximum times a member can renew a posting. Admins can override this for any given post.
Contact Person	Martin Smith Select Remove
	Save 🖌 Cancel 🗙

The following options can be configured:

- Define a Fee to allow members to post a job. If the value is zero, no fee is required.
- Fee Charged for Renewal controls whether members pay the fee once or each time a job posting is renewed. If this option is checked, another field will appear to allow you to enter the renewal fee (which can be different from the posting fee.)
- Financial Account controls which account is used for job posting fees. If QuickBooks®is enabled, you can also specify the QuicBooks Item Name.
- **Posting Active Days** defines how long a job posting should be active for before the status is changed to Expired.
- **Posting Requires Approval** defines whether a club admin or coordinator must approve a job posting before it can become active.
- If **Member can edit post after approval / once active** is checked, then the post can be changed without further approval or review. If this option is not checked, Active posts cannot be edited except for the Number of Positions field.
- **Maximum Renewals** defines how many times a post can be renewed beyond the original listing. For example, if active days is set to 30 and maximum renewals is set to 3, the post can be visible for up to 120 days (original posting plus up to 3 renewals.) Note that renewals are not automatic, even if no fee is charged. Members must still login and explicitly renew a job posting. Note that this limitation does not apply to admins, who can renew a job posting beyond the maximum number of renewals.
- **Contact Person** defines which member will be notified by email when a job posting or renewal requires approval.

Click **Save** to save your changes and return to the Jobs Board Manager, or **Cancel** to return without saving.

Reports/Exports

Reports

Selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Add/Edit Job Postings

This allows admins to create or edit job postings on behalf of members. One difference on the form itself is a **Post Owner** field at the top of the screen, allowing you to specify the member.

The other difference is how the system behaves when job postings require approval. If they are entered by an administrator or module coordinator, approval is automatic. If there's no fee, the job posting is immediately Active. If there is a fee, the status is Approved Pending until payment has been recorded.

Approving and Declining Job Postings

When postings require approval, admins will go to the Jobs Board Manager and search by status = "Submitted". Click the **Edit** (pencil) icon to review the detailed job posting.

To approve a job posting, click the **Approve** button at the bottom of the screen. The status changes to Active if payment is not required, or Approved, Pending Payment if payment is required. The posting member is notified by email that the job posting was approved and to login and complete payment.

To decline a job posting, click the **Decline** button at the bottom of the screen. You will see a small popup to enter comments explaining why the job could not be approved. The status changes to Declined and the posting member is notified by email that the job posting was declined (with your explanatory comments included in the email.)

Member Fleet (for Sailing/Yacht Clubs)

Activation: The one-time fee to activate this module for your website is \$200.

This simple module lists each member and his or her boat name, length, type, and mooring no.

<u>Usage</u>

When this module is added to the menu, clicking it displays a screen similar to the following:

Home > Member Fleet				
Member Fleet				
Found 151 boat(s).				< Page 1 of 6 ᅌ 🕨
Boat Name	Owner	Length	Туре	Mooring #
Absolut	Jess Humphrey	40	Power	
Adios	Joseph F Sherer	24	Power	83
Alizarin	Fred Melnyk	25	Power	

The list is sorted by boat name and includes paging support (30 entries per page.) Users can also click the member's name to jump to their bio page.

Boat name, Length, Type, and Mooring# are stored using Additional Member Data questions. Once these questions have been created, we configure them behind the scenes in order to activate the module.

Mobile App

Logging In	
Using the AppHome Screen	
Choosing a Channel	
Viewing Notifications	
Direct Messaging	
Your Info	
Customizing Your Experience	
Selecting a Channel	
Meets	
Meets on a Desktop	
Chat	
Chat on a Desktop	
Directory	
Events	
Polls	
Purchasing and Setting Up Your Mobile App	

The mobile app is based around "channels", which can be created in many different ways. Your club or association can define as many channels as it needs. Members will only see the channels that they have access to. The mobile app provides five special functions for each channel:

- Meets, allowing you to connect with channel members nearby
- Chat, a live chat function
- Channel Directory
- Channel Events, including the ability to create your own QuickEvents
- Channel Polls, including the ability to create your own Polls

In addition to channel-based features, your club's mobile app also comes with:

- Mobile App menu a menu of featured functions you want to highlight for app users.
- In-App Notifications push notifications out to users either generally, or as an admin option in events you've created.
- Direct Messaging members can send direct messages to other members in the mobile app.

The Meets, Chat and Direct Messaging functions are also available on your website.

Activation: The one-time fee to activate the mobile app for your website is \$200. For information on purchasing and setting up your app, see "Purchasing and Setting Up Your Mobile App" on page 1204

Logging In

Tap the app to open it. You will see a splash screen and then the login screen.

Enter the same username and password that you use on the main website. You can also tap the **Remember me on this device** option so that the system will automatically log you in each time you open the app.

If you don't remember your username and or password, tap the **Forgot My Username/Password** option, enter your name and email address and the system will send you new temporary credentials, which you will change as soon as you login.

Retrieving a Lost Username/Password

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

Forgot Us	ername/Password 🛛 🖨 🖗 🕻	×
name and a ne	ail address below. If your email address is on file, your user aw password will be emailed to you. If your email address is than one member, you may also enter your first name to help i.	
Email Address		
First Name		
	OK 🖌	

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.

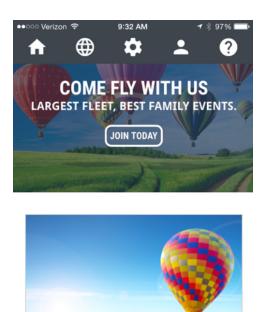
If no match was found, or if multiple matches were found, the system will not generate a new password. If this occurs, or if your email address is no longer valid, **contact a club or association officer to have your password reset manually**.

Using the AppHome Screen

The mobile app has two main navigation menus:

- The hamburger menu at the top left corner of the screen, which shows the mobile app menu (See "Mobile App Menu" on page 357) and your club's full website menu and
- The icon tray at the bottom of the screen, which includes quick links to take you to the home page, your channels (See "Mobile App Manager" on page 378), notifications (See In-App Notifications), direct messages (See Direct Messaging) and profile.

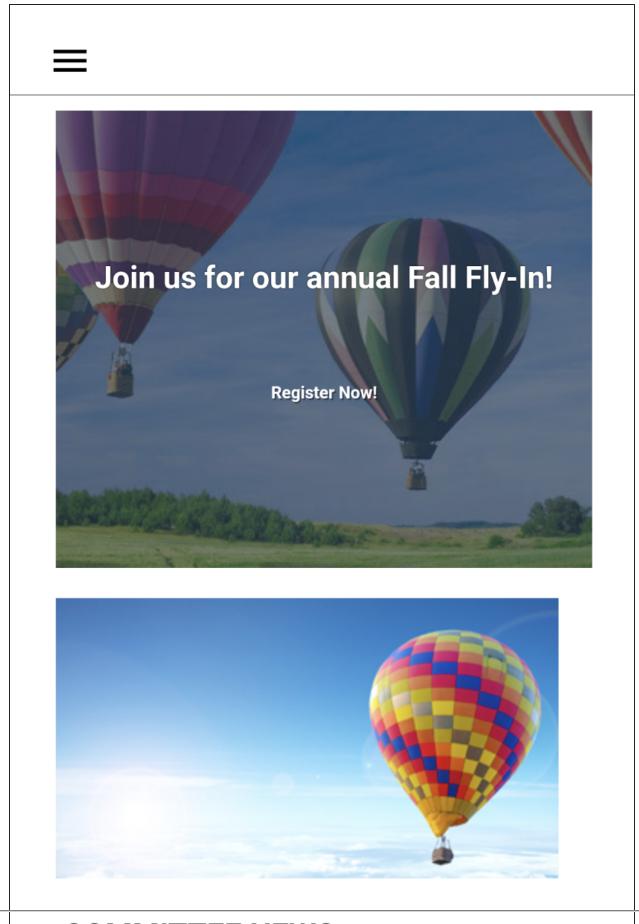
The app will next display a mobile version of home screen from your club's or association's website.



COMMITTEE NEWS

The Education Committee is planning an Intermediate class for the fall, designed for members who want to achieve a class C license





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Choosing a Channel

Some features of the mobile app are built around channels created by your club or association to collect members together. Channels can be created based on things like your member type, interests, chapter, and more. Your organization may have many channels, and each member may belong to more than one channel. When you tap the Channels icon, you'll see a list of all the channels you can access, with a green dot next to your current channel.

When you select a channel, the "Chat" on page 1194 and "Meets" on page 1190 functions will be limited to that channel. For example, a member can be added to a channel for all active members, a channel for members of the club's Scholarship committee, and a channel for members interested in volunteering. When the member selects the channel for the Scholarship committee and chooses Chat, the chat participants are limited to other members of the same committee.

See **Customizing Your Experience** to learn how to manage your available Channels.

Viewing Notifications

Notifications can be sent to you through the app by club administrators. You can view these notifications by tapping the Notification icon. Each notification will appear along with the sender and date. Tap an individual notification to view the entire message.

Direct Messaging

You can send one or more members a direct message, outside of any channel-based chat. See Direct Messaging for more details.

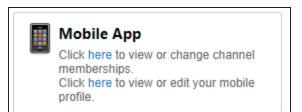
Your Info

Use this option to access your member profile, virtual membership card (if your organization has membership cards), privacy policy and settings, online help, or to log out. If you have a pending payment, you'll also see a Payment Due option. Tap it to make a payment.

Customizing Your Experience

Some mobile app options can be customized through your member profile, like Channel memberships and your avatar.

If your club or association has activated the ClubExpress mobile app and you have downloaded this app from the Apple Store or Google Play and actually logged in, the following options will appear on your Profile screen:



Channel Memberships

Channel Memberships	
This page lists all the channels you belong to, along with an 'Edit' icon to modify your channel settings, and a 'Quit' icon join if you wish.	to resign from optional channels. There is also a list of optional channels you may
Join n you man.	Egenc
Automatic channels	
You are a member of these channels automatically based on your activity in Windy City Morgan Owners Group (for exa your member type or chapter membership). You cannot directly remove yourself from these channels, however you can This will proven the channel from being selected in your chat or meets displays. Click the CBIT con to set your preferen	hide them from your channel list by checking the "hide this channel" checkbox.
fav color = blue Member Additional Data	Ø
All Active Members All Club Mambars	6
Member Type = Michelle Mombership Type: *Michelle	Ø
Optional channels	
You are a member of these channels because you joined, or an admin added you. Click the 'Edit' icon to set your preferences for each channel. Click the 'Quit' icon to resign from the channel (or 'Quit All' to resign from all optional channels).	් Quit A
General Opt-In Chat Member Opt-in	ሮ ወ
Return to Previous Page	

This screen lists the Automatic Channels you are a member of based on some fixed criteria:

- All Active Members
- You were added by a Moderator
- Your Participation in an Interest Group;
- Your Membership in a Committee;
- Your Answer to an Additional Member Data Question;
- Your Membership in a Chapter, District, or Region;
- You have a specific Member Type.

It also lists Optional Channels where you can opt-in by clicking the green icon or opt-out by clicking the red icon. There is also a **Quit All** option to opt out of all optional channels.

For each channel, click the **Edit** (pencil) icon to modify your preferences for that channel. You will see the following screen:

your active channels list. hannel: All Members ember: Martin Smith Channel Status Active Hidden Send Chat Notifications Chat notifications will be sent only if the channel is set to 'Active'.	Select the visibility for this channel below. Selecting "active" will show this channel in your channels list. Selecting "hidden" will hide this channel from	8
Active O Hidden Send Chat Notifications	annel: All Members mber: Martin Smith	
	-	
Save 🖋 Cancel 🗶	Save 🖋 Cancel 🗶	

Specify whether you want this channel to be active for you or hidden—even though you are a member of this channel, it will not be displayed in your mobile app or in the Chat or Meets functions on the website.

Check the Chat Notifications box if you want the app to notify you whenever a new chat message is posted in this channel. This notification is integrated with the notifications system of your phone; notifications will appear even if the screen is not currently active or if you are in another app.

This notification options is not active by default. It must be enabled for each channel where you want to receive notifications of new messages.

Mobile App Profile

Select this option to modify your profile in the Mobile App. You will see the following screen:

Home > Mobile Profile Edit		
Mobile App Profile		
Upload your avatar and set chat handle here. Your "handle' is the nickname that will be used for your chat sessions. You can use your own name or modify the handle. Your avatar image should be roughly square and will be resized and appear next to your handle in chat.		
Handle	Manny Diaz	
Current Avatar	MD	
Avatar Type	 ● Initials Only ○ Use Image 	
Default Channel	All Members	
Show In Meets	No ♥Yes	
	Save 🖌 Cancel 🗙	

Specify the **Handle** you want to use in forums. The system will pick a default **Avatar** using your initials and a random color but you can also upload an image and have the system use that instead.

Specify a default **Channel** from the list of available channels. You can also specify whether you will be shown by default in the **Meets** function.

Mobile App

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

Across the top of the screen are icons to perform the following functions:

Return to the home screen. Display the menu from your club or association website. This option allow to other pages on the website. Display a drop-down menu allowing you to view the Terms of Use, Privacy	
to other pages on the website.	
Display a drop-down menu allowing you to view the Terms of Use Privacy	rs you to navigate
screens.	Policy, and About
Display a drop-down menu allowing you to access your Profile screen, do membership cards (if this option has been enabled) or logout.	vnload virtual
Display a help screen for your current function.	

Icons - Top

Along the bottom of the screen are the special "Channel-based" functions for the mobile app. Each of these functions is described in special sections below.

lcon	Description
:== Channels	Select a Channel to use for the other functions along the bottom of the screen.
e Moets	Display a map showing other members of the current channel who are interested in meet- ing each other.
Directory	View a Directory of other channel members.
Chat	Chat with other channel members.

 Icon
 Description

 Image: Construction
 View and create Quick Events specifically for your channel members.

 Image: Construction
 Create and respond to quick Polls specifically for your channel members.

Icons - Bottom

Selecting a Channel

The mobile app is built around channels, created by your club or association to collect members with similar interests, functions, member types or locations. Channels can be created based on the following criteria:

- All Active Members. Everyone will be a member of this channel.
- Member Opt-In. You can choose to join or leave this channel at any time.
- Admin Defined. An administrator has added you to this channel.
- Interest Members. You will have been added to this channel because you joined an interest group on the website.
- **Committee Members**. You will have been added to this channel because you are a member of a committee such as the Board of Directors.
- **Member Type**. You will have been added to this channel because you have a specific member type (such as Individual, Family, Senior, etc.)
- **Subgroup**. You will have been added to this channel because you are a member of a chapter, district, or region defined by your club or association.
- Answer to an Additional Member Data Question. You have been added to this channel because you selected or entered a specific answer to an additional member data question (select list, checkbox, or radio button questions only.)

A club or association can have as many channels as it wants, even multiple channels of a specific type from the above list.) Members will only see channels that they are a member of.

Channels 🚫
All Members
Board of Directors
Safety
САСТ
Channels

Tap the Channel icon to see a popup list of your channels. Tap any channel and the remaining functions across the bottom of the app will now be limited to that channel.

You will see a small message at the bottom of the screen to confirm your channel selection; this message will fade after a couple of seconds. If you are viewing an app page that uses channels, the page will refresh to reflect the new channel. On any other page, nothing will happen (except the message.) When you later go to a page that uses channels, the most recently selected channel will be active.

By selecting **Profile – Mobile Apps – Channel Memberships**, members can choose to be a part of any channel that is available to them.

Example: You may have been added to a channel based on your member type = "Family", but you can choose to hide or show this channel from your active channel list on your mobile device using the above screen, which is available either through the mobile app or the website.

Meets

Meets is a powerful function that uses the geolocation features of your smartphone or computer to help you meet other channel members. Your participation in Meets is entirely optional; if you are concerned about privacy, simply don't make yourself visible. But if you're in a time and place where you're open to meeting other channel members, you can make yourself visible for a specified period of time.

When you first select this option, you will see the following screen:

Mobile App

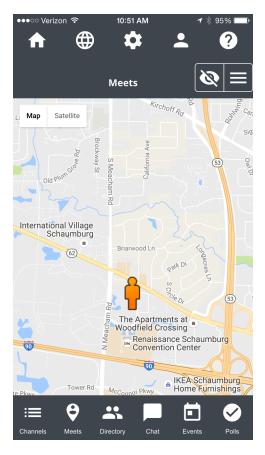
●●○○○ Verizon 🗢 10):50 AM	≁ ∦ 96% 📼)
	\$ 1	?
Ме	ets	
Select the search radius for your me which will be displayed if another us marker on the displayed map to viev	er clicks on your map marke	r. Click on a
Show me		
For 1 Hour		
Show others		
Within 1/4 mile	of your position	
04-4		
Status message		٠
At Hudson Park with	my kids.	
29 of 140 characters used		
Update	my position	
By clicking the above button,		on the map
and have other users see you	ar location on the map.	
😑 😌 🚢		<u>;</u>
Channels Meets Director	ry Chat Eve	ents Polls

Specify for how long you want to be visible on the Meets map. Once this time is up, you will no longer be shown. You can configure visibility up to 24 hours.

Specify the range where other channel members will be shown on your map.

Specify a status message to be shown to other members when they tap your icon on the map.

When you tap **Update my position**, the Meets map will be refreshed to show your position and any other channel members within the defined radius who have also agreed to make themselves visible to channel members.

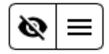


When you tap another channel member's icon, you will see a small popup window showing the following information:

- Name
- Handle
- Avatar (picture or initials)
- The Status Message they have chosen to share
- Email Address (tapping it opens an email window to send them an email)
- Mobile Phone no. (tapping it opens a device popup menu where you can choose whether to send them a text or call them.)

Meets Options

Two controls are available in the top left corner.



Click the left icon to toggle between Visible and Not Visible. It shows the status you want to change to, the opposite of your current status.

Click the right icon to see a drop-down menu with options to refresh the map and update your current position (if you're moving!) When you select **Update Position**, the following dialog is displayed:

may als another marker	the search radius for your meets search. You so enter a "status" which will be displayed if r user clicks on your map marker. Click on a on the displayed map to view information hat member.
Show	me
For 1	Hour ᅌ
Show	others
Within	1/4 mile of your position
Status	s message
Status	s message
	s message

Specify how long you want yourself to be visible. Also specify the default radius within which other channel members will be shown.

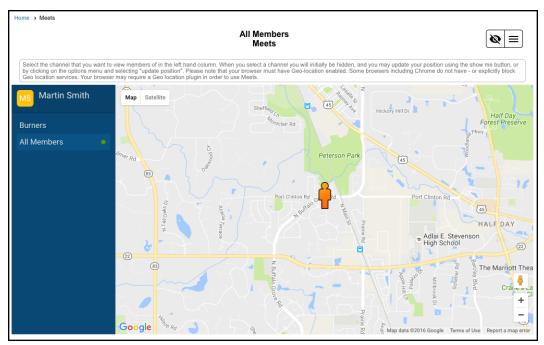
You can enter a short status message that will be shown to other channel members when they click or tap your icon on the map.

Click **Update my position** to refresh the map with the new parameters. By clicking the button, you agree to be shown on the map and have other users see your location.

Meets on a Desktop

Similarly, if your club or association has enabled the mobile app, and if you have downloaded the app and actually logged in, a Meets option may appear on your organization's website. This option mimics a function from the mobile app on the website, allowing you to participate in these club activities from a computer.

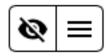
When you select this option you will see a screen similar to the following (but hopefully with many more visible icons!):



Meets allows members to meet other members who belong the same channel, who are within a defined distance, and who are interested in meeting other channel members. Using a Google Map, it will show members within that distance who have opted to make themselves visible to other channel members.

Meets Options

Two controls are available in the top left corner.



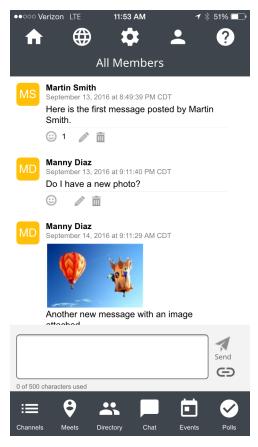
Click the left icon to toggle between Visible and Not Visible. It shows the status you want to change to (the opposite of your current status.)

Click the right icon to see a drop-down menu with options to refresh the map and update your current position (if you're moving!) When you select **Update Position**, the Configuring Meets screen is displayed.

Chat

Tap the Chat icon to open a live chat function, similar to the chat functions provided by Facebook, WhatsApp, Slack, and other popular platforms.

Chat displays a sequence of messages posted by channel members. The most recent 20 messages are displayed, with the newest message at the bottom of the list, immediately above the new message box. Swipe down to bring older messages into view. At the top of the list is a button to view the next 20 messages and this process can continue until the complete list of messages since the channel was created has been loaded.



Each message is shown with the member's avatar or initials, their name, and the date and time when the message was posted. If an image was uploaded with the message, it is shown above the message text.

1

A **Like** icon appears below each message. Tap the icon to record that you like it; tap it again to remove your like (you can only vote once!) The system will retain a count of likes and you can also tap the number to see a list of members who liked a specific post.

100

A **Flag** icon also appears below each message. Tap the icon to report a message to your organization's administrators.

remove these messages. (They also appear on every message for members with admin rights in the Chat module.)

Standard Edit and Delete icons appear for messages you have posted, allowing you to modify or

Entering a New Message



Send Enter your message text (up to 500 characters) in the box provided. There is no formatting but the system will recognize the **[Enter]** key to start a new line or paragraph break. Tap the **Send** icon to post your message to the chat, where it will immediately appear for any other member currently in the chat session.

Tap the **Menu** icon to view a popup menu with the following additional functions:

- Select Image from your device. You will see a popup menu asking if you want to take a photo immediately or choose an existing photo from your library. One photo can be added to a message, or removed before sending if you made a mistake.
- **Insert Link to Event**. You will see a popup list of events in your Channel. Select one to add a link to this event in your chat message.
- Insert Link to Poll. You will see a popup list of polls in your Channel. Select one to add link to this poll in your chat message.

Reporting a Message

Tap the flag icon to report a message to website administrators. When you report a message you will be asked to provide a reason for reporting the message.

Report This Message (and hide message) G Admin	
Be sure to update your member directory listings!	
Your Reason For Reporting This Message	
0 of 200 characters used Save Cancel	/

Enter the reason for reporting, then press Save to flag the message and report it to your organization's administrators. The message will be removed from the chat immediately. Your website administrators will be able to review the message content, including the reason you entered when reporting the message.

Session Expiration

After one hour of inactivity on the Chat windows, the app will display a small message asking if you want to continue the session. If you respond, you will get another hour. If you don't respond within 2 minutes, the chat session will end.

Chat Notifications

Chat notifications are sent to members of a channel where:

- the member is active (or a trial member)
- the channel is set to active for the member (not hidden or banned)
- the member has requested notifications
- the member has visited the chat page on the app at least once in the past 30 days

The notification process runs every few minutes on the chat server. If any messages have been received in a channel, members of that channel receive the following notification:

New messages have been posted in the <name> channel.

These messages are handled a little differently depending on the status of the app on your device:

- If the app is in the background (not visible) the notification will appear on the device's notification area;
- If the app is not in memory at all, it will get loaded, and then the notification will appear on the device's notification area;

- If the app is in the foreground (you are looking at it), the message will be displayed within the app a little popup will slide down, and then disappear after a few seconds;
- If you are currently chatting on the same channel that the notification pertains to, nothing is displayed (you can already see that new messages have been posted.)

Tapping on the notification takes you to the chat page with the proper channel selected. Note that this does not change your "current channel".

Example: Say you are viewing channel 'A' on the directory. You see a chat notification for channel 'B'. You tap it, and see chat messages for channel 'B'. You then tap the directory button, and you are back to channel 'A'.

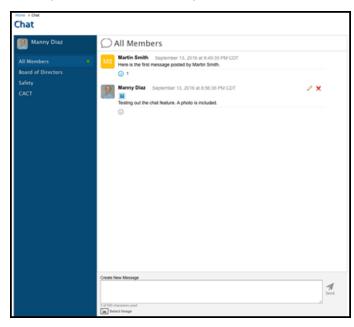
Multiple notifications from the same channel will be handled differently:

- On Android devices, only the latest message for a channel will be displayed older ones will be replaced when new ones are received.
- On Apple devices, all messages for a channel are displayed, even if the same channel has sent multiple messages.

Chat on a Desktop

If your club or association has enabled the mobile app, and if you have downloaded the app and actually logged in, a Chat option may appear on your organization's website. This option mimics a function from the mobile app on the website, allowing you to participate in these club activities from a computer.

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



On the left is a list of channels that you belong to. Select a channel from the list and the most recent 20 chat messages from that channel appear. When you scroll through this list, you can click a button to load the next 20 messages, etc. Within a channel, a chat is a single thread of messages.

Each message is shown with the member's avatar/initials and handle, as well as the date and time that the message was posted. The message may include a single photo or image, as well as links channel events, polls, or external websites (for example, a Facebook post.)

Click the Like icon to like this message. Members can also click the count of likes to see who else liked the message.

At the bottom is a text box to enter a new chat message. Enter the text and click the Send icon to send the message. You can also click the **Select Image** option to upload an image from their local computer and add it to the chat message. There is no formatting but members can easily add emojis to their messages.

Admin Functions

For users with administrator or module coordinator rights to the Chat function, two icons appear to the right of each chat message:



Click the Edit (pencil) icon to modify the message. You will see the following dialog:

Editing Message	\otimes
Testing out the chat feature. A photo is included.	2
50 of 500 characters used	
Remove Existing Image Replace Image	
	Save

You can edit the message text in the top section, perhaps to remove offensive or incorrect statements.

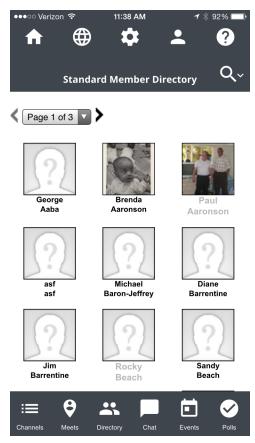
If an image was added to the message, you have the option of keeping the existing image, removing it, or replacing it with something else. When you select the **Replace Image** option, an icon appears, allowing you to select another image from your local hard disk.

Click **Save** to save your changes and return to the Chat panel, or **Cancel** to close this window without saving.

There is also a **Delete** icon to remove a message completely. You will be prompted to confirm this action. Note that for archival and legal reasons, messages are not actually deleted. Rather, they are flagged as deleted so that they are never shown, but retained in the database.

Directory

Tap the Directory icon to see a list of channel members.



Tap the photo or silhouette (if no photo was uploaded) to see a popup window showing more information about that channel member:

			88
	Manny Dia	IZ	
201	Schaumburg, IL		
E	Phone	813-956-2742	
More Info			

Tap the More Info button to see the full bio page:

Mobile App

••••• Verizon হ The second se	11:42 AM 7 \$ 92%
Basic Information	Ø
Location	Schaumburg, IL
Email Address	
Phone	813-956-2742
Address	568 Roselle
	Schaumburg, IL 60193
Personal Information	
Chapters	
Connecticut Area Classic T-E	Birds
Biography	Ø
i≡ ⊖ 2 Channels Meets Dire	ctory Chat Events Polls

Tap the Directory icon to return to the channel directory.

The directory also includes a Search function. Tap the magnifying glass icon in the top right corner to display a popup panel allowing you to search in a number of different ways.

Note: The Channel Directory will respect a member's visibility settings, defined on their Profile screen. If you choose not to show your email address or mobile phone, they will not be shown to other channel members.

Events

Tap the **Events** icon to see events created for and linked to the current channel. You will see a month list view of events similar to the following

Mobile App





This is not the full calendar for your club or association. Rather, it is a list of events linked to the current channel. Some of these events may have been created by channel members. You can use the arrow keys on either side of the month title to move forward or backward one month at a time.

• Tap the event date or the eyeball icon to see details for that event and to register for it.

Tap the Add to Calendar icon to add the event to your device's calendar.

Options Tap the Options bar in the top right corner to add a QuickEvent, search through events (within the current channel), or view the legend (which describes the color assigned to each category of events.)

Add QuickEvent

Ŧ

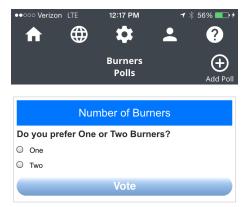
When you tap **Add QuickEvent** (see "Create a QuickEvent" on page 786), the Create QuickEvent screen is displayed. It allows you to specify the properties of a quick event, including:

- Title
- Short Description
- Category
- Date and time of the event
- Whether registration is available, optional, or required
- The maximum number of guests a member can bring
- The event location, including phone and website if necessary

The QuickEvent is created as a channel event, open only to members of the channel.

Polls

Tap the **Polls** icon to view and respond to channel polls.





If more than one poll is active, you will see a list of polls. If only one poll is active, it is immediately displayed and you can respond to it. If no polls are active, a message will be displayed.

Once you respond to a poll, the results are immediately displayed.

Add Poll

Tap the **Add Poll** (see "Add Poll" on page 1005) button in the top right corner to create a new channel poll. You will be prompted for a poll title and question and then a list of possible responses that will be treated as radio buttons (only one can be selected by each respondent.)

Purchasing and Setting Up Your Mobile App

Administrators: If you've already set up your mobile app, go to "Mobile App Manager" on page 378 to set up Channels and options for your club's app.

ClubExpress has an available mobile app for your club or association, see "Website " on page 303. This is not a "ClubExpress" app. Rather, it's an app that's fully branded by your organization.

The app needs to be built and deployed to the Apple Store and Google Play before members can download it. Once members have logged into the app, new options appear on their Profile screen to update app preferences and channel memberships. Some functions such as Chat and Meets can also be accessed from the website.

Activation: The one-time fee to activate the mobile app for your website is \$200.

The app may be free or may have a \$2.00 charge to download it (based on your club's or association's preference.)

This app works for members only, and they will need to login with the same username and password that they use for the main website. These credentials only need to be entered once; members can check the **Remember Me** option so that the app subsequently opens without prompting for this information.

The mobile app provides access to the full website as well as the member's Profile screen and payment options if money is owed. But its real strength lies in the special features provided for mobile users for members and administrators.

Note that if you want to change any of the information on this screen, including the app name, download method, or any of the images, it will require that a new version of the app be built and sent to Apple and Google for review and approval. This will incur an additional \$100 setup fee.

Mobile App Setup

Once you've purchased the app, you also need to decide whether members will be charged a fee to download the app. There are two options, one that makes a little money for your organization and the other

that costs a small fee for each download:

- 1. Members will be charged \$2.00 to download the app. Apple and Google keep 30% of this or \$0.60. The \$1.40 balance is remitted to ClubExpress and we will split this with you, \$0.70 each. The amount is paid within 30 days after the end of each month, as a credit to your account.
- 2. Downloading the app will be free to members. In this case, ClubExpress will charge you \$0.70 for each download. The amount will be debited from your account within 30 days after the end of each month.

Specify the App name. This is the name that will appear under the icon on the mobile device's home screen or app manager. For most organizations, it will be an abbreviated version of your club or association name.

The **Meets** function within the app allows channel members to optionally choose to find other members within a defined radius and time frame who are interested in meeting each other. You can specify which time spans and radius choices will be shown to members when they use this function.

The Mobile App Setup screen continues below:

Three images must be uploaded. These images are used for your organization's logo, the app splash screen, and the icon on the device's home screen. Apple and Google require that these images be submitted to them in multiple resolutions but ClubExpress will derive these resolutions from the three images that we ask you to upload.

Note that if you do not have the services of a graphic designer within your organization, ClubExpress can help generate attractive images for a one-time additional fee. Contact us for more information.

Specify which model you want to use when members download the app. The two models are described on the previous page.

You can click the **Save** button at any time and your settings will be saved with a status of "Pending". Or click **Cancel** to cancel your changes and return to the Control Panel without saving.

When you check the box at the bottom of the form, your settings are saved with a status of "Submitted". This tells us that you want us to charge the \$100 one-time setup fee and proceed with building your app and submitting it to Apple and Google for review and approval.

Note that we may need you to fix problems with the uploaded images if we believe that the ones you provided are not suitable (too large or small, wrong aspect ratio, too grainy, etc.) before we can build the app and submit it to Apple and Google.

Note also that the Apple and Google approvals process may take a few days. We will notify you when the app is available to be downloaded from the Apple Store and Google Play.

Online Professional Development

In the Member Profile	
Non-Member Interface	
Class Manager	
Configure the Module	
Reports/Exports (Class/Student Level)	
Manage Classes	
Add Class	
Edit Class	
Manage Semesters	
Manage Prerequisites	
Manage Vendors	
Student Manager	
Add Student	
Classes	

The Online Professional Development Institute (OPDI) module was developed for an association that offered its own online courses, to allow members to earn continuing education units (CEUs) and points towards a certificate. Students can take a variety of courses in different tracks, focused on different knowledge domains and based on their individual career goals.

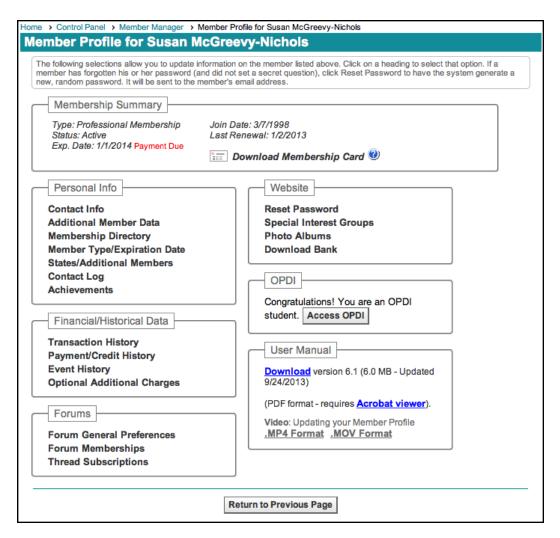
Courses are presented online using the Sakai Learning Management System (LMS), an open-source platform that is one of the most respected LMS's available. This module interfaces with an instance of Sakai managed by the LAMP Consortium (<u>http://lampschools.org</u>).

Activation: The one-time fee to activate this module for your website is \$5000. This fee is quite high but the module provides a complete management tool and single sign-on interface to a powerful online LMS. It also will require extensive customization to meet the needs of your association.

In the Member Profile

When

OPDI is active, members see a new panel in their Profile screen:



The OPDI panel will show different text and options based on the member's status in OPDI:

- You are not yet an OPDI student For members not yet enrolled in OPDI. This is also the version shown while the application is "In Process" not yet complete or submitted by the student. Clicking the link displays the application form.
 - Resend Email This option resends the initial "Save Application" email to a student whose OPDI application is "In Process". It is not available for any other status.
 - Delete This option deletes a student record where the OPDI application is "In Process". It is not available for any other status. You will be asked to confirm this action.
- Your OPDI application fee has not yet been paid For members who have completed the enrollment application but have not yet paid their application fee. Status is "Pending". Clicking the link displays the Pending Payment page.
- Your application for OPDI is under review For members who have paid the application fee. Status is "Applied".
- Your application for OPDI has been decined For members whose enrollment was rejected. Status is "Rejected". There is also a link to update the application with more recent information.
- Congratulations! You are an OPDI student For members whose enrollment was accepted. Status is "Accepted". There is also a link to update the application with more recent information.

Completed and In-Process Classes

For students in OPDI, clicking the **Access OPDI** button displays information on completed and in-process classes, required classes and upcoming classes. A screen similar to the following is displayed:

	ontrol Panel > Member Manager > Member F	Profile > F	Profile - OPDI					
Profile	e - OPDI							
	ormation on classes in which you a currently e ing Classes', view class details and click 'Enrol				t to com	plete. To enro	oll in a class, c	lick on
Comple	eted and In-Process Progress	Require	d Upcor	ming Classe	s			
Class No	Name	Track	Section	Status	Grade	CEUs Attempted	CEUs Completed	Maintain
OPDI-106	Choreographic Explorations: What contemporary dance choreographers are creating today and why	History	Summer 2013	Registered		3	0	S
						3	0	

This screen shows completed and in-process classes, including the class no, name, and track, section and status, grade and CEUs for completed classes. For classes where the status is In Process, clicking the Access Sakai icon jumps the user over to Sakai, logged in and accessing the learning space for that class.

If payment is owed, a payment icon will appear. Clicking it displays the Pending Payment screen.

For classes that are flagged as In Process, an **Access Sakai** icon is displayed to allow users to jump directly into that class space in Sakai, without needing to login again.

For classes that are flagged as Completed, a **Print Certificate** button allows the student to print a certificate of completion for that class.

Progress Classes

Home > Control Panel > Member M	Ianager > Member Profile > Profile - OPDI
Profile - OPDI	
	nich you a currently enrolled, have completed, or still have yet to complete. To enroll in a class, click on etails and click 'Enroll' on the class(es) you wish to take.
Completed and In-Process	Progress Required Upcoming Classes
Choreographic Explorations:	What contemporary dance choreographers are creating today and why
Creative Dance in Early Chil	dhood
Dance History 1800 to Prese	ent
Dance Integration: Using the	e Creative Process to Develop Integrated Projects
Elements of Movement	
Foundations for Assessment	its in Dance
Foundations of Dance Pedag	gogy
Introduction to Dance Education	ation K-12: Theories and Practices
Introduction to Dance Education	ation Research
Introduction to the Professio	onal Teaching Standards for Dance Arts (PTSDA)
Pedagogy - Learning Styles	and Theories
PTSDA - Professional Portfo	olio Development
	•
Check All Uncheck All	

Admins will see a list of classes in the system, with a checkbox beside each class. They can check those classes that the student needs to complete. There is no "Save" button; changes are saved as each box is checked or unchecked.

Users see a read-only list of these checked classes, with a "Completed" column showing Yes or No for each class.

Required Classes

Home > Con	trol Panel > Member Manager > Member Profile > Profile - OPDI	
Profile	- OPDI	
	mation on classes in which you a currently enrolled, have completed, or still have yet to complete. To enroll in a class g Classes', view class details and click 'Enroll' on the class(es) you wish to take.	s, click on
Complete	ed and In-Process Progress Required Upcoming Classes	
Class No	Name	Completed
OPDI-101	Introduction to the Professional Teaching Standards for Dance Arts (PTSDA)	No
	· · · · · · · · · · · · · · · · · · ·	

This screen lists any classes flagged as "Required" and whether or not they have been completed.

Upcoming Classes

		sses in which you a currently enrolled, have completed, or still have yet to c w class details and click 'Enroll' on the class(es) you wish to take.	omplete. To enroll in a class, c	lick on
Completed	and In-Pro	ocess Progress Required Upcoming Classes	L	
Section	Class No	Name	Status	Maintain
Fall 2013	OPDI-101	Introduction to the Professional Teaching Standards for Dance Arts (PTSDA)	In Process	•
Summer 2013	OPDI-M2	Elements of Movement	Not Yet Open for Enrollment	8
Summer 2013	OPDI-M1	Pedagogy - Learning Styles and Theories	Not Yet Open for Enrollment	2
Summer 2013	OPDI-105	Introduction to Dance Education Research	Open for Enrollment	0
Summer 2013	OPDI-106	Choreographic Explorations: What contemporary dance choreographers are creating today and why	Open for Enrollment	2

This screen lists upcoming classes. Clicking the Details icon displays a popup screen with basic information about the class. Clicking the Additional Info icon downloads and displays the file of additional information (usually a PDF) that was uploaded for the class.

For classes that are "Open for Enrollment", an Enroll icon appears to allow students to enroll in the class.

Non-Member Interface

The O

PDI application form can be placed anywhere on the website. Its title is **OPDI Application**.

It can be found in the list of available modules and pages when you are building a menu or submenu. It can also be found in the list of Built-in Modules in the Link Builder, available in the advanced content editor.

On the public side of the website, you will most likely have a custom page describing OPDI. The application form can then be placed as a link or button on this page, to allow members and non-members to launch the application.

Non-members will see the following screen. Notice the link for members to login.

Home > Student Application		
Student Applicat	ion	
	ass, select one of the following options. If you are a already a member, you must first log in before applyir ad as possible. If you are unable to complete the application at this time, you may save it and return later l	
Organization Member? Lo	gin to Apply	
Contact Information-		
Student First Name	•	
Student Last Name	•	
Preferred Email Address	· · · · · · · · · · · · · · · · · · ·	
Preferred Phone		

Members will see this version of the same screen, with their contact information already filled in.

Ho	me > Student Application		
S	student Applicat	tion	
	Enter all information as detail	ed as possible. If you are unable to complete the application at this time, you may save it and return later	r by clicking the 'S
	– Contact Information –		
	Student First Name	ClubAdmin	
	Student Last Name	True	
	Preferred Email Address	michelle@clubexpress.com	
	Preferred Phone	111-111-1111	

Class Manager

This section describes the administrative interface for OPDI classes, which allows you to define classes, semesters, tracks, prerequisites, and other supporting information. It also defines the interface with Sakai.

To access OPDI, go to Control Panel – People tab – Admin Functions section, and click OPDI.

The OPDI administrative interface has two main admin screens: Class Manager and Student Manager. A configuration setting allows you to define which screen will appear from the Control Panel. And from each screen, you can easily jump to the other screen.

When the OPDI Class Manager is displayed, you will see a screen similar to the following:

Home > Co	ontrol Panel > OPDI Class Manager		
OPDI	Class Manager		
classes the list. view rep Use the	to manage them; use the various options to The links associated with each class allow y ports on specific classes here.	 Imit the number of classes shown you to manipulate the class semester onfigure tracks, teach/work environ 	am. The search panel allows you to find existing in the list and click the Search button to update ers, prerequisites, and vendors. You can also ment, education levels, vendors, refund policies, loes not exist.
Sear	ch		Students
Class	Title pedagogy		Configure V
Т	rack All Tracks	\$	Reports
	Date and		Exports
		Search 💋	Add Class
Search R	esults (2 classes found)	Prev	Page 1 of 1 💠 Next 🕨
Class ID	Title	Track	Maintain
OPDI-M1	Pedagogy - Learning Styles and Theories	Pedagogy and Teaching Methods	🤌 🎓 🗟 🗰 🎦
OPDI	Foundations of Dance Pedagogy	Pedagogy and Teaching Methods	🤌 🎓 🗟 🛄 🎦
		Return to Previous Page	

The search panel at the top of the screen allows you to filter the master list of classes in different ways:

- By a text value anywhere in the class title
- By track
- By date range when the class was first defined.

When you click **Search**, the results panel lists each class, including its ID, Title and Track. The Maintain column provides options for each class, described in detail below. 30 classes are shown at a time; use the paging controls to move through each page.

Click the Students button to switch over the Students side of OPDI.

Configure the Module

Click the **Configure** button to see the following options in a popup menu:

Tracks

Select **Tracks** to maintain the list of tracks into which each class is assigned. You will see a standard ClubExpress admin screen for supporting tables:

Home > OPDI > OPDI Class Mai	nager > OPDI Mana	iger - Tracks							
OPDI Manager - Tra	cks								
Maintain tracks into which class	ses are organized.								
Add Track									
Track	Available Classes	Required Classes	Maintain						
Arts Integration	1	0	Ø						
Assessments	1	0	Ø						
History	2	0	Ø						
Kinesiology	0	0	🧷 違						
Leadership and Administration	0	0	🧷 違						
Pedagogy and Teaching Methods	5	0	Ø						
Research	1	0	Ø						
Standards/Portfolio	2	0	Ø						

When you click Add Track, the following screen appears:

A	dd/Edit Track					08)
	Add or edit information			save your changes ar	nd return to the tracl	k admin	
Cl	Track	•				•	
			Save 🖋	Cancel 🗶			

Enter the track name and the number of classes required in this track. Click **Save** to save your entry and return to the Tracks manager, or **Cancel** to return without saving.

Back on the Tracks manager, click Edit to modify an existing track. If classes have not yet been assigned to a track, a Delete link will appear, allowing you to delete the track.

Click Return to Previous Page to return to the OPDI Class Manager.

Teach/Work Environment

Select **Teach/Work Environment** to modify the different places where OPDI students work. This is a similar lookup list to Tracks and it functions the same way. Note that this list includes an "Active" flag that controls whether a specific entry is currently visible.

Education Levels Attained

Select **Education Levels Attained** to modify the lookup list of education levels. It functions the same way, with the addition of a **Display Sequence** button that allows you to control the sequence of entries. Clicking this button shows the standard ClubExpress sequence dialog.

Reasons for Attending

Select **Reasons for Attending** to modify the lookup list of reasons. It functions the same way as other lookup tables, including an "Active" flag to turn individual reasons on or off.

Semester/Year

Select **Semester/Year** to modify the list of semesters and years, including an "Active" flag to turn individual semesters on or off.

Primary Place of Employment

Select **Primary Place of Employment** to modify the lookup list of employment types. Includes an "Active" flag.

Vendors

Select **Vendors** to display the lookup list of vendors with which NDEO has partnered to provide CEUs and education credits. Although the Add/Edit screen collects more information on each vendor, this section functions the same way as other support lists in the system.

Refund Policies

Select **Refund Policies** to define policies that can be linked to each class. You will see a list of policies. Clicking **Add Refund Policy** or the Edit link displays a screen similar to the following:

Add/Ec	lit Refun	d Policy	@ 	8
			refund policy. Click "Save" to save your changes and return to the refund ef" to return without saving.]
Policy N	ame 12	Week Cours	e 🌢	
	Days C	Dut Refur	Add	
	-14	50	Remove	
	-7	75	Remove	
	1	100	Remove	
			Save 🖋 Cancel 🗶	-

Enter the Policy Name. The screen then allows you to enter a number of Days Out (before the class begins) and the percentage refund that will be allowed. Click the **Add** button to add this entry to the list, then continue with another entry if appropriate. If you make a mistake, click the Remove link to remove that entry.

When you have finished, click **Save** to save your refund policy and return to the main list of policies, or **Cancel** to return without saving.

How You Heard of Us

Select this option to modify the **How You Heard of Us** list in the application form. Includes an "Active" flag to turn individual entries on or off.

Options

Select **Configure – Options** to modify OPDI options. You will see the following screen:

Home > OPDI > OPDI Class Manager > Profest	sional Development Options
Professional Development O	ptions
This screen allows you to configure default optic return without saving.	ons which apply to professional development. Click Save to save your changes, or Cancel to
Short Name	
Name	Online Professional Development Institute
Default Admin Screen	Class Ostudent
Non-Member Applicant Category	None Selected
Non-Member Applicant Email Content	You must contact NDEO and join the organization in order to start registering for and participating in classes.
Sakai	Enable Customer Code OPDI
Application Fee	25.00
Refund Admin Fee	50.00
CEUs Required	33
Director Name	Jane Bonbright
Director Email Address	opdi@ndeo.org
Backup Email Address	
	You can specify another person to whom email notifications will be sent

Enter the Short Name and full name of this module. You can also specify which admin screen should appear when you select this module in the Control Panel.

Non-Member Applicant Category is used when non-members first apply to take OPDI courses. The Email Content field specifies custom text that is added to the confirmation email when a non-member application is received.

OPDI can be used with or without a direct interface to Sakai. Check the box to enable this interface and specify the unique customer code assigned by the LAMP Consortium.

Specify the application fee to become an OPDI student and the admin fee that is deducted from individual class registration fees if a student is unable to take a class and requests a refund.

Specify how many CEUs are required to receive a Certificate.

Enter the name, email address and backup email address of the OPDI program director.

Application Disclaimer									
🗼 🗈 🛱 🦛 🖷 🦛 🕶 🖛	≣ ≣ ≝ ≇ ≇ ⊡ • 象 🗞 🖬 🔄 Ω • ⊙ • ☺ • ∗ •]								
Styles - Select Font - Re	B I ∐ ⅔ ⅔ x ² ×₂ A • ⊗ • ♣ ☷ ⊞ ⊟ ♂ • ॐ ♣								
NDEO Online Professional Development Institute Admission Application									
broad range of dance education courses. Stud	NDEO is preparing the next generation of learners through a new Online Professional Development Institute (OPDI) offering a broad range of dance education courses. Students will be able to obtain NDEO-endorsedContinuing Education Units (CEUs) for individual courses or accumulate credits towards a Certificate in Dance (CID).								
Application Form and a \$25 non-refundable receipt and applicants should expect to here	Before you can register for the online courses, you will first need to fill out and submit this OPDI Admission Application Form and a \$25 non-refundable application fee. After you hit Applications will be reviewed in order of receipt and applicants should expect to hear from NDEO within 2 to 3 weeks of their submission date. If accepted into OPDI, you will be required to have a current individual NDEO membership for the duration of the online course(s). Separate tution course fees apply.								
For more information, click here.									
Contraction Contra	🧕 Zoom - 🖨 🤐								
Words: 141 Characters: 915									
	Save 🖌 Cancel 🗙								

When members and non-members apply to join OPDI, the custom text in the Application Disclaimer is displayed at the top of the application form. This is the standard ClubExpress advanced content editor.

Click **Save** to save your changes and return to the main OPDI Manager screen, or **Cancel** to return without saving.

Reports/Exports (Class/Student Level)

When you click **Reports**, you will see a standard ClubExpress Reports dialog, showing available reports at the Class level or, if you are viewing the Student Manager, available reports at the Student level.

When you click **Exports**, you will see a standard ClubExpress Exports dialog, showing available exports at the Class (or Student) level. Select an export and click the **Export** button. The system will generate a CSV file of the appropriate information and save it to your local hard disk. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Manage Classes

Add Class

Clicking the Add Class button displays the following screen:

Add/Edit Class	@ & &
Add or edit inform "Cancel" to return	ation on this class. Click "Save" to save your changes and return to the class manager page, or without saving.
Class ID	•
Title	↓
Track	Select ‡
Description	
Financial Account	Master Education \$
Select File	Choose File no file selected
	Max file size 80 MB
Instructor	
NDEO Credits	0
Duration(wks)	0
Туре	Cohort Self-Guided
NDEO Fee	0.00
Refund Policy	None ‡
Capacity	0
Required	
Active	
	Save 🖌 Cancel 🗙

Class ID is the internal identifier for each class. It can be up to 8 characters long and include letters, numbers, and hyphens.

Specify the full title of the class, the track it belongs to, a short description, and a financial account into which class revenues will be aggregated.

Select file allows you to upload a detailed class description (usually in PDF format.) Click **Choose File** (the actual button text may be different based on your platform and browser) to pick a file to upload from your local hard disk.

Specify the **instructor name**, how many NDEO credits will be awarded, and the class duration. Class type is for informational purposes only; it tells students how the class will be presented.

Specify the **fee** that NDEO will charge for this class, before extras (CEUs, credits, or transcripts from other institutions.) Select a refund policy from among the policies already defined, and enter a capacity (max students).

The **Required** flag indicates a class that every OPDI student needs to take to receive their CID.

The Active flag can be used to display or hide a class.

Example: If a specific class is not currently being offered, unchecking this box will hide it.

Click Save to save your changes and return to the Class Manager, or Cancel to return without saving.

Edit Class

Click the Edit icon to modify class properties.

If you want to upload a new or updated class document, check the **Additional Info** option on the dialog; the screen will refresh to provide the Select File option, including the ability to replace the original file name or to use a new file name.

Manage Semesters

A class covers specific and related information that is taught as a single unit.

Example: "Dance History – 1800 to Present". A class semester is an instance of that class offered at a specific date. For example, the Fall, 2014 session of a class.

Select the Class Semesters icon to review, add, and update these instances. You will a screen similar to the following:

Home > OPI	DI > OPDI (Class Manager	> Cla	iss Semester	s						
Class S	Class Semesters										
Maintain o	class semest	ters.									
Class: Of	Class: OPDI-101 - Introduction to the Professional Teaching Standards for Dance Arts (PTSDA)										
Add Class	Semester]									
0	Of and Date	Elalah Data		Status	Churchen te		-1			1	
Semester	Start Date	Finish Date	Time	Status	Students	Maint	ain				
Spring 2012	1/16/2012	4/8/2012		Completed	0	- 🔒	A	÷	-		
Fall 2013	Fall 2013 9/2/2013 11/24/2013 In Process 2 🤱 🥢 🎽 🛐										
				Re	turn to Pre	vious	Pag	e			

Each entry in the grid represents a different time where that class was offered or is going to be offered, including the class semester status and the number of student enrolled.

Click Add Class Semester to create a new instance of that class. You will see the following screen:

Class Semest	
oldas ocifiesi	er e
Sakai Co	de OPDI_OPDI-101_
Start Da	te 🔤 🖉
Finish Da	te 💿 🖉
Tin	ne 🔯
	For courses that meet at a specific time
Stat	US Select ‡

In the Class Semester field, specify the semester and year. Each class semester needs a unique code in Sakai; this can be any sequence of letters and numbers up to 20 characters long.

You also need to specify the start date and finish date. For a cohort-based class, this will be the dates of the first and last sessions. For a self-guided class, this will be the dates when the course materials are first available and when they are made unavailable, assuming that every student has now completed their self-guided review of the materials.

Status	Visible to Admins - Drop Down List	Visible to Members - Profile - OPDI Screen	Enroll Link Shown
In Development	Yes		
Not Yet Open for Enrollment	Yes	Yes	
Open for Enrollment	Yes	Yes	Yes
Full	Yes	Yes	
In Process	Yes	Yes	
Completed	Yes		
Cancelled	Yes		

Status is one of the following values:

Semester Status

Click **Save** to save your changes and return to the Class Semesters list screen, or **Cancel** to return without saving.

Students

Select the Students icon to see a list of students enrolled in that class semester. You will see a screen similar to the following:

Home > OPDI > OPDI CI	ass Manager 🔸	Class Se	mesters > Stude	nts in a Class Semester						
Students in a C	lass Sem	ester								
Maintain students in class semesters.										
Class Semester: Fa	Class: OPDI-101 - Introduction to the Professional Teaching Standards for Dance Arts (PTSDA) Class Semester: Fall 2013 Update Grades from Sakai									
Student	Status	Grade	Maintain							
Melissa Greenblatt	Registered		🛛 🙀							
Betsy Loikow	Registered		🛛 🙀							
Susan McGreevy-Nichols	Withdrew									
	; <u> </u>									
Return to Previous Page										

This grid shows each student, plus his or her status and progress grade.

Click **Update Grades from Sakai** to have the system retrieve grades from Sakai and update this screen. This is generally not done until the class is complete.

Click the Cancel icon to cancel the student's registration for this class. After a confirmation step, the student's status is changed to "Withdrew". If a refund is owed, it will be applied to the student's account as a credit.

Click the Delete icon to remove this student completely from the class. No refunds are given and all record of registration is deleted. This option is only available if the registration has not been paid.

There is also an icon to add the student to the Sakai roster. This icon will display if the student was not added to the class during payment for some reason.

The **Enrollment Status** is a link. Click it to update the status manually. Available options depend on the current status.

Students cannot be added to a class semester from this screen. Instead, this is done from the Student Manager side of OPDI (see below.)

Edit, Copy, Reports

Click the Edit icon to modify the properties of a class semester.

Click the Copy icon to clone a class semester. The Add/Edit screen is shown with selected values prepopulated. Click **Save** to create a new class semester based on the old one.

Click the Reports icon to display the standard reports dialog, showing reports available at the class semester level.

Manage Prerequisites

Select the Prerequisites icon to specify which classes must have been completed before a student can register for this class. You will see a screen similar to the following:

Home > 0	ome									
OPDI	OPDI Manager - Class Prerequisites									
Mainta	Maintain class prerequisites.									
Class:	OPDI-101 - Introduction to	o the Profess	ional Teaching Standards for Dance Arts (PTSDA)							
Add Pre	Add Prerequisite									
Class ID	Title	Maintain								
OPDI	Creative Dance in Early Childhood	<u>î</u>								
		~								
		Return	n to Previous Page							

Click **Add Prerequisite** to add a new class to this list. You will see a popup screen allowing you to select a class and click **Save** to add it.

Click the Remove icon to remove a class from this list.

Note that the system does not protect against circular references (a sequence of prerequisite classes that results in one class being its own prerequisite.)

Manage Vendors

Select the Vendors icon to update the list of vendors (colleges) that are willing to offer CEUs and/or academic credits to students taking this class. You will see a screen similar to the following:

Home > Control Panel > OPDI Class Manager > OPDI Manager - Class Vendors OPDI Manager - Class Vendors Maintain class vendors.										
Class: OPDI-101 - Introduction to the Professional Teaching Standards for Dance Arts (PTSDA) Add Vendor										
Vendor	CEUs	CEU Fee	UGrad Credits	UGrad Fee	Grad Credits	Grad Fee	Maintai	n 📑		
Mills College	3	150.00	n/a		n/a		Ø 1	1		
University of North Carolina - Greensboro	n/a		3	0.00	3	0.00	Ø 1	1		
Return to Previous Page										

This screen lists vendors together with the CEUs and credits being offered, as well as the fees charged by each institution.

Click Add Vendor to add a new vendor to the list. You will see the following screen:

Add or edit information on this c semester admin page, or "Cano			r changes and return	to the class
Vendor	Mills College			
Issues CEUs	Credits	3 Fee \$	150.00	
ues Undergraduate Credits	Credits	Fee \$		
Issues Graduate Credits	Credits	Fee \$		
	Save 🖋	Cancel 🗙		

Select a college from the drop-down list. Then check each option and specify credits and fees as appropriate. Click **Save** to save your changes and return to the Class Vendors screen, or **Cancel** to return without saving.

After vendors have been defined, when students register for a class, they will be given the option of selecting a vendor and what type of credit they want. The additional fee(s) will be added to their transaction for payment at the end of the registration process.

Student Manager

This section describes the administrative interface for OPDI students, allowing you to manage the students enrolled in each class semester.

To access OPDI, go to Control Panel – People tab – Admin Functions section, and click OPDI.

The OPDI administrative interface has two main admin screens: Class Manager and Student Manager. A configuration setting allows you to define which screen will appear from the Control Panel. And from each screen, you can easily jump to the other screen.

When the OPDI Student Manager is displayed, you will see a screen similar to the following:

Home > C	ontrol Pane	I → OPDIS	tudent Ma	nager							
OPDI	Studer	nt Mana	iger								
student the list. enrolled Use the	ts to manag The links a d. You can e buttons to	e them; use associated w also view rep the right of t	the variou ith each s ports on s the search	spects of your professional d is options to limit the number tudent allow you to edit stude becific students here. In panel to configure tracks, te nt button if you want to creat	of students show ant information, and each/work environ	n in the list d classes t ment, educ	and click the student	the Sear t in whic	ch button to h the studen	update t is	
⊢Sear	rch ——					_ [Cla	asses			
	Student Name me Configure V										
c	Class Title Reports										
	Status	All Status	Codes	\$			Fx	ports			
	Search 4										
							Add	Studen	it		
Search Results (2 students found)											
Number	Name		Туре	Institution	Location	Status	Classes	CEUs	Maintain		
3406	Melissa Greenbl		Member	National Dance Education Organization	Silver Sping	In Process	0	0	/ P 3		
12451	Test Me	mber	Member	NDEO	Silver Spring	Pending	0	0	<i>i</i> 🖉		
				Return to Pre	vious Page						

Use the Search panel to find students, using a string anywhere in the first or last names, a class for which they are enrolled, or their status.

The results grid shows the student number and name, type, institution they work for, location, status, classes enrolled in, and CEUs. The options in the **Maintain** column are described below.

Click the **Classes** button to jump over to the OPDI Classes Manager.

The options under the **Configure** button are the same as on the Classes Manager and were described in full in the previous chapter.

Click **Reports** to display and run reports across all students enrolled in OPDI. This is a standard ClubExpress dialog.

Click **Exports** to display another standard dialog to generate exports across all students enrolled in OPDI. These exports create a CSV file that can be opened directly in Excel, Access, or another spreadsheet or database program.

Add Student

This option is used when a student has applied to join OPDI using a printed form which then needs to be transcribed into the system. ClubExpress OPDI also provides an online form for users who are more tech savvy and can apply on their own through the website.

Click Add Student to add a student to OPDI as an admin. You will initially see the following screen:

Home > OPDI Student Manager > Student Application	
Student Application	
As a club administrator you can edit and review applications from members and non-members. You can also create an application and submit it on behalf of a member or non-member.)
Type of Applicant Apply for a member Not Selected Select Member Apply for a non-member	
Save Session Submit Application 🖋 Cancel 🗶	

When you select "Apply for a Member", click the Select Member link to select an existing member. The system will display the standard ClubExpress member selector. When you click **Select**, the screen will refresh to show that member's contact information together with the rest of the student application.

When you select "Apply for a Non-Member", click the Search Non-Member Database link to select an existing non-member record. The system will display the standard ClubExpress non-member selector. When you click **Select**, the screen will refresh to show that non-member's contact information in an editable format, together with the rest of the student application.

If you are applying for a non-member who is not yet in the database, cancel this process and switch over to **Control Panel – People** tab – **Admin Functions** section – **Non-Member Database**, then add the non-member first from this screen.



Status	In Process \$
pplication Comments	
Great!	
	/
Date Created	12/5/2008
Date Modified	9/16/2013
Browser Used	Chrome
eason for Rejection	
	1

The Application Status section only appears on the admin version of the application. It allows admins to specify a status, write comments, and specify a rejection reason if the application was rejected.

Changing the application status from "Applied" to "Accepted" causes an acceptance email to be generated to the member or non-member.

Changing the application status from "Applied" to "Rejected" causes a rejection email to be generated to the member or non-member, including any text entered into the Reason for Rejection field.

The next panel is Education and Goals. It includes the answers to special questions asked of the applicant.

The final panel is the Disclaimer statement, which is configured on the OPDI Options screen, under the **Configure** button.

Click the **Save Session** button to save your changes and return to the OPDI Student Manager, or click **Cancel** to return without saving.

Member and Non-Member Applications

When members and non-members start the OPDI application process, they can complete the application in stages. Clicking **Save Session** saves their work to date. It also generates an email that includes a link allowing them to resume working on the application. Their status is "In Process".

When members and non-members complete the application themselves, there is an additional button: **Submit Application**. It changes their status to "Pending" and redirects them to the payment page to pay the application fee.

Once the fee is paid, their application status changes to "Applied".

Classes

Click the Classes icon to see classes that student has been enrolled in. A screen similar to the following will be displayed:

This pa	Student Class		currently enrolled, or	that s/he has co	ompleted. Stud	lents car	n be rem	oved fro	oma	
clicking	provided the the 'Cancel' link. A cred	lit will be issued, if ap	plicable.		lass, s/he may	cancell	ed from	that clas	ss by	
	: Susan McGreev									
Class No	Class			Semester	Status	Grade	CEUs	Mainta	in	
OPDI-106	Choreographic Explorations: What contemporary dance choreographers are creating today and why			Summer 2013	Registered		3	8	î,	
OPDI-105	Introduction to Dance	Education Research		Summer 2013	Incompleted		3			
OPDI-101	Introduction to the Prot Arts (PTSDA)	fessional Teaching St	andards for Dance	Fall 2013	Withdrew		3			
							9			
	s Towards Certif						9			
Track		Classes Required	•	ed			9			
Track Arts Integra	ation	Classes Required	0	d			9			
Track Arts Integra Assessme	ation	Classes Required 0 0	0	sd			9			
Track Arts Integra Assessmen History	ation nts	Classes Required 0 0 0	0 0 0	d			9			
Track Arts Integra Assessmen History Kinesiology	ation nts ,	Classes Required 0 0 0 0	0 0 0 0				9			
Track Arts Integra Assessmei History Kinesiology Leadership	ation nts r o and Administration	Classes Required 0 0 0 0 0 0	0 0 0 0 0				9			
Track Arts Integra Assessmei History Kinesiology Leadership	ation nts ,	Classes Required 0 0 0 0	0 0 0 0				9			
Track Arts Integra Assessmei History Kinesiology Leadership	ation nts r o and Administration	Classes Required 0 0 0 0 0 0	0 0 0 0 0	id			9			
Track Arts Integra Assessmen History Kinesiology Leadership Pedagogy a	ation nts r and Administration and Teaching Methods	Classes Required 0 0 0 0 0 0 0	0 0 0 0 0 0 0				9			

The top part of the screen shows the classes this student is currently enrolled in or has completed, including the semester and his or her status. Students can be removed completely from a class if the status is Registered by clicking the Cancel link. The following screen is displayed:

Cancel Student
Add or edit information on this class vernfo. Click "Save" to save your changes and return to the class semester admin page, or "Cancel" to return without saving.
Cancel Type 💿 With Credit
 Without Credit
Credit As Of Date 5/13/2013
Credit Status E Flag credit as having been refunded
Save 🖋 Cancel 🗶

Specify whether a credit should be recorded and the "as-of" date. This will determine the amount of the credit based on the linked Refund Policy. You can optionally record the credit as having already been refunded, or leave it open to be applied against a future class.

Click **Save** to save your changes and return to the Student Classes screen, or **Cancel** to return without saving. If you click Save, the student status is changed to "Withdrew".

The second part of the screen shows each track defined in the system, how many classes are required in that track to receive a CID, and the number of completed classes.

Resource Scheduling

User Interface	
In the Member Profile	
Editing a Reservation	
Reserving a Resource as an Admin	
Resource Manager	
Reports	
Reservation Manager	

The Resource Scheduling module allows clubs and associations to define resources that can be rented or reserved by members. This module is suitable for many different types of clubs:

- Tennis clubs that allow members to reserve a tennis court;
- · Sailing and yacht clubs or canoe/kayak clubs, with a fleet of boats that members can rent;
- Ski clubs with a lodge where members and their family can rent rooms;
- · Clubs with a clubhouse that includes meeting or banquet rooms;
- Etc.

Resources can be rented hourly, in 15, 30, or 60 minute increment, daily (such as for a sail boat or canoe), or overnight (such as for a ski lodge room).

Each resource can have different properties and rental rules. The club can define a setup period before the reservation starts and a cleanup period for after the reservation finishes. Resources can have different fees at different times of the day, week, month, or year. Clubs can define a resource setup fee and different fees for members and non-members. Resources can also have blocks of time where the resource is not available, perhaps for maintenance or repairs.

Reservations operate using a Shopping Cart metaphor. A reservation can include more than one resource reserved at the same or at different times. The check-out process links the shopping cart to the standard ClubExpress transaction and payment system.

Initially, the Resource Scheduler is in Test Mode. You can do everything except create transactions, so resources cannot incur charges. Once the fee is paid, we will switch the module into Active Mode.

The Resource Scheduler can be placed on any menu to allow members, and optionally non-members, to be able to reserve items on their own. Alternatively, you can place a read-only version of the Resource Scheduler on your menu. This allows members and non-members to be able to view available items and time slots, but they would not be able to reserve these items on their own. Instead members and non-members would need to contact an administrator to reserve an item.

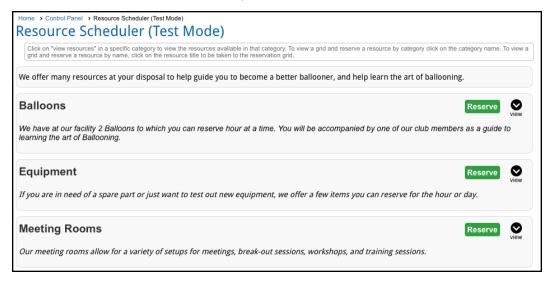
This option is available in the Control Panel > Club Tab (note that the tab may be labeled differently to match your organization type). Select the Configure option to view available modules to activate and deactivate. In the list of available items, you'll see the read-only version of the Resource Scheduler. To add the item to a menu, be sure to set the status to Active. Then navigate to the Website Tab to edit your website's menu and add the module.

Configure			0 % 8
Select Function Ad Hoc Reporting Benefits Chapter Finder Classified Ads Contact Data Export Member Joining Agreement Metro Areas Name and Description Organization Data Resource Scheduler (Test Mode) Titles Reports - Organization DataDisabled Modules For This Tab Resource Scheduler	Functio Me SEO / Brow	Coordinators Status Disabled/Hidden ▼ II Name Resource Scheduler (Read-Only) In Text Intervention Ink Text Intervention Save Cancel X	
	(Close 🗶	

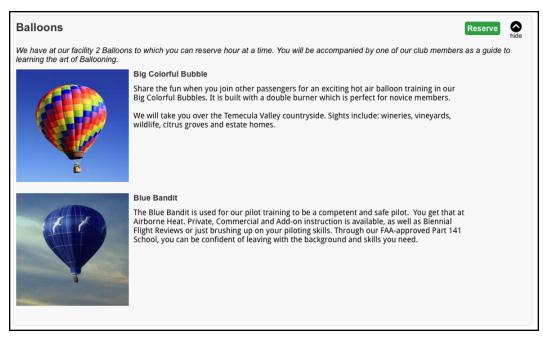
Activation: The one-time fee to activate this module for your website is \$500.

User Interface

Select the Resource Scheduler and you will see a list of resource categories similar to the following:



Click the View button on the far-right side to see details of the resources within each category:



If you have a reservation in process, with one or more resources in your reservation Cart, a **Show Cart** button will appear at the top of the screen, allowing you to jump to the cart or make changes or check out (see below for the checkout process.) If a **Cancellation Policy** has been defined, clicking that button will display it.

Click the **Reserve** button to begin the reservations process.

Reserving a Resource

The Scheduling Calendar shows a list of resources within a single category. For resources available **by the hour**, each resource is a separate column and

each screen shows a single day, with the rows representing time.

		> Scheduling Caler	
Click on th	start time	to begin a reservati	on. Or select a different category. Or
NOTE: T created.	he resou	irce scheduler m	odule is in test mode. All fun
Reservatio		k to Reserve	Unavailable 🗾 Reserved
		Balloons	0
	Ē	Sunday, Ma	ny 15, 2016 🗲 🛛 Today
		Balloon #1	Balloon #2
6:00 AM	15- 30- 45-		G.
7:00 AM	15- 30- 45-		Reserved
8:00 AM	15	Ģ	Learn to Fly Classes
9:00 AM	15	Q	
10:00 AM	15 30 45	Ģ	
11:00 AM	15	Ş	Q.

For resources available by the day, each resource is a separate column and each screen shows a single month.

	category. Or select a d ode. All functions tha@email.com This Month North
Reserved a Elizabeth <u>saman</u> Cabins V	tha@email.com
a Elizabeth <u>saman</u> Cabins V	This Month
· · >	
West	North
9	
8	- Q.
	. 1960
9	9
9	1
	- Q.
9	2
Q.	Q.
105	Y

Different categories can be selected by clicking the drop-down list above the grid. Click the arrows to the right and left of the date to move forward or backward by one day at a time. You can also click the calendar icon to select any date in the future, or the **Today** button to jump back to today.

The calendar will only show times when the resources in that category are available (each resource can be defined with an earliest start and latest finish dates.

When you hover over a cell in the grid a small green icon will appear.



For categories that are reserved on a daily or overnight basis, each screen shows a single month, with the rows representing days, and starting from today:

	Select a Category: Balloons 🛟						
May 2019							
	Balloon #1	Twinspark	Balloon #2	Cam Tool	Cam Lock	Fault Code	
Saturday May 11	R		R				
Sunday May 12	R		R				
Monday May 13	G.		¢,				
Tuesday May 14	R		Martin Smith				

Click the arrows to the right and left of the date to move forward or backward by one month at a time. You can also click **This Month** button to jump back to the current month.

In either mode, when you hover over a cell in the grid a small icon will appear and that cell is highlighted.

Reservation Wizard

Click this icon to begin the reservation process for that resource. For an **hourly** reservation, you will see a screen similar to the following:

Reservation 200
Verify the date and time, and click one of the buttons at the bottom to confirm your reservation. You may change the end time of your reservation by clicking the clock icon.
Big Colorful Bubble
Sunday, May 15, 2016
10:00 AM to 11:00 AM 😰
Click the clock icon to change the reservation time
Fee: \$ 100.00 1 hour(s) @ 100.00 per hour
Usage Description
0 of 200 characters used
Special Instructions
0 of 1000 characters used
Cancel

At the top of the dialog, click the clock icon to confirm your reservation start time. The cell where you initially clicked is highlighted but you can select any available start time that day. Each resource can be configured for reservations in 15 min, 30 min or 60 min durations and the available start times will reflect these settings.

Select Start Time					
6:30 AM	6:45 AM	7:00 AM			
7:15 AM	7:30 AM	7:45 AM			
8:00 AM	8:15 AM	8:30 AM			
8:45 AM	9:00 AM	9:15 AM			
9:30 AM	9:45 AM	10:00 AM			
10:15 AM	10:30 AM	10:45 AM			

Once you select a start time, the popup changes to allow you to select an end time for your reservation. Each resource can be configured with minimum and maximum reservation times and the End Time dialog will reflect these available lengths.

Select End	Time	8
11:00 AM	12:00 PM	1:00 PM

In the above example, the resource is configured for a minimum reservation time of 1 hour (10:00 to 11:00) and a maximum reservation time of 3 hours (10:00 to 1:00) in 1-hour increments.

Once start and end times have been selected, the system will calculate and show a reservation fee if one applies. You can then optionally enter a short description of what you're planning to do with the resource and any special instructions (for example, how you want a meeting room to be set up.)

Click the **Next** button to move to the next step of the reservations process, or **Cancel** to cancel your reservation and return to the scheduling calendar.

Once start and end times or days have been selected, the system will calculate and show a reservation fee if one applies. You can then optionally enter a short description of what you're planning to do with the resource and any special instructions (for example, how you want a meeting room to be set up.)

To associate the reservation with a future event, check the box and select the event from the drop down list.

Click the **Next** button to move to the next step of the reservations process, or **Cancel** to cancel your reservation and return to the scheduling calendar.

For a **daily** reservation, you will see a screen similar to the following:

Reservation	088
Blue Bandit	
Starting Monday March 2 2:00 PM E For 1 Vight(s) Ending Tuesday March 3 12:00 PM Click the calendar icon to change the reservation date(s)	
Mark these days as unavailable	
Fee: \$ 100.00 1 night(s) @ 100.00 per night	
Usage Description	
0 of 200 characters used	
Special Instructions	
0 of 1000 characters used	
Event Calendar	
Associate this reservation with an event?	
Cancel	

Select the number of nights you wish to reserve the resource using the drop down menu. Selecting more than one night will update the Reservation Ending date on this screen.

Once start and end times or days have been selected, the system will calculate and show a reservation fee if one applies. You can then optionally enter a short description of what you're planning to do with the resource and any special instructions (for example, how you want a meeting room to be set up.)

To associate the reservation with a future event, check the box and select the event from the drop down list.

Click the **Next** button to move to the next step of the reservations process, or **Cancel** to cancel your reservation and return to the scheduling calendar.

User Agreement

Resource categories can be configured with a user agreement that you must "sign" before the reservation can be completed. This agreement can include waiver of liability language, or information on permitted

Resource Scheduling

and banned activities.



If this screen appears, you must click **I Agree** before you can complete the reservation.

In ClubExpress, a reservation can include one or more items, even items from different categories.

- Click **Save and Checkout** to be taken to your Reservation Cart, where you can review the items in your cart and begin the checkout process.
- Click Save and Add Another to add this item to your Reservation Cart but continue looking at available resources and time slots.
- Click Cancel to cancel this reservation.

Reservation Cart

The reservation cart will look something like this:

Home > Resource Scheduler (Test Mode) > Reservation Cart		
Reservation Cart		
right of each resource. Click the pencil to edit the reservation.	is page. The number of hours and date will appear beneath each resource, and the total dollar amound will appear to and menove it by using the trans Lon. If you want to notify others about your reservation check the "I want to notify." want to add another reservation, click the "Keep Shopping" butter. If you're neady to book your reservation, click the	he box.
Enter a title for this reservation		
Balloon #1 05/15/2016 3 hour(s) at 10:00 AM	\$300.00 🔀	
Balloon #1 05/15/2016 3 hour(s) at 2:00 PM	\$300.00 🗶	
Total	\$600.00	
I want to notify others about my reservati	ion	
	Empty Cart Reserve Another Check Out	

Each item in the cart is shown with its reservation name, the date, start time, and duration of the reservation, and the fee. Click the **Remove** icon to remove that item from the reservation. You can also specify a title for this reservation, to be used on the Transaction History screen and in confirmation emails.

Click the **Add to Calendar** icon to add this reservation to your calendar. This option supports contact managers such as Outlook and Google Calendar, as well as the calendars on your smartphone or tablet.

Click the **Remove** icon to remove that item from the reservation. You can also specify a title for this reservation, to be used on the Transaction History screen and in confirmation emails.

Click the **Empty Cart** button to cancel this pending reservation completely.

Click the **Reserve Another** button to continue adding items to the cart.

Click the **Check Out** button to finalize the reservation.

Notify Others

ClubExpress optionally allows you to notify others about a reservation.

Example: If you reserve a tennis court for a weekly foursome, you might want to tell the other three players which court has been reserved and the date and time. Click **I want to notify others about my reservation.** You will see the following screen:

Reservation Notifications
You can select up to five other members to be notified about this reservation. Members must be active and must not have opted out of receiving general emails from the club.
Info Included on Email
Balloon #1 05/15/2016 3 hour(s) at 10:00 AM Balloon #1 05/15/2016 3 hour(s) at 2:00 PM
Subject
Message Text
•
0 of 1000 characters used
Send To Add member to list
No members added
Can select up to five members
-
Save Notifications 🗸 🛛 Cancel Changes 🗙

Specify the Subject of the email, any custom message text, and up to five other club members, using the standard ClubExpress Member Selector. When you click **Save Notifications**, this information will be saved with the reservation, and once it has been finalized and paid, the notifications will be sent out.

Checking Out

The checkout process will vary slightly depending on who is doing the reservation and whether a fee is due for any part of the reservation:

- When members check out, the system already knows who they are. If no fee is due, clicking the **Check Out** button completes the reservation. If a fee is due, clicking the **Check Out** button takes the user directly to the Pending Payment page to complete payment.
- If your club makes selected resources available to non-members, when they check out, the system
 will first prompt for their contact information (which is then stored in the Non-Member Database
 under the "Reservation Requests" category.) If no fee is due, clicking Complete Reservation will do
 just that. If a fee is due, the user is taken directly to the Pending Payment page to complete payment.
- If the current user is an administrator or module coordinator, the system will display three radio buttons asking if the reservation is for "yourself", another member, or a non-member. From that point forward, it behaves like one of the options above.

Reservation Notes

Resources may be defined with required setup and cleanup times.

Example: Staff may need time to set up a meeting room for your event and then to clean up once the event is over. These times will be added to your reservation as "Unavailable", If a fee is due, it is only charged for the actual duration of your reservation, not including the setup and cleanup times.

Once a reservation is confirmed, the system will send a confirmation email to the member or non-member making the reservation. You can also optionally notify an administrator or module coordinator that a reservation has been made. And if users select the "Notify Others..." option, those emails are also sent.

In the Member Profile

Reservation History

When the Resource Scheduler module is enabled, a new link appears in the section Histories in the Member Profile.



Clicking this link displays a screen similar to the following:

Res	ervation History			
This p	age displays reservations for which you have pre	viously paid f	or. Each reservatio	on that has be
Within the	e last 12 Months 🗸			
Res	ervations			
Res #	Description	Status	Amount (US\$)	Maintain
1004	< No Title Available >	Final		Ø
1004-1	Blanket Sep 2, 2021 1 hour(s) at 2:00 PM	Approved	0.00	i 🔁
1004-2	Blanket Sep 2, 2021 1 hour(s) at 3:00 PM	Approved	0.00	Ê
1004-3	Blanket Sep 2, 2021 1 hour(s) at 4:00 PM	Approved	0.00	î <u>e</u>
1003	< No Title Available >	Final		Ø
1003-1	Captn Sep 2, 2021 1 night(s) at 2:00 PM	Approved	100.00	î <u>s</u>
1003-2	Captn Sep 3, 2021 1 night(s) at 2:00 PM	Approved	100.00	î <u>e</u>
1002	Blankets	Final		
1002-1	Blanket Sep 1, 2021 1 hour(s) at 12:00 PM	Approved	0.00	
1002-2	Blanket Sep 1, 2021 1 hour(s) at 12:00 PM	Approved	0.00	
				Retu

Use this screen to view your resource reservation history.

Select a time period from the drop-down menu to filter your results by either the previous 12 or 24 months, or view all reservations.

Each reservation will be grouped together (including all items in the reservation). Each reservation will include the:

- **Reservation number** each reservation will have an assigned reference number, and individual items will be listed underneath the main reservation
- **Title** the title entered at the time of making the reservation, as well as the name of each item in the reservation and the time for which is has been reserved
- **Status** the status of the reservation (either Approved, Waiting for Approval or Canceled if the administrator has not approved the reservation)
- **Amount** the cost of each item in the reservation. Note if a reservation has been canceled the column will be blank.

Further options are available in the Maintain Column:

Select the **Edit** icon to edit the reservation. The Edit icon will only appear for future reservations.

Select the **Delete** (trashcan) icon to delete the item from the reservation. You will be prompted to confirm this action.

Editing a Reservation

When you select the Edit icon for a future reservation, you will navigate to the Reservation Edit screen:

Res	ervation Edit				0
Use th	nis page modify your reservation.				
Ente	r a title for this reservation				
Add No	ew Reservation Item				
ltem #		Price			
1004-1	Blanket Sep 2, 2021 1 hour(s) at 2:00 PM Blanket Sep 2, 2021 1 hour(s) at 3:00 PM				
	Blanket Sep 2, 2021 1 hour(s) at 4:00 PM				
			Cancel Edit	Save Changes	

In the title field, enter a new title or the reservation, or change an existing title.

Each item displayed will include the item number, description of the item (including the date and time of the reservation) and the price per item.

Select the **Edit** icon next to an item to edit the reservation details for that item.

Selecting the **Edit** icon takes you to the *Scheduling Calendar* for that item. From this screen, you will see the reserved time slot highlighted. If the same item has been reserved for additional time slots, only the time slot you chose on the *Reservation Edit* screen will be available to edit; remaining time slots will be marked Reserved. To edit those time slots, return to the Reservation Edit screen and select the Edit icon inline with the item.

Select the slot the item is reserved for to open the *Reservation pop-up window*. From this window, you can edit the reservation time, Setup Fee, Usage Description and Special Instructions. Make your changes, then select **Save and Checkout** to apply the changes to the item and return to the Reservation Edit screen. **This will not save the changes to the reservation, you'll do that on the Reservation Edit screen**.

Reserving a Resource as an Admin

When administrators or module coordinators make a reservation, there are additional options available at the bottom of the Reservation dialog:

Resource Scheduling

Event Calendar
Associate this reservation with an event?
Select an event: <pre>< Not Selected > </pre>
Copy Reservation? Copy this reservation? Multiple or single occurrence(s)
Cancel Next (copy)

When the **Event Calendar** box is checked, you will see a drop-down list to select an event on the same day as the reservation.

When the **Copy Reservation** box is checked, the Next button at the bottom of the dialog changes. Clicking this button displays a new panel in the Reservation Wizard, allowing you to make single or multiple copies of the reservation. You will see the following screen:

Reservation 2 3 3
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 Save to make the copy/copies, or Cancel to close the dialog without making copies.
Meeting Room 2
Original Reservation May 11, 2019 11:00 AM to 11:30 AM
Сору Туре
• Make One Copy OMake Multiple Copies
Copy Options
New Start Date 5/12/2019
Cancel Next

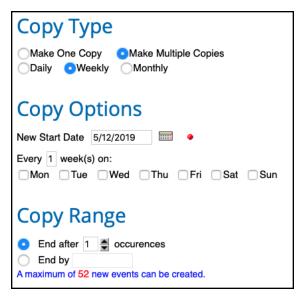
Check **Make One Copy** to copy the same resource to another date, as part of the same reservation. Specify the date and click **Next**.

Check Make Multiple Copies to copy the same resource over multiple dates.

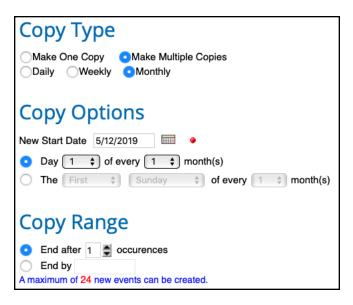
Example: If the Bridge club always meets from 10:00 AM to 12:00 Noon on Wednesdays, in Meeting Room 2, you can build the reservations for a full year using this feature. You will see a screen similar to the following:

Сору Туре
Make One Copy Make Multiple Copies Daily Weekly Monthly
Copy Options
New Start Date 5/12/2019
 Every 1 day(s) Every weekday
Copy Range
 End after 1 = occurences End by A maximum of 50 new events can be created.

When you specify **Daily** copies, enter a start date and specify the copy frequency and range. Up to 50 copies can be made as part of a single reservation.



When you specify **Weekly** copies, enter a start date and frequency. Specify the day or days of the week and then the range. Up to 52 copies can be made as part of a single reservation.



When you specify **Monthly** copies, enter a start date. The frequency can be specified in two ways: on a specific day of the month, or on a specific day of the week, from the 1st through the last day of that month, and every month or every Xth month. The range is also specified. Up to 24 copies can be made as part of a single reservation.

When you press **Next**, the system will generate additional resources on the specified dates, as part of the same reservation:

Please r will be in	Reservation Co eview and confirm the idicated. If you wish to	following date	eservation cop	y, please click	the back button and
be creat		d indicates a			licts. Reservations will an "unavailable" time.
vailable	Resource	Date	Start Time	End Time	
\odot	Meeting Room 2	5/18/2019	11:00 AM	11:30 AM	
\odot	Meeting Room 2	5/25/2019	11:00 AM	11:30 AM	
\odot	Meeting Room 2	6/1/2019	11:00 AM	11:30 AM	
\oslash	Meeting Room 2	6/8/2019	11:00 AM	11:30 AM	
\odot	Meeting Room 2	6/15/2019	11:00 AM	11:30 AM	
\odot	Meeting Room 2	6/22/2019	11:00 AM	11:30 AM	
\odot	Meeting Room 2	6/29/2019	11:00 AM	11:30 AM	
-					
Can	cel Back	Save an	d Add Anoth	er Sav	ve and Checkout

This reservation includes the same resource on multiple days, based on the copy instructions.

- A green check mark indicates dates without a conflict. When you click one of the **Save** buttons, these resources will be reserved.
- A red X indicates dates with a conflict or a date/time when that resource is unavailable. When you click one of the **Save** buttons, these resource date/times will be skipped.

Resource Manager

There are two ways to manage Resource Schedules:

- 1. Administrators and Function Coordinators can select the module in the Control Panel (Club Tab) to access the admin side of the function.
- 2. When viewing any page in the Resource Scheduler, coordinators and administrators can click the pencil icon the Page Tools Widget on the right side of the screen.

The Resource Scheduler function has two main admin screens, one for Resources and the other for Reservations. You can specify which should initially be displayed on the **Configure – Options** page. The Resource Manager screen is shown below:

Home > Resource S	Scheduler (Test M	ode) ≯ Re	source Man	ager		
Resource	Mana	ger				
			tor by optog	and and inclu	do /ovolu	de decomissioned recourses. You
This is the resour	ce manager page	You can fil	ter by catego	bry, and inclu	de/exclu	de decomissioned resources. You
Search Filter						Reservation Manager
Category	< All Categories	>			\$	Configure V
Include	Available					Reports
	Decommission Not Available	ea				Exports
				Course	1	Check In Desk
				Search	2	Add Resource
Search Results	16 item(s) fo	und				
Resource Name	Category	Status	Maintain			
Big Colorful Bubble	Balloons	Available	<i>i</i> 🖉	🍃 國		
Blue Bandit	Balloons	Available	<i>i</i>	🍃 🖪		
Cabin	Daily	Available	<i>i</i>	🍃 🖪		
Barometer Log	Equipment	Available	Ø 🗎	D> 🖪		

At the top of the screen is a search panel that allows you to filter the list of resources by category and resource status. The results panel lists each matching resource and its status.

Clicking the **Reservation Manager** button displays the other main screen on the admin side of this module, allowing you to view and manage resource reservations.

Clicking the **Configure** button displays a drop-down menu of configuration options:

Configure - Categories

Select this option to define categories of resources that your club or association makes available for rent or borrowing. Categories allow you to group similar resources (for example, tennis courts) and separate dissimilar resources that have different properties (for example, meeting rooms.) You will see a screen similar to the following:



The grid shows a list of resource categories. Click the **Add Category** button to create a new category. You will see the following screen:

Home > Control Panel > Resource Manager > Ret	ource Scheduler (Test Mode) Category Manager > Add/Edit Resource (Category
Add/Edit Resource Cate		
This page contains settings for your resource catego	ories. Some of these settings will be used as defaults for resources that a en given default values. Settings here will directly influence how your res	
Basic Settings		
Name	Meeting Room	
	Name limited to 50 characters	
Reservation Type	Hourly 0	
Reservation Unit	Hour	
Resource Status	Available	
Reservation Access	Members and Admins	
Requires Approval	No Approval Required	
Financial Account	Master Reservation	
Reservation Length		
Fixed Schedule Allow Part	ial Units 🖂	
Reservation Length (Units) Default 1	Minimum 1 🕈 Maximum 4 🕱	
-Fees and Times-		
Fees Member 30 D Non-member	50	
Allow Partial Payments		
Time that resource is available 8:00 AM to	10:00 PM 😭	
Click on the clock to select/change start and end	A	

Resources can be configured to allow either Hourly or Daily reservations and the options for each differ slightly.

To define a category with an Hourly reservation type:

Basic Settings

- Category Name
- **Reservation Type** for resources in this category can be hourly or daily. These instructions will cover the **Hourly** setting.
- **Reservation Unit** for resources in this category can be by quarter hour, half hour, or hourly. This setting also controls when reservations can start. For example, quarter hour reservations can start on any quarter hour boundary but hourly reservations can only start on the hour.
- **Category Status** allows you to activate, temporarily deactivate, or fully decommission whole categories of resources.
- **Reservation Access** allows you to control who can see and make reservations for resources in this category. For example, tennis courts might be available to members only while meeting rooms are available to anyone. Note that if you want to make some resources of a specific type available to members only while others are available to anyone, just use two categories (for example, tennis courts 1-4 can be reserved by anyone while courts 5-12 are for members only.)
- **Requires Approval** determines whether reservations in this category must be approved by an administrator. This setting may apply to non-members only or to everyone.
- Specify the **Financial Account** into which reservation fees will be accumulated (for reservations that incur a fee!)

Contact Information

• Select a member to act as the contact for the resources in this category. This is optional and you may define a contact at the resource level.

Reservation Length

- Check **Fixed Schedule** if all reservations in this category are for the same length of time (for example, tennis courts can only be reserved for 1 hour.) Specify the number of "Units". Note that if reservation "Units" is defined above as "Quarter Hour", one hour would be 4 units.
- Uncheck **Fixed Schedule** if reservations can have different durations (for example, a meeting room could be reserved for 1 hour or 4 hours or all day!) Specify the default, minimum, and maximum number of units.
- Check **Allow Partial Units** to allow users to make reservations in smaller increments than the base units. For example, if "Units" is defined as "Hourly", reservations can be in ½ or ¼ hour increments.
- Define how many units constitutes a reservation, as well as a minimum and maximum number of units allowed in each reservation.
- Define how much time must be blocked for prep/cleanup for a reservation.

Fees and Times

- Specify fees that are charged to members and optionally, to non-members for reserving a resource in this category. Fees are based on the specified units. For example, if the fee is \$10/hour, a 4-hour reservation costs \$40.
- Specify fees that are charged to members and optionally, to non-members for setting up a resource for a reservation in this category.
- Click the Clock icon to specify the range of times when resources in this category are available. You will see a popup panel to specify the earliest reservation time, followed by a second popup panel to specify the latest reservation time. For example, an unlighted tennis court might only be available

from 8:00 AM to 5:00 PM but a meeting room could be available until 10:00 PM.

• Select the number of days in advance a reservation can be made.

The Resource Category screen continues below.

-Resource Usage Description	
Usage Desc. Entry None Optional Required	
Reserved Item Display [©] "Reserved" User Name Usage Description Usemame & Description	
- Additional Settings	
Allow User Notifications Notify Admins/Contact on reservation?	
Prompt for setup instructions?	
C of 4000 characters used	
QuickBooks Item Name	
Save 🗸 Cancel 🗙	

Resource Usage Description

- Usage Description Entry determines whether a description is shown on the resource grid for reservations. If "None" is specified, then reservation blocks are shown as unavailable without any further information.
- Reserved Item Display determines what is shown for reservation blocks.

Additional Settings

- Allow User Notifications specifies whether the person making the reservation can generate a short email to a list of other people to confirm the reservation. For example, he or she might want to notify the other three people in a tennis foursome about the date, time, and court that was reserved.
- Check **Notify Admins/Contact on Reservation** if the system should send a notification email whenever a reservation is made.
- Check **Prompt for setup instructions** if this category of resources might be setup in different ways. For example, a tennis court does not require setup but a reservation for a meeting room might have very specific setup requests from the reservation holder.
- **Reservation Rules** allows you to specify the club's rules for reserving a resource in this category.
- **QuickBooks**®**Item Name** will only appear if QB has been enabled. When transactions are exported to QB, it allows you to specify the item used for reservations that impose a fee.

To define a category with a Daily reservation type:

Basic Settings

- Category Name
- **Reservation Type** for resources in this category can be hourly or daily. These instructions will cover the **Daily** setting.
- **Category Status** allows you to activate, temporarily deactivate, or fully decommission whole categories of resources.

- **Reservation Access** allows you to control who can see and make reservations for resources in this category. For example, tennis courts might be available to members only while meeting rooms are available to anyone. Note that if you want to make some resources of a specific type available to members only while others are available to anyone, just use two categories (for example, tennis courts 1-4 can be reserved by anyone while courts 5-12 are for members only.)
- **Requires Approval** determines whether reservations in this category must be approved by an administrator. This setting may apply to non-members only or to everyone.
- Specify the **Financial Account** into which reservation fees will be accumulated (for reservations that incur a fee!)

Contact Information

• Select a member to act as the contact for the resources in this category. This is optional and you may define a contact at the resource level.

Reservation Length

- If your resource(s) can be reserved overnight, check the box **Resources are used for Overnight Reservations** in *Fees and Times*
- Check **Fixed Schedule** if all reservations in this category are for the same number of days.
- Uncheck **Fixed Schedule** if reservations can have different durations, or if you want to set a minimum and maximum reservation duration.

Fees and Times

- Specify fees that are charged to members and optionally, to non-members for reserving a resource in this category.
- Click the Clock icon to specify the range of times when resources in this category are available. You will see a popup panel to specify the earliest reservation time, followed by a second popup panel to specify the latest reservation time. For example, check-in and check-out times for a lodge.

The Resource Category screen continues below.

-Resource Usage Description
Usage Desc. Entry Optional Optional Optional
Reserved Item Display Reserved* User Name Usage Description Username & Description
- Additional Settings
Allow User Notifications D Notify Admins/Contact on reservation?
Prompt for setup instructions?
Reservation Rules
QuickBooks Item Name
Save 🖋 Cancel 🗙

Resource Usage Description

- Usage Description Entry determines whether a description is shown on the resource grid for reservations. If "None" is specified, then reservation blocks are shown as unavailable without any further information.
- **Reserved Item Display** determines what is shown for reservation blocks.

Additional Settings

- Allow User Notifications specifies whether the person making the reservation can generate a short email to a list of other people to confirm the reservation. For example, he or she might want to notify the other three people in a tennis foursome about the date, time, and court that was reserved.
- Check **Notify Admins/Contact on Reservation** if the system should send a notification email whenever a reservation is made.
- Check **Prompt for setup instructions** if this category of resources might be setup in different ways. For example, a tennis court does not require setup but a reservation for a meeting room might have very specific setup requests from the reservation holder.
- **Reservation Rules** allows you to specify the club's rules for reserving a resource in this category.
- Reminder Email Additional Text appears only if you've selected "Send reminder emails" in Options for the module. If you are sending reminder emails, you can specify additional text to be inserted in the reminder email for all reservations for that category.
- **QuickBooks®Item Name** will only appear if QB has been enabled. When transactions are exported to QB, it allows you to specify the item used for reservations that impose a fee.

Note that many of these properties can be overridden at the individual resource level. Click **Save** to save your changes or **Cancel** close the form without saving.

Click the **Display Sequence** button to control the order in which categories are displayed on the opening Resource Scheduler screen. You will see the standard ClubExpress display sequence dialog.

Category Maintain Options

The following options can be found in the Maintain column:

Icon	Description
🥟 (Edit)	Edit the properties of this resource category.
(Edit Description)	Edit the detailed description of this category of resources. The advanced content editor is displayed to allow you to create a fully-formatted description. It can also be customized at the individual resource level.
(Edit User Agree- ment)	Edit the user agreement/waiver associated with this category of resources. The advanced content editor is displayed. This agreement is shown during the reservation process and users must agree to it in order to complete the reservation. It can also be customized at the individual resource level.

Icon	Description			
(Cus- tomize Daily Options)	This option allows you to customize the available times and fees for each resource. See the detailed explanation below. These settings can also be customized at the indi- vidual resource level.			
(Resource Sequence)	Controls the sequence in which resources within this category are displayed. You will see the standard ClubExpress display sequence dialog.			
(Delete)	Delete this category. This option is only available for categories with zero resources.			
Maintain Options				

Configure - Options

Select **Configure – Options** to customize options at the module level. You will see the following screen:

Options	?
Configure the module options from this screen. You can modify who can make reservations, cancellation policy, the flat fee for reservation, if members get notified when they make a reservation, the days in advance a reservation must be made and the main admin page.)
Contact Person Not Selected Select	
Main admin page Resource Manager 💌	
Mailing List Category Reserved Resource 🗸	
Default Financial Account Master Reservation 🗸	
Maximum number of items in reservation Leave blank for no limit	
Send Reminder Email	

The following options can be defined:

- Select a **contact person** to be notified whenever a resource is reserved. For many clubs, this will be your primary facility manager. This setting can be overridden at the category level, to specify different contact people for each resource category (e.g., tennis courts vs. meeting rooms.) You can also control who can see that person's email address and phone.
- Specify which **main admin page** should be displayed when you open the administrative side of the module: Reservation Manager or Resource Manager.
- When resources are reserved, specify the **category** into which these users will be assigned.
- Specify the default financial account to be used for reservations with a fee.
- Determine whether or not to send **reminder emails**; if you select the option, you'll enter the number of days in advance of the reservation the email is sent to the user. The reminder email will be sent in the morning, approximately 8:00 AM Central. To send the reminder email the day of the reservation, enter "0".

Note: If you send reminders out the day of your reservations (entering "0"), the reminder will be sent for all reservations in the next 24 hours. For early morning reservations, users may receive emails after their reservation has taken place.

Click **Save** to save your changes and return to the main admin screen, or **Cancel** to return without saving.

Configure - Main Page HTML

Select this option to define introductory text that will be displayed at the top of the module's opening page, above the list of categories. You will see the ClubExpress advanced content editor, which allows you to create fully formatted text, including images and links.

Configure – Cancellation Policy

Select this option to define your club's policy for cancelling reservations. You will see the ClubExpress advanced content editor, which allows you to create fully formatted text, including images and links. This policy is displayed on a popup screen, accessible from a **Cancellation Policy** button at the top of the module's opening page.

Reports/Exports

Reports

If available, selecting Reports displays a standard ClubExpress Report wizard. The system lists a number of reports related to the active module.

Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

Check-In Desk

Select this option to track and record if a user has checked-in for a reservation. You will see a screen similar to the following:

	An orthogonal large	-	-	Destador	the later	Aug
	Rear Rent	1000	149.1	As Table 1		No. 1
(married)	Rear Rent	944 (225) (225)	144.1			
-	Rearry Res.	1000	144.1	As Table 1	la tenter la tenter	-

Use the search filter panel to limit what items are shown in the results panel by category, date and status. A reservation may include one or more resources; this screen will show each resource reserved by a user (member or non-member) as a separate line, with the ability to check-in or check out the user for each resource.

Click the member's name to view their contact information. Click the Not Checked In text to check in the reservation holders. The text will change to **Checked In**. You can also click that status to check the users out at the end of their reservation.

Add Resource

Click the Add Resource button to create a new resource. You will see the following screen:

There are three required fields:

- Resource name
- A shorter name for display purposes
- The category

There are many optional fields. Click the black arrow icon to expand this section. Any values that you don't specify will be inherited from the category level settings.

Each section is described in more detail below:

Basic Settings				 	 	
Resource Status	Available	٥				
Reservation Access	Allow Non Members	٥				
Requires Approval	No Approval Required		٥			
Reservation Unit Type	Hour	٥				

You can control the status, access, approval requirement, and unit type (hourly reservations only) for individual resources within a category.

Example: One tennis court might be temporarily out of service, another could be available to members only, while another is available to non-members but require approval. One activity room could be reserved in half-hour units while another is only reservable in one-hour units.

Resource Scheduling

Reservation Length -				
Fixed S	Schedule Ouse Category	Settings OYes ONo		
Allow Par	tial Units Use Category 	Settings OYes ONo		
Length(Units)	Default	Minimum	Maximum	
Use these text boxes	to define your reservation ler	ngth in units. Leave these value	es blank to use category settings	

If Fixed Schedule is set to **Yes**, specify the unit length. If Fixed Schedule is set to **No**, you can specify the default, minimum, and maximum number of units allowed for this resource (where units was defined in the previous section.)

You can also specify whether partial unit reservations are allowed.

Fees and Times —			
Fees	Member	per unit Non-member Fee per unit	
Leave these value	ies blank to use catego	ory settings	
Time that resou	irce is available	Use Category Setting 🕞	
Click on the cloc	k to select/change star	rt and end times	

Specify the fee per unit to be charged for members and, optionally, non-members.

Click the clock icon to specify the earliest start time that a reservation can be made and the latest time when a reservation can end. The full 24-hour clock is available and you can expand or contract the dialog to show more or fewer times. Once a start time is selected, the dialog will change to allow you to specify an end time. These times can be different for different resources, even within the same category.

Example: An unlighted tennis court might need to end reservations at 5:00 PM while a lighted tennis court can be available until 9:00 PM or later.

For overnight reservations, click the click icon to specify when the reservation starts on the first day and when it finishes on the last day. These times can be different for different resources, even within the same category.

If custom times are specified, click the red X icon to revert back to the category settings.

lesource Usage Description
course oblige Description
Usage Desc. Entry OUse Category Setting ONone Optional ORequired
Reserved Item Display Use Category Setting
"Reserved"
OUser Name
OUsage Description
OUsername & Description

Specify whether a usage description can or must be specified, or whether no usage description will be shown. You can also choose the text to be shown in the reservation scheduler itself, from one of "Reserved", the reservation holder's name, the usage description, or both the name and description.

Resource Scheduling

Additional Settings		
Allow User Notifications	●Use Category Settings ○Yes ○No	
Notify Admins/Contact on reservation?	◯Use Category Settings ☉Yes ◯No	
Prompt for Setup Instructions?	◯Use Category Settings ☉Yes ◯No	
Reservation Rules		
	0 of 4000 characters used	
	0 of 4000 characters used	
QuickBooks Item Name		
Resource Image	Browse	Remove Image

Allow User Notifications can be enabled to allow reservation holders to notify others of the reservation (for example, the other players in a tennis foursome.)

If **Notify Admins/Contact on Reservation** is set to Yes, the designated contact person will receive an email whenever this resource is reserved, showing the details of the reservation.

If **Prompt for Setup Instructions** is set to Yes, the system will ask the reservation holder if there are any special setup instructions.

Example: A tennis court doesn't need any but a meeting room might.

Reservation Rules allows you to define special rules that need to be observed when this resource is reserved. For example, a ski lodge room might have special requirements regarding bed linens or noise after a certain hour.

QuickBooks: If QuickBooks®integration is enabled, specify the **QuickBooks®Item Name** for income attributable to this resource.

Finally, you can upload a photo of this resource, to be shown on the main resource screen.

Click **Save** to save your changes and return to the Resource Manager, or **Cancel** to return without saving.

Maintain Options

The following options can be found in the Maintain column:

Icon	Description			
🥟 (Edit)	Edit the properties of this resource.			
(Edit Description)	Edit the detailed description of this resource. The advanced content editor is displayed to allow you to create a fully-formatted description.			
(Edit User Agree- ment)	Edit the user agreement/waiver associated with this resource. The advanced content editor is displayed. This agreement is shown during the reservation process and users must agree to it in order to complete the reservation.			
(Cus- tomize Daily Options)	This option allows you to customize the available times and fees for each resource. See the detailed explanation below.			
Maintain Options				

Customize Daily Options

Click this icon to customize rules on a day-by-day basis for how this resource can be used. For each day, you can **Use Category Settings** or specify individual rules. You will see a screen similar to the following:

Home Resource Scheduler (Test Mode) Resource Manager Customize Daily O Blue Bandit - Daily Options	ptions
Set daily rules for start and end times. Statuses for each daily time period may be set,	, along with member and non member fees for the time period.
Sunday	Oustomize ○Use Category Settings
Use Category Settings Set Custom Times Select "Custom Times" to define a time range for daily options Custom Times 12:00 PM to 6:00 PM O Click the clock to begin the time selection process	
Member fee 50.00	Non-member fee 75.00
Define a member fee that will be used for this day and time Status Available Select a status for this resource/category that will be used for this day and time	Define a non-member fee that will be used for this day and time
Monday	Customize • Use Category Settings

Three settings can be customized for each day of the week:

- The times when a reservation is available. For example, a meeting room may only be available on Sundays from 2:00 PM onwards but available based on the category settings on all other days.
- The fee charged to members and, optionally, non-members. For example, club canoes for rent may have one fee during the week but a higher fee on weekends.

• The availability of the resource. For example, a grass tennis court may be available on every day of the week except Mondays, to give it time to recover.

Click **Save** to save your changes and return to the Resource Manager, or **Cancel** to return without saving.

Reservation Manager

When you click the **Reservation Manager** button, you switch to the *other* main admin screen in the Resource Scheduling module. You will see a screen similar to the following:

Reservation Manager	(?)
Use the criteria shown in the search box to find the reservations you want to manage. The maintair contact info for the reservation, and re-send the confirmation email. The "Configure" button has a d brings up a list of reports for your Resource Scheduler. Click the "Add Reservation" button to launce	n column next to a reservation gives you the options to edit the reservation, cancel the reservation, see the users drop down menu for reservations, categories, options, main page text/html and policies. The "Reports" button th the scheduling calendar.
View By O Items Reservations	Resource Manager
Search Filter Resource or Category All Categories and Resources Start Date 9/3/2021 Image: Search 2010 User Type 2010 Member 2010 Reservation Status In Cart 2011 Payment Pending 2011 Image: Search 2010 Last Name Res. # Search 2010	Configure '7 Reports Exports Approve Reservations Check In Desk Add Reservation
Search Results 1 item(s) found	
Trans. Date Ref # User Name Mem. Status Res. Status Items Price (\$) Maintain	
9/3/2021 1366 Mary Smith Member Final 3 75.00 🖉 🛒 🖂 1	
Return	n to Previous Page

In the ClubExpress model, a *reservation* can include one or more *items*.

Example: A yacht club may rent its clubhouse out for a member's daughter's wedding, where multiple rooms will be needed for different times of the day. This can be handled as a single reservation.

The Reservation Manager can display data at the reservation or item level. The search options are slightly different at each level. Click the **Search** button to view matching results.

At the reservation level, you will see the date that the reservation was made, its reference number, the member or non-member who made the reservation, its status, the number of items and the total fee paid, if any.

At the item level, you will see the date and time range for which that item is reserved, the reference number (which exists at the reservation level), the resource name, member or non-member name, item status, and the fee paid for that item, if any.

The buttons to the right of the Search panel are similar to those found on the Resource Manager screen:

Clicking the **Resource Manager** button displays the other main screen on the admin side of this module, allowing you to view and manage resources.

Configure, Reports, Exports, and **Check-In Desk** perform the same functions as on the Resource Manager screen.

Approve Reservations

Click this button to approve reservations for resources that require approval. You will see a screen similar to the following:

App	Home > Resource Scheduler (Test Mode) > Reservation Manager > Approve/Decline Reservations Approve Reservations (You can approve reservations from this screen. Reservation items will be listed beneath the main reservation details. To approve a reservation or multiple reservations, click the checkbox next to the reservation the ick the "Approve Reservations" button. You must select at least one reservation to approve before clicking the "Approve Reservations" button.					
Crie	Trans, Date	Ref #	User Name	Price	ast one reservation to approve before clicking the Approve Reservations button.	
0	5/15/2016	1009	Barbara C Jones	\$75.00		
	Double 05/16/201	6 1 hour(s) at 6	:00 AM	\$75.00		
	Approve Checked Items Return to Previous Page					

The details of each reservation requiring approval are shown. Check the box on the left for each reservation you want to approve (or the box in the header to approve them all) and click **Approve Checked Items**. Or click **Return to Previous Page** to go back to the Reservation Manager without approving any reservations.

Note that when admins or module coordinators make reservations, approval is handled automatically when the reservation is made.

Add Reservation

Click this button to jump to the user side of the module to make a reservation.

Maintain Options for Reservations

The following icons appear in the Maintain column when reviewing Reservations.

Icon	Description
🥟 (Edit)	Selecting this icon takes you to the Reservation Edit screen. You have the option to edit each item in the reservation. The option to edit reservation items is only available in this view.
(Reser- vation Details)	Clicking this icon displays a popup screen showing the details of that reservation. You have the option to cancel or keep individual items. If any items are cancelled and a fee had been paid, the user will receive a credit in his or her account.

lcon	Description
(Resend Confirmation Email)	Click this icon to have the system resend the confirmation email to the person who made the reservation. If he or she wanted others to be notified, these emails will also be resent.
(Cancel Entire Reser- vation)	Click this icon to cancel the reservation. You will be prompted to confirm this action. If a fee had been paid, the user will receive a credit in his or her account.

Maintain Options - Reservations

Editing a Reservation

When you select the Edit icon, you'll be taken to the Edit Reservation screen.

Res	rvation Edit	?
Use th	page to modify your reservation. Existing Reservation Items can be edited to change their time or date. Pending changes can also be cancelled.	
Ente	a title for this reservation Blankets Needed	
Add Ne	w Reservation Item	
Item #	Description Price	
1006-1	Blanket Oct 1, 2021 1 hour(s) at 7:00 PM 0.00 🤌 Blanket Oct 1, 2021 1 hour(s) at 1:00 PM 0.00 🧪	
	Cancel Edit Save Changes	

The screen will list all items included in the reservation, including the

- **Item Number** the reservation number followed by an assigned sequential number based on the order the items were selected while the user made the reservation),
- Item Description the name of the item, followed by the date and time the item has been reserved for,
- Price the price of the item reserved
- Edit icon use this to edit the item reserved.

Selecting the **Edit** icon takes you to the *Scheduling Calendar* for that item. From this screen, you will see the reserved time slot highlighted. If the same item has been reserved for additional time slots, only the time slot you chose on the *Reservation Edit* screen will be available to edit; remaining time slots will be marked Reserved. To edit those time slots, return to the Reservation Edit screen and select the Edit icon inline with the item.

Select the slot the item is reserved for to open the *Reservation pop-up window*. From this window, you can edit the reservation time, Setup Fee, Usage Description and Special Instructions. Make your changes, then select **Save and Checkout** to apply the changes to the item and return to the Reservation Edit screen. **This will not save the changes to the reservation, you'll do that on the Reservation Edit screen**.

Rese	ervation Edit						
Use thi	s page to modify your reservation. E	xisting Reservation Items	can be edited to ch	hange their time or date. I	^o ending changes ca	in also be can	ncelled.
Enter	a title for this reservation Bla	ikets Needed					
Add Ne	w Reservation Item						
	Description	Price				lew Price	
1006-1				Oct 1, 2021 1 hour(1
	Blanket Oct 1, 2021 1 hour Blanket Oct 1, 2021 1 hour			Oct 1, 2021 1 hour().00).00	1
	ous Reservation Total: US ew Reservation Total: US						
			Cancel	I Unsaved Changes	Save Cha	inges	

On the *Reservation Edit* screen, the **Description** for the edited item will include the original reservation time, followed by the new reservation time. The original price of the reservation will be listed, followed by the new price of the reservation. You will also see a Delete (trashcan) icon. Select the Delete icon to revert your changes to the item back to their original state. To save the changes, select the Save Changes button at the bottom of the screen.

If **new** items were added to the reservation, those items will be listed at the bottom, on the right-hand side of the list of reserved items.

If the changed reservation requires approval by an administrator, any new reservation items will have a status of Waiting for Approval.

If the changed reservation requires a payment, either because the reservation wasn't paid for initially or the reservation changes resulted in a higher fee, the new charges will be highlighted on the *Reservation Edit* screen and the reservation status will change to Payment Pending on the *Reservation Manager* screen .

Reservation Edit		0
Use this page to modify your reservation. Existing Reservation Items can be	edited to change their time or date. Pending changes can also be cance	lled.
Enter a title for this reservation Jenny's Blankets		
Add New Reservation Item		
Item # Description Price	New Price	7
1008-1 Red Sep 16, 2021 1 hour(s) at 10:00 AM 10:00 🧷	10.00	
1008-2 Red Sep 16, 2021 1 hour(s) at 11:00 AM 10.00 🧷	10.00	
1008-3 Red Sep 16, 2021 1 hour(s) at 12:00 PM 10.00 🧳	10.00	
1008-4	Red Sep 16, 2021 1 hour(s) at 1:00 PM 10.00	
Previous Reservation Total: US\$ 30.00 The original fee New Reservation Total: US\$ 40.00 Charged.	e was 30.00, and an additional 10.00 will be	
	Cancel Unsaved Changes Save Changes	

Maintain Options for Items

The following icons appear in the Maintain column when reviewing Items.

Icon	Description
(Reser- vation Details)	Clicking this icon displays a popup screen showing the details of that reservation. You have the option to cancel or keep individual items. If any items are cancelled and a fee had been paid, the user will receive a credit in his or her account.
(Cancel Reservation Item)	Click this icon to cancel this specific item within the reservation. You will be promp- ted to confirm this action. If a fee had been paid, the user will receive a credit in his or her account. If the reservation comprises only one item, the whole reservation will be deleted.

Maintain Options - Items

Ride Cue Sheets (for Cycling Clubs)

User Interface	
Ride Cue Sheet Manager	

Ride Cue Sheets (for Cycling Clubs)

Cue Sheets document the various rides in a region. Each ride is categorized by the following properties:

- Name
- General Location (County and City)
- Starting Point
- Miles/Kilometers
- Vertical Ascent
- "Effort Index" a measure of difficulty

Search functions allow members to find an appropriate ride, each of which also includes a downloadable PDF with the ride map and turn-by-turn directions.

The module also includes Ride With GPS support.

This module was developed for a cycling club but it can also be used by other trail-based clubs such as horseback riding and snowmobile clubs.

Activation: The one-time fee to activate this module for your website is \$400.

User Interface

When members open this module, they will see a screen similar to the following:

Home > Cue Sheets					6 3
Cue Sheets				Search	For Cue Sheets 😸
This screen shows the Cue Sheets that have been defined on the	system. You m	ay filter the results	by entering values in the	Name	
Found 248 Cue Sheet(s). Click 🝳 to search again				County	< All Counties >
Name	County	City	Starting Point	City	< All Cities >
				Mileage	< Any Mileage > ᅌ
Alexander Explores Leicester	Buncombe	Woodfin	Woodfin Riverside Pa		
All About Weaverville	Buncombe	Weaverville	Weaverville public par		< Any Ascent > 📀
Apple Blossom Challenge Ride	Henderson	Etowah	Ingles in Etowah	Effort Index	< Any Effort > ᅌ
Apple Blossom Moderate Ride	Henderson	Etowah	Ingles in Etowah	Sort By	Name
Apple Orchard Easy Ride	Henderson	Hendersonville	Martin Luther King Me	Use the search tool to display this box	Reset Search 🔗
Apple Orchard Hilly Ride	Henderson	Hendersonville	Martin Luther King Me	this box monar Park on 4th Ave E	42.0 2920 /1

Available cue sheets are listed in alphabetical order, including the basic information on each sheet. Clicking the cue sheet name displays a panel showing a more detailed of the ride and including a download link to open the cue sheet itself, a PDF file. You can also click the **Ride with GPS** link to jump to the RidewithGPS.com website and download GPS route guides.

Apple Valley	Henderson	Fletcher	Fletcher Community Park on Howard Gap Rd	25.3	1591	41
Ride begins at Fletcher Community Park on Howard Ga Download Details 🔿	ap Rd, 0.3 of a	mile from the	traffic light on Hendersonville Rd in Fletcher.	Ride with (<u>GPS</u>	

<u>Searching</u>

The search panel appears when the module is first opened. It allows searching on the following fields:

- Name (anywhere in field)
- County
- City
- Mileage (using predefined ranges)
- Ascent (using predefined ranges)
- Effort Index (using predefined ranges)

Users can also sort the results in a number of ways. Click the **Search** button to run the search or **Reset** to clear search settings and start over.

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The search panel can be displayed at any time by clicking the Search icon at the top of the screen or in the floating Page Tools widget on the right side of the screen.

Ride Cue Sheet Manager

Administrators and module coordinators can access the admin side of the module by clicking the Admin icon (pencil) at the bottom of the Page Tools Widget, or by selecting **Control Panel – Website – Admin Functions – Cue Sheets.** The following screen is displayed:

Cue Sheets This screen shows the Cue S Edit icon to view and / or mor and City admin screens.	Sheets that have been define dify a Cue Sheet and the Del	d on the system. Yo lete icon to delete it.	u may filter the red The Add button le	uits by ent its you add	ering valu a new Ci	ues in the Sear ue Sheet, and I	ch Panel and pres the Counties and (using the "Search" button. Click the Cities buttons take you to the County
Searci Name County < All Counties > City < All Cities >	h For Cue Sheets	Search 🗲	Countier Cities Reports Add Cue Si					
6		a		100000		Effect in term	Malata and	< Page 1 of 9 0
Cue Sheet		County	City				Maintain III	Page 1 of 9
Alexander Explores Leicester		Buncombe	Woodfin	21.0	1916	30	1	Page 1 of 9
Alexander Explores Leicester All About Weaverville		Buncombe	Woodfin Weaverville	21.0 44.0	1916 3816	30 82	/ 强	C Page 1 of 9
Alexander Explores Leicester All About Weaverville Apple Blossom Challenge Ride		Buncombe Buncombe Henderson	Woodfin Weaverville Etowsh	21.0 44.0 40.2	1916 3016 2544	30 82 66	/ 6	Page 1 of 9
Alexander Explores Leicester All About Weaverville Apple Blossom Challenge Ride Apple Blossom Moderate Ride		Buncombe Buncombe Henderson Henderson	Woodfin Weaverville Etowah Etowah	21.0 44.0 40.2 19.6	1916 3816 2544 1336	30 82 66 33	/ B / B / B / B	Page 1 of 9
Alexander Explores Leicester All About Weaverville Apple Blossom Challenge Ride Apple Blossom Moderate Ride Apple Orchard Easy Ride		Buncombe Buncombe Henderson Henderson	Woodfin Weaverville Elowah Hendersonville	21.0 44.0 40.2 19.6 9.8	1916 3816 2544 1336 563	30 82 66 33 15		Page 1 of 9
Alexander Explores Leicester All About Weaverville Apple Blossom Challenge Ride Apple Blossom Moderate Ride Apple Orchard Easy Ride		Buncombe Buncombe Henderson Henderson	Woodfin Weaverville Etowah Etowah	21.0 44.0 40.2 19.6	1916 3816 2544 1336	30 82 66 33	/ B / B / B / B	Page 1 of 9
Cus Sheet Alexander Explores Leicester All About Wesverville Apple Biossom Challenge Ride Apple Orchard Easy Ride Apple Orchard Hilly Ride Apple Orchard Hilly Ride Apple Valley		Buncombe Buncombe Henderson Henderson	Woodfin Weaverville Elowah Hendersonville	21.0 44.0 40.2 19.6 9.8	1916 3816 2544 1336 563	30 82 66 33 15		Page 1 of 9 6

A simplified search panel allows administrators to find a cue sheet for editing. Search results are displayed in a standard grid, 30 per page, with the standard paging controls at the top and bottom.

The Maintain column includes the standard Edit and Delete icons.

Click the **Configure** button to display a simple drop-down menu.

The **Counties** button allows administrators to update the list of counties while the **Cities** button performs the same function for cities and towns where rides begin. These buttons both lead to standard screens.

The **Reports** button provides access to a simple listing report.

Clicking the **Add Cue Sheet** button displays the following popup form. A similar screen is shown when the Edit (pencil) icon is clicked.

d/Edit Cue	Sheet V
lse this screen to e	enter information about the Cue Sheet, including its name, description, and mileage
Name	Apple Blossom Challenge Ride
Description	Ride starts at Ingles in Etowah. From Asheville go 14.4 miles from Exit 40 on I-26 via Rt 280, go 10.7 and turn left on Brickyard Rd, continue 3.4 miles and turn left on Brevard Rd, for 0.3 miles to Ingles.
	Max 1000 characters - 793 characters left
County	Henderson
City	Etowah 📀
Mileage	40.2 •
Ascent	2544 •
Starting Point	Ingles in Etowah
Effort Index	66 •
idewithGPS URL	https://ridewithgps.com/
File Name	Apple_Blossom_Challenge_Ride_1313881522.pdf
	Save 🖋 Cancel 🗙

This screen allows administrators to add or edit the information on a cue sheet. When adding a new sheet, the File Name option allows a PDF file to be uploaded from the local hard disk.

Click **Save** to save the new entry or changes or **Cancel** to close the dialog without saving.

Ride Log (for Cycling Clubs)

User Interface	
In the Member Profile	
	1269
Ride Log Manager	
Configure the Module	

Many cycling clubs run competitions to see which members ride the most miles or kilometers in a year, or the most number of rides; or which members lead the most number of rides.

This module tracks these statistics for each rider in a club.

Activation: The one-time fee to activate this module for your website is \$400.

User Interface

The user side of this module displays a simple grid showing club riders, the number of rides led, the number of rides participated in, total miles for that year, average miles/ride, and lifetime miles. The list of riders is sorted by last name by default. Select a column heading to sort the list by that field. A simple drop-down list allows users to view the current year or past years.

			Select Year 2	021 🗸			
lame 📥	Rides Led	Rides	Total Miles	Leader Bonus Miles	Home Miles	Miles/Ride	Lifetime Ride Log Miles
Abbott, Mara	0	62	2279	0	20	37.1	3268
Adkins, Christine	0	62	2269	0	20	36.9	3256
Adkins, John	0	62	2279	0	20	37.1	3233
Adkins, Susan	0	62	2269	0	20	36.9	11289
Anquetil, Jacque	0	62	2279	0	20	37.1	2949
Armstrong, Lance	0	62	2269	0	20	36.9	3061
Baldwin, Chris	0	62	2279	0	20	37.1	2714
Banks, Rob	0	62	2269	0	20	36.9	3230
Banks, Susan	0	61	2239	0	20	37	2978
Benedict, Becca	1	61	2239	5	20	37.1	2276
Benedict, Will	0	61	2244	0	27	37.2	2598
Billy, Johns	2	60	2179	10	28	37	2839
Bouchard, Mary	1	58	2084	5	24	36.4	3019
Bradley, Bill	2	52	1894	10	24	37.1	2143
Bradley, Jill	6	48	1742	30	23	37.4	2010
Bright, Lynn	18	38	1352	90	24	38.6	1901
Brown, Bobby	10	18	670	50	0	40	1324
Brown, Kevin	15	18	665	75	9	41.6	1174
Brown, Sally	3	7	210	15	4	32.7	584
Cancellara, Fabian	1	2	90	5	0	47.5	495
last name, person 1	0	1	25	0	4	29	29
last name, person5	0	1	25	0	4	29	29
R., Elyssa	0	1	25	0	4	29	29
Sanders, William	4	5	167	20	4	38.2	191
Smith, Martin	0	1	25	0	4	29	591
Total	63	989	36067	315	383		57210

The grid may optionally include columns for Home miles (ridden from home to the ride start and from the ride finish back home) for Leader miles, if your club tracks and provides credit in either or both of these categories. No matter which options are enabled, the total miles and lifetime miles will always be correctly calculated.

In the Member Profile

The Ride Log module also includes a Profile screen for each club member. Clicking **My Rides** displays a screen similar to the following:

Select Year 2016 0						
Date	Ride Title	Leader	Miles	Leader Bonus Miles	Home Miles	Total Miles
05/03/2016	Call-In-Ride: 10:00 AM	Yes	21	0	0	21
09/02/2016	Call-In-Ride 9:30 AM	Yes	25	0	2	27
10/29/2016	TEST EVENT - Rider Mileage	Yes	100	50	14	164

Members can select a year and see all their rides within that year, sorted in ascending date order, including optional bonus miles for being a leader, home miles and total miles credited for that ride.

Ride Log Manager

The admin side of the Mileage Log module is accessed in the usual way, by clicking the **Admin** (pencil) icon on the floating Page Tools widget, or by selecting **Control Panel – Club – Admin Functions – Mileage Log**. The following screen is shown:

	ntrol Panel > Club Rides Administration			
Club R	ides Administration			
of miles a	an shows the Club Rides that have taken place in the par ssigned to each participant. Note that if you do not see a rant type for people who are registered for an event via th	an Edit lin	k next to your ev	
Date	Club Ride	Riders	Maintain 🔳	Options
12/14/2016	1 PM Anderson Park M Ride (note change of location!)	3	Ø	Ride Event Categories
12/07/2016	Wednesday Dewitt Township Hall 12:30 PM	3	Ø	Export
12/03/2016	Saturday Global Fat Tire Day M Ride 11:15 AM	7	Ø	Export
12/03/2016	Saturday Ingham County Fairgrounds 11:00 AM	0	Ø	
			1	-

Information in the Mileage Log module is updated by ride leaders, who need to be configured as module coordinators. This is done in the Control Panel by clicking the standard **Coordinators** icon.

This screen shows a list of rides in specified categories and going back the specified number of days. Ride leaders can click the **Edit** (pencil) icon to update the information for that ride. A screen similar to the following is displayed:

event, check the Leader box in the middle of the form be	s between the lists. If the efore clicking the arrow
Participants	
Home Miles Miles Leader Leader Calille, Carl[M:214 Koller, Anthony[M Koller, Anthony[M Koller, Janice[M:2 Reynolds, Jeanee Smith, Jeff[M:214 Watson, Gar[M:214 Watson, Gar[M:214 Miles With "H:".	+H:22] I:21+H:2] 21+H:2+L:50] n[M:21+H:0] ·H:0]
	Home Miles Home Miles Miles Leader Leader Bonus Miles 50 The Participants column prefixes: Miles with "M:" Leader miles with "L:"

The left column lists the active members of the club. The right column lists those members who participated in the ride. To move one or more members from the left to the right, click a name on the left, specify the number of miles that person rode, and whether he or she served as a ride leader. Click the right-pointing arrow. If an entry was made in error, select it on the right and click the left-pointing arrow to remove that person.

Some clubs also report on miles ridden from home to the ride start and from the ride finish back home. If members report this information and if the club collects it, you can optionally track these home miles as well.

Some clubs provide a mileage "bonus" for the ride leader. If this option is enabled, these miles will be added automatically when the ride leader box is checked.

On the left side you can also [Shift-click] to select a contiguous range of members, or [Ctrl-click] (on a Mac, use [Command-click]) to select multiple entries that are not contiguous. The Miles setting will be retained through each cycle as you select people through the member list.

New entries are added to the Participant list at the end. Click the **Sort** button to resort the list to verify who has been added and who still needs to be added.

Click the **Save** button to record these participants, their mileage, and their leader status, or **Cancel** to close the dialog without recording this information.

Ride participants may not have pre-registered for the event. When you click Save, the system will add anyone who did not pre-register to the registration list for the event, so that this information is also displayed in their event history.

Configure the Module

Click the **Options** button to see the following screen:



- Specify the keyword used for a ride (singular and plural) and for a ride participant.
- Editable Days defines how far back the system should look for rides.
- Specify the month in which the club's "ride year" begins.
- Specify the event Registrant Type that should be assigned to previously unregistered riders who joined the ride.
- Specify whether ride leaders receive a bonus. The bonus amount can be different for each category.
- Specify whether riders can optionally receive credit for miles ridden from home to the ride start, and from the ride finish back home.

Click **Save** to save these options and return to the main Ride Log admin screen, or **Cancel** to return without saving.

Click the **Ride Event Categories** button to specify which event categories can be included for mileage credit. These are typically the daily rides but may also include special riding events and competitions. You will see a screen similar to the following:

Home > Control P	anel > Club Rides A	dministration > C	Club Rides Event Categories Administration
Club Ride	s Event Ca	tegories	Administration
This page lists the		or which mileage c	an be logged in the system. Click the "Add Category" button to create a new category;
Add Category)		
Category L	Leader Bonus Miles	Maintain 💼	
Class A+ Ride	50	🧷 💼	
Class A Ride	50	🤌 🙀	
Class B Ride	50	🧷 🛱	

This is a standard ClubExpress admin screen. Click **Add Category** to see the following screen, where you can select a previously unselected category and also specify how many bonus miles (if any) leaders should receive.

Enter a new category or edit the existing category, then click "Save" or "Cancel".
Category SummerTour
Leader Bonus Miles 50

Back on the main administration screen, click the **Export** button to generate an export of rides, riders, and miles within a specified date range. The system will generate and download a CSV file that can be opened in Excel for further manipulation.

Trail Maps and Trail Status

User Interface	
Manage Grooming Status	
Manage Trails	
The Trail Status Widget	

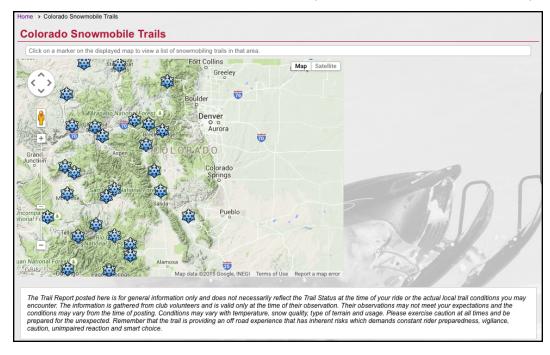
This module was designed for a state snowmobile association. It tracks every major trail in a defined area, showing the trail status, snowfall, base, trail conditions and other relevant information. Users have the option of downloading a trail map in a PDF file.

This module is potentially suitable for other outdoor sports clubs, including cross-country skiing, mountain biking, off-road vehicle clubs, and horseback riding clubs.

Activation: The one-time fee to activate this module for your website is \$400.

User Interface

Selecting this option on the club's menu displays a Google map showing the major trail areas:



Clicking an icon displays a list below the map of the individual trails in that area.

Example:

Carbondale					
	Marion Gulch Carbondale connec	tion to SP Trial		0	
Closed - no snow	Click here to displa Grooming Status Snowfall Last Report	y map Not groomed, no snow 0.00 inches in the past 48 hours 4/2/2015 11:00 AM	Date Groomed Estimated Base	3/6/2015 0.00 inches	
	Grooming Rep Other Informat	oort/Trail Conditions 🕀			
	S-P Trail			0	
I.	Sunlight to Powderk				ſ
Partially Open - see notes	Grooming Status Snowfall Last Report	Groomed 0.00 inches in the past 48 hours 4/9/2015 8:15 AM	Date Groomed Estimated Base	3/12/2015 22.00 inches	
	Grooming Rep	oort/Trail Conditions			

Each listing starts with a large trail status icon. The listing also includes the trail name and description, a link to download a PDF trail map, grooming information, recent snowfall and base, and the date and time of the most recent report.

Each listing may also include expandable fields showing detailed trail conditions and other information that may be relevant to riders. Click the "+" icon to expand this information.

Manage Grooming Status

If the current user is configured as a trail grooming manager, an Edit (pencil) icon will be displayed in the top-right corner of each trail listing. Clicking this icon displays a popup dialog similar to the following:

Add/Edit Groomi	ng Status 🛛 🖗 🛠 🏵
Edit information related to the	his trail, including the date, grooming status, and trail conditions. Click 'Save' when finished.
Trail Report Date/Time Trail Status Date Trail Groomed Grooming Status On/Off Trail Conditions	S-P Trail 9/8/2015 8:10 PM Partially Open - see notes
Snowfall (inches last 48hrs) Estimated Base (inches) Other Information	18 of 1000 characters used 0.00 22.00
₩C.	0 of 1000 characters used Enter any other issues regarding this trail, including events, parking, etc.

The trail being edited is shown at the top along with the report date/time (which is generated by the system.) Trail Status and Grooming Status are selected from drop-down lists; the values can be configured in the Admin screens (see below.)

Other fields are completed as shown. Click **Save** to save the changes and return to the Trail Maps screen. Previous entries are overwritten; the system does not maintain a history of reports.

Manage Trails

As with all ClubExpress modules, there is also an admin side to this module. It can be accessed in the standard ways (by clicking the Admin [pencil] icon on the floating Page Tools Widget, or by clicking the module name or icon in the Control Panel. A screen similar to the following is displayed:

Set up trail areas, trail ratings, trail status, ar existing trails. Click the 'CSP Report' button			utton and selecting	g the appropriate option. You c	an also edit and de	lete
Configure V CSP Report	13/1	1.00		Cont.	0	(
Trail Name	Area	Status	Last Report	Who	Maintain	
Toner Road F.R. 636	Pagosa Springs	Closed - no snow	3/14/2015	Donna Batchelor	Ø	
#1 Gould - Calamity Pass	Walden	Open	3/16/2015	RANDY MILLER	Ø	
#1 West Mancos	Durango	Open	3/4/2015	ROGER A PENNINGTON	Ø	
	Durango Walden	Open Open	3/4/2015 3/16/2015	ROGER A PENNINGTON RANDY MILLER	0	
#1 West Mancos #2 Custer Draw - Bockman #2 Missionary Ridge-					-	

The grid lists trails in alphabetical order by Trail Name. It also shows the area, status, date of last report, who filed that report and the standard Maintain column with an Edit link.

Clicking the **Configure** button displays a drop-down menu with the following options:

Areas

Selecting Areas displays a screen similar to the following is displayed:

Home > CSA Trail G	rooming > Trail Manager > Areas	
This is a list of tra area. Click on 'Me	il areas, and the club responsible for that area (if specified). Click "A mbers' to select members who are authorized to modify reports for	dd Area" to create a new trail area, or "Edit" to edit an existing trail area. Click "Delete" to remove a trail that trail area.
Add Area	aller d	Carol Carol
Area Name	Club Responsible	Maintain 📑
Avon	HOLY CROSS POWDER HOUNDS-AVON	
Buena Vista	BUENA VISTA SNOWMOBILE CLUB-BUENA VISTA	
Carbondale	MT SOPRIS SNOWMOBILE CLUB-CARBONDALE	
Cedaredge	DELTA SNOKRUSERS-DELTA / CEDAREDGE	

This screen lists the major trail areas; each one becomes an icon on the Google map.

Clicking the Add Area button displays the following popup screen:

	e name, latitude, and longitude of the area. Optionally specify the club sponsible for this area. Click 'Save' when finished.
Name	Creede
Club	NORTH FORK SNOWMOBILE CLUB-HOTCHKISS
Latitude	37.816367
Longitude	-106.927679

Each area has a name and responsible club; the latitude and longitude define where the area icon is displayed on the map. Click **Save** your changes to save and return to the main Areas grid, or **Cancel** to return without saving.

The **Edit** icon displays the same screen as above. Click the **Groomer** icon to display the following popup form to manage the list of authorized groomers for an area. A dialog similar to the following will be displayed:

file repor remove a	Id Groomer" to select a club member to ts for this area. Click the "Remove" link to a groomer from the list. Click "Done" to ous page.
Add Grooi Groomer	mer Maintain
Bob Kukuk	

Click the **Add Groomer** button to add a groomer. Click the **Delete** icon to remove a groomer.

Groomers in this list will see the Trail edit icon in the top-right corner of the trail listing.

Trail Status

Select **Configure – Trail Status** to define the list of allowable trail status values. This is a standard ClubExpress lookup screen.

There are four status Type values:

- Closed the trail is not open for the specified reason. Displays using a red octagon, similar to a "Stop" sign.
- Partially Open. Displays using a yellow triangle.
- Open. Displays using a green circle.
- Hidden the trail will not be displayed on the map; it's no longer available for some reason (temporary or permanent.)

Grooming Status

Select **Configure – Grooming Status** to define the list of allowable grooming status values. This is a standard ClubExpress lookup screen.

Add Trail

Select Configure - Add Trail to add a new trail to the list. You will see the following screen:

	tion related to a snowmobiling trail. If a map link is specified, users will be able m the list of trails in the area (these maps are set up in the documents e' when finished.
Name	#1 West Mancos
Descripion	There are two-approx 40 mile loops here that area groomed with lots of other non groomed trails. This trail is a heavily used MULTIPLE USE TRAIL. Dog Sledders, Cross Country Skiers & Snowmobilers being the main users. Be curtious! Windy Gap to Gold Run any off trail riding between these two points be prepared for Avalanches. The rest of the areas are lots of meadows to play in and lots of off trail and road riding.
Map Link	Durango - West Mancos Trail Map
Area	Durango
Status	Open 🗘
Grooming Status	Not Groomed - weather
	Save 🖋 Cancel 🗶

Specify the trail name and description. The Map Link field points to a document in a defined folder in the Document Library module designated for trail maps. Specify the Area under which this trail should appear, its initial status and grooming status, and click **Save** to save the new trail, or **Cancel** to close the dialog without saving.

Trails can be edited by clicking the **Edit** (pencil) icon the Maintain column. The same screen shown above is displayed.

To remove a trail from the module, change its status to a status you've defined of the "Hidden" type (there could be more than one reason why a trail would be hidden.)

CSP Report

The system also includes a standard report in a format requested by the state supervising authority. This report can be modified if necessary for your local state.

More configurations

This module allows the following options to be configured:

- Keyword for a trail user (e.g. snowmobile, bike, horse)
- Title for the main page
- Disclaimer text to be placed under the map
- Map icon (e.g. a snowflake or a bike or a horse)
- Trail status label (e.g. "Grooming Status" or "Trail Conditions")
- Trail status date label (e.g. "Date Groomed" or "Date Checked")

There is no user interface for these options. Let us know what terms you want to use and we will configure them for you.

The system also needs a folder in the Documents Library module where trail maps are stored. Once this folder has been defined, notify us and we will configure it.

The Trail Status Widget

When this module is activated, a new widget is added to the Advanced Content Editor. When this widget is added to the home page of your website or to a content box, or even a custom web page, it will list the status of each trail defined in the module.

TRAIL STATUS			
Arlington Heights Trail			
	Open		
Buffalo Grove Trail			
	Partially Open		
Evanston Trail	Open		

If the list is longer than the specified height, a scroll bar will appear along the left edge.

Clicking the trail name jumps the user to that trail's detail page within the module.

Two Passwords Feature

Specifying Two Passwords	1283
Configuring Member Types	.1284
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The Federal Government now requires increased security requirements for websites that are used by federal employees, especially those people employed in sensitive situations (for example, the US State Department.)

To satisfy this requirement, we now offer a double password login system, which can be limited to selected member type(s).

When these members log in using their standard username and password, the system will test the member type and if an appropriate type is found, a second password screen will be displayed. Members will not be able to login until a valid second password is provided. Unlike the primary password, this second password cannot be "remembered"; it must be entered every time.

When this option is enabled for a member type, members will see a new option on their **Profile** – **Username/Password** screen to change their second password (on the same screen where they change their username and initial password.)

We have also updated the user's "Forgot My Password" function and the admin "Reset Password" function that generates new temporary passwords for these members. The system also ensures that the initial and second passwords are not the same.

Activation: The one-time fee to activate this feature for your website is \$200.

Related Tasks

Configuring Member Types	
Specifying Two Passwords	
Logging In	

Specifying Two Passwords

When two passwords are required but only one is initially defined, the user will be able to login the first time using just the single password. But then the system displays the following screen to update both the initial password and the second password:



The second password must pass all of the following rules:

- Must be at least 10 characters long
- · Cannot be the same as your first password, user name, first name, or last name
- · Cannot contain sequences of more than two matching characters in a row

Your second password must pass at least three of these rules:

- Contain at least one lower-case letter
- · Contain at least one upper-case letter
- Contain at least one number
- Contain at least one special character

Configuring Member Types

When this feature is enabled, the **Add/Edit Member Type** screen is modified to include the following option (at the bottom of the screen shot):

General Settin	gs		
Name	Government Individual (10-14)	٠	
Description			
₿¢.			
	0 of 300 characters used		11
Duration	12 🚔 Month(s) 🔮		
Availability	New Members and Renewals		
Renewal	Use default settings \$		
Fee Change?	None 🗘		
Web Site Menu	< Default Member Menu > \$		
Apply Subgroup Fees	Every Time 🗘		
Financial Account	Master Membership Dues	\$	
Requires Approval?	OYes ●No		
Login Password	 Single Password (Normal Setting) Require Two Passwords (Extra Security) 		

Specify **Single Password** to use the normal setting for member logins, or **Require Two Passwords** to enable the extra security option.

Logging In

When members with two passwords login, the initial screen is the same as always:

Two Passwords Feature

Home → Login	
Login	
Please enter	your user name and password and click "Login".
User Name	icarson
Password	•
Remember m	e on this computer
Login 🖋	Cancel 🗙
Forgot My Userr	name/Password
Trouble logging	in? Click here for assistance.

The second login screen is then displayed:

Home > Login	
Login	
Please enter your user name and password and click "Login".	Your user name is not case-sensitive but your password is.
Second Password Submit Cancel X	Your membership requires ▲ a second password to log in
Forgot My Username/Password	
Trouble logging in? Click here for assistance.	

Virtual Membership Cards

Activation: The one-time fee to activate this module for your website is \$400. Note that virtual membership cards with a member photo are \$600.

ClubExpress provides a feature that allows members to download a virtual membership card. This card can have any design the club wants and can include many fields from the database:

Category	Available Fields
Names	Full name, reversed name, first name, last name, spouse full name, spouse reverse name, spouse first name, spouse last name, mailing name, salutation
Membership Info	Member number (number or code 39 bar code - no other code types), expiration date, join date, member type, member level (primary, secondary, tertiary - using the names the club has assigned)
Business Info	Member name or company name (if the member is part of a business membership, then the company name is displayed, otherwise the member name is shown), com- pany name
Subgroup Info	Subgroup name (can show chapter, region, or district name), chapter (this will only pick up one chapter if the member belongs to multiple)
Address Info	Mailing name, address 1, address 2, postal location (city, state, zip)
Miscellaneous	Answer to a selected additional data question, today's date, email address, static text (any text up to 50 characters)

Membership Card Data Fields

Here is a sample card:



How It Works

For virtual membership cards, members will see a **Download Membership Card** option on their individual Profile screens. When they click it, a card will be dynamically customized and displayed for them; they can either print it on a local color printer, or save the JPEG and then download it to a smartphone.

To get started, we need two JPEG files.

- 1. The first is the "blank" membership card that we'll install in the system.
- 2. The second is the same but with dummy data filled in. This will tell us what data should go where, font, size, etc.

Each file should be 1012px X 638px (3-3/8" x 2-1/8", which is credit card size at 300px/in.) Your designer can use full color right up to the edges (no need for a border.)

If the designer uses any custom fonts, we will also need the True-Type font files for installing on our Windows-based servers.

We need to know whether the cards should be enabled for secondary and tertiary members belonging to your membership.

Some clubs use secondary memberships for spouses while others simply list the spouse information as part of the primary membership; if this is the case, let us know if spouse cards should be enabled.

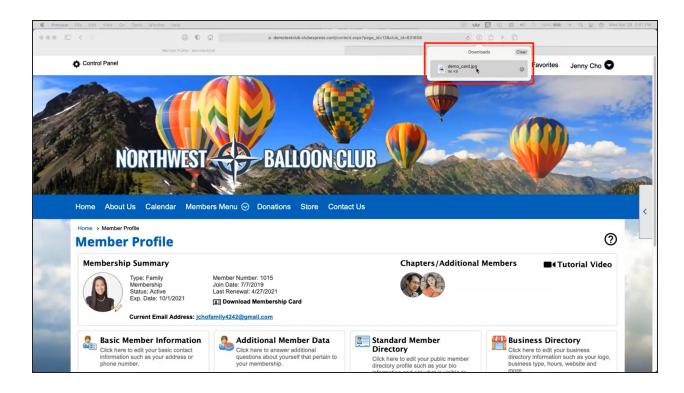
If your organization offers business memberships, virtual membership cards for those members can show the business name above the member's name.

Tips On Printing Your Membership Card

Printing from a Mac

Click the membership card link. Once the image has downloaded, select the image to open it.

Virtual Membership Cards



In the Print popup, select Orientation: Landscape, and Scale: 24%.

<< < 1	of 1	Printer: O Sal	es Area D1350	0
		Presets: Single	Sided	0
		Copies: 1	C Two-Sided	
	IEMBERSHIP	Pages: O All	n: 1 to: 1	
102	RIRUT	Paper Size: US Let	tter 8.50 by 11.00 inches	٢
		Orientation: 🔿 🛃 P	Portrait 🔘 🕩 Landscape	
		Prev	view 😒	
		Auto Rotate		
		O Scale:	24%	
		Scale to Fit:	Print Entire Image Fill Entire Paper	
		Copies per page:	1	
?	Hide Details	PDF 🔁	Cancel	Print

Select the **Print** button to print a copy of your card.

Printing from Windows

Windows users have two options to print their membership cards:

Option 1: Click the **membership card link**.

Find the image in your *downloaded items*. The location of the downloaded card will vary depending on the browser you are using. **Open** the image using *Windows Photo Viewer*.

Select the **Print** icon, or enter **CTRL + P**.



Select the appropriate printer, then select Photo Size -2 x 3 in. (Wallet), and Fit - Shrink to fit.

demo_card (4).jpg - Print	×
Printer	
Microsoft Print to PDF ~	\leftarrow 1 / 1 \rightarrow 🗔
Let the app change my printing preferences	
on On	
Orientation	
Landscape ~	
Paper size	
Letter 8.50° x 11.00°	
Photo size	
2 × 3 in. (Wallet) V	Martis Smith 101/2021 Fanity Membership demo2iub dubespress.com
Page Margins	
Normal	
Fit	
Shrink to fit 🛛 🗸	
More settings	
Print Cancel	

Select the **Print** button to print a copy of your card.

Option 2: Click the membership card link.

Find the image in your *downloaded items*. The location of the downloaded card will vary depending on the browser you are using. **Right click** the image and select **Print**.

In the *Print Pictures* popup, select **Wallet** from the list of size options on the right-hand side, and make sure **Fit picture to frame** is *not selected*.

Virtual Membership Cards

						×
Print Pictures						Ŷ
How do you want to print	your pictures	?				
Printe <u>r</u> :	Paper <u>s</u> ize:	<u>Q</u> uality:				0
Microsoft Print to PDF $\qquad \lor$	Letter \lor	600 x 6	00	~		Ø
MEMBE Member Market Market Market Market Market Member Market Member Mem	RSHIP Page				3.5 x 5 in. (4) Wallet (9) Contact sheet (35)	~
Copies of each picture: 1	Eit picture to	frame			Options	
			1		<u>P</u> rint Cance	I

Optionally, select the number of copies you would like to print, up to 9 copies of the same card per page.

Select the **Print** button to print a copy of your card.

Web Services

ClubExpress plans to offer a full suite of API functions, to allow outside developers to create applications that can access data for a specific club or association.

The first of these functions is a membership verification web service. This function can be used to verify whether someone is an active member of the club or association, based on either their username and password, or their email address and first name.

Activation: The one-time fee to activate this module for your website is \$200.

Member Lookup

The base url to access the service is: <u>https://ws.clubexpress.com/member_status.ashx?cid=<CLUB_</u> ID>&key=<KEY>

CLUB_ID is a "club_id", an internal value.

KEY is a unique value, also internal, that we generate for you.

To this url, you will add the parameters needed for the lookup. These can be either a user name ('&u') AND password ('&p'); or an email address ('&e') AND first name ('&f'); or an email address ('&e) AND member number ('&n'). So, for example, to look yourself up by email and first name, you would add the following to the base URL

'&e=<EMAIL_ADDRESS>&f=<FIRST_NAME>'

The web service will return a single number. This number represents either the status of the matched member, or an error code. (Some of these status codes will not apply to a specific club's membership, but here is the complete list, just in case.) The possible results are:

- 1 = active member found
- 2 = expired member found
- 3 = dropped member
- 5 = frozen member
- 6 = bulk loaded member

- 7 = pending member
- 8 = prospective member
- 10 = trial member
- 0 = internal error occurred (ClubExpress problem)
- -1 = more than one match found (applies to email lookup only see note below)
- -2 = no match found

-3 = invalid request (user name without password, or email without first name)

When we do lookups by user name and password, there can be at most one matching member. When we match by email and first name, it is possible that multiple members will match. If all matching members have the same status, we will return that status. If they are different, we will return the -1 code.

The usage rules are:

- Only GET requests (no POST).
- Only HTTPS (SSL) requests (no HTTP)
- If the request does not use HTTPS, or if it is missing the 'CLUB_ID' or 'KEY' parameters, or if they don't match, you will receive an http 'Not Authorized' error (403)
- A POST request will result in a 404 error.
- All parameters must be url encoded (note the encoding in the key value, and the email address in the samples).
- We must receive either a user name and password, or an email and first name. Otherwise, we will return the invalid request code (-3).
- If you supply more parameters than required, we will ignore the extras. If both user name and password are supplied, we will use them and ignore any email and first name that are sent.

If you receive an internal error code (0), we get an email from the system so we know there is a problem.

JavaScript Object Notation (JSON) Member Data Feed

A file is created once per day (replacing the previous day's file) and is accessible at a URL provided (but not linked anywhere on your website).

The file contains the following fields for each Active member in your database:

- First Name
- Last Name
- Middle Initial
- Spouse First Name

- Member Number
- Address1
- Address2
- City
- State
- Zip
- Latitude
- Longitude
- Phone
- Mobile Phone
- Email Address
- Member ID

Note: Not member number; the Member ID is used to link to the member's profile.

- Photo File Name
- Member Type

Note: You must notify us if you wish to use the JSON file so we can perform a few steps manually on our end.

Getting Started for Users

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, sororities and alumni clubs, community service clubs, and professional and trade associations of all kinds.

ClubExpress allows you to move the administration of your club or association entirely online. And if your club or association has chapters, districts and regions, ClubExpress has powerful support for 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. When administrators log in, they have access to additional screens and functions for managing the organization.

These instructions are designed for club or association members only. They do not include discussion of coordinator and administration functions, which are described in the Administrator Instructions.

Subgroups: 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.

Logging In

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

Logging In

kme i Login		۵
Login		V
Please enter your user name and pass	iord and click "Login". Your user name is not case-sensitive but your password is. Click	"Cancel" to return to the Home Page.
User Name	•	
Password	•	
Remember	ne on this computer	
NOTE Do not sel	ct this option on a shared or public computer	
Login 🗸 Cancel 🗶 For	pot My Username/Password 🔒	
ouble logging in? <u>Click here</u> for a	ssistance.	

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

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 dialog is displayed:

Enter your emainame and a ne	ername/Password ail address below. If your email address is on file, your user we password will be emailed to you. If your email address is than one member, you may also enter your first name to help	×
Email Address First Name		
	OK 🖌	-

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 will not generate a new password. If this occurs, or if your email address is no longer valid, **contact a club or association officer to have your password reset manually**.

Logging in as a Different User

If you use a shared computer, there is an option on the drop-down name panel to log in as a different user:



When you use this option, any Remember Me setting is ignored and you will see the Login screen to enter the new username and password.

Privacy Options

As an existing member, when you login the first time only, you may see a screen similar to the following:

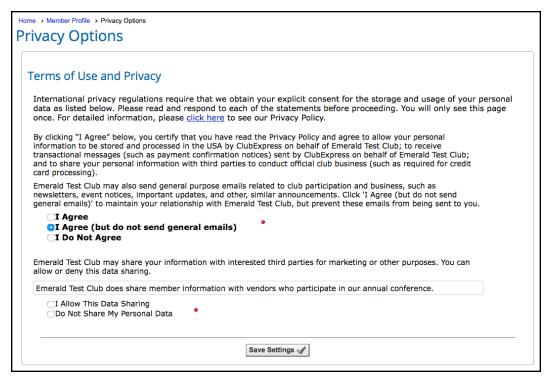
r	ivacy Options
	Terms of Use and Privacy
	International privacy regulations require that we obtain your explicit consent for the storage and usage of your personal data as listed below. Please read and respond to each of the statements before proceeding. You will only see this page once. For detailed information, please <u>click here</u> to see our Privacy Policy.
	By clicking "I Agree" below, you certify that you have read the Privacy Policy and agree to allow your personal information to be stored and processed in the USA by ClubExpress on behalf of Emerald Test Club; to receive transactional messages (such as payment confirmation notices) sent by ClubExpress on behalf of Emerald Test Club; and to share your personal information with third parties to conduct official club business (such as required for credit card processing).
	Emerald Test Club may also send general purpose emails related to club participation and business, such as newsletters, event notices, important updates, and other, similar announcements. Click 'I Agree (but do not send general emails)' to maintain your relationship with Emerald Test Club, but prevent these emails from being sent to you.
	⊂I Agree ⊂I Agree (but do not send general emails) ⊂I Do Not Agree

You are asked to consent to the following 3 provisions:

- That your personal information will be stored and processed in the USA by ClubExpress on behalf of your club or association.
- That you will receive transactional emails (such as renewal notices or payment confirmations) sent by ClubExpress on behalf of your club or association.
- That your personal data will be shared with third parties to allow your club or association to conduct its official business (such as credit card processing.)

You must agree to this option as a condition of membership.

When you click **I Agree** or **I Agree (but do not send general emails)**, the screen will update and may show an additional question:



The next question gives you the option to accept general purposes emails concerning club or association business, such as a newsletters or event notices.

If your club or association shares personal data with third parties for marketing or fund-raising purposes, the final question allows you to opt in or out of having your personal data included in such lists. You may see some additional text from your organization explaining how and why they share such information and why it's important for your personal data to be included. If your club or association does not share personal data for this purpose, this question will not appear.

You can change these options at any time by going to the Privacy Options screen on your personal Profile.

Click **Save Settings** to save these changes and proceed into the member section of the website.

If you are not willing to agree to these terms, you cannot continue your membership. Your club or association has chosen ClubExpress to maintain its member records and the terms listed above are required for us to fulfill our contractual responsibilities. You have the option of simply cancelling your membership or of being removed completely from the database.

If you click I Do Not Agree, you will see the following screen:

me Member Profile Privacy Options
rivacy Options
Terms of Use and Privacy
International privacy regulations require that we obtain your explicit consent for the storage and usage of your personal data as listed below. Please read and respond to each of the statements before proceeding. You will only see this page once. For detailed information, please <u>click here</u> to see our Privacy Policy.
By clicking "I Agree" below, you certify that you have read the Privacy Policy and agree to allow your personal information to be stored and processed in the USA by ClubExpress on behalf of Emerald Test Club; to receive transactional messages (such as payment confirmation notices) sent by ClubExpress on behalf of Emerald Test Club; and to share your personal information with third parties to conduct official club business (such as required for credit card processing).
Emerald Test Club may also send general purpose emails related to club participation and business, such as newsletters, event notices, important updates, and other, similar announcements. Click 'I Agree (but do not send general emails)' to maintain your relationship with Emerald Test Club, but prevent these emails from being sent to you.
○I Agree ○I Agree (but do not send general emails) ②I Do Not Agree
If you do not agree to these terms, and wish to cancel your membership and/or be removed from the database completely, use one of the buttons below. Your membership will be canceled immediately. If you request removal, we will process your request as quickly as possible.
Cancel My Membership
If you no longer wish to be a member of Emerald Test Club, click the button below. Your membership will be canceled. You will no longer be able to log in to the website, and you will not receive renewal reminders or other communications.
Cancel My Membership
Remove Me Completely
You have the right to be removed from the Emerald Test Club database. Click the button below to begin this process. Your membership will be canceled immedately. You will receive an email confirming your request, and your personally identifiable information will be removed as soon as possible. Please note that your request may be denied if Emerald Test Club has a compelling legal or business reason to do so. In this case, you will receive another email explaining the decision, which you can appeal if necessary.
Remove Me Completely

- **Cancel My Membership** cancel your membership immediately. You will be prompted to confirm this action. You will no longer be able to log in to the website. You will not be further charged and you will not receive any more communications from the organization. Note however that if you change your mind, this action can be reversed and your membership reinstated.
- **Remove Me Completely** cancel your membership and have your personal data removed completely from the organization's database. This option conforms to international regulations and the "Right to be Forgotten". You will be prompted to confirm this action. Your membership will be canceled immediately and your "remove me" request will be submitted to the club or association for approval. Note that they have the right to decline this request but must provide a reason. You then have the right to appeal this decision with your local Data Processing Authority.
 - If the request is approved, you will be notified by email. All personally identifiable information will be deleted from the database.
 - Your club may need to maintain accurate records such as transactions, payments, event attendance, etc.
 - This information will be retained but it will also be anonymized.
 - This decision cannot be reversed. If you change your mind you will need to rejoin the organization from the beginning.

Pending Payments and Renewals

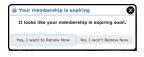
When members login, if they have a pending payment, they will see the following popup message:

I You have a pending payment				
It looks like you have at least one pending payment.				
Yes, I want to make a Payment	No, I won't Pay Now			
	no, i non er dy non			

Members can click the **Yes**,... button to jump directly to the Pending Payment screen, or the **No**,... button to ignore the payment and continue with what they were doing.

This dialog encourages members to complete pending payments and will help clubs and associations collect funds sooner.

If members logging in are in the Renewal Cycle (where the first renewal notice has been sent out) they will see the following popup message:



Members can click the **Yes**,... button to jump directly to the first page of the renewal wizard, or the **No**,... button to hold off on renewing.

This dialog encourages members to renew more quickly once the initial notices go out. It will help clubs and associations accelerate their renewals.

Turning Off These Notices

These popup notices can be turned off by an administrator on the Control Panel – Website tab – Setup section – Website Options screen.

Security

Your website should always be displayed in secure mode (https://) using TLS 1.2, the most current and approved SSL standard. Users must be running a reasonably recent computer or mobile device and browser:

- Windows Users you must have Windows 7 or newer. Windows XP and Vista will not work. And in some cases, your browser may need to be manually configured; see below.
- Mac Users You must have OS X 10.9 ("Mavericks") or newer.
- Android Users Version 5.0 ("Lollipop") or newer.
- iOS Users Version 5.0 or newer

Browser Support:

- Google Chrome (version 30 or higher), Mozilla Firefox (version 27 or higher), Apple Safari (version 7 or higher), Microsoft Edge (all versions), Microsoft Internet Explorer (version 11 or higher)
- If you are still using IE 8-10, TLS 1.2 may be available but is not enabled by default. Select Tools Internet Options Advanced, then scroll to the end of the list. Uncheck the SSL, TLS 1.0 and TLS 1.1
 boxes, check the TLS 1.2 box and save.

Cookies

Logging in to the web site requires that your web browser allows "cookies". A cookie is a small bit of info stored on your computer by the web site which allows the site to remember you after you have logged in. This cookie contains no personal information, and cannot be used by any other web site.

The following sections explain how to enable cookies for the most common web browsers. After following these instructions, try to log in again. If you still have a problem logging in, please call ClubExpress toll-free at 1-866-HLP-CLUB (457-2582 - outside the US, +1 847-255-0210) and we will be happy to work with you to resolve it.

If you are using Internet Explorer, please follow these directions:

Logging In

- Select "Tools Internet Options" from the browser menu. A box title "Internet Options" will appear.
- Select the "Privacy" tab. If you do not see the "Privacy" tab, you are probably using a business computer configured with a restrictive security policy. Contact your network administrator to see if it is possible for you to access the site with this computer.
- Click the "Advanced" button. A box titled "Advanced Privacy Settings" will appear.
- Check the "Override automatic cookie handling" checkbox.
- Select "Accept" under "First Party Cookies".
- Select "Block" or "Prompt" under "Third Party Cookies". (This is optional, but recommended.)
- Check the "Always allow session cookies" checkbox.
- Press the "OK" button in both the "Advanced Privacy Settings" and "Internet Options" popups.

If you are using Windows 10 with the new Edge browser:

- Press the three-dot More Actions button on the top right
- Select Settings from the menu that shows up.
- Tap or click View Advanced Settings. You'll need to sll down to the bottom of the page
- Press the dropdown arrow under the Cookies field
- Select Block Only Third Party Cookies
- After picking your option, you can exit the settings panel by clicking anywhere else on the page.

If you are using Google Chrome:

- Select the Chrome menu icon Chrome menu.
- Select Settings.
- Near the bottom of the page, select Show Advanced Settings.
- In the "Privacy" section, select Content settings.
- Select Allow local data to be set (recommended).
- Select Done.

If you are using Mozilla Firefox, please follow these directions:

- Click the menu button in the top right corner and choose Options.
- Select the Privacy panel.
- Under History, set "Firefox will" to Use custom settings for history.
- Check mark Accept cookies from sites to enable Cookies.
- Choose how long cookies are allowed to be stored:
- Keep until: they expire: Each cookie will be removed when it reaches its expiration date, which is set by the site that sent the cookie.
- Keep until: I close Firefox: The cookies that are stored on your computer will be removed when Firefox is closed.
- Keep until: ask me every time: Displays an alert every time a website tries to send a cookie, and asks you whether or not you want to store it.
- Close the Options tab. Any changes you've made will automatically be saved.

If you are using Safari, please follow these directions:

- Select "Safari Preferences" from the menu. The "Preferences" settings box will appear.
- Click on the "Security" tab.

Logging In

- For the "Accept Cookies" option, select "Only from sites you navigate to" (recommended) or "Always".
- Close the "Preferences" box.

If you are using Netscape Navigator, please follow these directions:

- Select "Tools Options" from the browser menu. A box title "Options" will appear.
- Click on the "Site Controls" option.
- Check the "Allow cookies" checkbox.
- Check the "From originating site only" checkbox. (This is optional, but recommended.)
- Press the "OK" button.

If you are using the Opera browser, please follow these directions:

- Select "Tools Preferences" from the browser menu. A box title "Preferences" will appear.
- Click on the "Advanced" tab.
- Click on the "Cookies" tab.
- Check the "Allow cookies" checkbox.
- Check the "From originating site only" checkbox. (This is optional, but recommended.)
- Press the "OK" button.

Making a Payment

When making any payment, the screen will show one or more payments pending, including the detail for each. If there is only one payment shown, it will be checked. If multiple payments are shown, none of them will be checked; you must check at least one to pay, or select the Check All box to select all items.

Make Payment for Marti	n Smith (1)			?
	eckboxes to select which payment		vailable payment options are in the "Payment Method" dropdown list. Make a selection and fol	llow
Check All				
□ Donation (6/30/2021 Ref # 1052) Repair Clubhouse Roof		Due 30.00		
Repair Clubhouse Roof	30.00 Transaction Total: 30.00			
Event Registration (7/9/2021 Ref ≠ 1053) Jul 16, 2021 - Ballooning for Kids!		Due 10.00		
Martin Smith - Ballooning for Kids!	10.00 Transaction Total: 10.00			
Donation				
(7/9/2021 Ref # 1054) Wildfire Relief		Due 50.00		
Wildfire Relief	50.00 Transaction Total: 50.00			
	Total Select	ted For Payment	US\$ 0.00	
	Available Credit 175.00	-	0.00 /	
		Net Payment	US\$ 0.00	
C Other Payment Options				
You can also remit payment via Venmo using the following	account: ABC12345			
Refund Policy				
All payments are final. We do not provide refunds for review the charge(s) checked above and be sure you			ations, donations, storefront purchases, or other misc. charges. Please careful	ly
The refund policy is set by demotestclub. If refunds are av	ailable, requests must be direc	cted to demotestclub - the	ey cannot be handled by ClubExpress.	
	Print Invoice (PDF)	Print This Page	Submit Payment 🖌	
		Pay Later 🗙		

Credits

If any credits are available, they will be automatically applied up to the amount of the pending payment. ANy additional amount is available to be used or a future transaction.

Discount Coupons

Discount coupons can be applied on the payment page. If there are published coupons that apply to the transaction(s) on the page, users will see a field to enter a coupon code.

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.

Scheduled Payments

Some event registrations allow a partial payment to be made on a schedule specified by the event creator. If an event has an associated payment schedule, the check box next to the transaction is grayed out and you may check one or more individual lines. You may make more than one payment at a time, but only in chronological order.

Payment Methods

Members and non-members can choose from the following payment methods:

- Credit card processed on this website
- PayPal (if enabled)
- Print invoice to send with check

Buttons at the bottom of the screen:

- **Submit Payment** will appear for credit card transactions. **Done** will appear for all other payment types when you are just recording a payment received.
- **Print Invoice (Report)** allows an admin to print an invoice as a report. When members or non-members view this screen, they will see **Print Invoice (PDF)**, a slightly different option that directly displays a PDF invoice.
- **Print this Page** generates a direct, printable version of the page.
- **Pay Later** is the equivalent of the "Cancel" function, allowing you to leave this page without making or recording a payment. Note that if one of the listed event registration transactions requires Immediate Payment (a special option available for events only), this button will not be displayed. A payment must be made or recorded.

Member Profile

The Member Profile system is where you modify your personal information and preferences as a member of the club or association. Availability of these options depends on the options configured by your club.

lembership Summary		Chapters/Additional Members	Tutorial Video
Type: Family Membership Status: Active Exp. Date: 10/1/2021 Payment Due Current Email Address: ma	Member Number: 1 Join Date: 7/7/2002 Last Renewal: N/A I Download Membership Card Irty_smith42@gmail.com	1 more	
Basic Member Information Click here to edit your basic contact information such as your address or phone number.	Additional Member Data Click here to answer additional questions about yourself that pertain to your membership.	Click here to edit your public member directory profile such as your bio information and set what is visible to members or the public.	Business Directory Click here to edit your business directory information such as your logo business type, hours, website and more.
User Name / Password Click here to change your login information.	Mobile App Click here to view or change channel memberships. Click here to view or edit your mobile profile.		
More Member Options Privacy/Cancel/Remove Credit Card Optional Additional Charges Chapters/Additional Members Achievements Attachments Gift Memberships	Histories Transaction History Payment/Credit History Event History Donation History Reservation History Volunteering	Forums Forum General Preferences Forum Memberships Thread Subscriptions	Vour Website Functions Interests Photo Albums Collectibles Download Bank Blogs

Access Your Member Profile	
Renew/Cancel Your Membership	
Bad Email Address(es)	
Basic Member Information	
Additional Member Data	
Member Directory	
Business Directory	
Removing Your Directory Listing	
Histories	

User Name and Password	
More Member Options	
Mobile App Settings	
Forums	
Your Website Functions	

Access 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 your name and an arrow. Hover over either of these elements to see the following drop-down panel:



This panel allows you to access your profile screen or directory listing. If there's a payment due, click this link (or the red "\$" icon above) to jump to the Pending Payment screen. If it's time to renew, this option will also be available.

Click the photo to jump the Member Bio add/edit screen to update your bio, photo, social networking links or visibility.

You can also logout completely or login as a different user, for example, if you're on a shared computer at home.

Click the **Profile** option to enter the Member Profile.

Renew/Cancel Your Membership

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 belo necessary changes. The list of available membership types comprises all available types, inclu are not available to members when they join (such as complimentary memberships.) Then click at the bottom of the page to continue to the next step.	ding those which
Membership Status Expired 7/1/2004	
Membership Type Family - \$40.00 🗸	
All people living in a household.	
New Expiration Date 12/29/2005	
	Current Total \$40.00
Cancel 🗶 Next 🕨	

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 > Make Payment	
Make Payment for Sue Anderson	
The list below shows outstanding payments due for the current member. Use the checkboxes to select which payments to make. The available payment of dropdown list. Make a selection and follow the instructions. nbsp; To make a partial payment on any of the items, click 🖋 to change amount.	options are in the "Payment Method"
🛛 Sign Up	
(12/1/2017 Ref # 3777) Due 40.00 Pay 40.00 /	
Membership (Individual Member - Active) 40.00	
Transaction Total: 40.00	
Total Selected For Payment \$40.00	
Have a coupon? Enter the code:	
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	
All payments are final. We do not provide refunds for membership signups and renewals, event registrations, donations, storefront purchases, or other misc. charges. Please carefully review the charge(s) checked above and be sure you know what you are paying for.	
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.	
Print Invoice (Report) Print This Page Submit Payment I Cancel Payment X	

This screen shows one or more payments pending, including the detail for each. If there is only one payment shown, it will be checked. If multiple payments are shown, none of them will be checked; you must check at least one to pay.

Credits

If you have any pending credits, they will be automatically applied, up to the amount of the pending payment. Any additional amount is available to be used for a future transaction.

Discount Coupons

If you have a discount coupon, it can also be applied on the Payments page. If there are published coupons that apply to the transaction(s) on the page, you will see a field to enter the coupon code:

Total Selected For Payment	\$ 50.00
Have a coupon? Enter the code: Appl	У

Once the code has been entered, the screen changes as follows:

Total Selected For Payment	\$ 50.00
Any event Coupon Applied	\$ 5.00
Net Payment	\$ 45.00

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 **Edit** 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 Methods

For members, the Payment Options drop-down will only appear if credit cards and PayPal have been enabled. If only one of them has been enabled, it will be the only payment option.

To pay online securely by credit card, members 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. When you have entered the card information (which is not saved in the system), the **Submit Payment** button is enabled. Click to submit the payment to your club's merchant processor. After a couple of seconds, a page will usually appear confirming that your payment was processed. Click the **Done** button to return to the starting page (for example, the event that you registered for, or the Donations module main page.)

If there was a problem processing your payment, an error message will be displayed and you'll be returned to the payment page to fix the problem.

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.

Your club or association may also have enabled PayPal, allowing you to pay using funds accessible through your PayPal account. If you select this option, you will then see a PayPal popup window to login to your PayPal account. You can then pick the source of funds (a bank account, a credit card, or even a PayPal balance.) The funds then flow into your club's or association's PayPal account. Once the transaction is complete, you are returned to your ClubExpress website and to the payment summary page. PayPal will send you a separate receipt.

If your club allows you to print an invoice and mail a check, click the **Print Invoice (PDF)** button at the bottom of the screen. It will display a PDF invoice in a new tab of your browser.

Admins will instead see a **Print Invoice (Report)** button at the bottom of the screen, which allows them to print an invoice formatted for a standard #9 or #10 double window envelope.

There is also a simpler **Print this Page** button to print the page in a default layout.

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

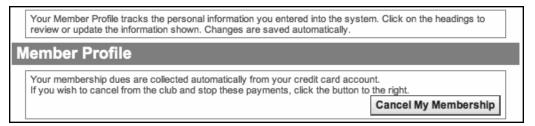
If you choose to pay by check, or if you select credit card but the transaction does not complete, your payment is flagged as Pending and can be "revived" at any time. If you have pending payments, you will see a **Payments** link when you log in as well as on the Profile screen. Clicking it takes you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

Click the **Cancel Payment** button to close this screen and return to the previous screen without making an immediate payment.

Immediate Payment Required

If you are registering for an event where immediate payment is required, you will see a special warning dialog. You have 30 minutes to complete payment by credit card before the event registration is automatically canceled. The **Print Invoice** option is not shown.

Automated Membership Renewal/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.

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 explicitly cancel your membership, effectively resigning from the club. To do so, click the **Cancel My Membership** button on your Member Profile screen.

Administrators: When clubs and associations use this option, we require them to have their own merchant account.

Bad Email Address(es)

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

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:

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.

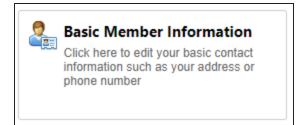
Select the appropriate action from the choices in the right-most column:

- 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.

Basic Member Information

In the Member Profile, the Basic Member Information option allows you to edit or update your contact information.



Click **Basic Member Information** to modify your name, address(s), phone number(s) work information, and email address. If the membership is a business membership, click **Company Profile** to manage the contact information for the company and the primary member contact. You will see a screen similar to either of the following:

Contact Information

Contact In	formation ⑦
	enter more contact information than was supplied in the Membership Application. The Secondary Address can be used if you spend a significant part of the year living at another location. Use the virale this address in place of the Primary Address.
General In	formation
Member Number	
Salutation	Select
First Name	Martin
Middle Initial	
Last Name	Smith
Gender	● Female O Male O Non - Binary / Other ●
Pronouns	< No Preference > V
Birthday	9/13/1949
Primary Ac	ldress
Country	United States of America V Show All
Address 1	123 Fourth Street
Address 2	
City	Chicago •
State	Illinois 🗸 •
Zip Code	60601 ·
Timezone	Central Time (US & Canada) (UTC-06:00) V Show All

Company Profile

Contact Info	rmation
Betsy Vernon	
This page allows you to ente	r more contact information for the member than was required in the Membership Application.
Company	
	Betsy's Ballooning School
Company Website	
Company Phone	
Company Toll-Free Phone	
Company Fax	
Company Ad	dress
Country	United States of America 🗸 Show All
Address 1	1051 Perimeter Dr
Address 2	
City	Schaumburg
State	Illinois 🗸
Zip Code	60173
Timezone	Central Time (US & Canada) (UTC-06:00) 🔹 Show All
Member Con	tact
Member Number	₽7 •
Salutation	Select
First Name	Betsy •
Middle Initial	
Last Name	Vernon
Pronouns	(She/Her/Hers) V
Occupation/Title	Owner
Email Address	betsy@email.com
Mobile Phone	
Mailing Name	Betsy Vernon
Enter the	e name of this individual as you would prefer it to appear on mailing labels, or leave it blank and the system will automatically provide a suggested default.

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.

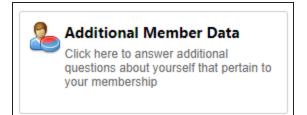
Required fields are indicated with a red dot. The Gender, Nickname, Spouse First and Last Name, Secondary Address and Work Information fields are optional and may not be visible if your club or association is choosing not to collect this information.

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. You may also see a panel to collect information on an Emergency Contact Person.

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

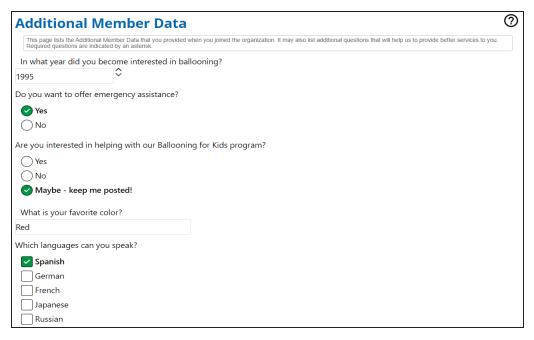
Additional Member Data

In the Member Profile, the Additional Member Data card allows you to provide answers to specific questions configured by your club or association.



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:



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

Clicking the photo or member's name displays the Bio page, shown below. This option is only available if members have agreed to display more than the lowest level of information (name, city and state only.)

Member Bio		0
		Contact Info Personal Info Additional Info Bio Photo Albums Interests Blogs Achievements Collectibles
Martin Smith		⊠ marty_smith42@gmail.com
Smith and Compar Chicago, IL	ny President	€ 630-555-1212 III vCard ⑦
Contact Informat	tion	1
Member Number	1	
Location	Chicago, IL	
Email Address	marty_smith42@gmail.com	<u>n</u>
Phone	630-555-1212	
Mobile Phone	555-555-1212	
Work Phone	333-555-2345	
Company	Smith and Company	
Title	President	
Address	123 Fourth Street Chicago, IL 60601 USA	
Alternate Address	1313 Mockingbird Lane New Orleans, LA 70112	
Personal Informa		

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.

Some clubs may also have custom versions of this module and screen, showing different fields and/or a different layout.

If you are viewing your own directory listing, you will have the ability to edit the content using the Edit (pencil) icon. You can also choose what level of contact information to display. You will see a screen similar to the following:

Member Photos, Social Networking and Bio



If the member has added their personal social networking links, banner and profile photos, those items will display at the top of the Bio screen. Select the edit icon to change visibility settings (how much information is shown to other members), add or edit the profile or banner photo, social networking links and the biography.

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 eight (8) levels are available:

ltem	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
Name		Not sho- wn	Shown	Shown	Shown	Shown	Show- n	Shown	Shown
City, State		Not sho-	Shown	Shown	Shown	Shown	Show- n	Shown	Shown

Item	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
	If con-	wn							
Metro Area	figured, shown in Contact Info	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Bio		Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Contact Info	Contact info entered in Basic Contact Info in the Mem- ber Pro- file	Not sho- wn	Not shown	Shown (member number, location, metro area)	Shown (member number, location, metro area, email)	Shown (member number, location, metro area, email, phone)	Show- n (mem- ber num- ber, loc- ation, metro area, email)	Shown (all con- tact inform- ation except email)	Shown
Per- sonal Info	Birthday (if enabled in the dir- ectory by an admin- istrator), spouse/- partner,	Not sho- wn	Not shown	Shown (includes birthday and spouse/- partner; personal website listed on card in	Shown (includes birthday and spouse/- partner; personal website listed on card in	Shown (includes birthday and spouse/- partner; personal website listed on card in	Show- n (inclu- des birth- day, per- sonal web- site)	Shown (includ- es birth- day, per- sonal web- site)	Shown

ltem	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
	personal website			member directory search results)	member directory search results)	member directory search results)			
Social Net- working	If enabled in the dir- ectory by an admin- istrator	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Email	Shown in Contact Info	Not sho- wn	Not shown	Not shown	Shown	Shown	Show- n	Not shown	Shown
Address	Primary address, sec- ondary address. When no address is shown, if the map is enabled you will be shown in the cen- ter of	Not sho- wn	Not shown	Not shown	Not shown	Not shown	Not shown	Shown	Shown

ltem	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
	your zip/- postal code.								
Phone	Primary, sec- ondary, mobile, work, toll-free work	Not sho- wn	Not shown	Not shown	Not shown	Shown (primary, mobile)	Show- n (all excep- t sec- ond- ary)	Shown	Shown
Addi- tional Member Data	If enabled, and if the answer visibility has been set to "Public " by an admin- istrator	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Achieve- ments	lf enabled	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Chapter- s	lf enabled	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Work Info	Includes com-	Not sho-	Not shown	Not shown;	Not shown;	Not shown;	Show- n	Shown	Shown

ltem	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
	pany, title, phone and toll- free phone	wn		where mem- bers join through their pro- fessional lives, only com- pany and location are shown	where mem- bers join through their pro- fessional lives, only com- pany and location are shown	where mem- bers join through their pro- fessional lives, only com- pany and location are shown			
Interest- s	If enabled, shows interests selected by the member	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Photo Albums	If enabled, shows photo albums created by the member	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown
Blogs	Shows blog posts	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown

ltem	ltem Notes	(0) Do not list me in the dir- ect- ory	(1) Show name, city and state only; no bio or con- tact inform- ation	(2) Show name, city, state and bio only; no contact inform- ation	(3) Show name, city, state, bio and email; no address, work inform- ation or phone	(4) Show name, city, state, bio, email and phone; no address or work info	(5) Show name, city, state, bio, email, phone and work info; no addre- ss	(6) Show all inform- ation except email	(7) Show all inform- ation
	authored by the member								
Col- lectibles	If enabled, shows col- lectible items owned by the member	Not sho- wn	Not shown	Shown	Shown	Shown	Show- n	Shown	Shown

Member Directory Visibility Settings

To add a banner photo, select the **Select Banner** Image button to upload a file, or use a stock photo.

Bio background	8	8
your own image b it should be appro image before uplo	image from the stock images we have provided, or upload y selecting "Upload My Own". If you upload your own image, priately sized and cropped. If you choose not to crop your bading, the image will be displayed centered at approximately fit the area. Top and bottom portions of very tall images will	•
Banner Type: Upload Image Stock Image	Upload a File: Allison-louise-xABgmIX4ABE-unsplash.jpg × Remove	
	Save Cancel 🗶	Ŧ

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 Contact Manager programs, including Outlook, Mozilla Thunderbird, etc. vCards can also be loaded directly into your mobile phone's Contacts app. 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.

Additional Information

Member Profile

Additional Inform	ation	
when did interest start?	1995	
Do you want to offer emergency asst.	Yes	
Participate in kids activities	Maybe - keep me posted!	
What is your favorite color	Red	

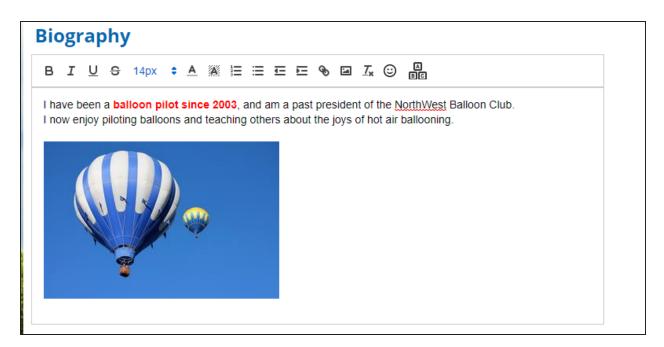
If additional member data has been collected from members, the Additional Information panel will list the questions along with the member's answers. Select the edit icon to change or update answers.

Additional Member Data 2				
This page lists the Additional Member Data that the member provided when he or she signed up. It may also list additional questions that you have asked members to answer as part of their membership profile. Required questions are indicated by an asterisk.				
In what year did you become interested in ballooning?				
1995				
Do you want to offer emergency assistance?				
⊘ Yes				
O No				
Are you interested in helping with our Ballooning for Kids program?				
O Yes				
○ No				
⊘ Maybe - keep me posted!				
Favorite balloon envelope color?				
⊖ Blue				
O Green				
⊘ Red				
O Yellow				
○ No preference				
O Other				
Save 🗸 Cancel 🗶	_			

Biography

Biography	/
I have been a balloon pilot since 2003 , and am a past president of the NorthWest Balloon Club. I now enjoy piloting balloons and teaching others about the joys of hot air ballooning.	

If the member has entered information in their bio it will be displayed in the Biography panel. Select the edit icon to change or update the bio.



Interests

Interests			
Ballooning			
Envelopes Burners			
Education			
Safety Junior Flyers			

If the club or association has enabled the Interests function, a member's interests will be shown in the Interests section. Select the edit icon to change or update the selected Interests. These interests can be tied to blast emails, forums and events, so make sure they are up to date!

Photo Albums

Photo Albums	/
Member has no photos to share	

If the club has enabled member-level photo albums, the system will place links to these photo albums in the appropriate section. Select the edit icon to change or update the photo albums.

Blogs

Blogs

Up In The Air All about Gear

If the member authors one or more blogs on the club's website, you will also see links for each blog. Select the edit icon to view blog entries or author another blog post.

I

Achievements

Achievements

Forklift Operator Certification Certified to operate heavy machinery

If the club or association has enabled the Achievements function, a member's listed achievements will also be shown in the Bio.

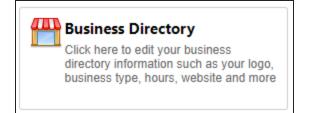
Collectibles



If the club or association has enabled Collectibles, the member's collectibles will be shown in the Bio. Select the edit icon to edit existing collectible items, or add new ones.

Business Directory

In the Member Profile, the Business Directory option allows you to edit or update your directory listing (if the Business Directory is enabled).



Selecting Business Directory displays the following edit screen:

Home > Member Profile > Bu	-	
Business	Information & Desc	ription
Enter the basic information a business description. Enter y	about your business here including a text description about your busin your business description using the editor, however you may want to	ness. Select a business category and type from the lists, you may continue adding keep the formatting simple.
Business Name	Smith Accounting, LLC	•
	Financial services and products Accounting	
	You are allowed up to 5 listings. 4 entries remaining	
Business Category	< Select >	
Business Type	< Select > 🗘 🔍	
Contact Name	Martin Smith	
Address 1	1100 S Roslle Rd	
Address 2		
City	Schaumburg	
State	Illinois O	
Zip Code	60193	
Country	UNITED STATES	
	Refresh Geocode	
Address Latitude	42.006729112945216	
Address Longitude	-88.080120101790129	
Phone	8664572582	
Toll Free	800-Bill-me	
Fax		
Email	geoffrey@clubexpress.com	
Website		
Facebook		
Twitter		
LinkedIn		
Youtube		
Pintrest		
Instagram		
Google Plus		

When this screen is first accessed, the system will copy over the member's personal contact information. But everything can be changed to show different information.

Example: The member may list a home address as part of her membership but could list a different address for the business.

Except for the Business Name, nothing on this screen is required. A member who works out of her home could leave the address fields blank and only show a phone number and email address. (Note that this means her icon would not appear on the Google map but it would be in the listing below the map.

Users can select one or more business categories and types from the drop-down lists. When a type is selected, an **Add** button will appear. Clicking this button displays the category and type below the list, with a **Delete** (trashcan icon). If there is a limit to the number of listings, this information will also be displayed.

Business Category	< Select >	\$			
Business Type	< Select > 🗘 🍳				
Business Category	< Select >	\$			
Business Type	< Select >	۰ 😂			
	Business to business	Accounting	1		
	Business to business	Hiring services	î,		
	Manuara allowed up to F	listings. 3 entries ren	aalala		

- Languages Spoken -may or may not appear, depending on your organization's preferences.
- Special Offers allows you to define any special deals or offers for members of the organization or even the public. (For example, "10% off your first order over \$50.00".)
- Show in Directory controls the overall visibility. A member's listing will not show in the Business Directory if this box is unchecked.
- Logo or Image allows users to upload a company logo or any image (for example, a photo of their storefront or an award that they won.)
- Description allows you to enter a fully formatted description of your business, the products and services you provide, your mission or values, the populations you serve, or really anything that would help you communicate with a potential customer or client.

For each of the social networking fields, a **Test** button will appear when a value is entered. This allows the user to verify that the link leads to the correct opening page on each social network.

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

Removing Your Directory Listing

If you wish to remove your directory listing completely, without canceling your membership, select Remove My Listing at the bottom of the Business Directory Profile screen.

Histories



In the Member Profile, the Histories options allow you to edit or update:

- Transaction History view and print a list of your transactions
- Payment/Credit History view and print a list of your payments
- Event History view and print a list of events you registered for and attended
- Donation History view your past donations and any recurring donations
- Volunteering History view a list of volunteering opportunities in the past and future for which you volunteered
- Reservation History view a list of upcoming and past resource reservations.

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.

Histo Transaction					
This scree	In lists the on-line transac	tions you have do	one on this websi	te, includ	ling members
Within the las	at 12 Months 🗸				
Date	Transaction Type	Amount (US\$)	Status	Ref #	Action
9/20/2020	Mid-Year Change	25.00	Paid in Full	1016	
9/20/2020	Mid-Year Change	25.00	Paid in Full	1015	
9/20/2020	Misc. Charge	25.00	Paid in Full	1013	iiit
8/3/2020	Event Registration	0.00	No Charge	1010	iii)
7/30/2020	Event Registration	0.00	No Charge	1007	
7/29/2020	Misc. Charge	20.00	Paid in Full	1006	
	Tra	nsaction Total	95.00		

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

Select a time period from the drop-down menu to filter your results by either the previous 12 or 24 months, or view all transactions.

To view the details of one transaction, click the Receipt icon in the Action column. You will see a popup dialog similar to the following:

Transaction Receipt	@ & &
Northwestern Balloon Club democlub.clubexpress.com	
Transaction Event Registration Jun 12, 2018 - Rally	
For Martin Smith	
Date 5/18/2018	
Amount \$ 15.00	
Ref # 3942	
Status Paid In Full	
- Transaction Items	
Martin Smith - Rally 1 @ 15.00 15.00	
Payment(s)	
5/18/2018 Check (# 554) 15.00	
Done Print Transaction Receipt	

You will see the individual line item(s) making up the transaction, and the individual payment(s) used to complete this transaction. Click the **Print Transaction Receipt** button to print a receipt of this transaction. Click **Done** to close the dialog.

For an unpaid transaction, click the green \$ icon to jump to the payment page.

Transaction Reference Number

Every transaction is assigned a transaction reference number, similar to an invoice number. This number is unique to each club or association and it increments automatically starting from 1000. This number will be visible on various pages as "Ref # xxxx".

Administrator Options

Administrators will see a Delete transaction icon 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.

Hitt	uries
	60°63
	TADAD TR. ALLA
cred	
	And and and an area and an
	center cause years

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** icon 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** icon to modify payment details. You will see a screen similar to the following:

Edit Paym	ent	
Payment From Amount \$ 100	n: Martin Smith .00	
Payment Type	Received Cash	\$
Date	12/22/2012 🔤 🧕	
Notes		
	Save 🖌 Cancel 🗶	
		10

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** icon 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.)

Edit icon beside an open credit to display the following dialog:

Edit Credit	6 6	8
Credit Issued To: Martin Status: Available Amount \$ 50.00 Balance		
Select Action	Edit 🗧	
Date	4/22/2013	
Amount \$	50.00	
Credit Type	For Services \$	
Description	Membership credit	
Account	Master Membership Dues 🗧	
QuickBooks Item Name		
	Save 🖌 Cancel 🗶	1.

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.

Event History

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

Histories Event History				
Event History				
This screen lists the events that you ha Within the last 12 Months ✔	ve registered for.	If you registered guests they will appear her	e as well.	
Event	Date	Amount (US\$) Status	Attendance	Action
Safety Committee Meeting	11/29/2020	0.00 Paid	Not Recorded	
Burner Basics	10/3/2020	0.00 Paid	Not Recorded	🔍 \$ 🝺
Ballooning Autumn Camp CANC	9/25/2020	0.00 Cancelled	Not Recorded	🖲 💲 🕵
		Retu	Irn to Previous	Page
		Retu	ini to i revious	Tage

Click the Details icon in the Action column to display details of that event. You will see a standard popup dialog. Click the **Done** button to close the dialog.

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.

Donation History

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

Histor Donation His						?
Donation	n History					
This screen	lists the on-line donations y	ou have done on this	website, inc	luding member	ship dues and event registrations.	
	Donations	Donation Type	Amount	Status	Ref # Action	
			<u>(US\$)</u>			
12/30/2020	Repair Clubhouse Roof	-	25.00	Paid in Full	1036	
		Donation Total	25.00			
					Return to Previous Page	-

Click the Details icon in the Action column to display details of that donations. You will see a standard popup dialog including a receipt for the transaction. Click the **Done** button to close the dialog.

Volunteering History

Select this option to see a screen similar to the following:

Histories
Volunteering History
My Volunteering History
Future Opportunities
× New Year New Dinner! 1/2/2021 - 1/2/2021
Within the last 12 Months V
Past Opportunities
Volunteering time for Fiscal Year beginning
Name Level Hours
This member has not accumulated any hours this fiscal year
× Fall Fly-In 11/13/2020 - 11/13/2020
Return to Previous Page

Select a time period from the drop-down menu to filter your results by either the previous 12 or 24 months, or view all completed volunteering opportunities.

This screen consists of two panels. The top one shows future or upcoming volunteering opportunities. Click the double-arrow symbol to expand the opportunity to view the individual slot(s) you signed up for.

The **Delete** (trashcan) icon exists at the overall opportunity and the individual slot levels, allowing you to cancel your volunteering assignments at either level. You will be asked to confirm this step. You will receive a cancellation confirmation email and the volunteer opportunity coordinator will also be notified by email.

Member Profile

The bottom panel lists past opportunities.

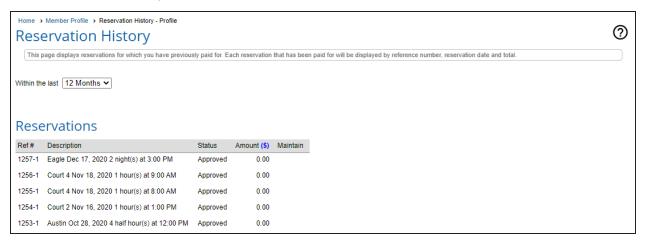
Click Return to Previous Page to return to your Profile screen.

Reservation History

When the Resource Scheduler module is enabled, a new link appears in the section Histories in the Member Profile.



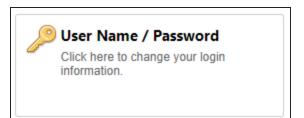
Clicking this link displays a screen similar to the following:



Learn more about managing your reservations here.

User Name and Password

In the Member Profile, the User Name/Password allow you to modify the user name and password used to log into the system.



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

Home Homer Profile Viser Name and Password	0
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 Msmith 6 of 50 characters used	
Password S of 50 characters used	
Re-enter Password	
Remember me on this computer	
Password Info	
A password strength indicator will give you a score on your selected password as you type. Note that this is for your information only - this web site does not enforce specific password rules.	
Some tips for a strong password:	
 Do not use common, obvious passwords like 'password' or '123' Do not use easily guessed passwords like your first name or your 	
birthday • Include a mix of upper- and lower-case letters and numbers	
Add punctuation and other special characters Longer is better	
 A 'passphrase' is often better than a complex password. For example, 'My favorite color is ecru' is a very strong password; it is easy to remember and hard to guess 	
Save 💅 Cancel 🗶	

Because your password is encrypted by the system using a one-way hashing algorithm (so that no-one, not even a ClubExpress 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 (twice!), 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 casesensitive. It can be up to 50 characters long.

Passwords can be up to 50 characters long and may include anything, even punctuation symbols. The password is case-sensitive. The system will display a dynamic "password strength" meter as you type. Stronger passwords include a mix of upper and lower case letters, numbers, punctuation, even spaces.

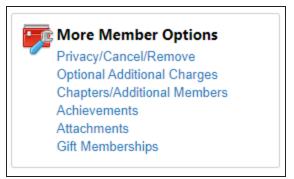
Your organization may have specific requirements for your password (number of characters, use of special characters, etc.). Follow any on-screen prompts to select a new password, and contact your club administrator if you need assistance.

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 (for example, if you are using a computer at a public library), or if two family members share a computer, 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.

More Member Options



In the Member Profile, the More Member Options panel allows you to edit or update:

- Decide whether to store your credit card in the system; see "Credit Card" below
- Update your privacy settings, cancel your membership; see "Privacy Options" on page 1340
- Purchase one or more of the club's additional charge options; see "Optional Additional Charges" on page 1341
- View or modify your achievements within the organization; see "Achievements" on page 1342
- Upload and attach files and images to your Profile; see "Attachments" on page 1342
- View gift memberships you have purchased; see "Gift Memberships" on page 1344

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:

Edit Cre	dit Card Info	ormation			(
Use this page t	o maintain or remove your cre	edit card information.			
There is no credit	card on file. Please specify	the information belo	V.		
Credit Card	< Select Card Type > ง	Card Number			
Expiration	< Select Month > ¥	< Select Year > 🗸	•		
Name on Card	First	Last			•
	For a business or organizati	on name, just use the l	ist name field		
Address	1051 Perimeter Drive S	uite 350			
City	Schaumburg				
State/Province	Illinois	~			
Zip/Postal Code	60173				
Country	United States of Americ	ca ✔ Show All Cou	<u>itries</u>		
				Save 🖌	Cancel X

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. ClubExpress is also fully compliant with the PCI (Payment Card Industry) rules for storing and protecting credit card data.

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.

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 explicitly 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.

Privacy Options

Click **Privacy Options** to update your privacy settings or cancel your membership. You will see the following screen:

me > Member Profile > Privacy Options
rivacy Options
Terms of Use and Privacy
As a member of Emerald Test Club you may receive general purpose emails related to club participation and business, such as newsletters, event notices, important updates, and other, similar announcements. Please verify that you wish to receive these important club emails. (You can always opt out later if you change your mind.)
● Yes, I want to receive these emails ○ No, I do not want to receive these emails
Emerald Test Club may share your information with interested third parties for marketing or other purposes. You can allow or deny this data sharing.
This is the additional test field letting you know that we do not sell member and/or non-member data but we do give it to the few charities that we support, for fundraising purposes only. We only give them your name and email address.
 I Allow This Data Sharing Do Not Share My Personal Data
Save Settings 🖋 Cancel 🗶
Cancel My Membership
If you no longer wish to be a member of Emerald Test Club, click the button below. Your membership will be canceled. You will no longer be able to log in to the website, and you will not receive renewal reminders or other communications.
Cancel My Membership
Remove Me Completely
You have the right to be removed from the Emerald Test Club database. Click the button below to begin this process. Your membership will be canceled immedately. You will receive an email confirming your request, and your personally identifiable information will be removed as soon as possible. Please note that your request may be denied if Emerald Test Club has a compellin legal or business reason to do so. In this case, you will receive another email explaining the decision, which you can appeal if necessary.
Remove Me Completely

The first question allows you to update your settings with respect to general communications from your club or association, such as event announcements, a monthly newsletter, etc.

The second question only appears if your club or association may share your personal data with third parties for marketing purposes. You may see some additional text from the organization explaining what sharing they do and why it's important for your information to be included. But you always have the option for your personal data not to be shared.

- **Cancel My Membership** cancel your membership immediately. You will be prompted to confirm this action. You will no longer be able to log in to the website. You will not be further charged and you will not receive any more communications from the organization. Note however that if you change your mind, this action can be reversed and your membership reinstated.
- **Remove Me Completely** cancel your membership and have your personal data removed completely from the organization's database. This option conforms to international regulations and the "Right to be Forgotten". You will be prompted to confirm this action. Your membership will be canceled immediately and your "remove me" request will be submitted to the club or association for approval. Note that they have the right to decline this request but must provide a reason. You then have the right to appeal this decision with your local Data Processing Authority.
- If the request is **approved**, you will be notified by email. All personally identifiable information will be deleted from the database.
- Note however, that your club or association has a compelling business reason to maintain accurate records such as transactions, payments, event attendance, etc. This information will be retained but it will also be anonymized.
- This decision cannot be reversed. If you change your mind you will need to rejoin the organization from the beginning.

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:

	Additional Charges							
This screen allow	vs you to purchase a	dditional items	and membership options	s. Some items may				
Additional Charge It	em	Quantity	Price (US\$)	Total Price (US\$)				
Name badge		N/A	5.00					
Coffee mug A nice coffee cu	ip with the club's logo		6.00					
		Tot	tal Additional Charges	US\$ 0.00				

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.

Achievements

If your club or association has enabled member achievements, select this option to view/update achievements for this member. For members themselves, this screen will be read-only; only an administrator or People Manager coordinator can edit this data. You will see a screen similar to the following:

To one shoe b	neder einen fasselik inter ihn neder på in heter ihninge der til för fank i sekorent heter i försentidet ett i Soga formalde i dep is ein i dette ösernet ochgan heter ich interation.
aldean	Detectore
-	Advenuer Marine

Click Add Achievement to create a new achievement. You will see the following screen.

	Achievement dates and description. Click "Save" or "Cancel" to return to the Achievements list.
Dates	2009-2010
Description	President
	Save 🖋 Cancel 🗶

Enter a free form date and description, then click **Save** to save your change, or **Cancel** to cancel without saving.

Click the **Edit** (pencil) icon to modify an existing achievement or the **Delete** (trash) icon to remove one. You can also click the **Display Sequence** button to reorder achievements already entered; the standard dialog is displayed.

Attachments

This option allows you to upload files and images and attach them to your Profile. Any required or optional files will have been defined by your club or association. When you select **Attachments**, a screen similar to the following is displayed:

Member Attachments				?
Attachments that administrators define are displayed here. You can enable you to replace the version of the file. Documents may be req	upload attachments that are required or option uired or optional. Versioning may be enabled fo	this screen. Click the add link to upload a file for that placeholde me files, allowing you to upload or view multiple versions. Depend	ar. Click the view link to download a version of a previously uploaded file. Click the delete ic- ing on the settings made by the administrator, some options may or may not appear.	on to remove the file. Clicking the edit icon will
Required attachment I Expired attachment	Optional attachment 🥚 Pending attac	ent 🕑 Uploaded/Approved attachment		
Commercial Ballooning License Required to participate in our Fly Me To The upload your license before volunteering.	Add Moon events. Please			
Flight Students Please upload a copy of your schedule or st student membership.	Add udent ID to qualify for a			
Ballooning License License provided by the FAA	⊕ Add			
Insurance Card Photo Pholo of your insurance card	(+) Add		4	
2022-09-21_10-37-53.png Added:11/29/2022	100			

Allowable documents are listed in the sequence defined by your club or association. The large icon on the left defines the type of upload, either a document or an image.

- A red circle indicates a required upload
- A yellow circle indicates an optional upload
- A green circle indicates a completed upload. If the attachment required approval, this also indicates the image or document has been approved by an administrator
- A blue circle indicates the attachment has been uploaded and is pending administrative approval
- · A black circle indicates an expired attachment,

Click the +Add icon to upload a new file or image. You will see a dialog similar to the following:



Click the **Select** or **Browse** button (depending on your browser) and select the appropriate file from your local hard disk. For files, you can upload a typical document such as a PDF, Word, or Excel file. For images, you can upload a typical image file such as a JPEG, GIF, PDF, or PNG. Click **Save** to complete the upload.

Where multiple versions are not supported, the **+Add** icon will disappear. Where multiple versions are supported, this icon will always be visible.

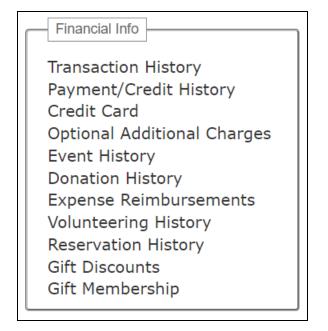
- Click the Edit (pencil) icon to replace the uploaded file.
- Click the View (eye) icon to view the uploaded file.

- Click the **Delete** (trashcan) icon to delete the uploaded file. You will be prompted to confirm this action. Note the option to delete an attachment may not be available for all attachments. Contact your club administrator if you need help removing an attachment from your profile.
- Click Return to Previous Page to return to the Profile screen.

Depending on the configuration settings for each attachment, some or all of these icons may not be visible.

Gift Memberships

If Gift Memberships are enabled, you can view all purchased gifts in your member profile (paid and unpaid) under Financial Info.



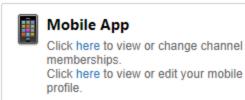
Clicking Gift Memberships will display the following screen:

Gift N	/lembers	hip	s for (Georg	ge Adı	nin
	se this page to view you id for, and if a Gift Mem					Sift Memberships, review past Gift Memberships, print out Gift Memberships that you have d.
Search F	Results (10 gift	(s) for	ind)			
Date Created	Recipient Name	Status	Amount (\$)	Date Used	Maintain	
3/30/2020	Samantha Elizabeth	Open	150.00			
3/31/2020	Billy Bob	Open	50.00			
3/31/2020	Billy Boberson	Used	100.00	3/31/2020		
3/31/2020	Billy Boberson	Open	100.00		5	
3/31/2020	John Lodoran	Open	0.00			
3/31/2020	Adrian Neville	Used	10.00	3/31/2020		
4/6/2020	Robert Stefanic	Open	150.00			
4/6/2020	Robert Stefanic	Used	60.00	4/6/2020		
5/11/2020	Bobbery Bobs	Open	150.00			
6/1/2020	George Martin	Open	100.00		S 🙀	

From this screen, you can delete or pay for unpaid gift memberships. You can also print out a gift membership certificate if you want to send it in the mail to the recipient.

Mobile App Settings

If your club or association has activated the ClubExpress mobile app and you have downloaded this app from the Apple Store or Google Play and actually logged in, the following options will appear on your Profile screen:



Channel Memberships

Home > Member Profile > Channel Memberships	
Channel Memberships	
This page lists all the channels you belong to, along with an 'Edit' icon to modify your channel settings, and a 'Quit' icon to resign fro join if you wish.	n optional channels. There is also a list of optional channels you may
	Legend
Automatic channels	
You are a member of these channels automatically based on your activity in Windy City Morgan Owners Group (for example, becau your member type or chapter memorship). You cannot directly remove yourself from these channels, however you can hide them fi This will prevent the channel from being selected in your chait or meds displays. Click the Celt icon to set your preferences for each	om your channel list by checking the "hide this channel" checkbox.
fav color = blue Member Additional Data	Ø
All Active Members All Club Members	Ø
Member Type = Michelle Membership Type: *Michelle	Ø
Optional channels	
You are a member of these channels because you joined, or an admin added you. Click the 'Edit' icon to set your preferences for each channel. Click the 'Quil' icon to resign from the channel (or 'Quit All' to resign from all optional channels).	් Quit All
General Opt-In Chat Member Opt-In	ሮ 🖉
Return to Previous Page	

This screen lists the Automatic Channels you are a member of based on some fixed criteria:

- All Active Members
- You were added by a Moderator
- Your Participation in an Interest Group;
- Your Membership in a Committee;
- Your Answer to an Additional Member Data Question;
- Your Membership in a Chapter, District, or Region;
- You have a specific Member Type.

It also lists Optional Channels where you can opt-in by clicking the green icon or opt-out by clicking the red icon. There is also a **Quit All** option to opt out of all optional channels.

For each channel, click the **Edit** (pencil) icon to modify your preferences for that channel. You will see the following screen:

Channel User Edit	8
Select the visibility for this channel below. Selecting "active" will show this channel in your channels list. Selecting "hidden" will hide this channel from your active channels list.	
Channel: All Members Member: Martin Smith	
Channel Status	
O Active ○ Hidden	
Send Chat Notifications Chat notifications will be sent only if the channel is set to 'Active'.	
Save 🖋 Cancel 🗶	

Specify whether you want this channel to be active for you or hidden—even though you are a member of this channel, it will not be displayed in your mobile app or in the Chat or Meets functions on the website.

Check the Chat Notifications box if you want the app to notify you whenever a new chat message is posted in this channel. This notification is integrated with the notifications system of your phone; notifications will appear even if the screen is not currently active or if you are in another app.

This notification options is not active by default. It must be enabled for each channel where you want to receive notifications of new messages.

Mobile App Profile

Select this option to modify your profile in the Mobile App. You will see the following screen:

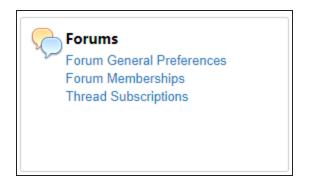
Home > Mobile Profile Edit	
Mobile App) Profile
Upload your avatar and s	et chat handle here. Your "handle" is the nickname that will be used for your chat sessions. You can use your own name or modify the handle. Your avatar image should be resized and appear next to your handle in chat.
Handle	Manny Diaz
Current Avatar	MD
Avatar Type	 OInitials Only ○Use Image
Default Channel	All Members
Show In Meets	ONo ●Yes
	Save 🖋 Cancel 🗙

Specify the **Handle** you want to use in forums. The system will pick a default **Avatar** using your initials and a random color but you can also upload an image and have the system use that instead.

Specify a default **Channel** from the list of available channels. You can also specify whether you will be shown by default in the **Meets** function.

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

Forums



In the Member Profile, the Forums options allow you to edit or update:

- Forum General Preferences specify your general preferences for participation in discussion forums
- <u>Forum Memberships</u> specify your preferences for individual forums
- Thread Subscriptions view current subscriptions or unsubscribe

General Preferences

If your club or association has enabled the discussion forums function, 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 50
Preferred Message View 🔘 Threaded 💿 Flat
Msgs Per Page (Threaded) 50
Msgs Per Page (Flat) 20
Email Address
Use Email Address 🔘 Primary Contact Email (support@clubexpress.com)
This Address info@gembrook.com
Allow Private Replies of 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 Links 🔲 Remove additional links and info text from my forum emails
NOTE: Forum emails include some identifying text and useful links after the message(s). Check this box if you wish to remove this text.
Email Format 💿 Plain text in the body of the email
Rich formatting in the body of the email
Frequency Immediately +
Check this box to apply these message delivery options to all my forums

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.

- 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.

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 Links** allows you to remove the standard text that normally appears at the bottom of each email. This text tells you how view the email online, modify preferences, opt-out, etc.
- 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 a digest containing all messages;
 - Daily Subjects send a digest containing subjects only; each message includes a link to view the complete email online.

Note that digests may be sent 1, 2, 3, or 4 times a day, depending on the popularity of the forum and how your club or association has configured this option. For example, if digests are configured to be sent 3 times a day, you will receive one approximately every 8 hours.

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

Member Profile

The description of Forum General Preferences screen continues below:

Authoring Message	es
Preferred Text Editor	Simple - Text Only Advanced - With Formatting Tools
Message Signature	Attach the following signature to each message
	Full Steam Ahead, Jonesy Chicago, IL mailto:dan@clubexpress.com
	63 of 200 characters used
	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 app	oly the signature settings to all my forums
Identification	
Forum Handle	Jonesy
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	S Display my location with my messages
	Location: Anytown, IL
Local Time Offset	The current server date & time is 3/28/2014 4:35 PM. Specify your offset time in hours (+/-).
Show Picture	Display this picture with my messages
Select Picture	Choose File no file selected
Check this box to app	oly these identification options to all my forums
	Save 🗸 Cancel 🗙

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 a similar editor to the one used to create custom pages within ClubExpress.)
- 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 reflecting 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 US 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 US
 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 are
 located on US east coast, specify "1" for this option. Then, when you are viewing a message posted on our servers
 on our servers at 10:45 AM CST, it will show 11:45 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 **Stop All Forum Emails** button allows you to temporarily stop emails for all forums if, for example, you go on vacation. Individual forum settings are not lost. Click **Resume Forum Emails** to start them coming again.

The screen is divided into three sections:

• Automatic Forums are those you are a member of because of your involvement in the club. It might include forums that all club members are part of, or forums that you belong to because of your membership in a committee or an interest group. These forums include an **Edit** (pencil) icon, allowing you to modify preferences for each forum.

- **Optional Forums** are those forums where you have explicitly opted in to membership or where a moderator joined you. Click the **Edit** (pencil) icon to modify preferences. Click the red **Quit** icon to resign from this forum. You can also click the **Quit All** icon to resign from all forums in this list. Any forums you quit will be moved down to the Available Forums list.
- Available Forums are those forums available to you where you are not yet a member. Click the green Join icon to join this forum. It will be moved up to the Optional Forums list.

In each panel, forums are listed in "Category > Forum Name" order. The next line in each forum box describes how you can post messages to the forum (either on the website only or also via email). The final line in each forum box describes how you read messages (either online only or via email; and if via email, whether each message is sent immediately or whether you receive full digests or subject-only digests.)

Click the Edit icon to change these options. You will see a screen similar to the following:

Member Profile

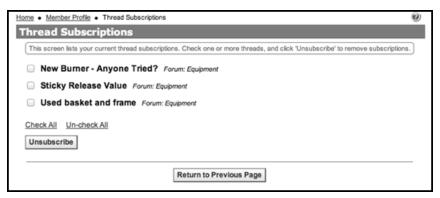
Home > Member Profile	Member Forums Forum Preferences
Forum Prefer	ences for Safety
	delivery and message authoring options you prefer to use in conjunction with this forum. Click 'Reset to Default' to use references. Click 'Save' when finished.
Email Address	
This forum sends new mes	sages via email, but will not accept incoming email posts.
Use Email Address	Primary Contact Email (support@clubexpress.com) Forum Default Email (info@gembrook.com) This Address
Allow Private Replies	Allow forum members to send replies directly to me via email NOTE: This setting applies only to online replies to messages. Since this forum is set up as a listserve, members will be able to reply directly to you via email.
Message Deliv	ery
Send Email	Send Forum Messages To Me Via Email NOTE: Your forum emails are turned off. You will not receive emails from any of your forums, regardless of the individual settings made on this page. To turn your messages back on, click the "Resume" button on the "Forum Memberships" page, or check the "Send Email" checkbox on the "Forum General Preferences" page.
Email Format	 Plain text in the body of the email Rich formatting in the body of the email
Frequency	Immediately +
Authoring Mes	sages
Forum Handle	Jonesy 🔷
Message Signature	Attach the following signature to each message
	Full Steam Ahead, Jonesy Chicago, IL mailto:dan@clubexpress.com
	63 of 200 characters used 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	S Display a link to my directory listing (bio) with my messages
Show Location	Solution with my messages
Show Picture	☑ Display my picture with my messages
	Reset to Default Save 🗸 Cancel 🗶

Most 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-byforum 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.**

Thread Subscriptions

Click **Thread Subscriptions** to view forum threads to which you are currently subscribed. You will see a screen similar to the following:



Check the threads from which you want to unsubscribe, then click the **Unsubscribe** button. You can also click the Check All and Un-check All links. Click **Return to Previous Page** when you are done.

Your Website Functions



In the Member Profile, the Website Functions allow you to edit or update:

- Interests let other members know what expertise and interests you have within your club
- Photo Albums upload photos and organize them into personal photo albums
- Edit Photo Album Content add and edit photos in photo albums
- <u>Download Bank</u> view any documents in your download bank

Interests

If your organization has enabled the Interests function, 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:

Interests	0
Select the Interests in which you would like to participate.	
× Uncheck All	
Safety Teaching and reinforcing the important safety considerations in our hobby/pastime. You may select any number of interests in this category	
Rules	
Safety rules and sanctions you need to know.	
Education and Inspection Updates on newer equipment and classes involving ballooning	
S Flying	
Let's go fly balloons! You may select up to 4 interests in this category	

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 top 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.

Photo Albums

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

Do not use this option for your member Directory photo. Instead, that photo should be uploaded on the Profile – Member Directory screen.

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

Photo Albu	um I	Vanager for N	Martin Smi	th									
		ual photo albums. Click 'Add Pho ios to a album or update the photo										figure' to modify the properties of that album. at the top of your album.]
Add Photo Album													
Title	Туре	Club level	Category	Status	Maint	tain					Ē		
Spring Balloon Ride	Member	Club	Member Photo Albums	Visible	Ø	١	8	ß	ñ	0	î.		
Summer Races	Member	Club	Member Photo Albums	Visible	Ø	۲	<u>æ</u>	ß	Ð	0	î.		
Winter Maintenance	Member	Club	Member Photo Albums	Visible	Ø	۲	8	ß	A	0	î.		

The grid shows photo albums that you have created, perhaps built around a specific event or project. The grid shows the title and status for each photo album.

Note that the practical size limit for each photo album is 300 photos. If you have more photos you want to display, spread them across multiple albums.

Add Photo Album

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

Photo Album	Configuration	688
Edit the properties of	your photo album.	
Album Name	•	
Menu Text	•	
Subgroup	< Select a subgroup > 🗸	
Availability	Any Web Site Visitor 🗸	
Visible		
Quick Link Name		
Description		
	0 of 200 characters used	
	Save 🖌 Cancel 🗶	

Specify the album name and text that can be used if the album is placed on the menu (which is often shorter.) You can also specify whether the album will be available to all website visitors or whether it should only be visible to members.

The album 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 album visible.

You can also enter a short description.

Subgroups: If you belong to any subgroups, you have the option of linking this album and any photos added to it to one of those subgroups. If you do, only photos that are linked to the same subgroup can be added. If you don't, the album will be linked to your membership only, and any photos can be added.

Click **Save** or **Cancel** to return to the Photo Album Manager screen.

Maintaining Your Photo Albums

The following options are available in the Maintain column:

Icon	Description
(Edit)	Click the Edit Content icon to manage the photos placed on the album, as well as a detailed description of the album.
(View)	Click the View icon to display the photo album, even if it's not on the menu.
(Coordin- ators)	Click the Manage Coordinators icon to add one or more coordinators who have administrative rights over this album.
Configure)	Click the EditConfiguration icon to display dialog allowing you to change name, menu text, category and visibility.
Long (Long Desc.)	Click the Long Description icon to display the advanced content editor, allowing you to create a more detailed description of the album. With this editor, you have full control over fonts, alignment, styles and other powerful HTML options; you can even add photos and other graphics.
(Delete)	Click the Delete icon to drop the album. You will be asked to confirm this action, which cannot be reversed; the album is completely deleted. Note however that any photos placed on the album are not deleted; they are still stored in your website and can be placed on other albums or pages.
	Maintain Options

Edit Photo Album Content

This screen shi Photo' to uploa	ows the photos on this photo album. Click 'Select I d a single photo or 'Add Multiple Photos' to upload	Photos' to select one more than one. Clicl	or more photos from among the images you have previously uploaded to the website. Click 'Add One 'Display Sequence' to modify the order in which photos are displayed.
hoto	Title	Maintain 📑	Select Photos
	bigstockphoto_Air_Balloon_1650	d i i i i i i i i i i i i i i i i i i i	Add One Photo Add Multiple Photos Display Sequence Configure Album
	Winner!	1	Long Description
	Balloon Flight 1	2	

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

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

lcon	Description
(Edit)	Click the pencil (Edit) icon to display a popup dialog showing the information saved with the photo. You can modify all the information saved with the photo. Click Save or Cancel to return to the Edit Photo Album screen.
(Delete)	Click the Delete icon to remove the photo from this album. It remains in the photo man- ager to be used on other photo albums. You will be prompted to confirm this action.

Maintain Options

Select Photos

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

Select Photo							
Enter tags and/or title text and click 'Show Photos' to see photos which match all entries. Select one or more photos from the list (using [Shift-Click] or [Ctrl-Click]) then click Select.							
Title	Title						
Tag(s)	Tag(s) balloons ×						
		Show Photos 🗳					
Photos Aerial Image		Preview					
And the Race is							
bigstockphoto_ bigstockphoto_	he Countryside Air_Balloon_165031.jpg _air_balloons_2571855.jpg _Balloon611148.jpg _Balloon611149.jpg						
	Select 🖋	Cancel X					

Enter text from the photo title and/or one or more tags, and click the **Show Photos** button to display a list of photos matching these criteria 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.

Note: You may add a maximum of five (5) tags to any single photo.

Subgroups: If the photo album is linked to one of your subgroups, you will only be able to select photos that are linked to the same subgroup.

Click the **Select** button to add the selected photo(s) to the album, 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 album. You will see the following dialog:

Add Multiple Photos					
files (.jpg (.jpeg	to upload multiple photos. C , .png, or .gif) from a local dir out the other information be	ectory or network. T	he files will begin	uploading	
Select Files	Select Photos				
	NOTE: Max photo size: 20 MB	per photo			
Tags				\bigcirc	
Photographer					
Date Taken					
	Allow Download of H	i-Res Version			
	Save 🧹	Cancel 🗙			

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 discontiguous 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, sorted by their original filename. If you see photos in the list that you don't want to upload, click the **Remove** link 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 the selected photos will be uploaded to the website and placed in your album. The screen will reposition to display a progress bar. Click **Cancel** to close the dialog without uploading.

Subgroups: If the photo album is linked to one of your subgroups, any photos uploaded into that album will be linked to the same subgroup.

Note that you should not attempt to upload more than 100 photos into an album at a time.

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 album. You will see the following dialog:



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.

Note: You may add a maximum of five (5) tags to any single photo.

Click **Save** to upload your photo and add it to the page 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.

Check the **Allow Hi-Res Download** box to allow members to download an original high-resolution copy of the image. A special button is displayed in the popup photo viewer. Note that this button is never shown to the public, only to members and then only if the box is checked. Note also that users can still right click the lo-res screen size version and save it; there is no way to stop this.

Subgroups: If the photo album is linked to one of your subgroups, any photos uploaded into that album will be linked to the same subgroup.

Display Sequence

This button shows the standard ClubExpress sequence dialog, allowing you to reorder the photos on the album. Note the first photo in the list is used for album preview.

Configure Album

Click the **Configure Album** button to modify the album title, menu text, and visibility. You will see the Photo Album Configuration dialog.

Album Description

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

Collectibles

When the Collectibles **and** Member Directory modules are both enabled, a new link appears in the section Your Website Functions in the Member Profile.

👮 🥷 Your Website Functions
Interests
Photo Albums
Collectibles
Download Bank
Blogs

Clicking this link displays a screen similar to the following:

Home > Member Profile > Collectibles Collectibles						
Enter your search criteria, and click the "Search" button to see a list of the Car Models that you have entered into the system. Note that your Car Models may appear in the list more than once if you've made copies of the information to, for instance, preserve it's history when you change something about it. Click the "Add Car Model" to add a new item.						
🖌 Active 🖉 Draft 🙆 Archive 😵 Rejected						
Status Active Display Sequence Search 4 Add Car Model						
Search Results (4 Car Models found)						
Balloon Name NO PHOTO AVAILABLE						
Return to Previous Page						

To learn more about Collectibles, see Collectibles

Download Bank

If your club or association has enabled the online Storefront function, and if you have purchased digital files, click this link to see a list of these files for downloading. You will see a screen similar to the following:

D	ownload Bank				0		
	The following documents are available in the download bank. Click the double arrows to the left of the document's name to view its details. Click the Download link to the right of the document's name to download the document. The File Readers and Utilities' section at the bottom of the page contains links to download programs to view files in various standard formats. These links will display the vendor's web site in a new window. Click on the double arrow to see the viewers.						
≽	Name	Status	Links				
×	New Drone Regulations	Available	Download	Edit			
*	New Drone Regulations	Available	Download	Edit			
۷	New Drone Regulations	Available	Download	<u>Edit</u>			
۷	New Drone Regulations	Available	Download	Edit			
*	FAA Balloon Flying Handbook	Available	Download	Edit			
۷	New Drone Regulations	Available	Download	<u>Edit</u>			
×	New Drone Regulations	Available	Download	<u>Edit</u>			
*	New Drone Regulations	Available	Download	<u>Edit</u>			
*	New Drone Regulations	Available	Download	<u>Edit</u>			
	New Drone Regulations	Available	Download	<u>Edit</u>			
۷	FAA Balloon Flying Handbook	Available	Download	<u>Edit</u>			
*	New Drone Regulations	Available	Download	<u>Edit</u>			
	Clear Click this button to clear al	I documents w	/hich can no lon	ger be do	vmloaded		
*	Click to view File Rea download	aders an	d Utilities	s for			

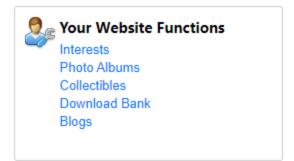
Click the double-arrow character on the left to view details of each document. Click the **Download** link to download the document. The **Edit** link will only appear for administrators; it allows them to update the properties of the document, including its status and expiration date.

Click the **Clear** button to remove from the list all documents that have been downloaded at least once or that can no longer be downloaded because they have expired.

There is also an option to download readers for common file formats. Click **Return to Previous Page** to return to the Profile screen.

<u>Blogs</u>

When the Blogs module is enabled, a new link appears in the section Your Website Functions in the Member Profile.



Clicking this link displays a screen similar to the following:



Learn more about managing your blog posts. See .

Glossary

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My Term My definition