MORE PASSION. LESS PAPERWORK.

Administrator Manual

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Important Copyright Notice

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.

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 here.

Active Members	Monthly Charge per Primary Member	Monthly Charge per Secondary Member
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

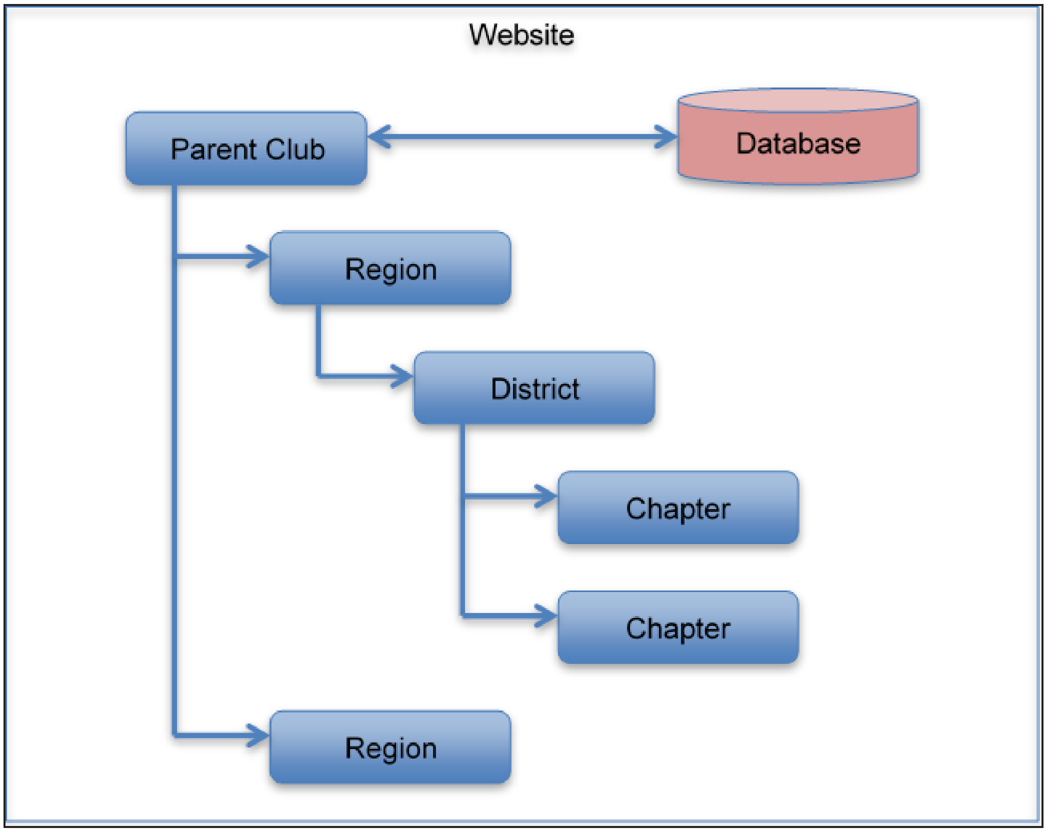
Active Member Charges

*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.

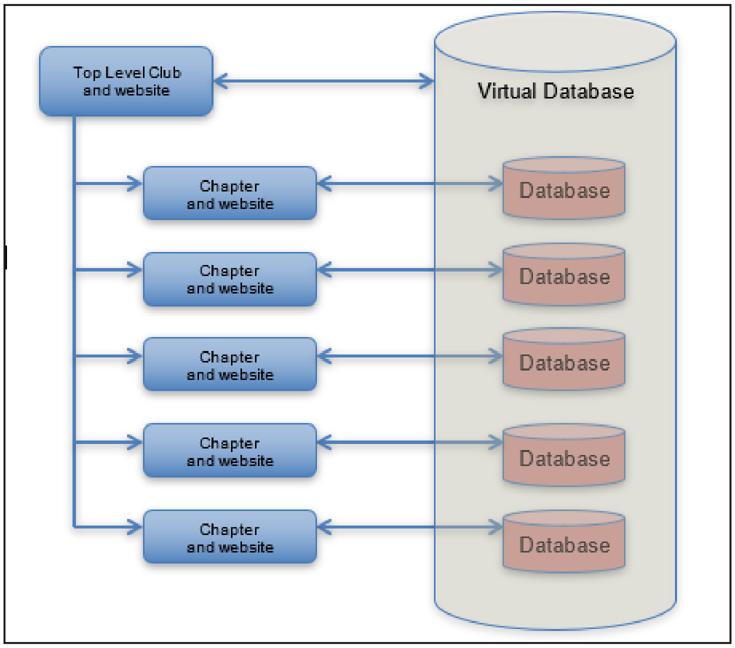
> **Example:** Some clubs will charge a separate chapter fee for each child in the membership, while others will charge a single chapter fee whether there are one or multiple children in the membership.

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 non-members 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.

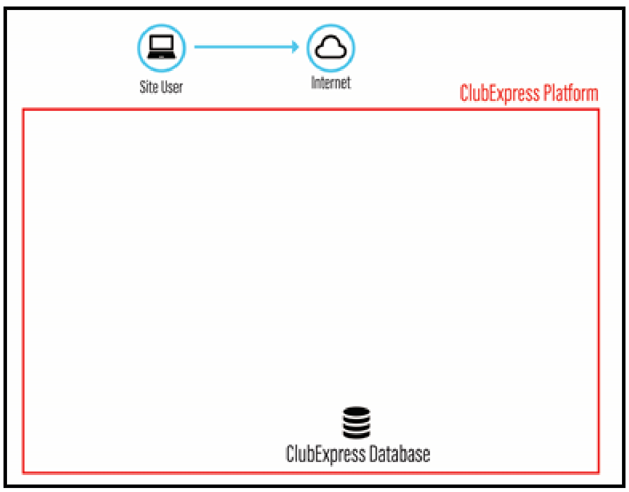
ClubExpress also makes it easy for you to define your **Data Protection Officer (“DPO”)**, who is responsible for protecting the personal data of members and non-members. The DPO also handles inquiries about data security, potential breaches, and requests to be removed or forgotten completely from your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

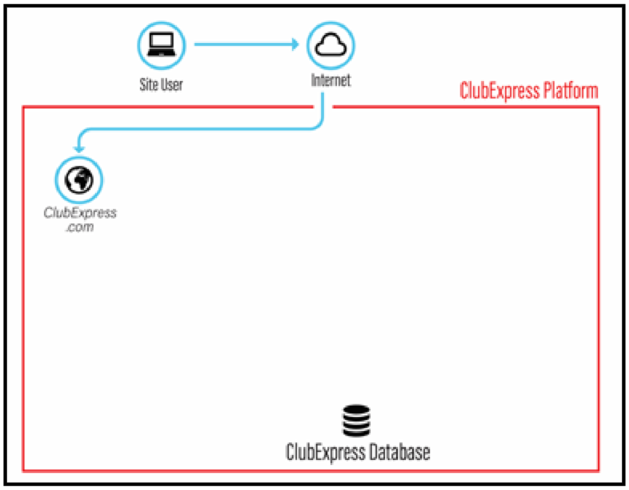


ClubExpress is software that runs on powerful computer servers in the data center provided by a commercial-grade Internet hosting company. This company provides multiple hi-speed connections to the Internet, to ensure redundant paths for your data and to provide optimal performance. They also provide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

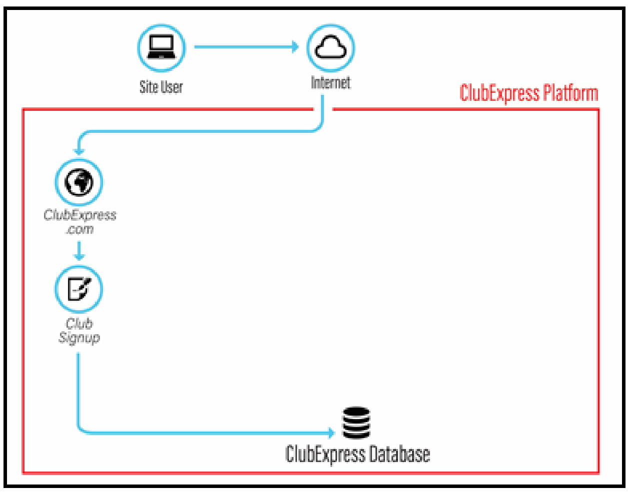
Within the platform is a sophisticated database that is used to store everything associated with your club or association, including member information, the content of your website, financial transactions and even the photos used on various pages.

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

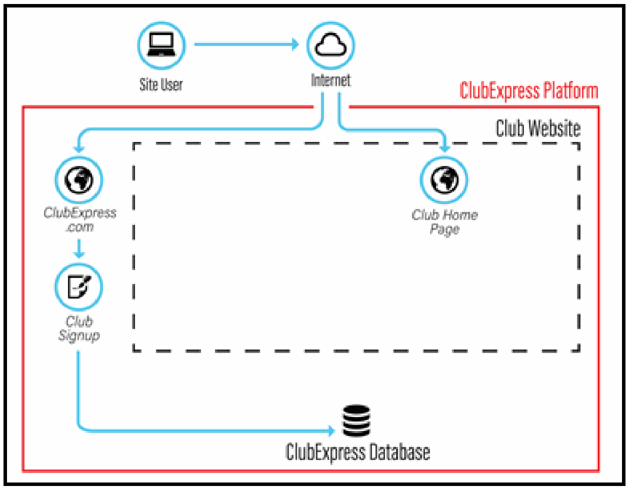


ClubExpress.com describes our product and service to prospective customers. It is also built using the ClubExpress platform.

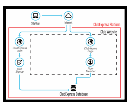


When a club or association wants to sign up for ClubExpress, it does so entirely online, creating its own account that is then entered into the database. An administrator steps through a short wizard to create the account and log in to the new website. He or she is then presented with a Setup Check List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

Initial Website

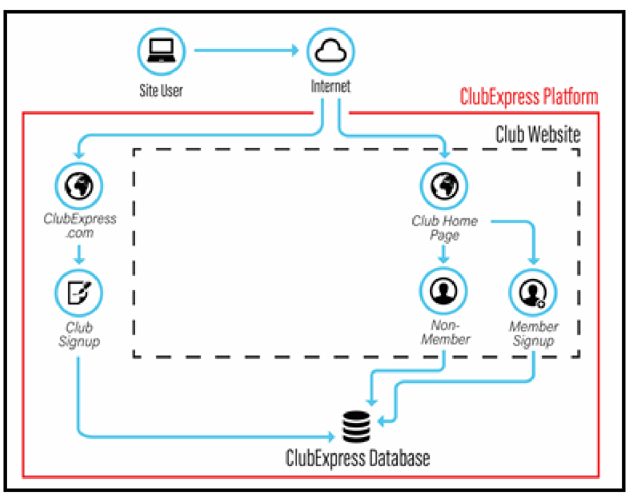


Once a club or association is signed up, ClubExpress automatically creates an initial website in the platform, with a default home page that can be extensively customized.



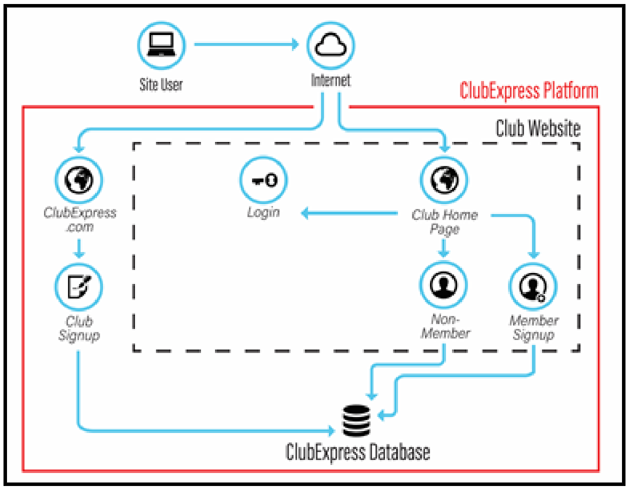
The public side of the website includes content that the club or association creates for non-members, including, for example, the benefits of signing up as a member, membership information, a list of member interests, a calendar of events, etc. This content can include any number of custom pages as part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

Member Signup

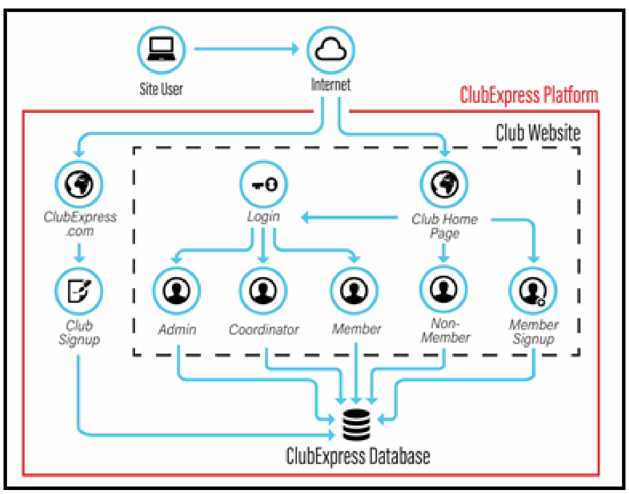


One of the features in ClubExpress is a wizard that allows new members to sign up entirely online. Members provide their basic contact information, establish a user account and password, answer club-specific questions, select a membership type from options that you define, and pay for their membership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

Login



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.

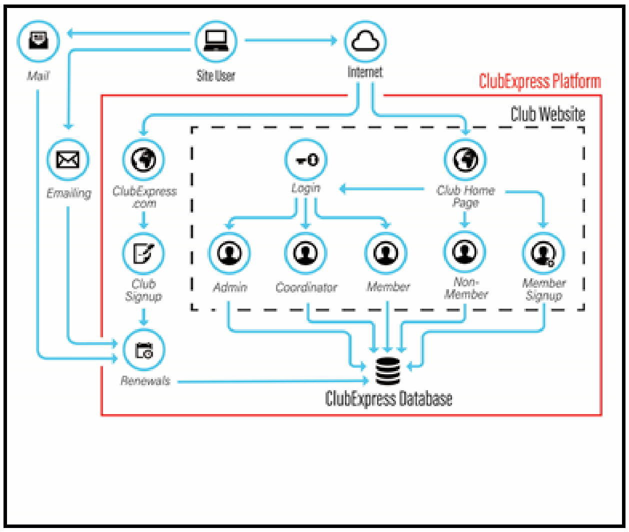
ClubExpress includes more than 22 purpose-built modules to handle many of the common activities that clubs and associations perform, including committee tracking, online discussion forums, documents, photo albums, surveys/polls, member interests, blogs, event calendar and registration, volunteering,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

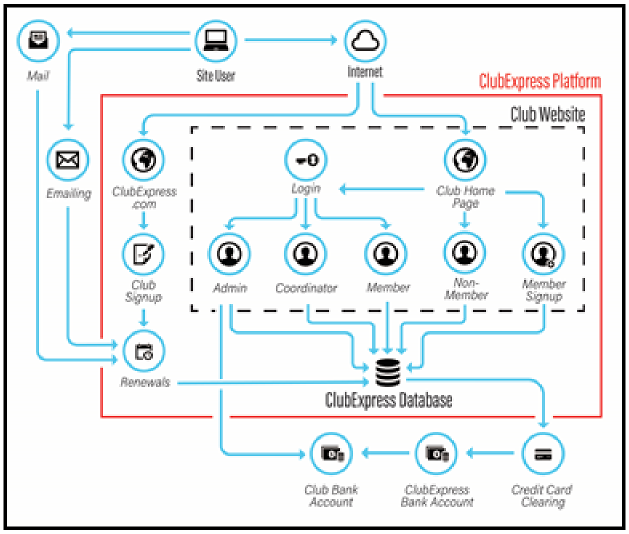
In addition, ClubExpress supports coordinators that you designate who have special administrative rights over a specific module or page, adding and updating content within that module or page only. Finally, the system recognizes a category of users called administrators who have complete control over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

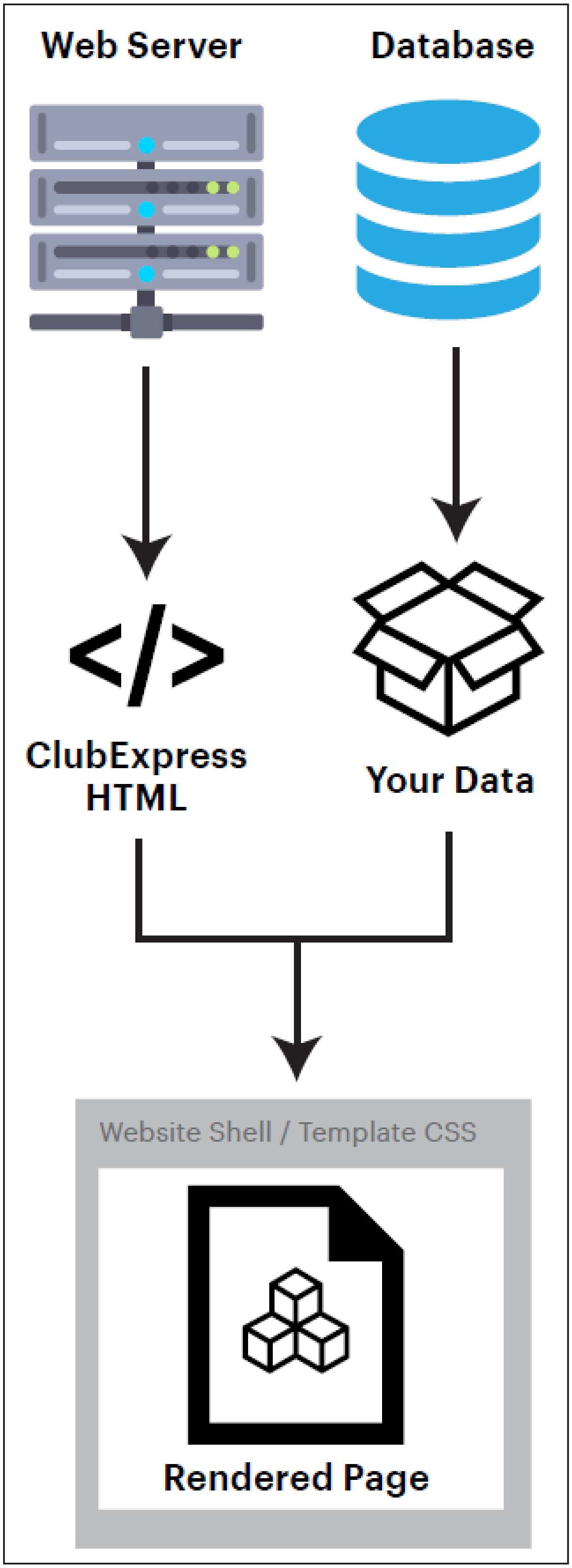
At the end of each month, we use the same automated bank transfer facility to withdraw our monthly fee from your bank account. A complete accounting of all bank deposits and withdrawals is also provided online.

Static Web Pages and Custom Pages

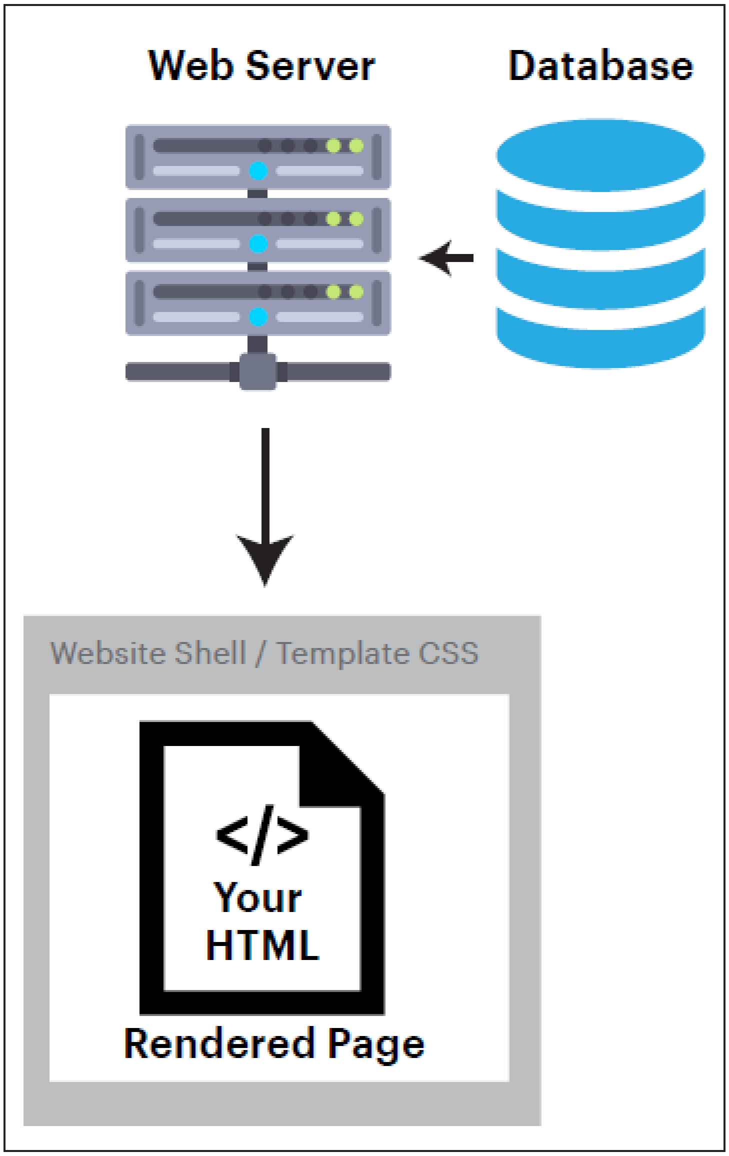
Your website is made up of a few basic components:

- 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.)


Web Server
Database
</>
ClubExpress HTML
Your Data
Website Shell / Template CSS
Rendered Page

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.

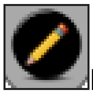
Control Panel Coordinators

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:** http://ShortName.clubexpress.com.

You can then log in with the administrator username and password you also chose during setup.

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

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

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:

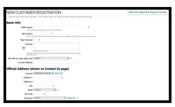
- Your printed membership application;
- Your club's or association's logo in an electronic format, ideally no larger than 125 x 125 pixels;
- Photos and images that you plan to use on the home page;
- Bank account information.

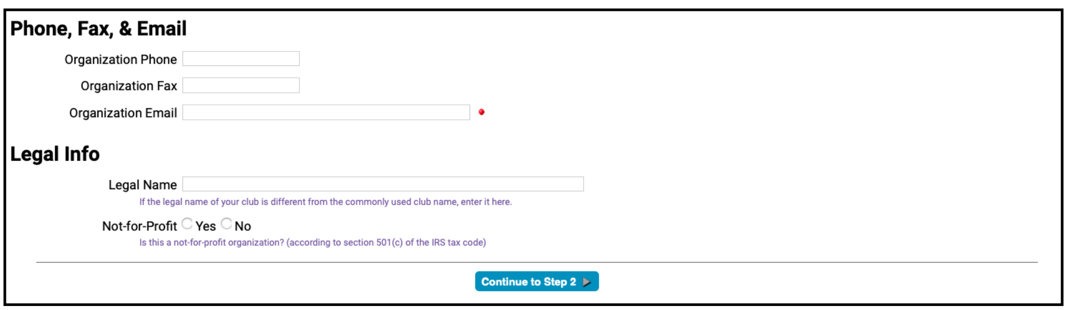
Sign up for a trial site

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:





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.

Example: 

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.

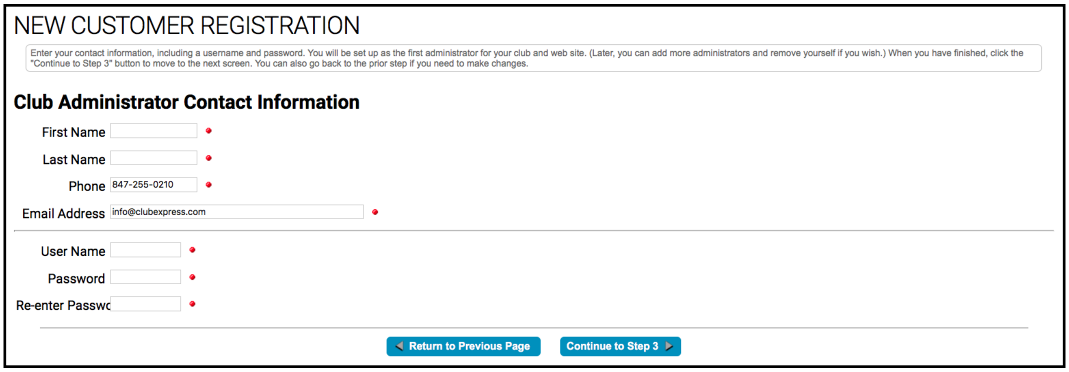
Note also that the following is **never** correct:

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:

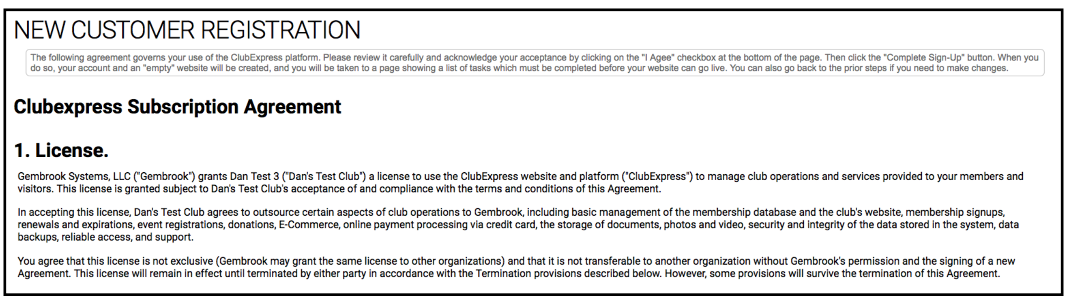


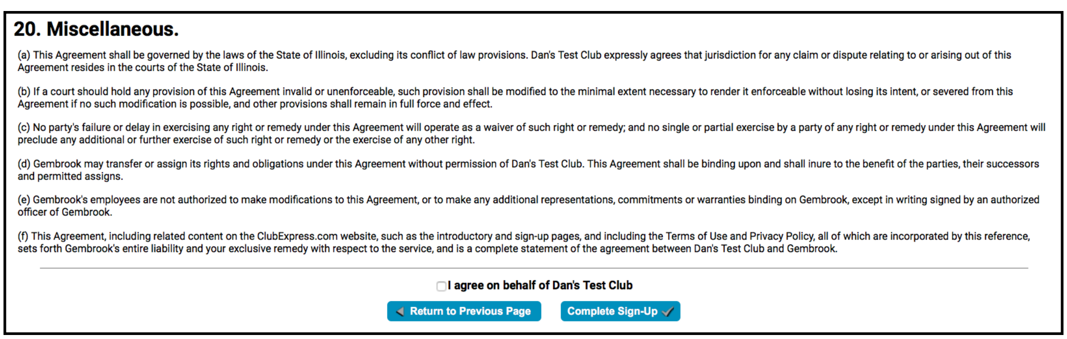
This screen sets up the first member/administrator account in the system. Each club or association needs at least one administrator and, initially, you're it. Enter your contact information, username and password.

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

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





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.

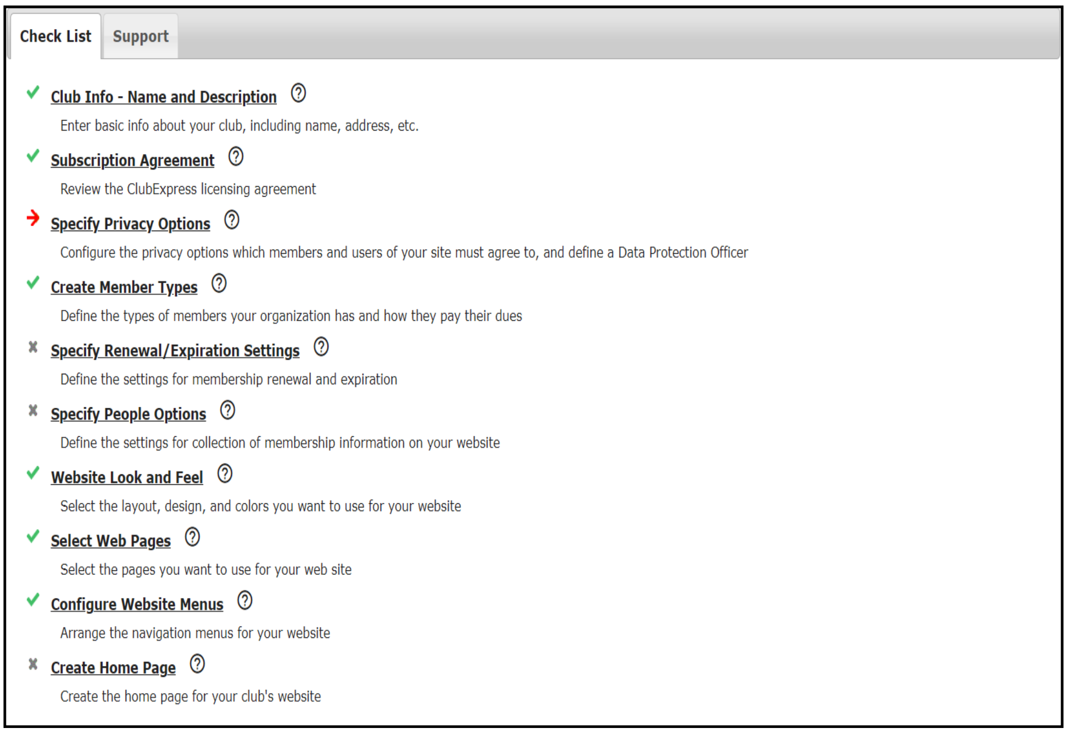
Click the **Complete Sign-Up** button to complete the sign-up process.

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:

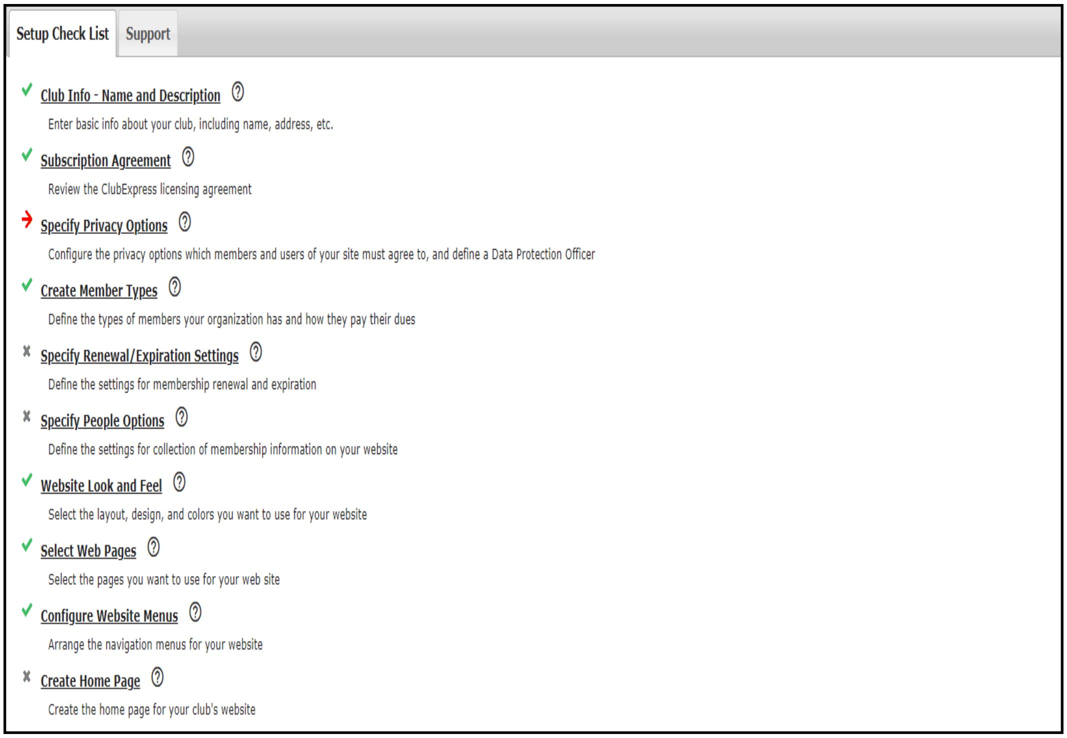
1. Select Control Panel – Public tab – Admin Functions panel – People Manager
2. Click Add Member to add the new member. Follow the wizard prompts.
3. When you get to the Payment screen, mark the member as having paid through an external system.
4. Select Control Panel – Club tab – Setup panel – Administrators / 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:



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:

- Configure the Member Signup/Renewal Wizard
- Member Interests
- Additional Member Data (if required)
- Additional Charges (if required)
- Member Joining Agreement (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 coordinator 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 here.

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 here.

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 here.

Reports

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

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 here.

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 here.

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 here.

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 here or read the How To Guide 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 mobile-friendly, 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

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

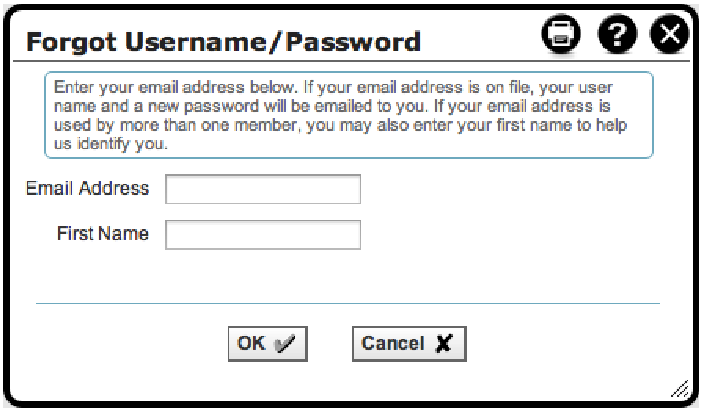
Enter your user name and password and click the **Login** button. Click **Cancel** to return to the home page.

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:

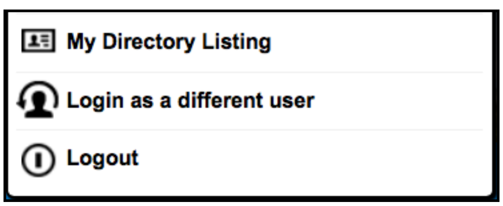


The system will prompt you to enter your email address and, optionally, your first name. When you click **OK**, the system will search for this information in the club's membership database. If one matching record is found, the username and a new temporary password is generated and sent to the email 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

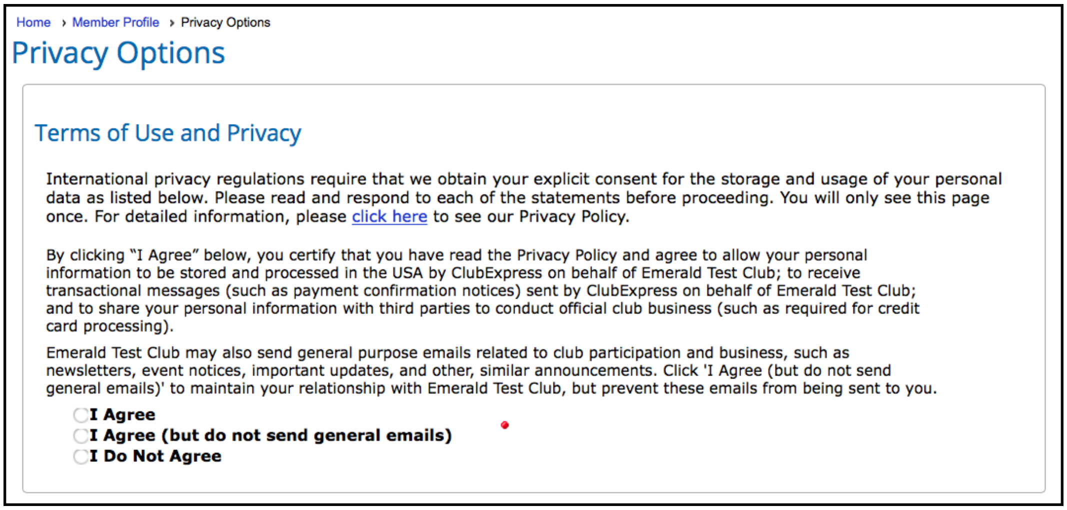
If you use a shared computer, there is an option on the drop-down name panel to log in as a different user:



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:

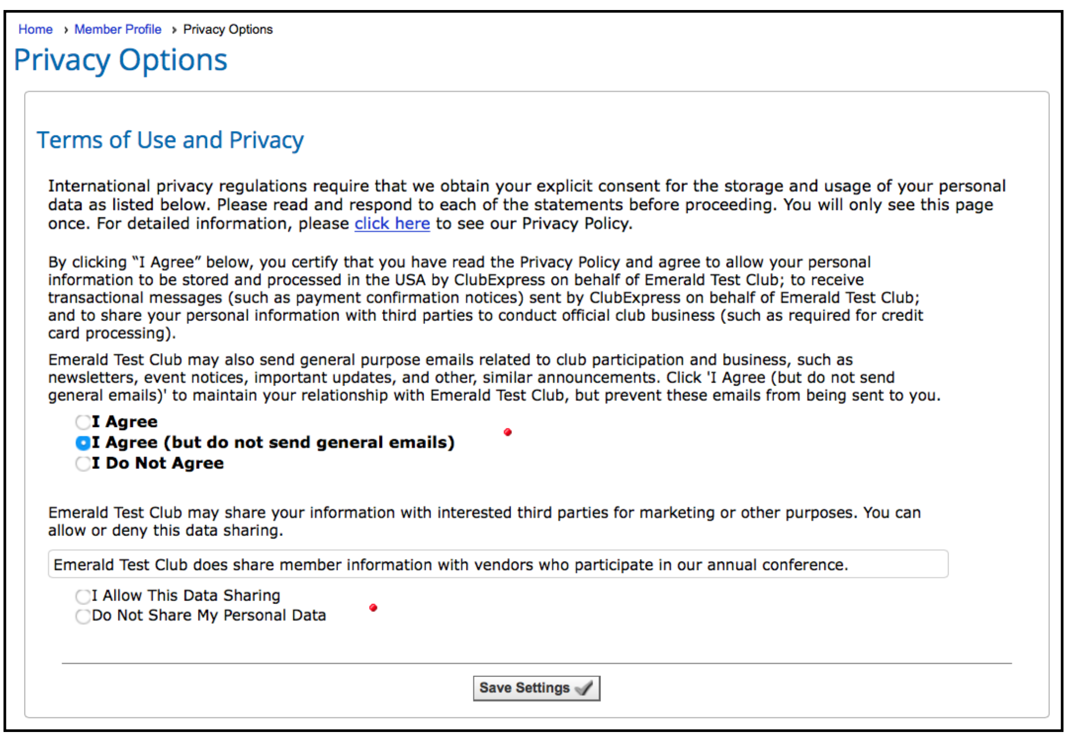


You are asked to consent to the following 3 provisions:

- 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.

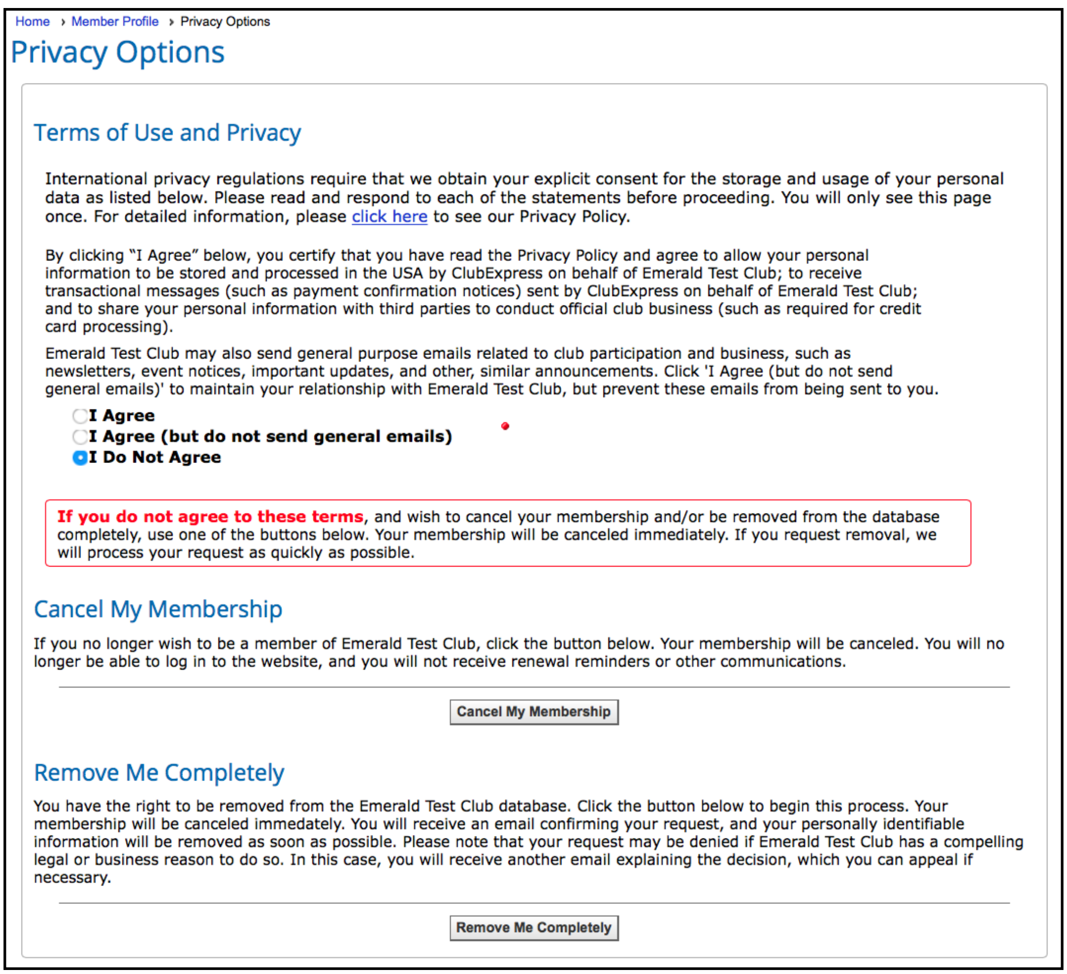
If your club or association shares personal data with third parties for marketing or fund-raising purposes, the final question allows you to opt in or out of having your personal data included in such lists. You may see some additional text from your organization explaining how and why they share such 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:



Home › 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 click here 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

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

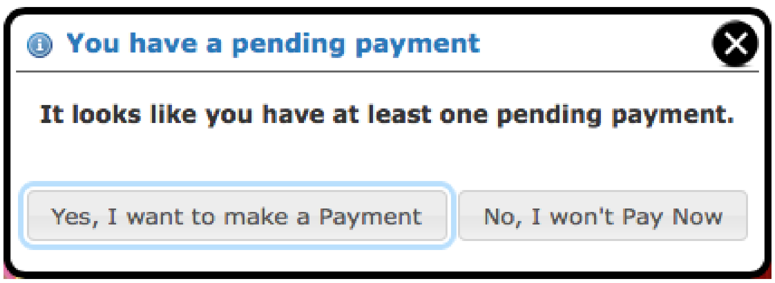
You have the right to be removed from the Emerald Test Club database. Click the button below to begin this process. Your membership will be canceled immedately. You will receive an email confirming your request, and your personally identifiable information will be removed as soon as possible. Please 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 Completel**y - 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

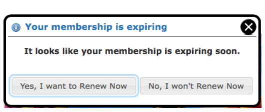
When members login, if they have a pending payment, they will see the following popup message:



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:

- 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.

- 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.

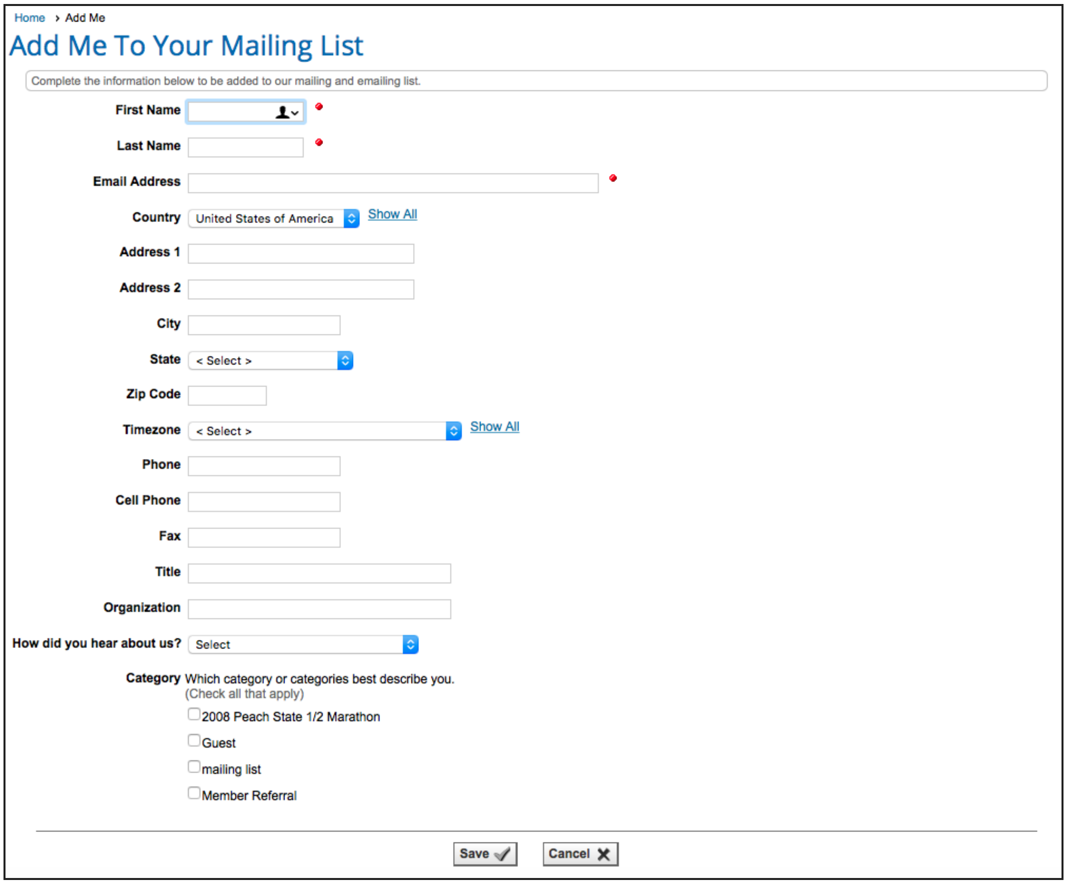
For an additional cost, we can also build a mobile app for your club, with additional features like local meet-up options and a chat function.

Desktop Site

Below is an example of a ClubExpress Desktop Site.

Add me to your Mailing List

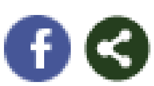
Clubs and associations have the option of enabling an *Add me to your Mailing List* prompt on the public side of their websites. Clicking this link displays the following screen:



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.

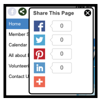
Social Networking Links

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:



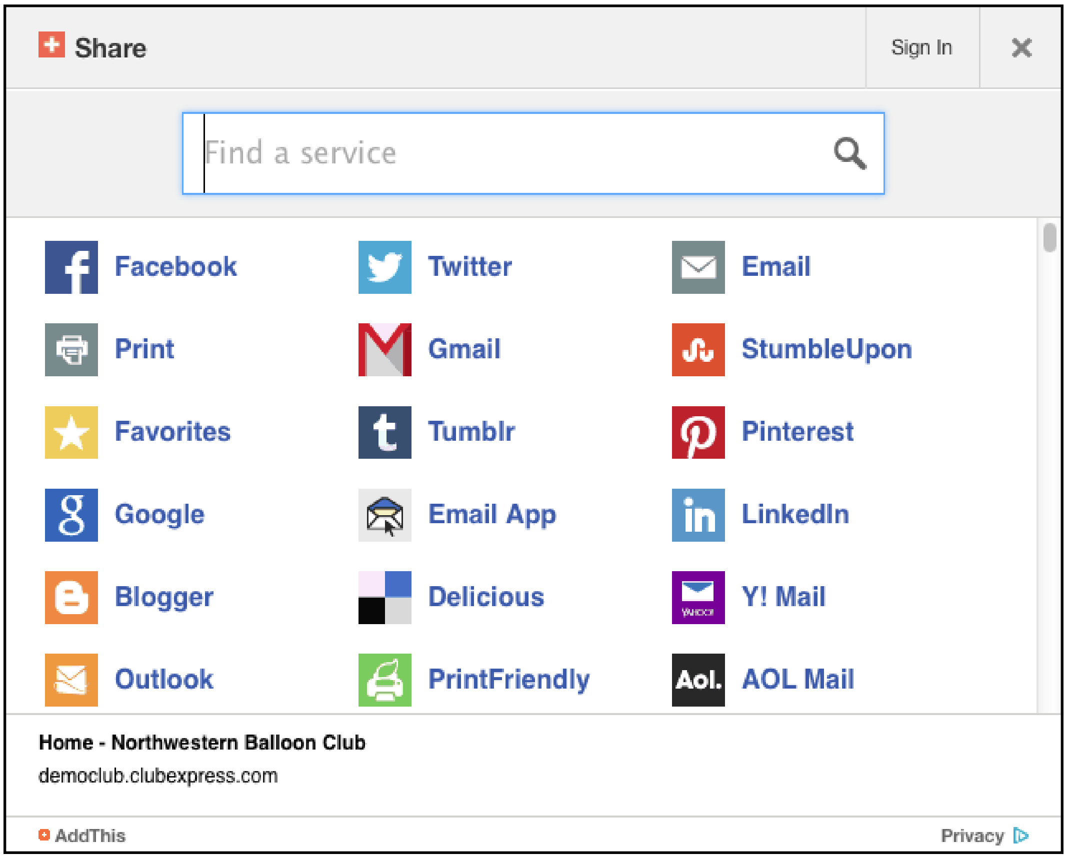
In the above example, the first link is to the club's Facebook page.

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:

- 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.

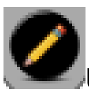
Under the crumb trail but above the module heading is a message area. In most instances, this area will be blank. Error messages appear in red while status and general informational messages appear in blue (or a similar "non-cautionary" color based on the current template, theme and style sheet.)

Page Tools Widget

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

[1] The crumb trail is named after the story of Hansel and Gretel, who left a trail of breadcrumbs into the forest to help them return after being abandoned by their wicked stepmother.

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.

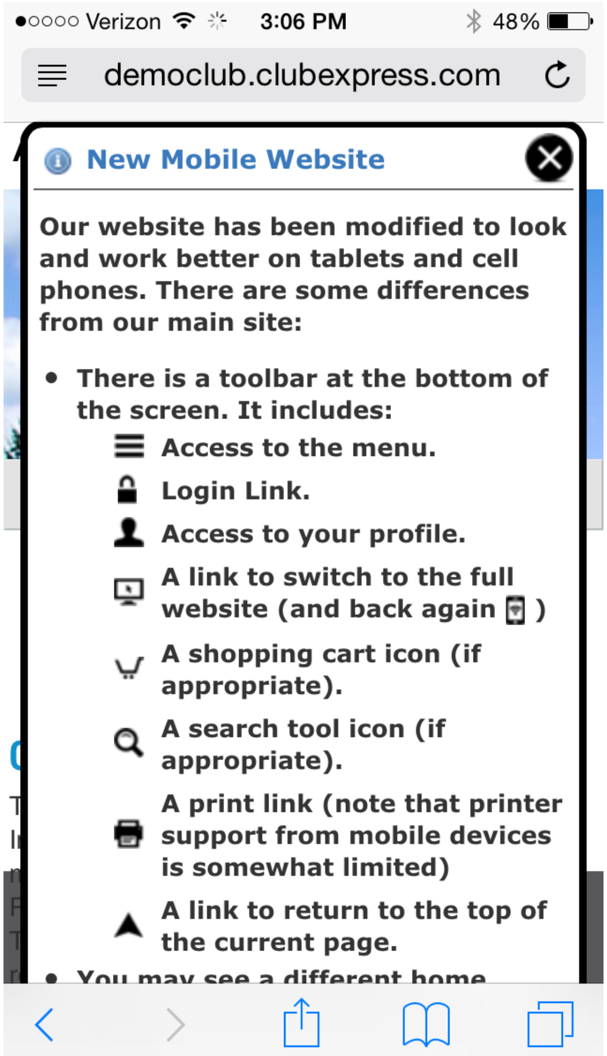
ClubExpress also provides extensive support for clubs and associations outside the United States.

- 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

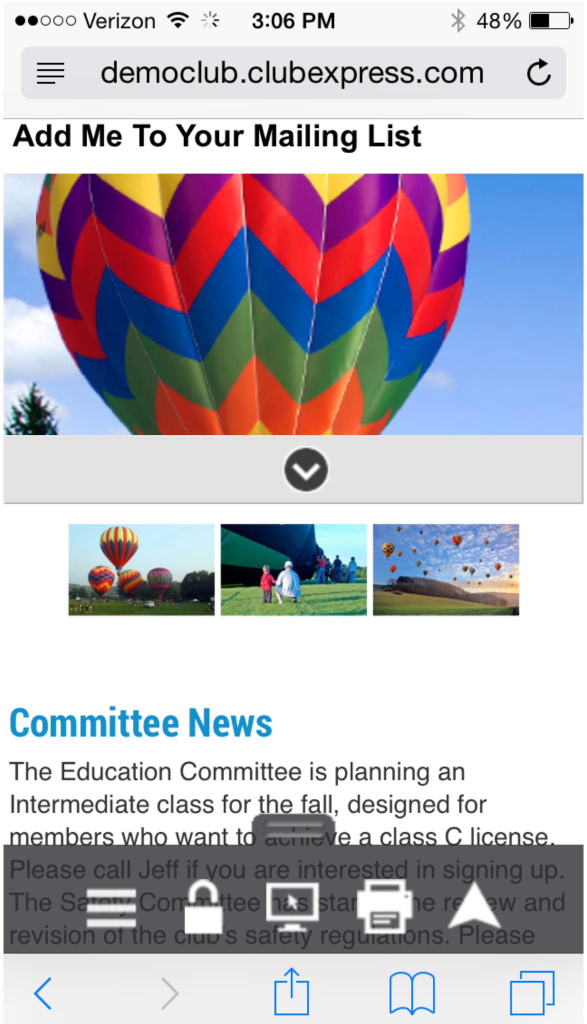
ClubExpress websites dynamically adjust themselves for mobile devices such as smartphones and tablets.

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



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:



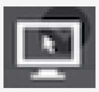
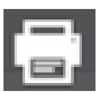
At the top is a standard link for non-members to add themselves to the club's mailing list.

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:

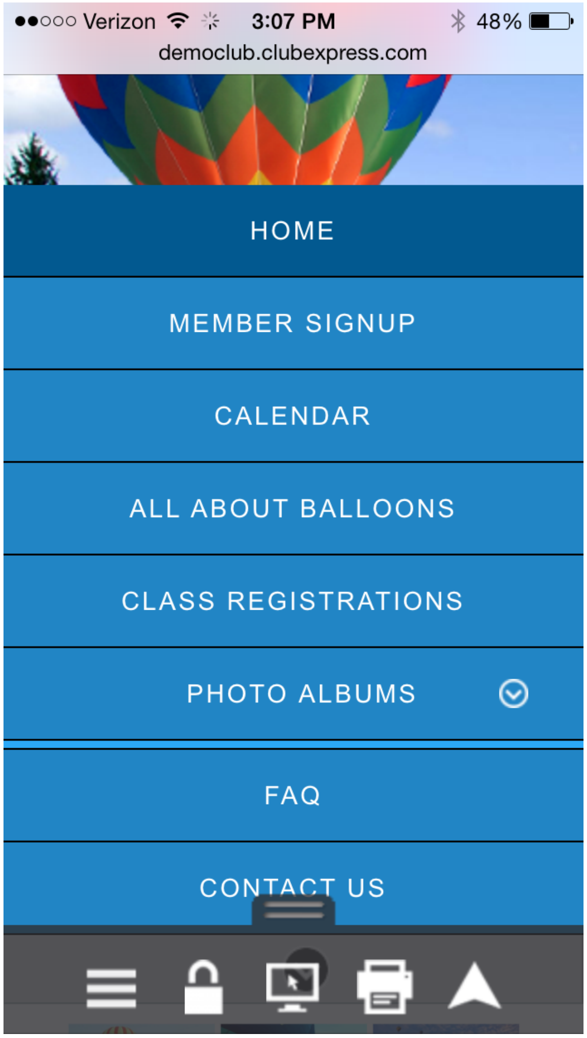
Icon	Description
 (Menu)	Tapping this icon displays the website menu.
 (Login)	Tapping this icon allows you to login to the website.
 (Profile)	When you are logged in, the **Login** icon changes to this one. Tapping it displays your individual Profile menu.
 (Full site)	Tapping this icon allows you to 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.
 (To Top)	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:

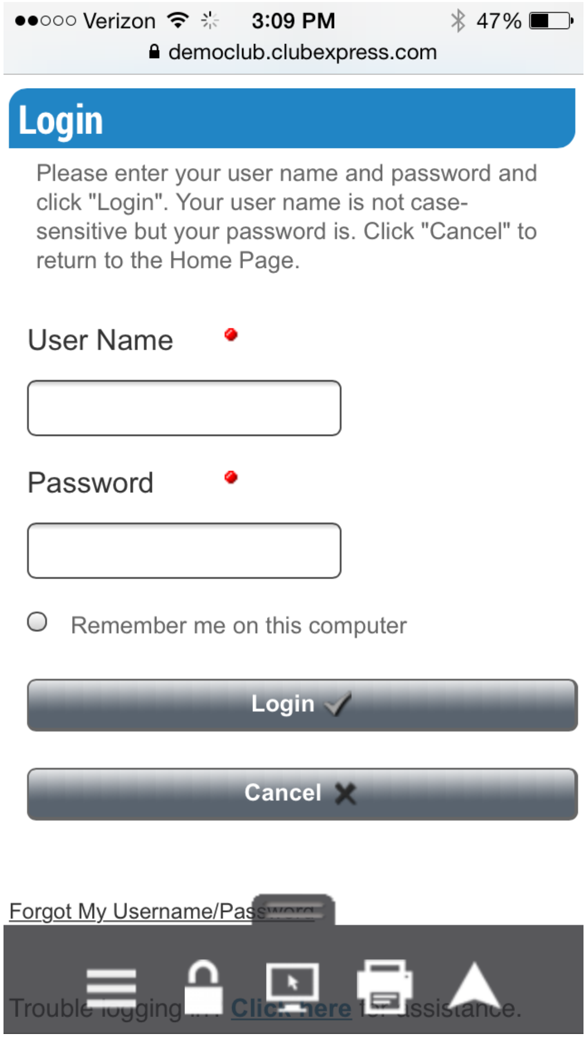


Tap a menu choice or tap the icon again to hide the menu. For submenus on a smartphone, tap the down arrow and the submenu will appear inline with the main menu. (On tablets, the submenu will appear to the side.)

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

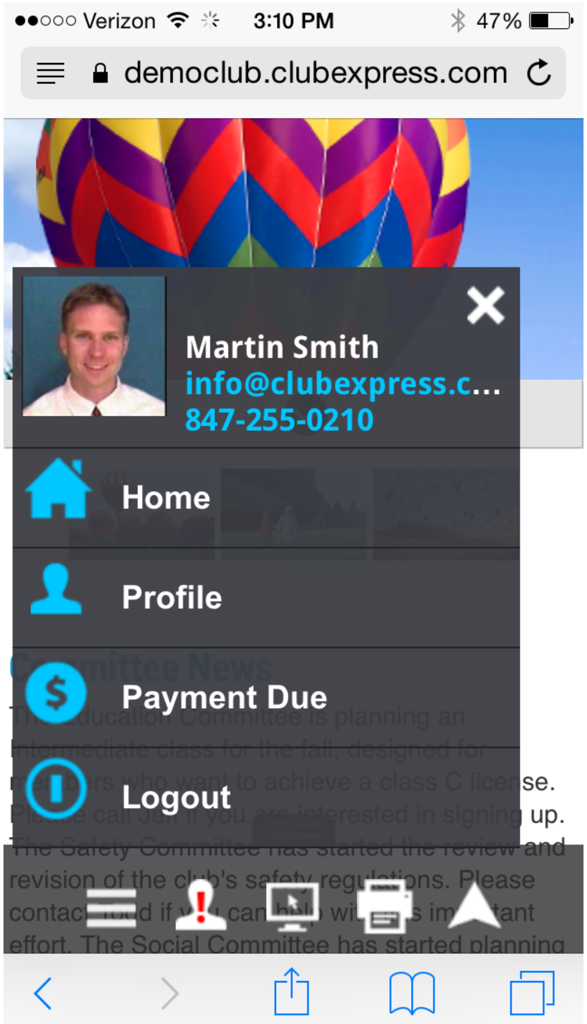
When you tap the **Login** icon, you will see a screen similar to the following:



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:

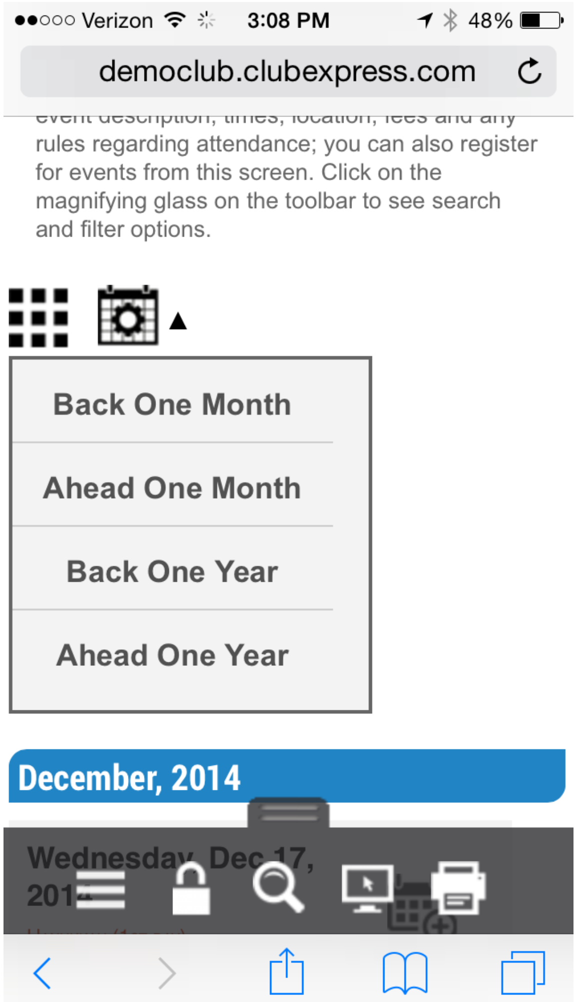


This popup menu allows you to jump to the home page, view your **Profile** screen or **Logout**. If you currently owe money, you will also see a **Payment Due** option and if your club or association is using the E-Commerce Storefront and you have placed items in your shopping cart, you will see a **Shopping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

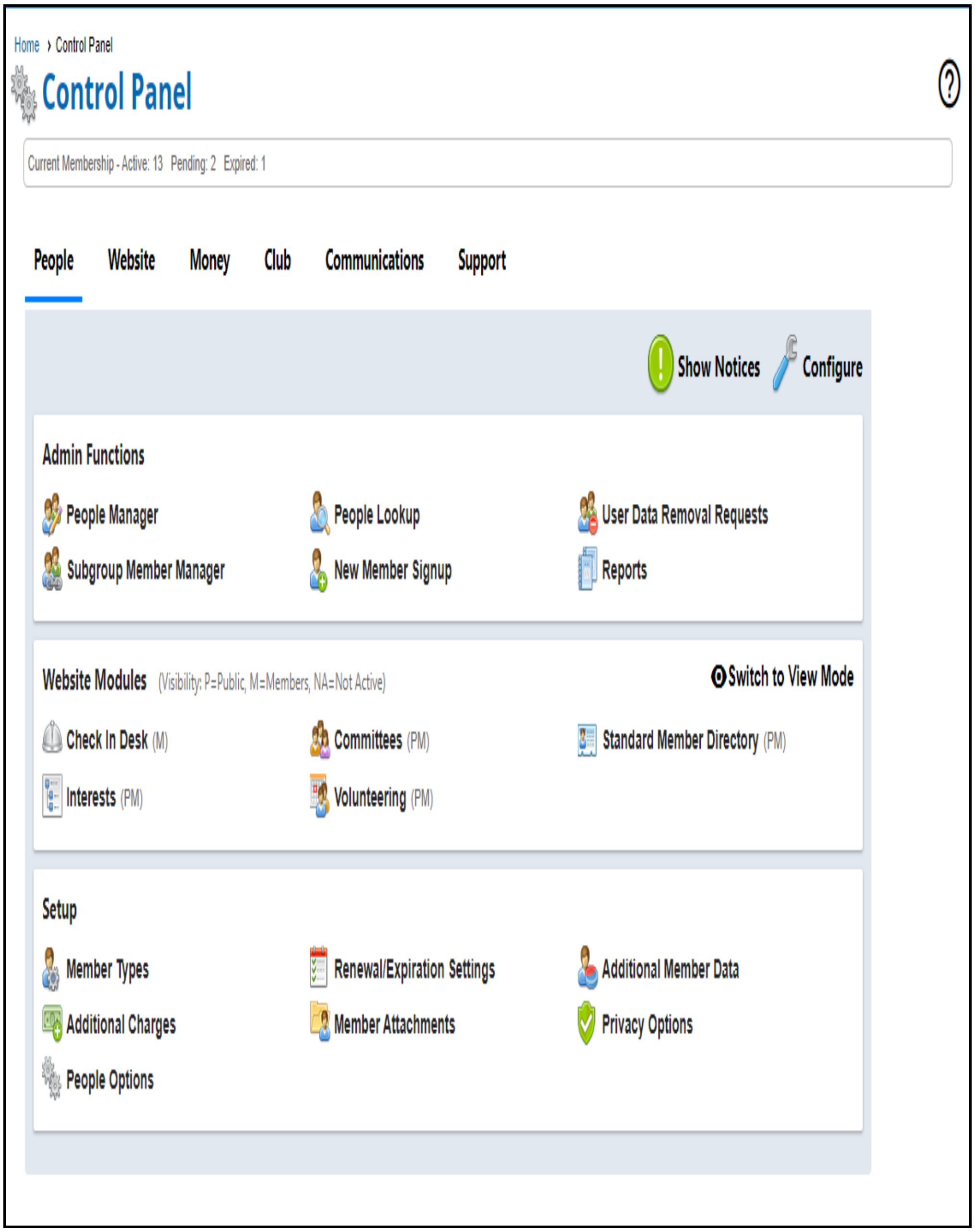
The Mobile App

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:



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.

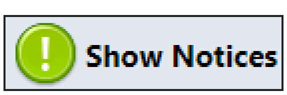
Websites are built from a combination of **built-in functions, custom web pages and photo albums** (as well as the home page, and the built-in admin screens to manage a member's personal profile and the Control Panel.) Individual functions can be enabled or disabled; if a function is enabled, it can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

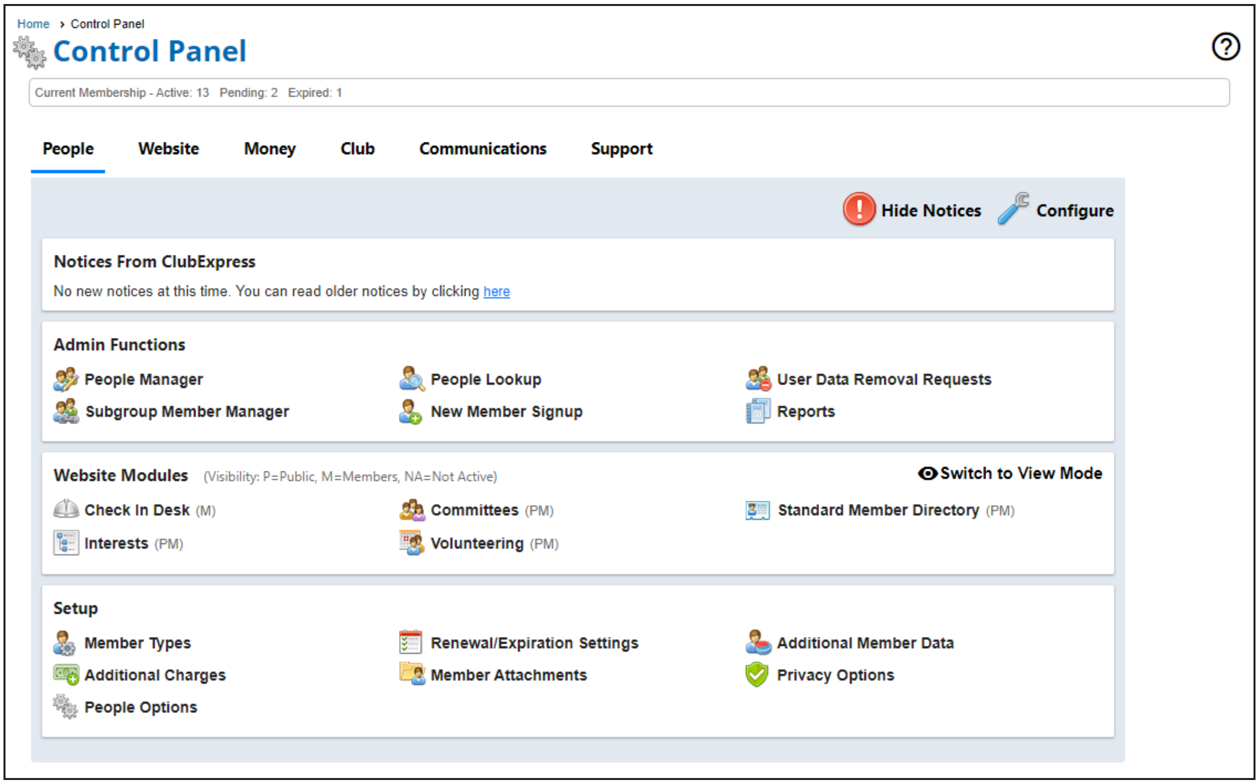
When the *Website Modules* panel is in **Edit Mode** (where the panel says "Switch to View Mode"), and

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.

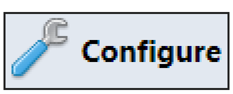


New notices will appear in the panel. If there are no new notices, select the available link to read old notices.

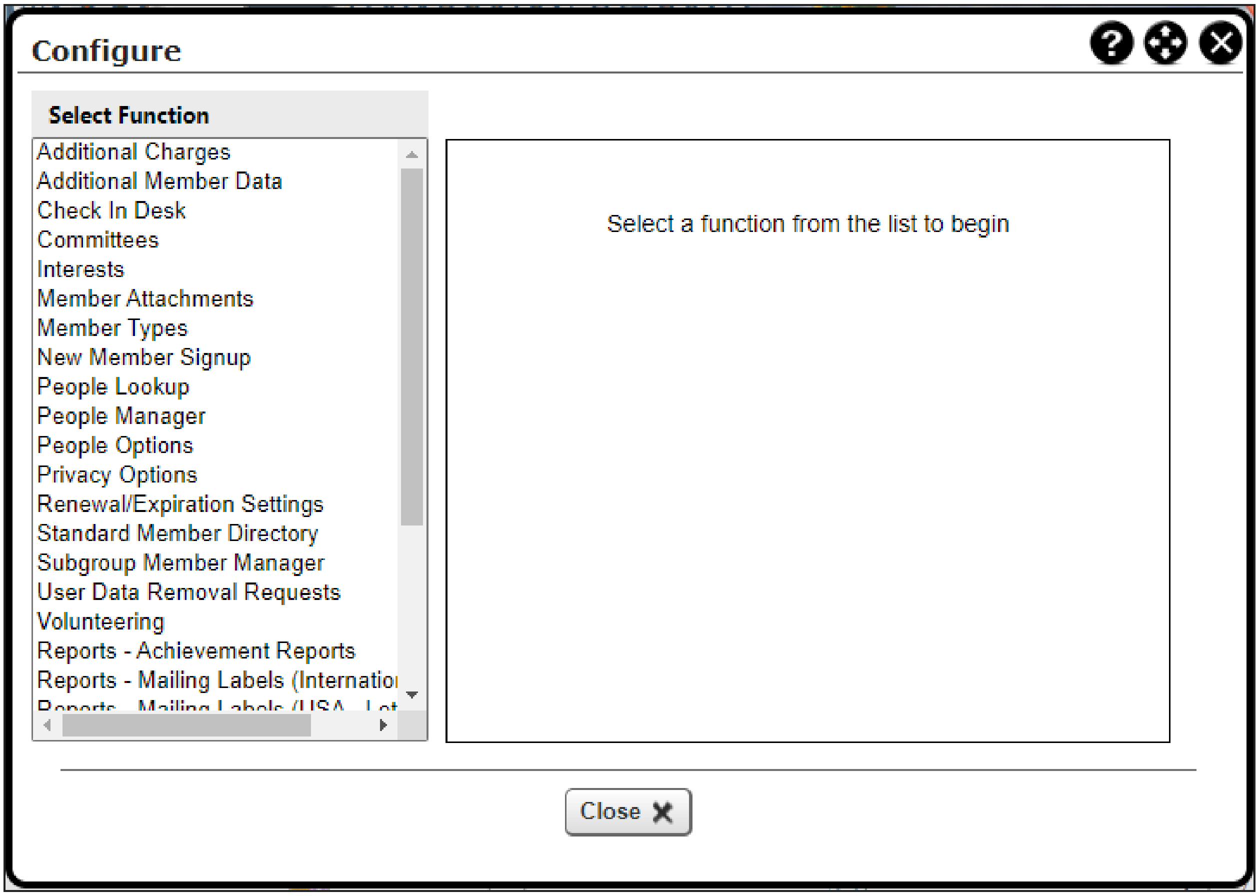
Select **Hide Notices** to collapse the panel.

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

Configure



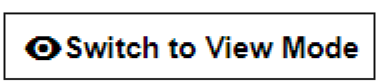
Select Configure to show the Configure pop-up dialog.



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

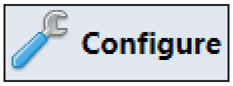


The default view for the modules listed in the Website Modules panel is Edit Mode. In Edit Mode, selecting the module link will take you to the admin side of the module. Select Switch to View Mode to switch to View Mode. In View Mode, selecting the module link will take you to the user side of the module.

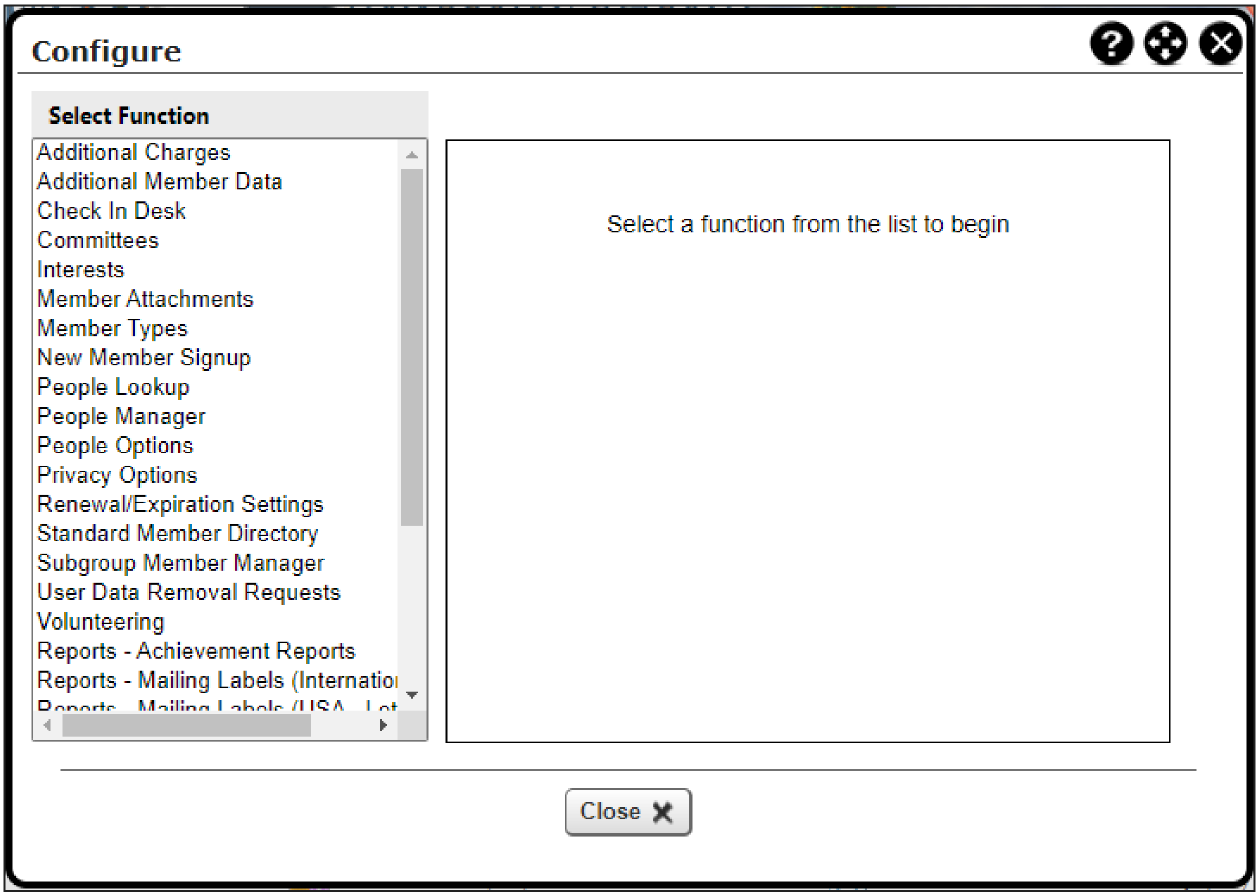
> **Note:** Some modules do not have an admin side and will only display in the Website Modules panel in View Mode, for example Chat and Meets (used with the Mobile App). Once you have enabled those modules, be sure to select Switch to View Mode in order to access the item.

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.



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



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.

Administrative Functions

Function	Description
People Manager	Just for the subgroup(s) that this member is administering, search for members, update information on existing members, add new members, change membership status, and process payments.
Emailings	Write and send emails to members and the mailing list in the subgroup(s) that this member is administering.
Custom Page Index	Define custom web pages that are assigned to a specific subgroup.
Add New Custom Page	Add a new custom web page.
Pending Payments	Process check payments that arrive in the mail, or cash received at an event. Only payments for subgroup members and non-members will be shown.
Open Cred-	View, add and edit credits which have not been fully allocated

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 Forums	Manage forums for the subgroup(s) that this member is administering.
Event Calendar	Manage events for the subgroup(s) that this member is administering.

Built-in Functions

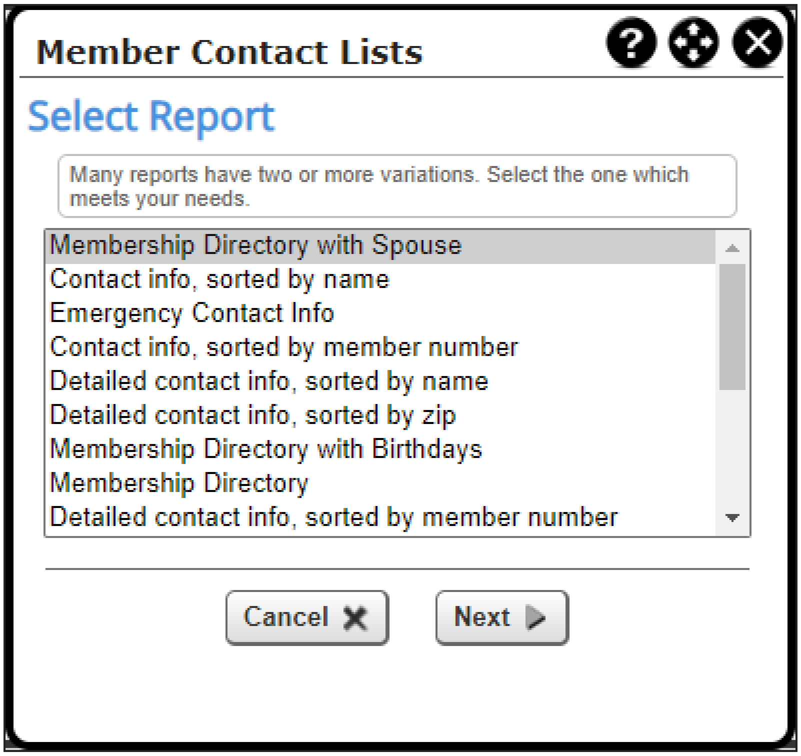
Reports

> **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.

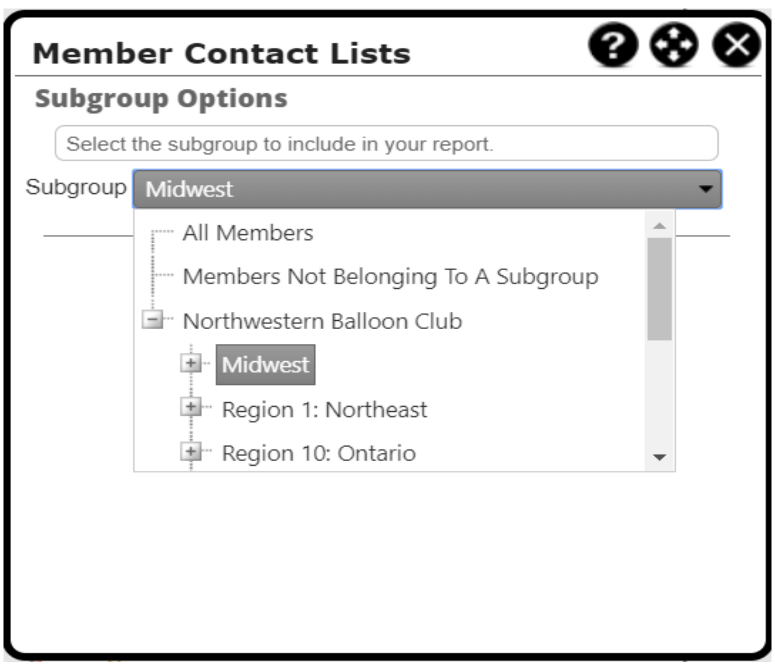
In the *Reports* pop-up dialog, select the **report group** you want to browse. A new pop-up dialog will appear containing all the reports in that group.



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:

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**:

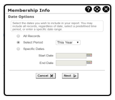
- All members, including solo, primary, secondary and tertiary;
- Solo and primary members only;
- Secondary (family or additional business) members;
- Tertiary members;
- Various combinations of primary and secondary/tertiary.

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

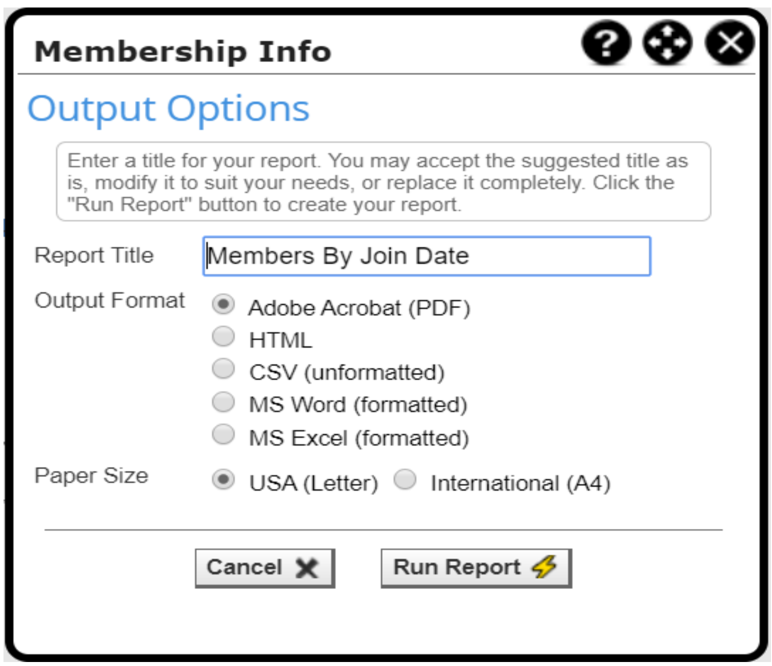
Some reports can be filtered by a date range. The following screen is displayed:



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.



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

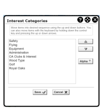
When printing mailing labels to PDF, be sure to set Acrobat's printer options to print the labels at full size. If you are using Acrobat 5, uncheck the options to shrink or expand pages to paper size in the "Copies and Adjustments" section of the print dialog box. For Acrobat 6, set the "Page Scaling" 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]**.

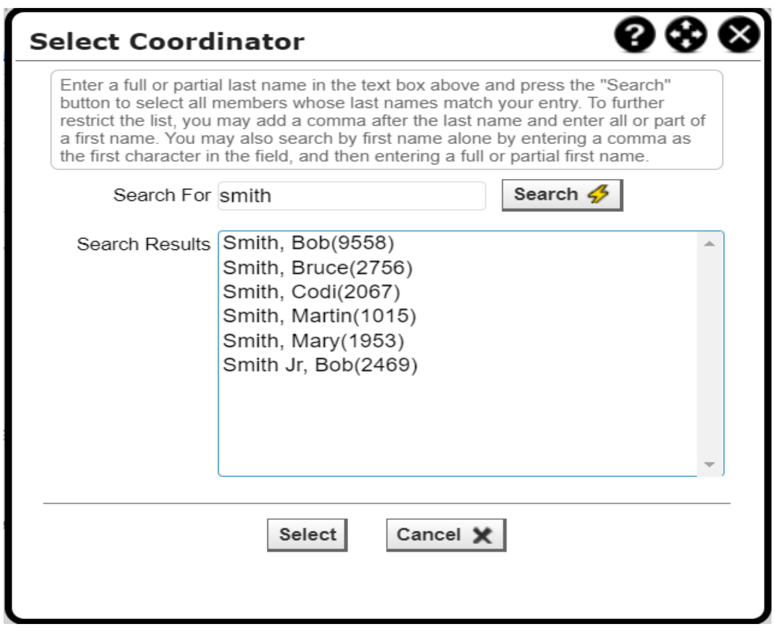
Clicking the Alpha button will sort in alphabetical order. Click the button once for ascending order, and again for descending order.

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 re-order 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:



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.

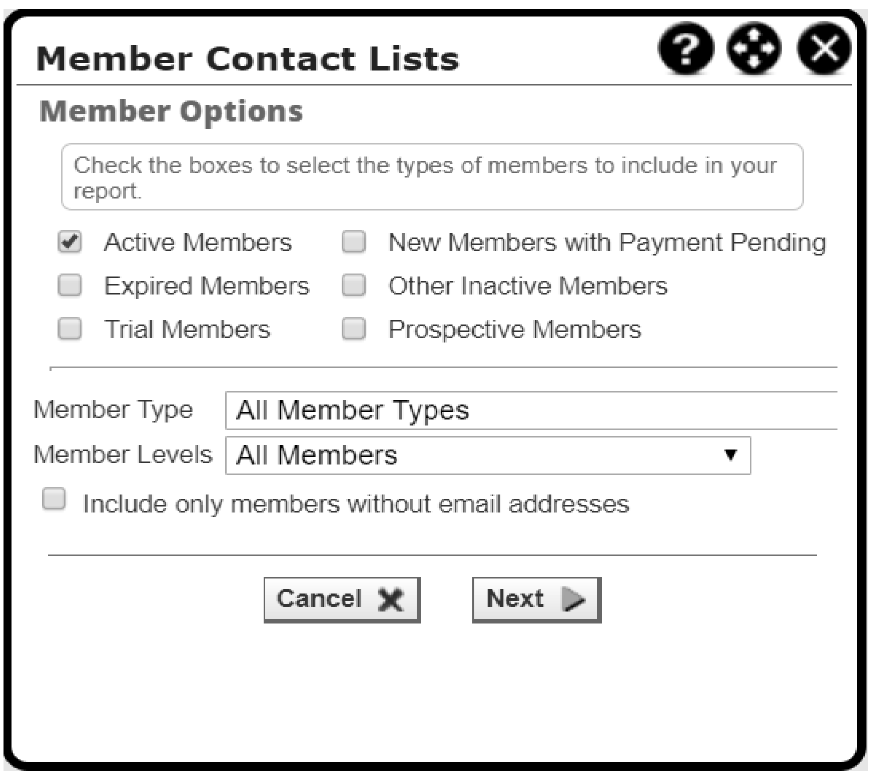
Subgroups: For multi-tier clubs and associations (with chapters, etc.), the member selector may include a member's chapter name, to help distinguish members with the same name in different chapters.

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.

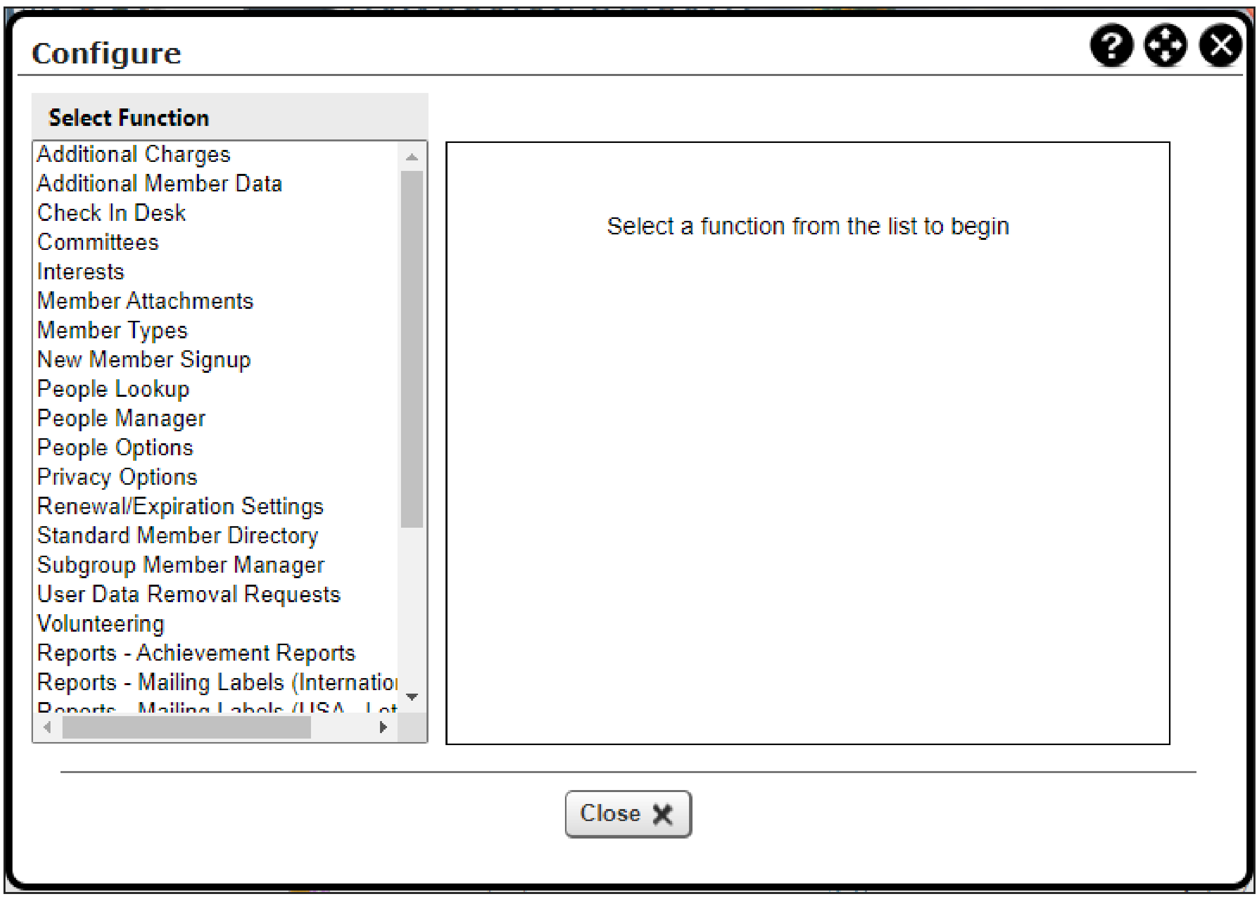


In this example, Jessica Smith is being defined as an event calendar coordinator for all events in the Northeast region, including all of its districts and chapters.

Enabling and Disabling a Website Module

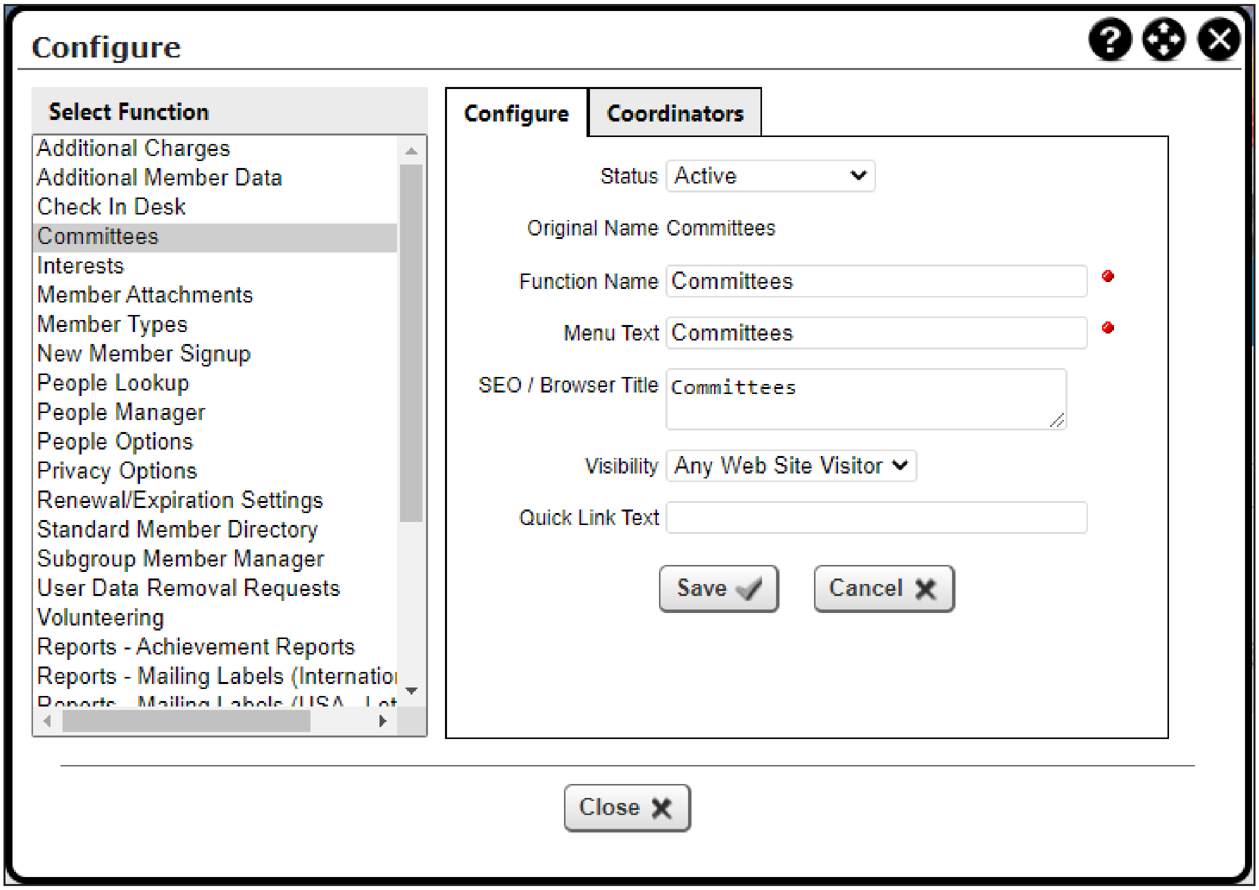
When you sign in as an administrator, select the Control Panel link to navigate to the Control Panel and manage the website modules on your site.

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



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*.



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 non-members 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.

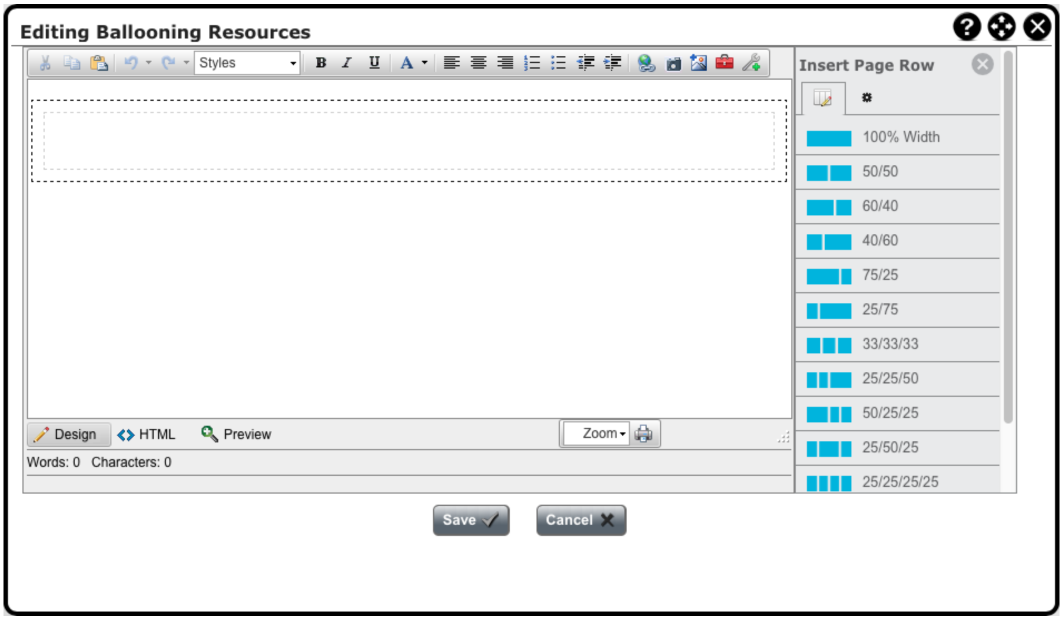
More experienced web designers can view and modify the underlying HTML code created when you edit pages with this tool.

> **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

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.

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:



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.

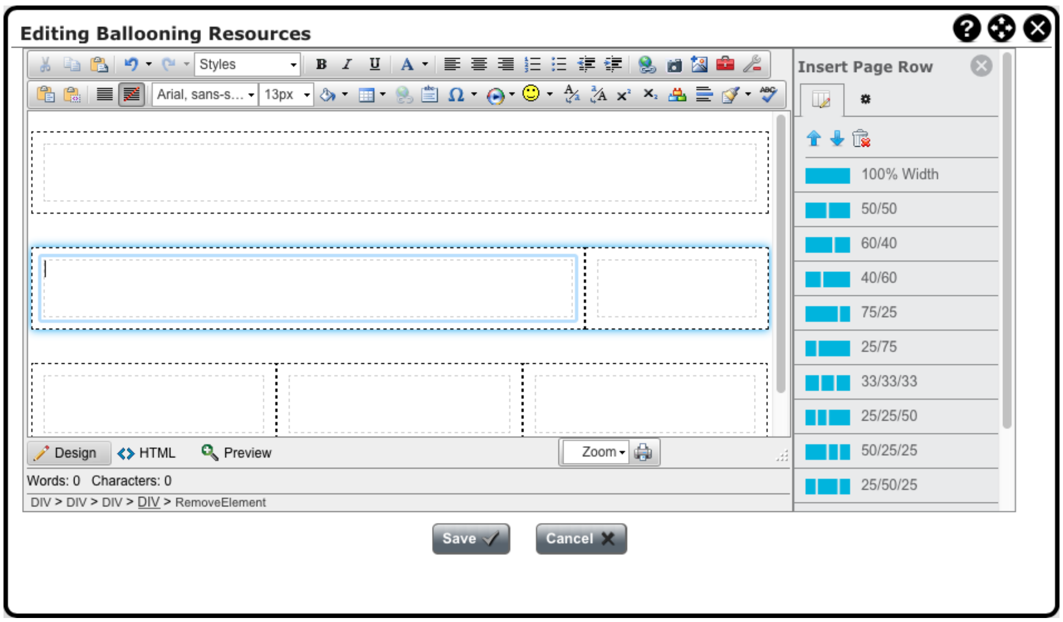
Working with Page Rows

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.

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.

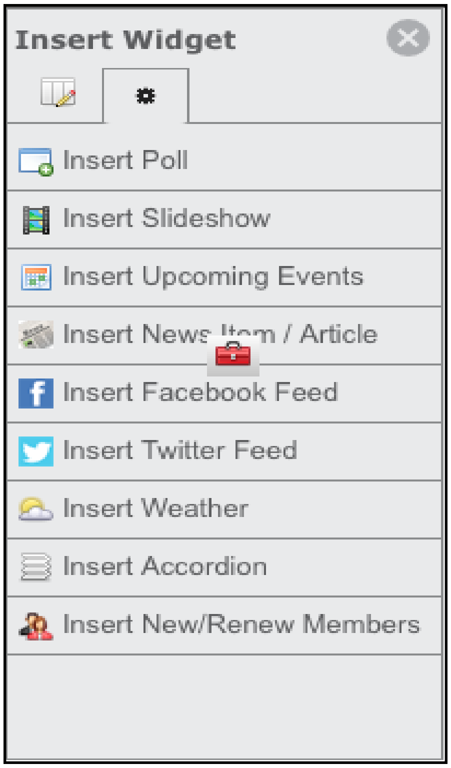
In general, row layouts cannot be changed (unless you're a very experienced website developer); once you have picked the set of boxes, you are stuck with them for that row.

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.



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

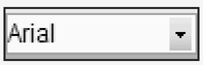
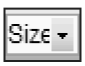
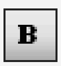
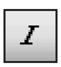
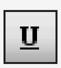
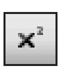
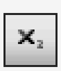
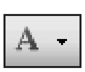
Icon	Description
	Cut the highlighted text to your computer's clipboard. The shortcut key *[Ctrl-X]* performs the same function.
	Copy the highlighted text to your computer's clipboard. The shortcut key *[Ctrl-C]* performs the same function.
	Paste text from your computer's clipboard at the current cursor position. The shortcut key *[Ctrl-V]* 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.
	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.
	Undo one or multiple changes. The shortcut keys *[Ctrl-Z]* and *[Alt-Backspace]* 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 *[Ctrl-Y]* performs the same function. Click the forward arrow to redo the last undo, or the small down arrow to select which undo point to reverse.
	Strip selected formatting options from the highlighted text. A small drop-down menu will appear, allowing you to choose exactly what should be stripped.
	Left Align the current line or block.
	Center Align the current line or block.
	Right Align the current line or block.
	Fully Justify the current line or block. The editor will insert additional spaces to line up both the left and right margins.
	Unjustify the current line or block. The editor will revert to left justified text, removing any spaces inserted to create fully justified text.
	Indent the current line or block 1 tab stop.
	Outdent the current line or block 1 tab stop.
	Insert or format a table at the current cursor position. A drop-down menu will appear allowing you to paint the rows and columns in the table and to specify other options.
	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 *[Ctrl-K]* performs the same function.
	Break the current hyperlink, removing the special linking code behind the scenes, The current hyperlink will revert to standard text. The shortcut key *[Ctrl-Shift-K]* 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.
	Insert a Special Symbol. Click the small drop-down arrow to display a popup window of special characters. Click a character to insert it in your text.
	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

Icon	Description
	text.
	Create and insert a widget.

Top Row Icons

Second Row

Icon	Description
	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.
	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.
	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.
	Click to **bold** the current block of text or to start bolding from the cursor position. *[Ctrl-B]* also works.
	Click to *italicize* the current block of text or to start italicizing from the cursor position. *[Ctrl-I]* also works.
	Click to underline the current block of text or to start underlining from the cursor. *[Ctrl-U]* also works.
	Click to convert the highlighted text to lower case.
	Click to convert the highlighted text to UPPER case
	Click to convert the highlighted text to superscript
	Click to convert the highlighted text to subscript
	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.
	Click to select the background color. The same color picker described above is displayed.
	Click to display a popup Style Builder dialog. This dialog allows you to specify complex style information for the selected text.

Icon	Description
	Click to begin a numbered list of items.
	Click to begin a bulleted list of items.
	Click to insert a horizontal rule across the page.
	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.
	Find text on the current page or find and replace. The shortcut key *[Ctrl-F]* performs the same function.

Second Row Icons

Options at the Bottom

Icon	Description
	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 View. This view allows you to see and edit the underlying HTML source code.
	Preview. This view allows you to see the page as it will generally look when it's being viewed.
	Full Screen Mode. This mode makes the edit box slightly larger by hiding all non-editor controls.
	Zoom. Click the drop-down arrow to zoom your text in to see more detail or out to see more of the page.
	Print. Click this icon to print the current page being edited.
	Displays an approximate word and character count for the current document.

Bottom Row Options

Summary of Shortcut Keys

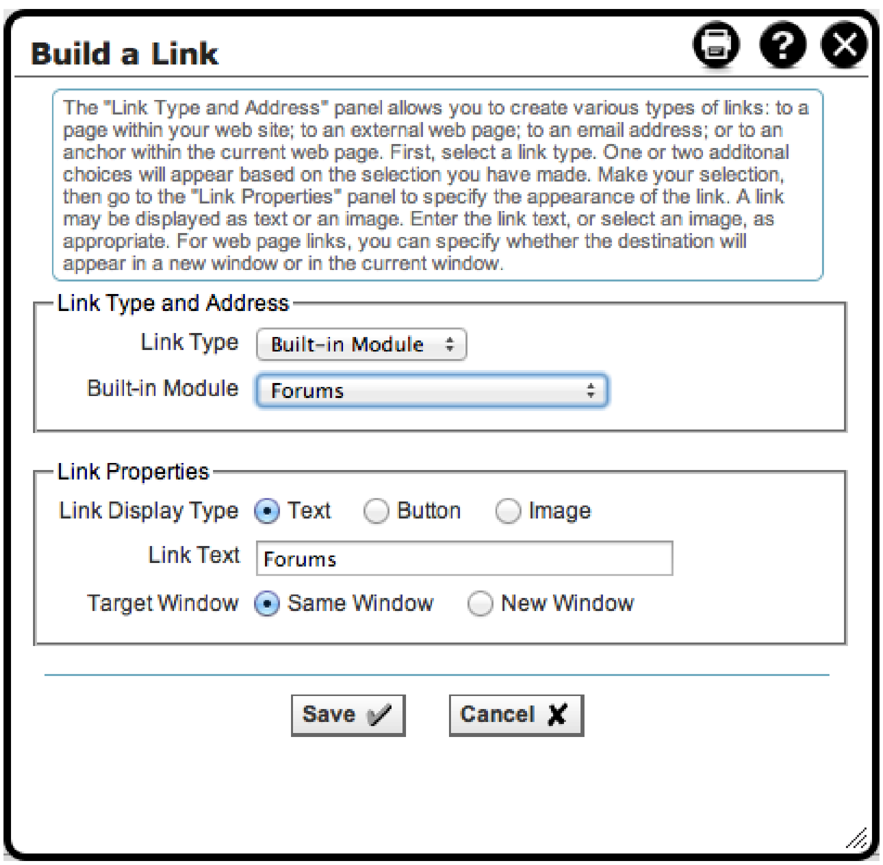
Shortcut	Description
Ctrl-X	Cut the highlighted text to the Clipboard
Ctrl-C	Copy the highlighted text to the Clipboard
Ctrl-V	Paste from the Clipboard at the cursor position

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:



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.

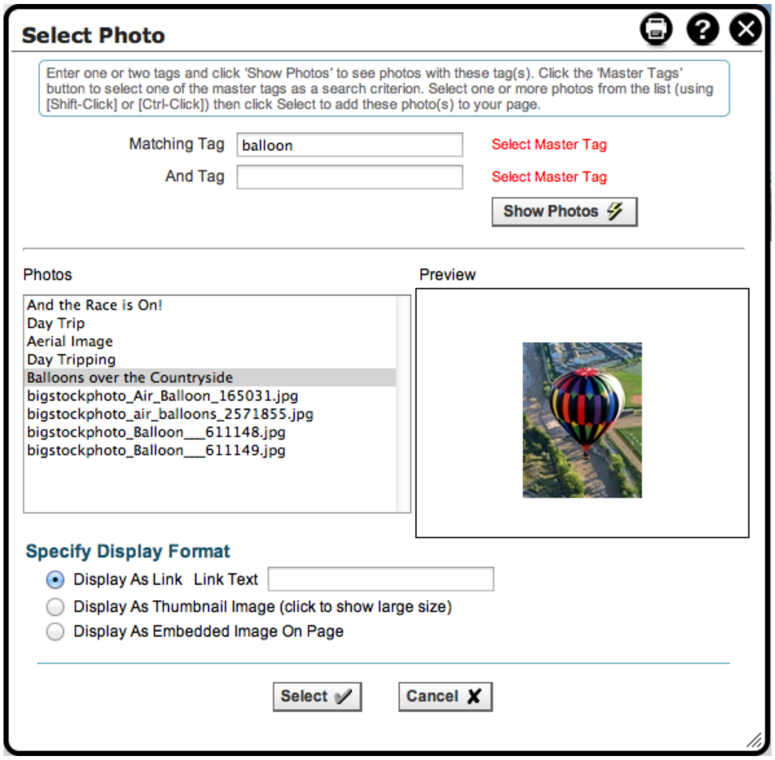
Links can be represented in three ways, using text, a ClubExpress-style button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, the field is replaced by a button that displays the ClubExpress Select an Image window, described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



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.

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Insert Image

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

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.

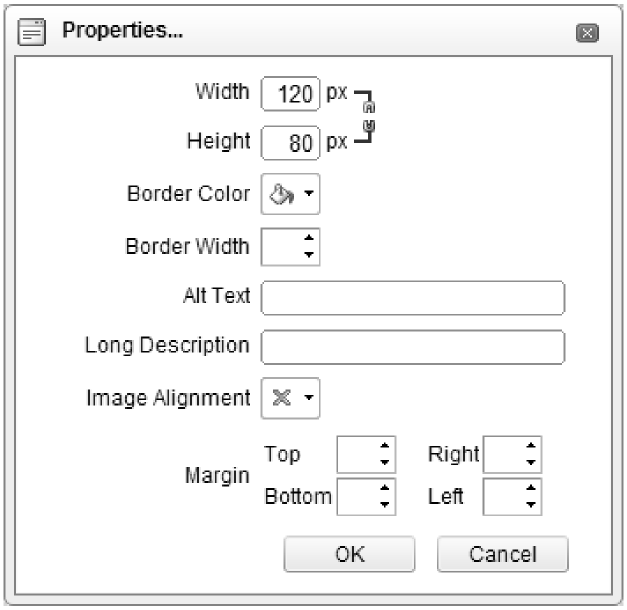
Unlike photo libraries of club activities or member collectibles, these images represent graphics and photos which are part of your website or which represent official club images (such as logos, graphical tag lines, affiliate logos, awards, and other special images.)

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:



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.)

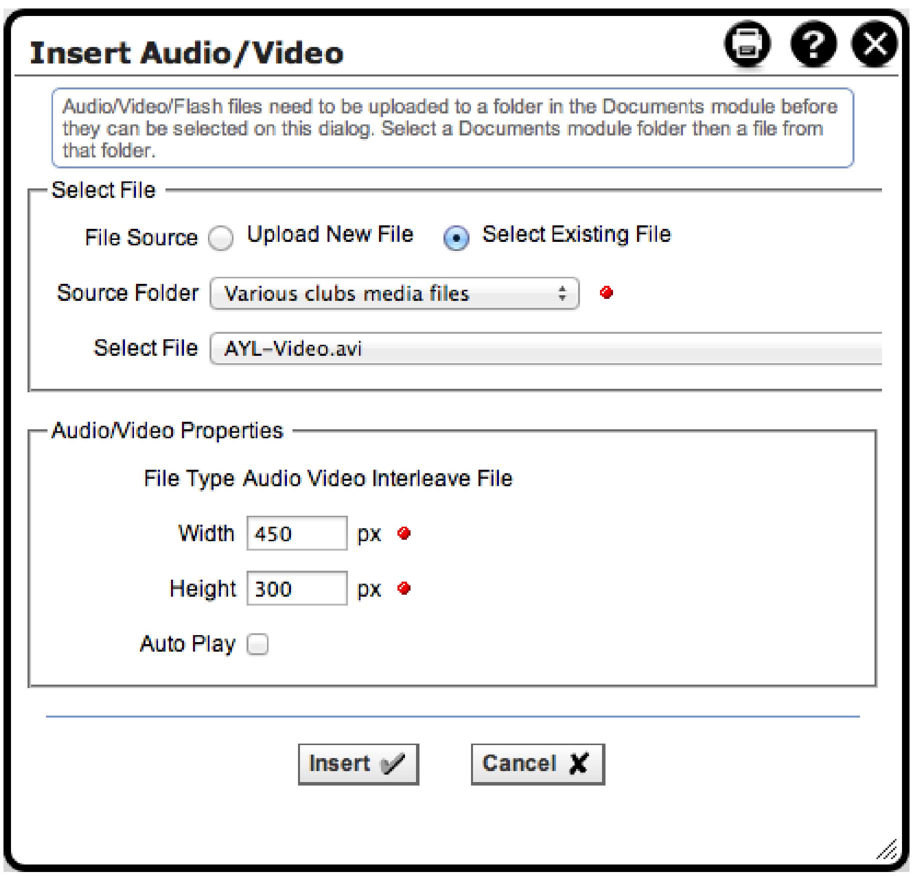
In YouTube, look to the right of the video for the "Embed" box. You can also click the "Gear" icon beside the Embed box to display a panel with additional options, including whether or not a border should be displayed (and its color), and the video size.

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:



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.

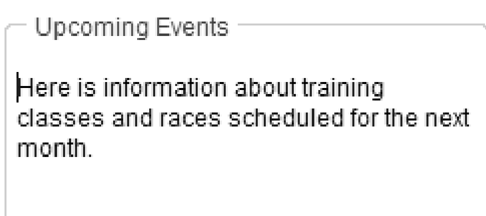
The system will detect the file type and give you an error if a non-supported file was uploaded. For video and Flash files, specify the width and height for the panel; this information can often be found in the file properties window of the file on your local hard disk. For audio files, specify the width 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



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.

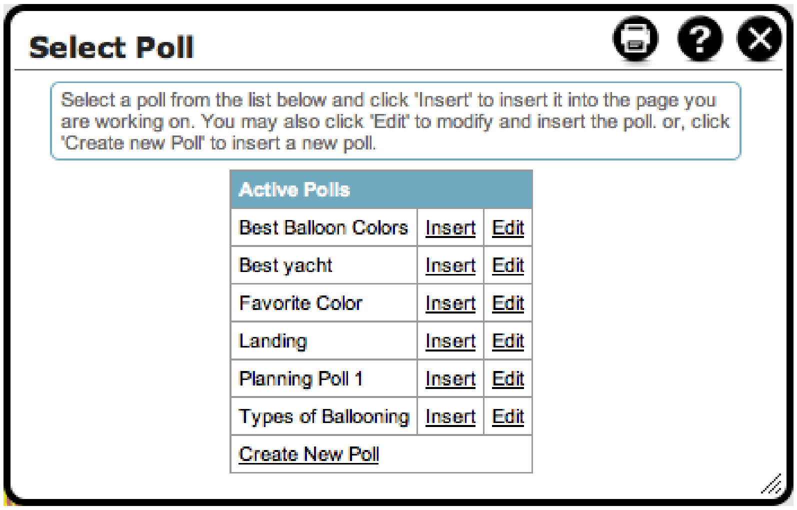
 Insert Poll

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.

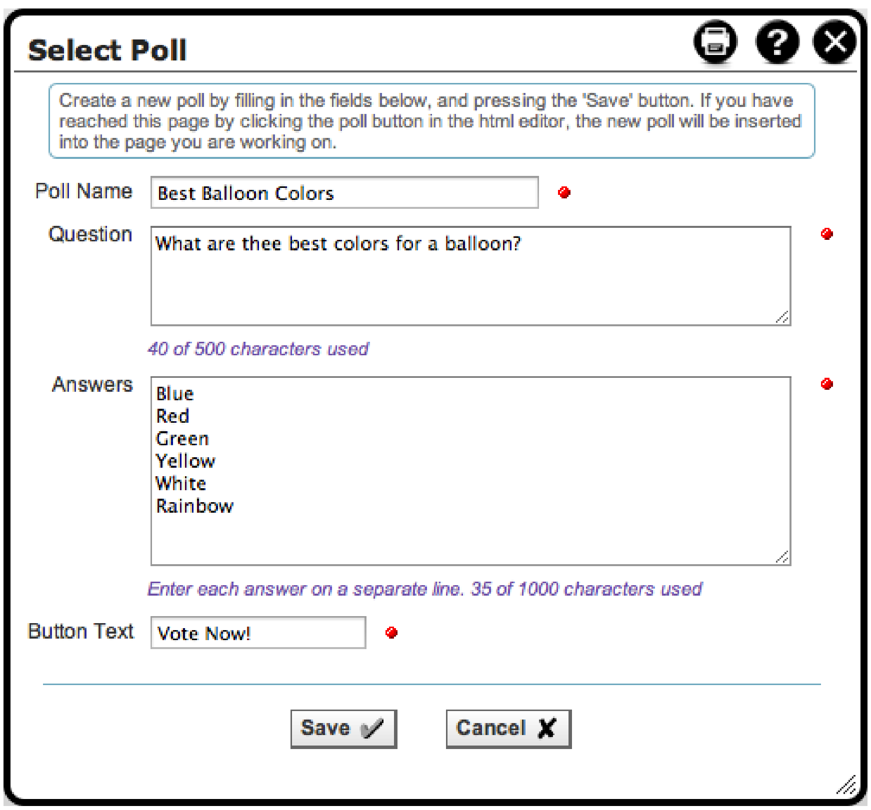
Polls are available to members only and the system will enforce one vote per member. Behind the scenes, polls are stored in the Surveys module and you can use the facilities of that module to modify a poll, view results, or output reports or exports.

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



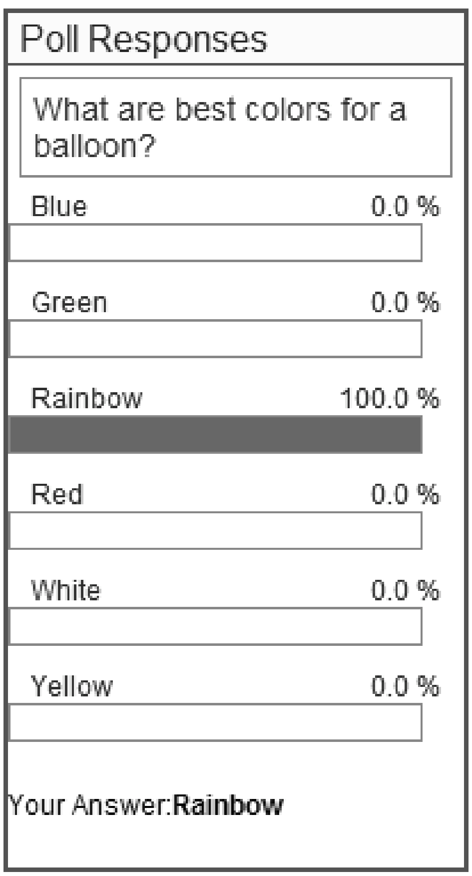
Click **Insert Poll** to insert an existing poll at the cursor position. While the editor is in edit mode, the poll will appear as an empty box; you cannot view the poll until you save the page.

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



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. 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:



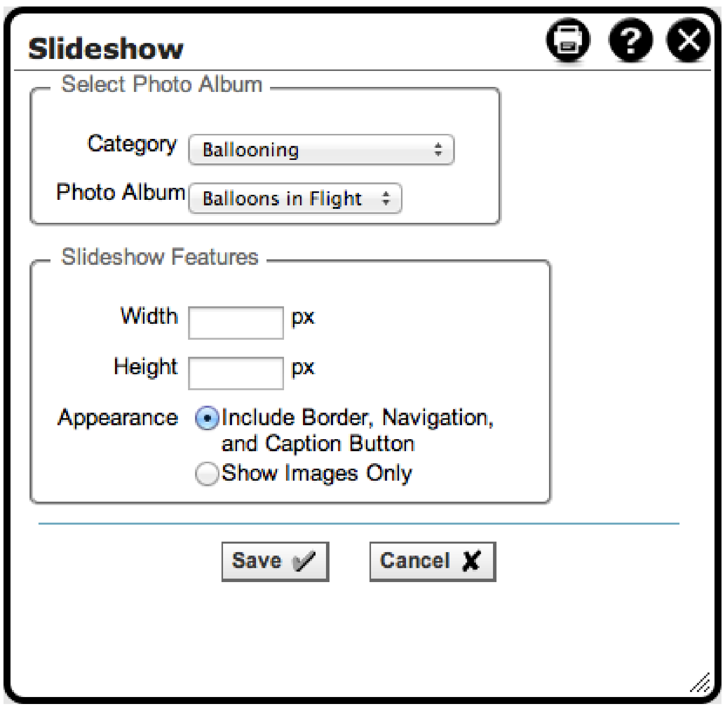
Right-click on this container to see the following options:

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

Insert Slideshow

See "Photo Albums" on page 938

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



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.)

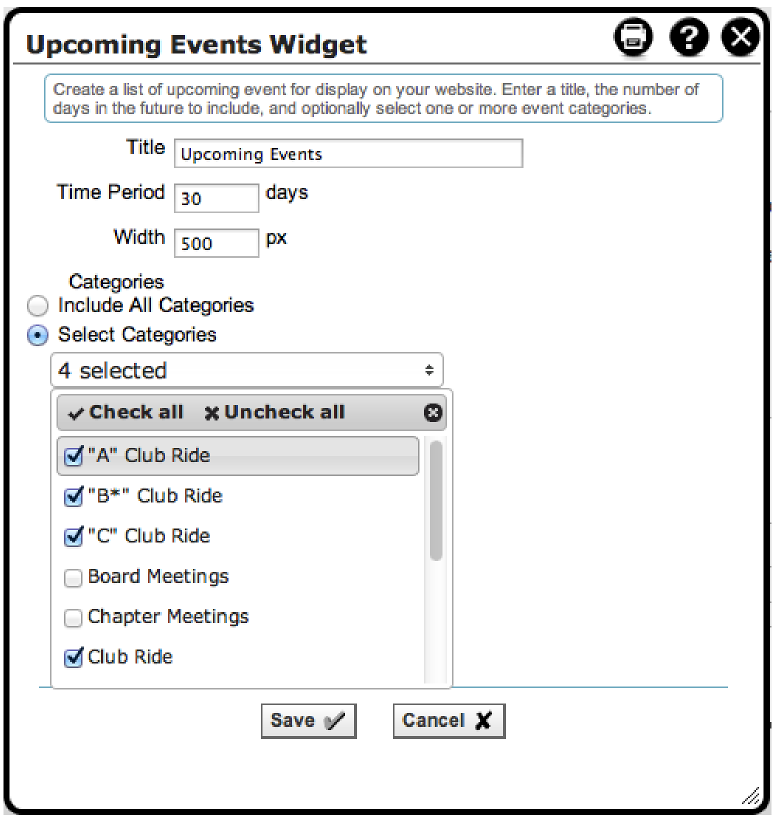
When you click **Save**, a container of the specified size is placed in the editor. Right-click on this container to see the following options:

- 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.

Insert Upcoming Events

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.



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.

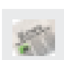
> **Example:** You might show just events open to the public, or events related to the mission of your organization (for example, a bicycle club might show rides and social events only, while a professional association lists seminars only.) Internal events such as committee meetings may not be shown.

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.

 Insert News / Articles Item

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:

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.

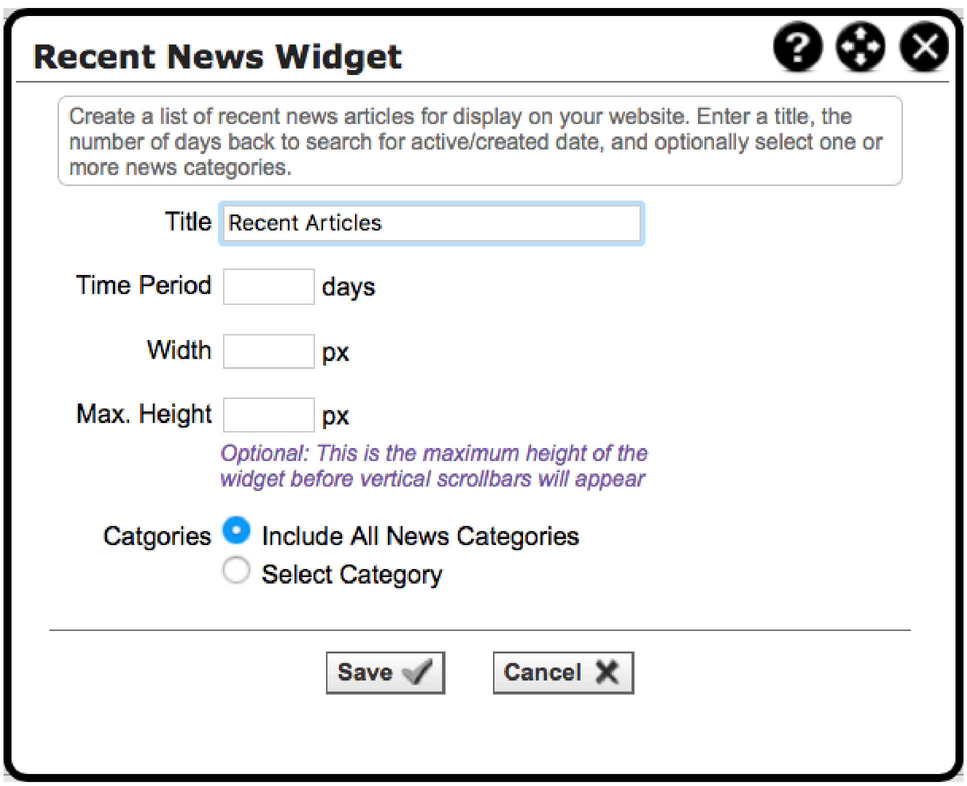
Click **OK** to complete the operation or **Cancel** to close the dialog without inserting the news item / article.

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.

 Insert Recent News Feed

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:



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:

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.

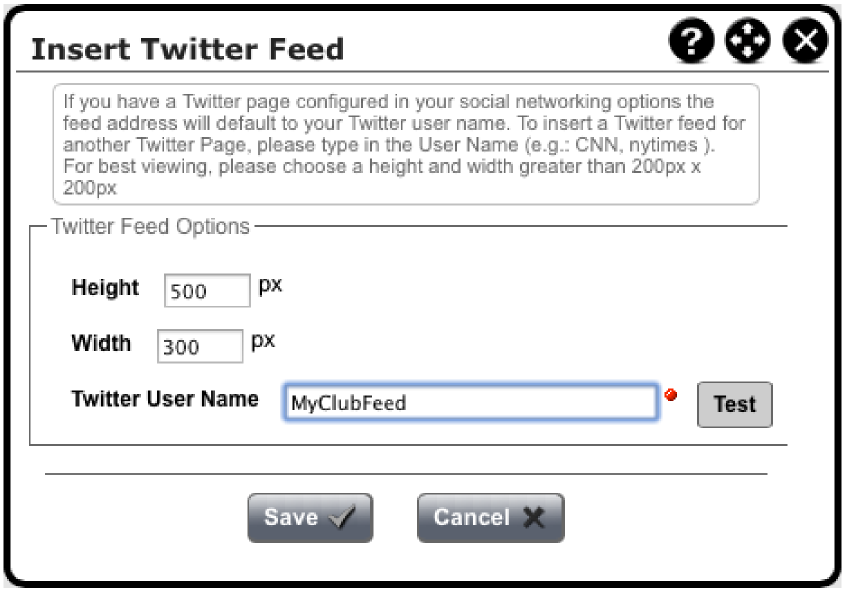
Click **Save** to create the Facebook widget and return to the editor, or **Cancel** to return without saving.

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:



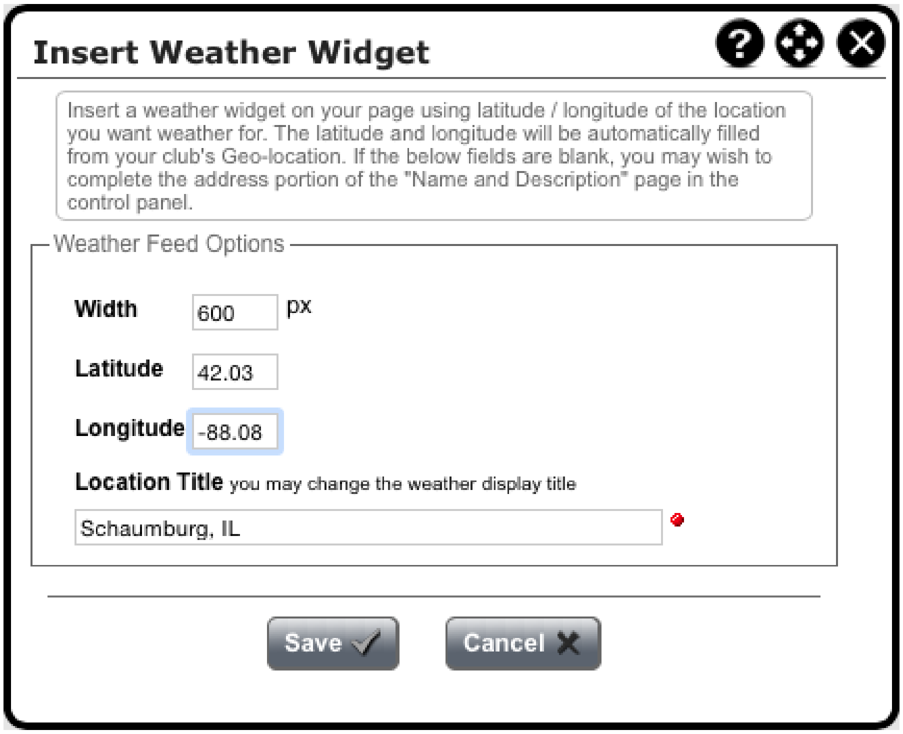
Specify the size and Twitter User Name, then click **Save** to create the feed and return to the editor, or **Cancel** to return without saving.

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.)

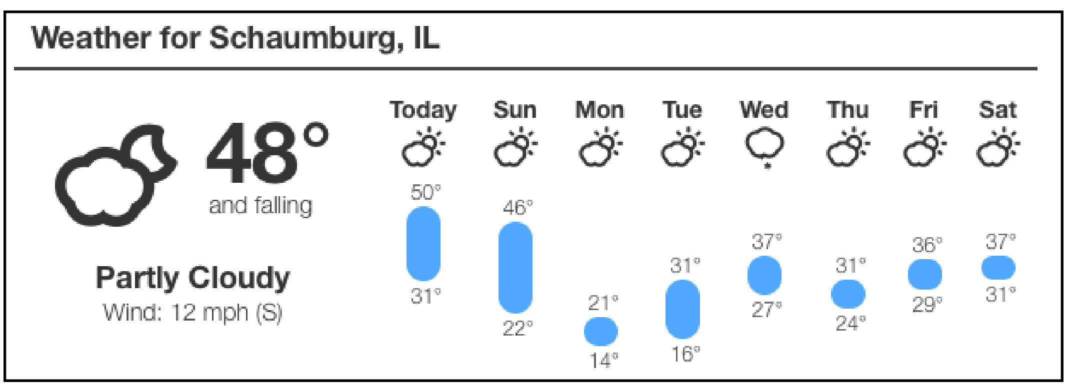
Insert Weather

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



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:

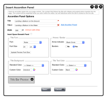


This weather widget works on the public and private sides of the website.

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.

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.

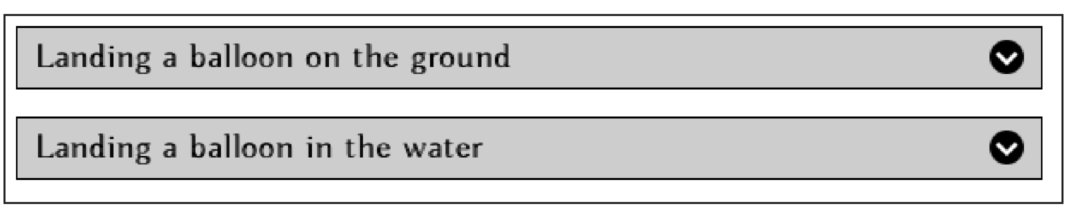
The other sections allow you to update the title font and size; the arrow style and whether the accordion should have a border; the background color of the title; and the text color. A preview section at the bottom allows you to see how this combination of colors and fonts will look.

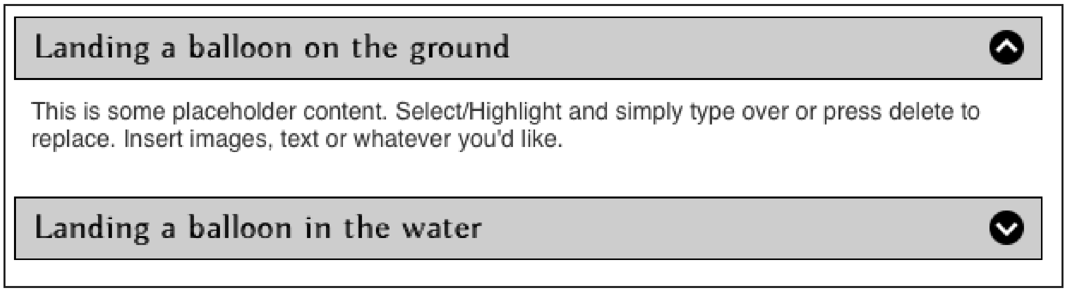
Click **Save** to create the accordion in your editor session or **Cancel** to close the dialog without creating it. You will see a display like the following:

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.





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.

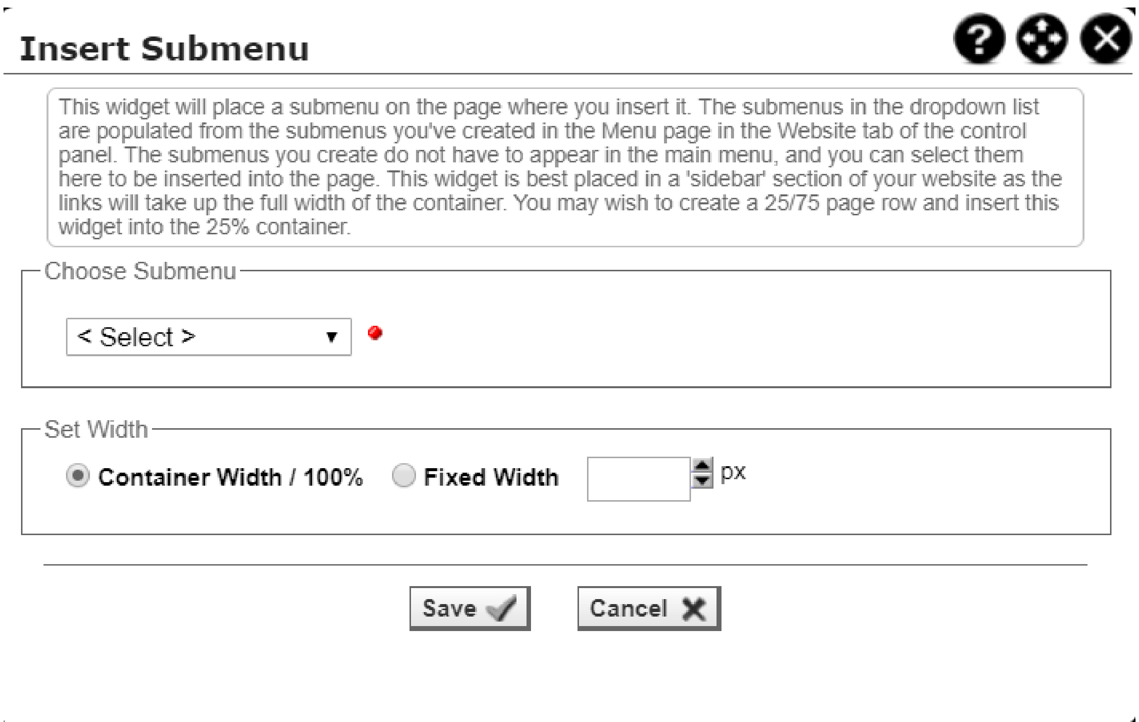
The widget can display items from all blogs or just selected ones.

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.



- 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

- 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.

Insert 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

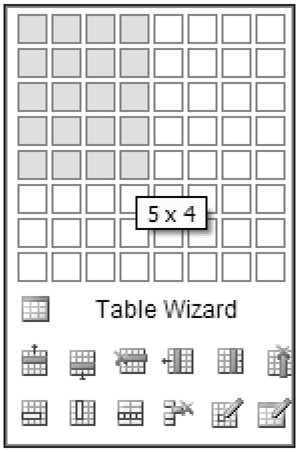
In the past, tables were often used as a formatting tool, to create complex layouts and columns within rows, with images aligned with text in sophisticated ways.

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.

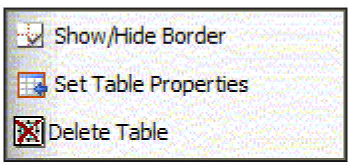
Tables are still available in the editor but they should be used for tabular data only!

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.)

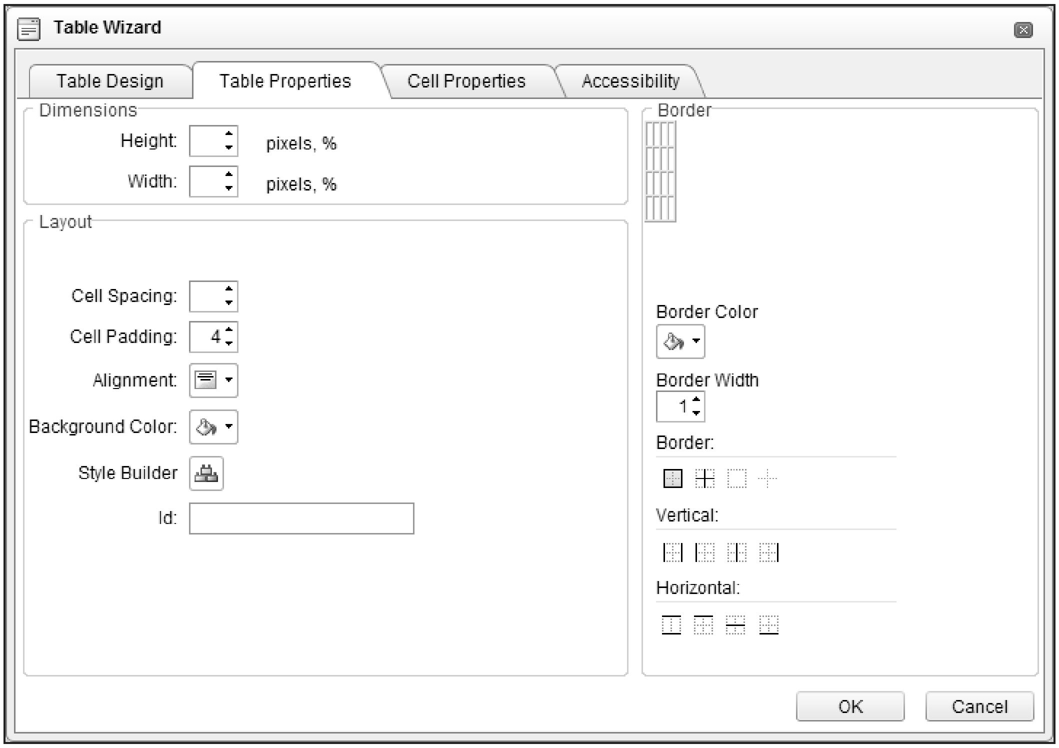
To highlight a table, click the border until you see selection boxes appear around the border. When you right click the mouse, the following popup menu appears:



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:



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.

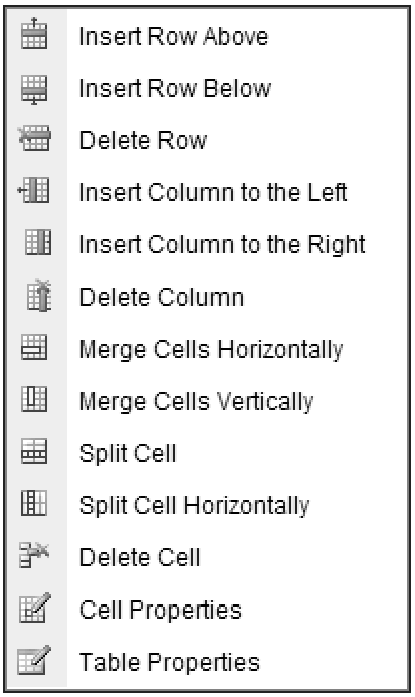
This dialog has some additional functions:

- 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.



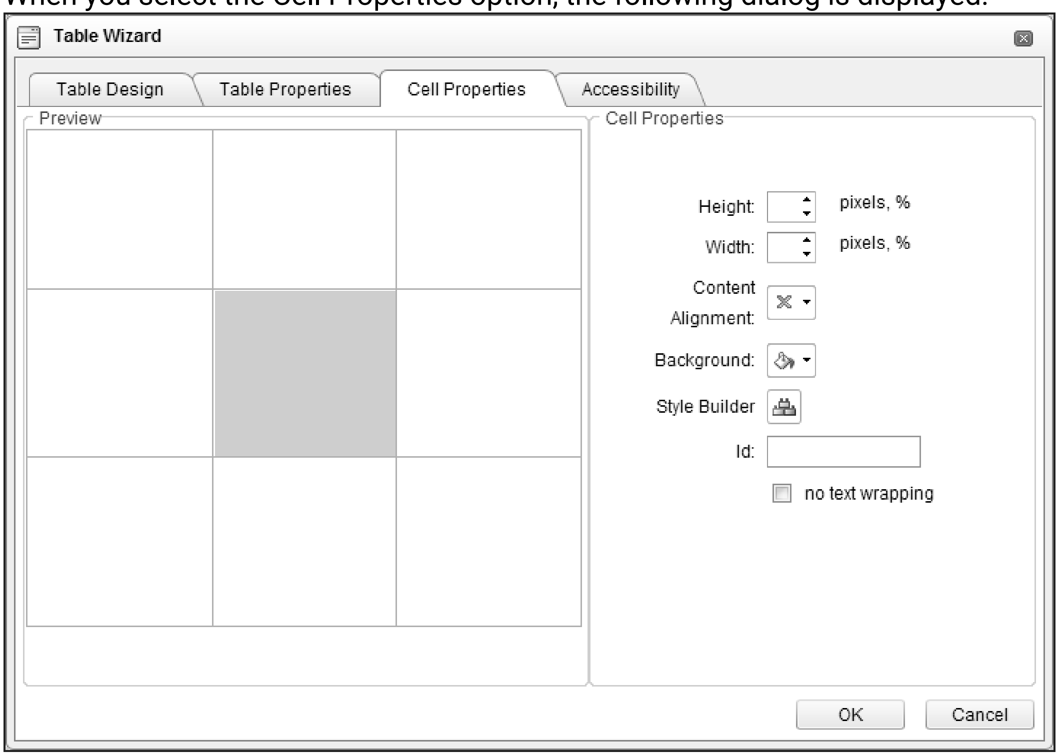
Here is an explanation of the various functions:

Icon	Description
	Insert a row above the current row
	Insert a row below the current row
	Delete the current row

Icon	Description
	Insert a column to the left of the current column
	Insert a column to the right of the current column
	Delete the current column
	Merge cells horizontally
	Merge cells vertically
	Split previously merged cells vertically
	Split previously merged cells horizontally
	Delete the current cell
	Display the cell properties dialog
	Display the table properties dialog

Cell Properties

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



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.

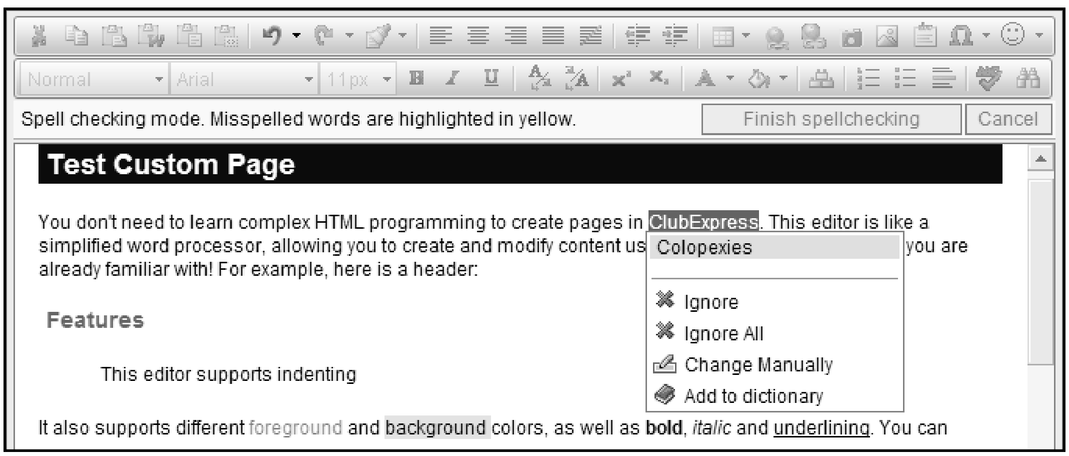
Select the Content Alignment option to control how text is aligned within the cell. Select Background to change the background color of the cell. Select the Style Builder option to display another dialog that provides control over the complete set of style options within the cell.

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

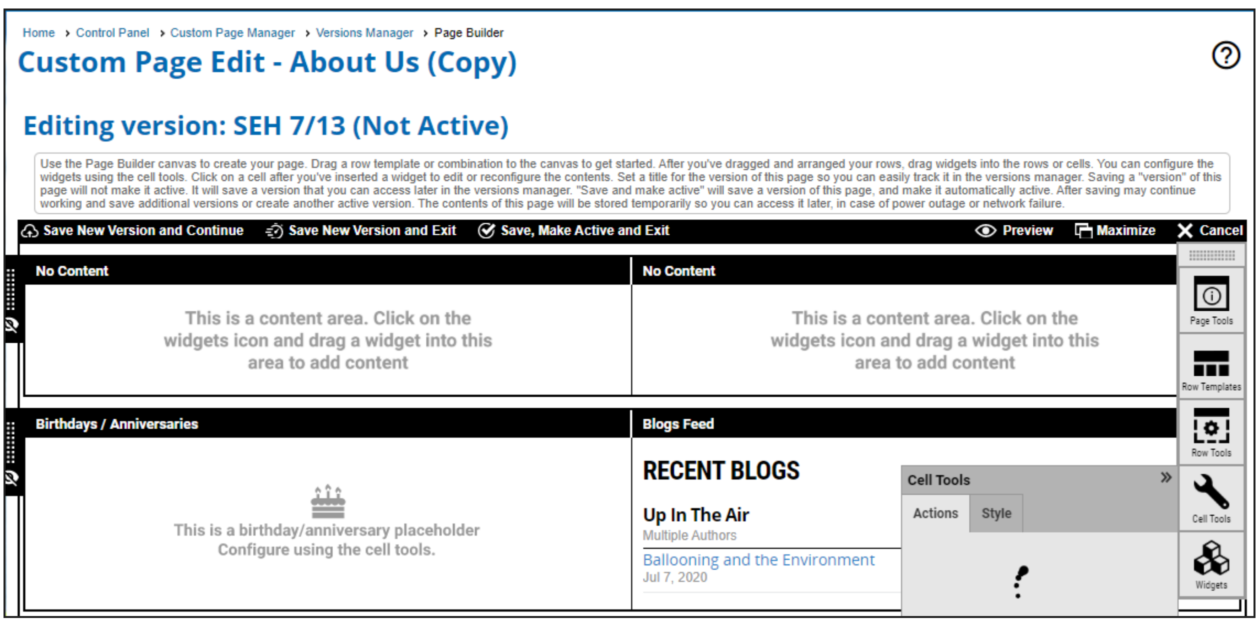
The Page Builder is an editing environment for creating and editing custom pages and your home page. The Page Builder includes:

- **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:



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.

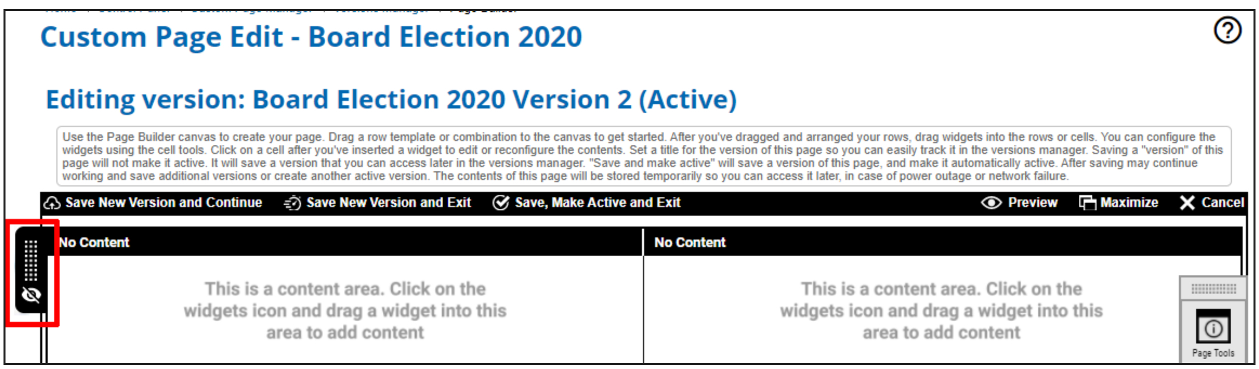
At the bottom of the canvas, in addition to the options at the top of the canvas, you have the option to:

- **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:



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.

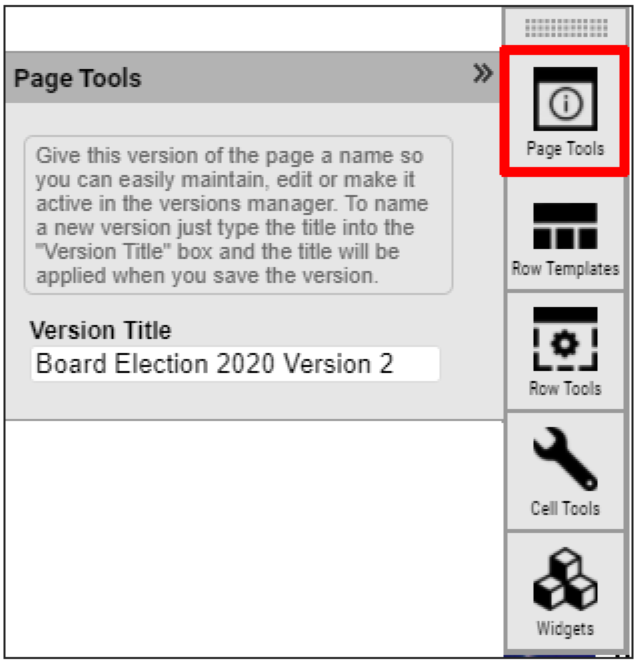
- **Everyone** - Both the public (non-members) and members can see the row.
- **Hidden** - The row can only be seen within the Page Builder by administrators or coordinators.

> **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:



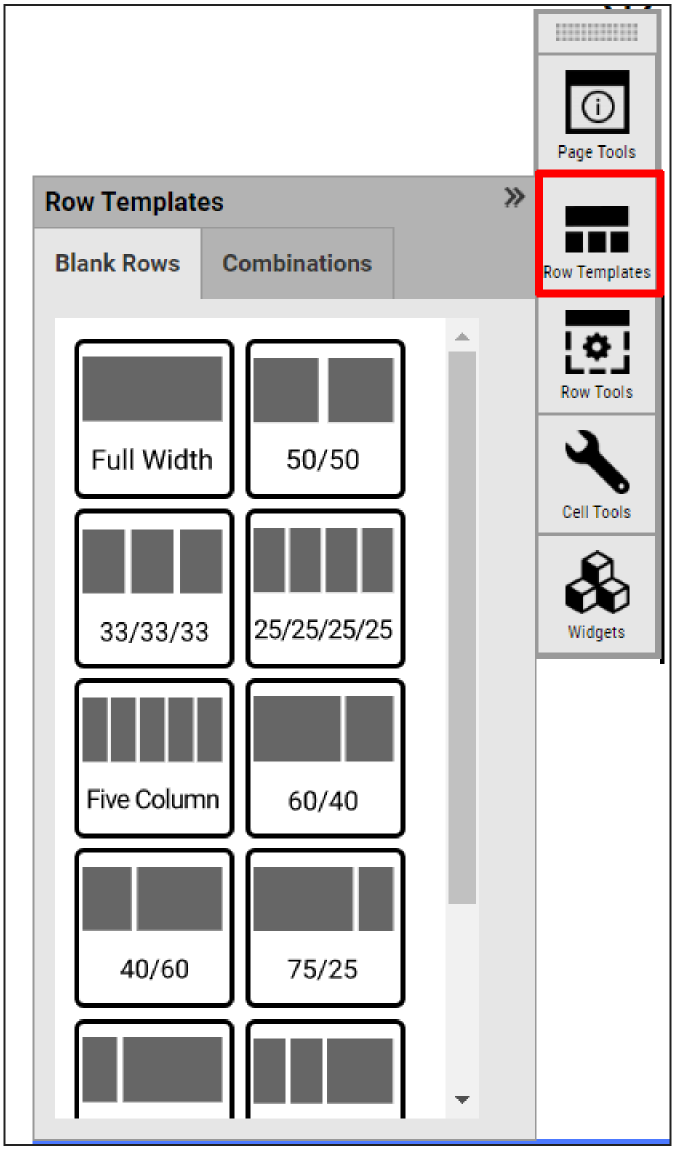
Enter in a name for the version of the page you are creating.

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 Version Manager screen where you can also edit the title.

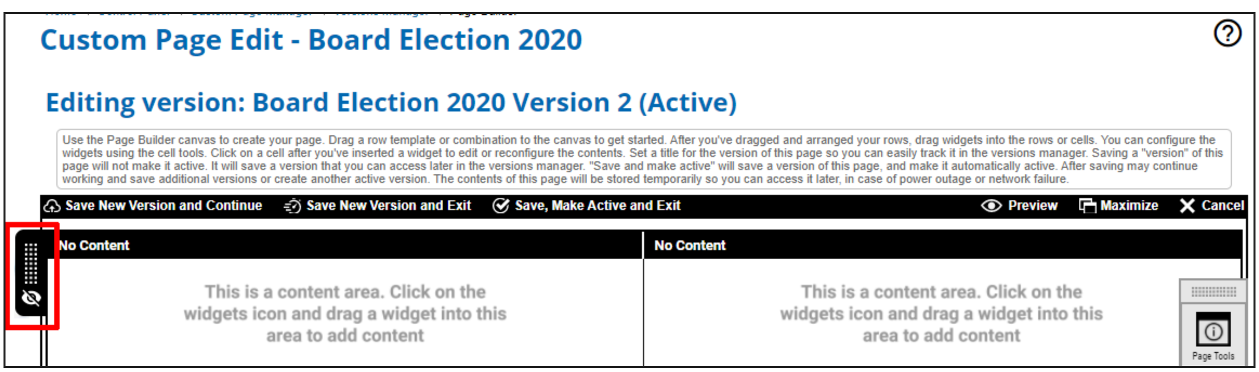
Row Templates

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.



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.

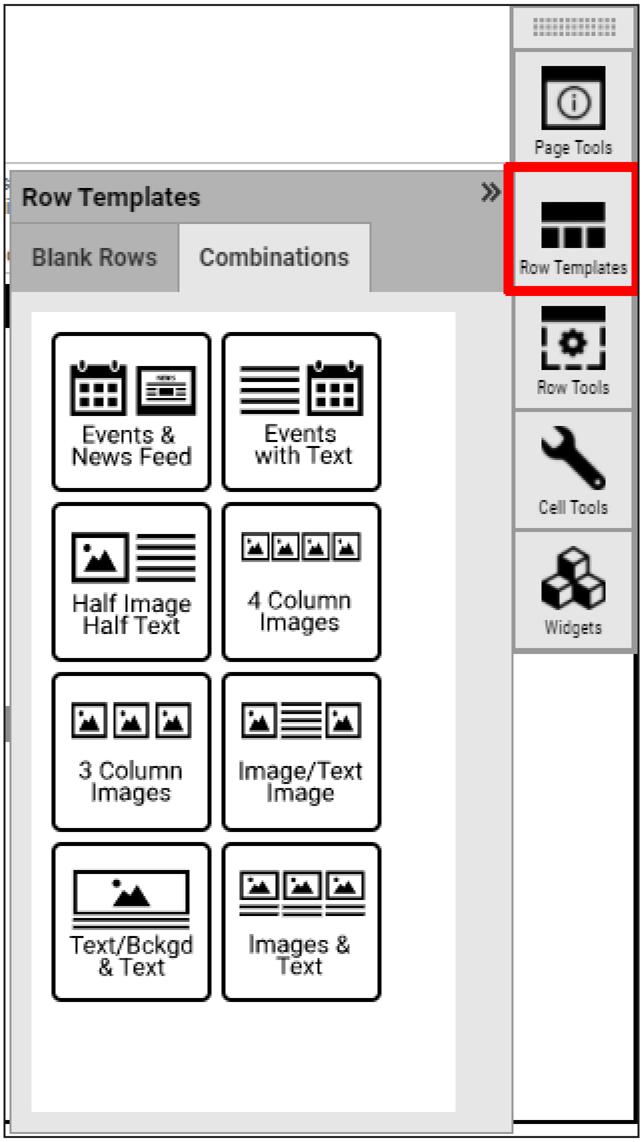
Blank Rows

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:

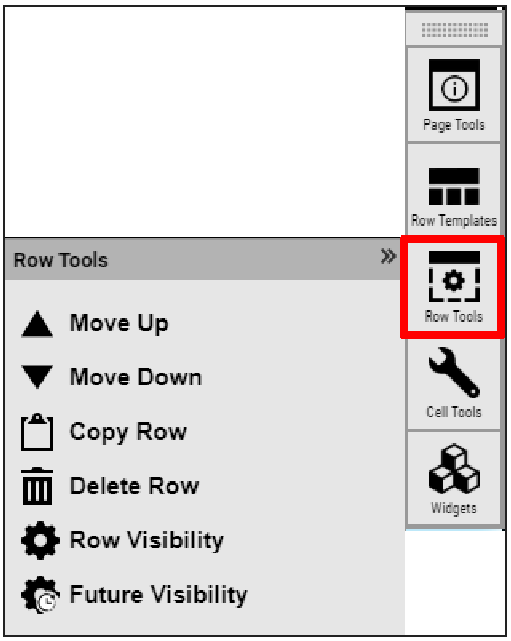
- **Events & News Feed** - Two content boxes: Left box includes the Upcoming Events widget, right box includes the News Feed widget.
- **Events with Text** - Two content boxes: Left box is a text box, right box includes the Upcoming Events widget.
- **Half Image Half Text** - Two content boxes: Left 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:



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

Actions

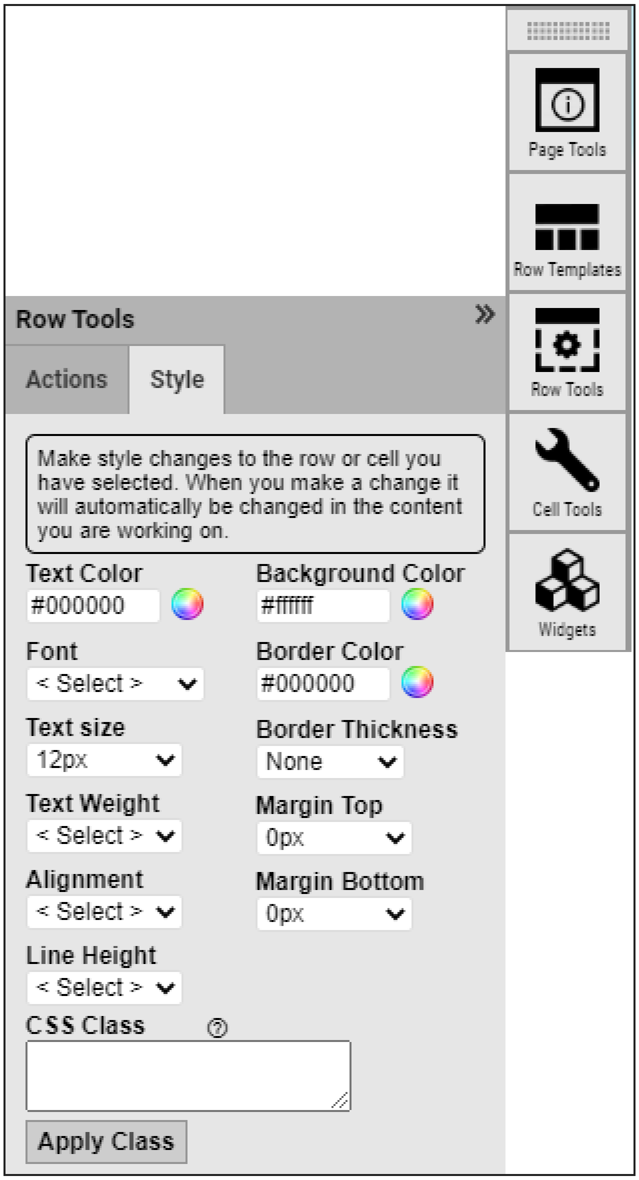
Actions are applied to the selected row and any content in the row.

- **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 bottom-most 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.

Style



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

The following options are available:

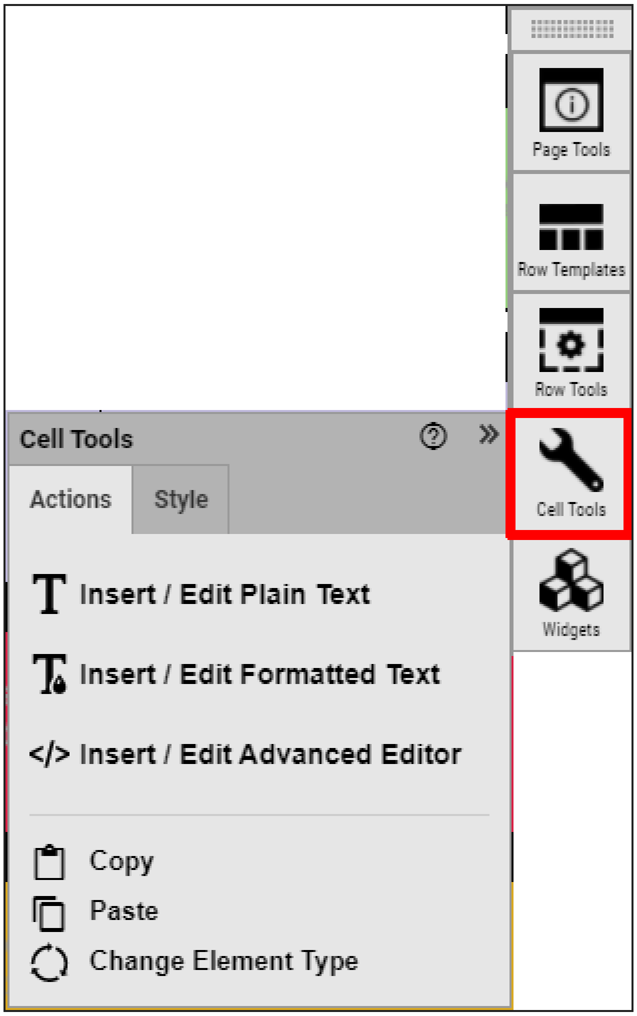
- **Text Color** - Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Background Color (of the cells)** - Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Font** - Choose a font from 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

Page Builder 139

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

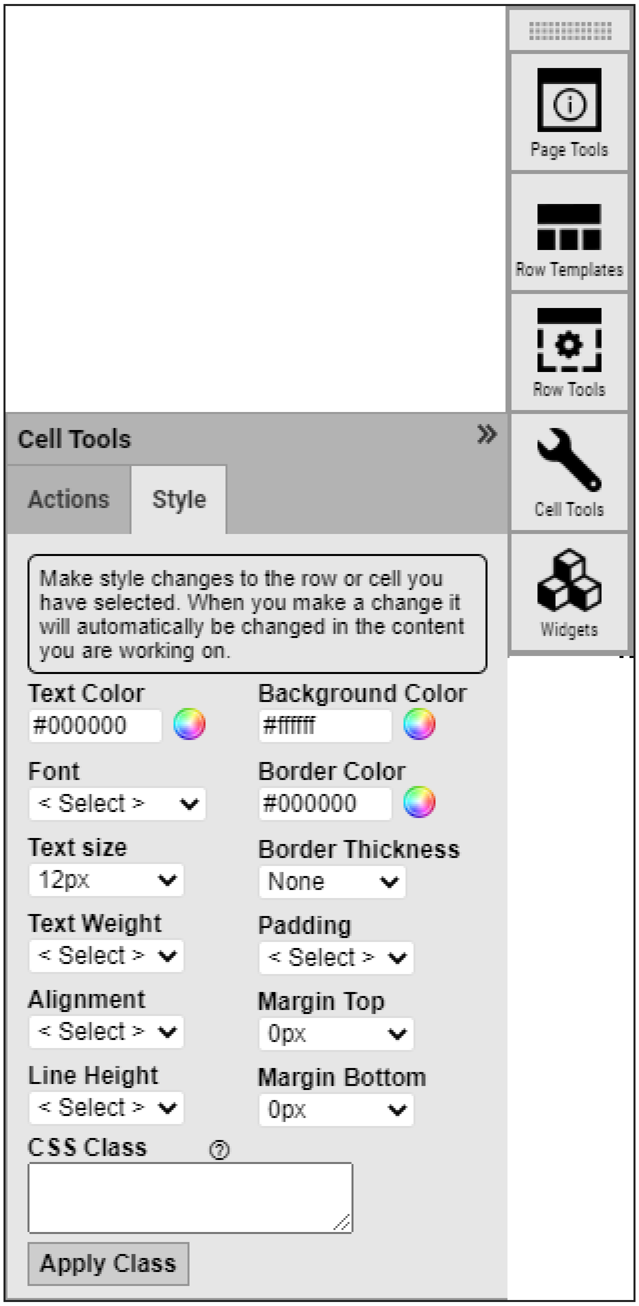
- **Title** - The title of the widget block.
- **Time Period** - Enter the number of days (if applicable) for which the widget should display data.

> **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.

Style

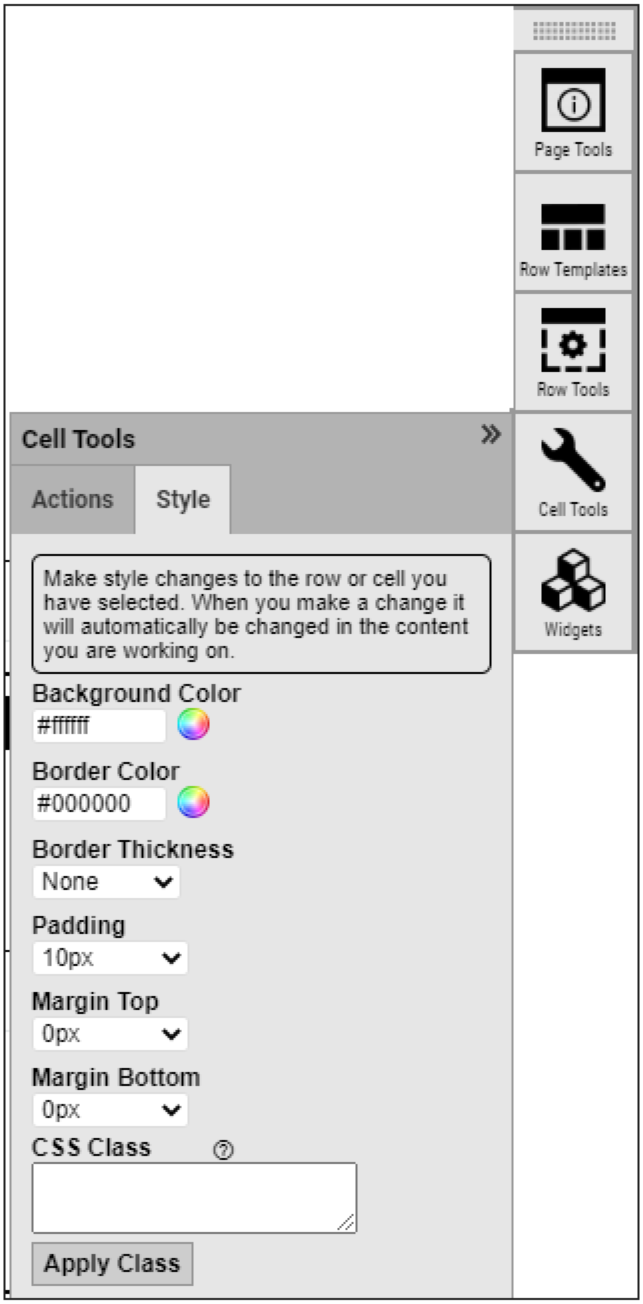


Style changes are applied to the selected cell and any content in the cell. If a style has been applied to the row, any styles applied to an individual cell will override the row style. The options available are determined by the content of the row or cell (text or image).

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.



The following options are available for **images**:

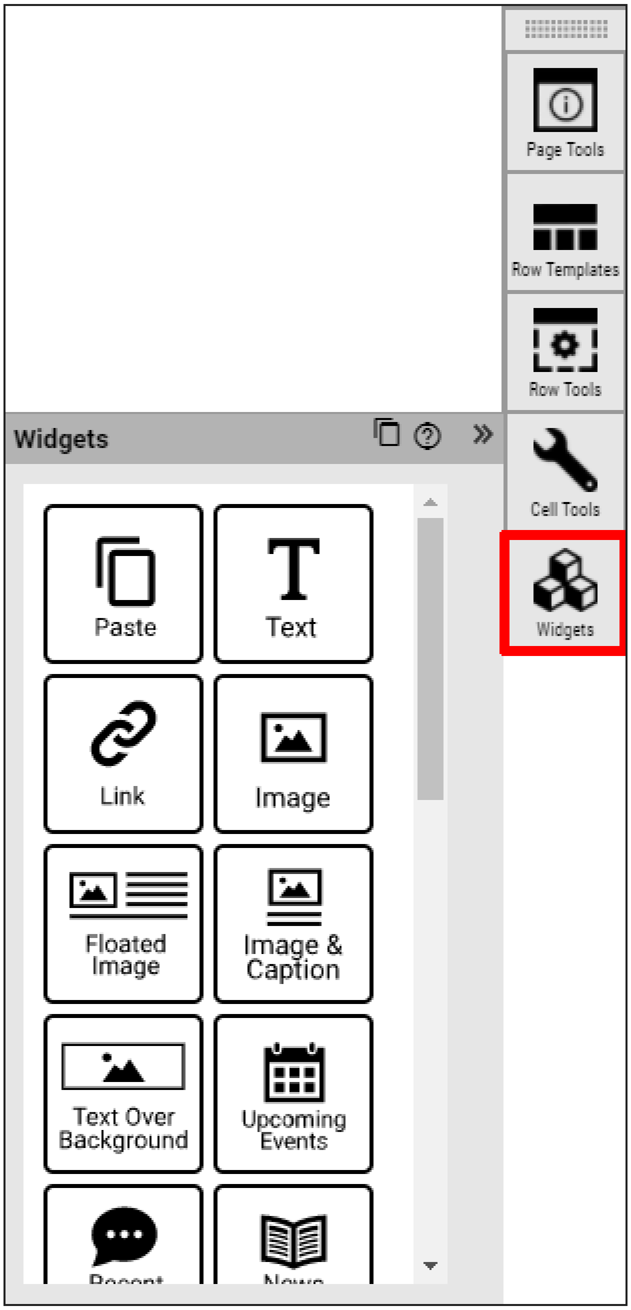
- **Background Color** - Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Border Color** - Choose a standard color from the drop down menu, pick a color from the color wheel, or enter a hex code.
- **Border Thickness** - Select the size of the 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:



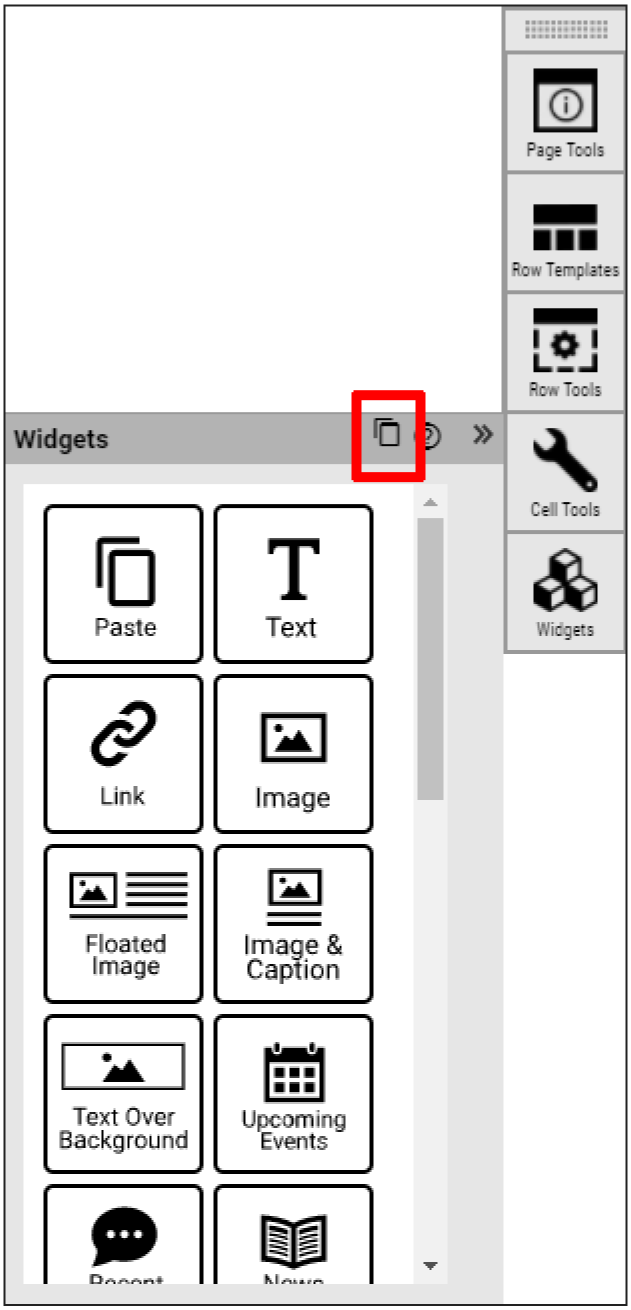
Widgets are inserted into cells and display content you add or create (text, images, links) or content from other modules on your website. To add a widget to a cell, select and drag the widget into the cell. If content or another widget is already in the cell, an alert displays confirming the existing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

The following widgets are available:

 Paste

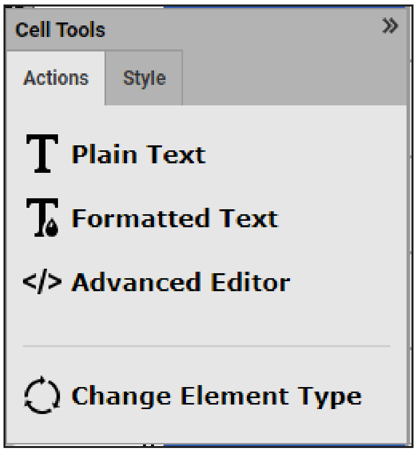
If you have copied content from one cell, the option to paste that content will appear as a widget in the Widgets menu. Drag the Paste widget into the cell to copy the content from your clipboard to the cell. If content already exists in the cell, you will be prompted to confirm replacing the existing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

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



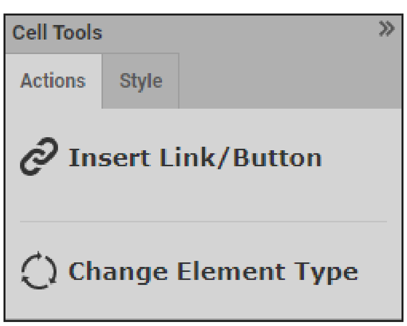
Select the type of text you want to use for the cell to determine the text editor you will use: plain, formatted or advanced. Save your changes in any editor to apply the changes to the cell.

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.

 Link

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



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.

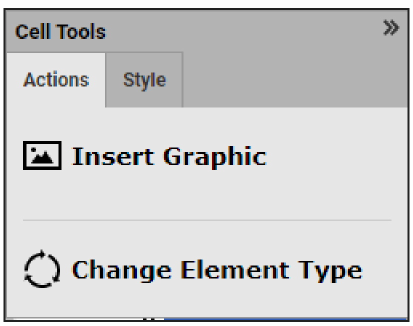
15. **Resource Scheduler** - Link to any resource available for reservations. The next field is a drop-down list of available resources.
16. **Ad Hoc Form** - Link to any ad hoc form. The next field is a drop-down list of available forms.
17. **Storefront** - Link to any active product in your website's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

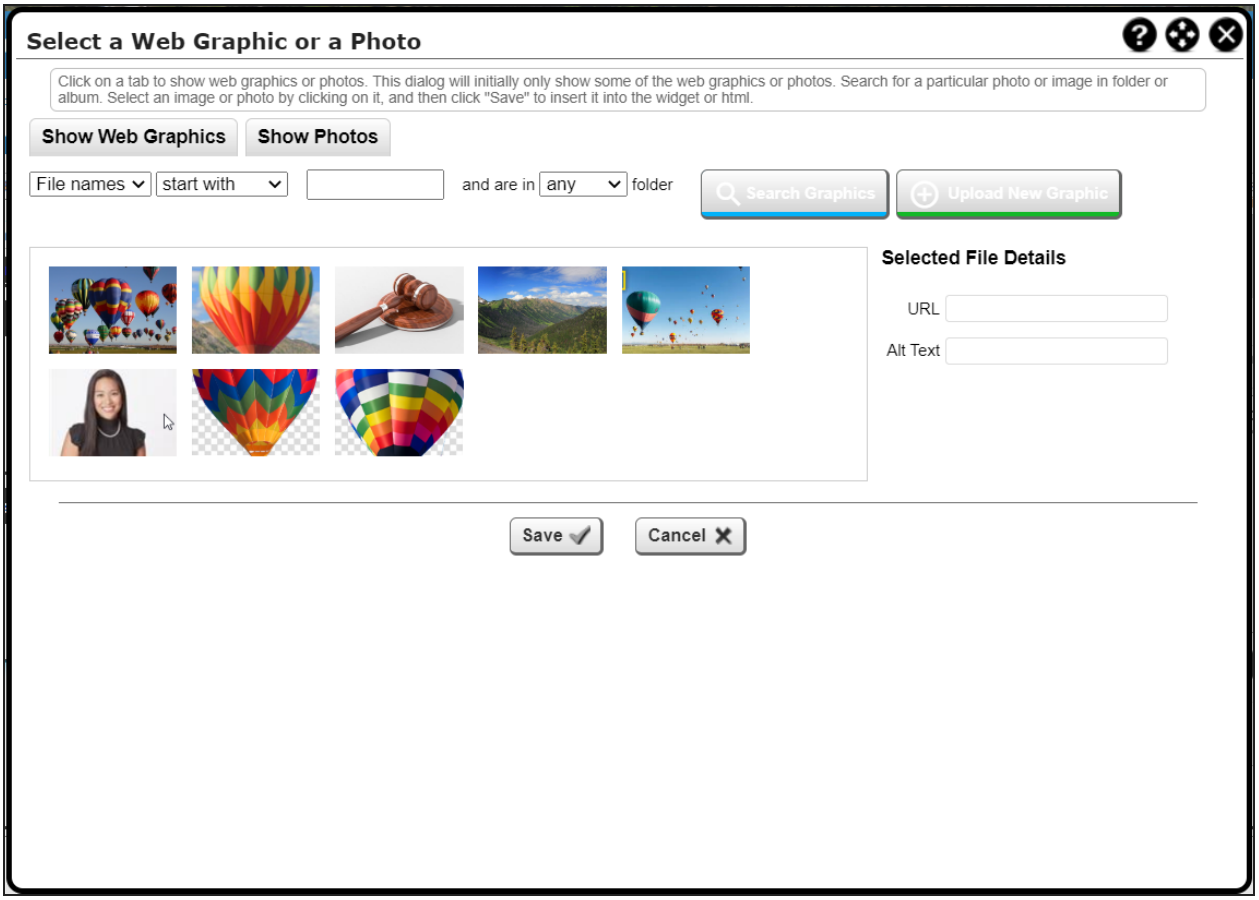
For linking to another ClubExpress module, a custom web page or a photo page, or an external website, you also have the option of having the target page appear in the same window (customary for another ClubExpress module, web page or photo page) or a new browser window (customary for linking to an external website.)

Image

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



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

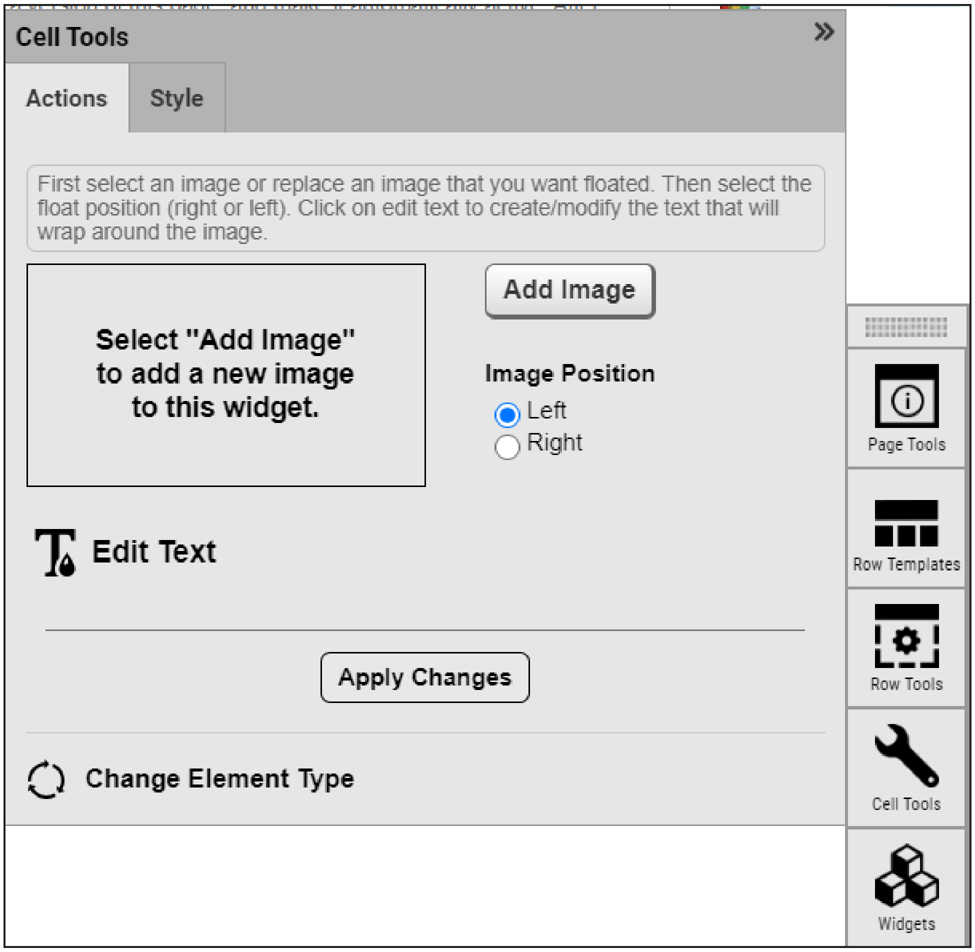


Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

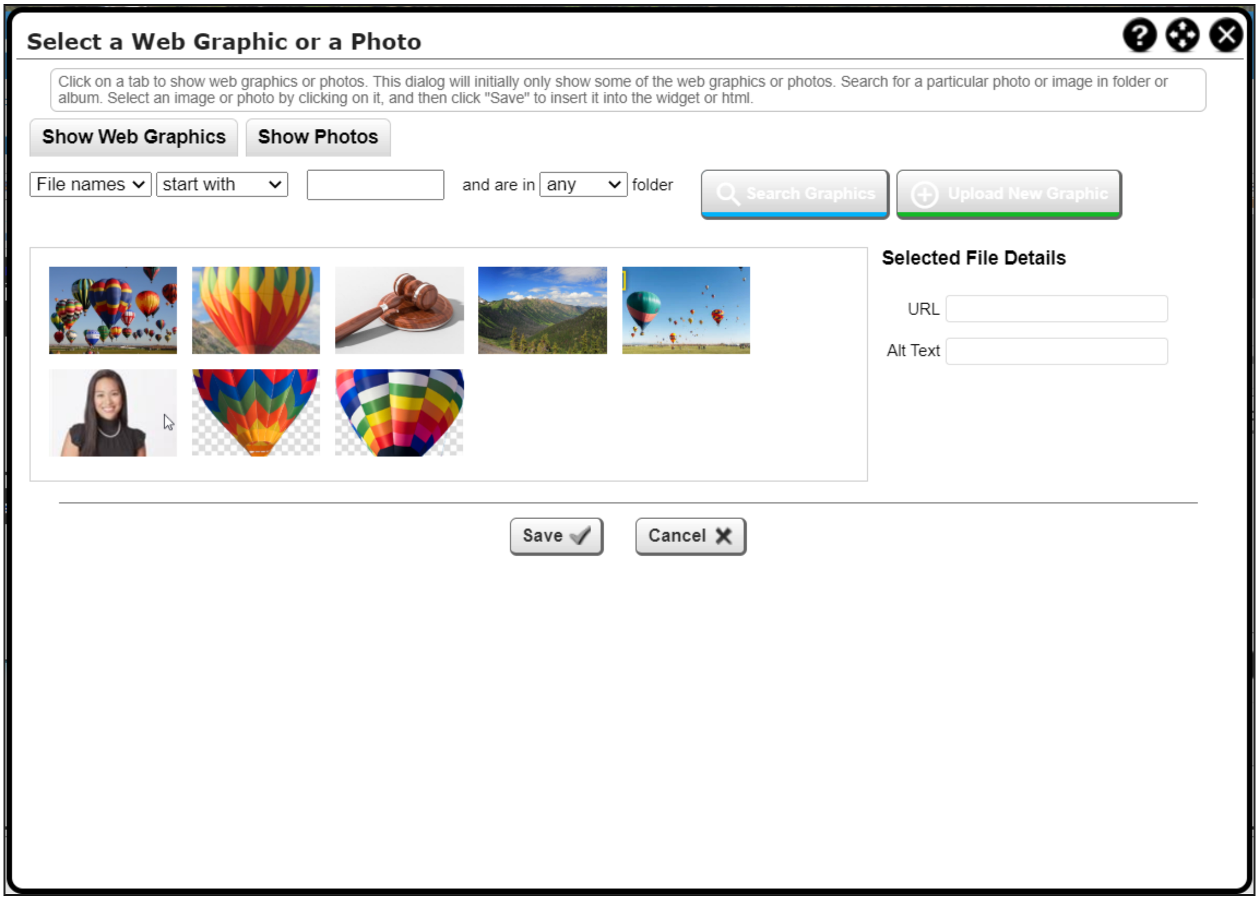
To resize an image that has been inserted, select and drag the double arrow at the bottom right corner of the image. You can also resize the image using Cell Actions.

Floated Image

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



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

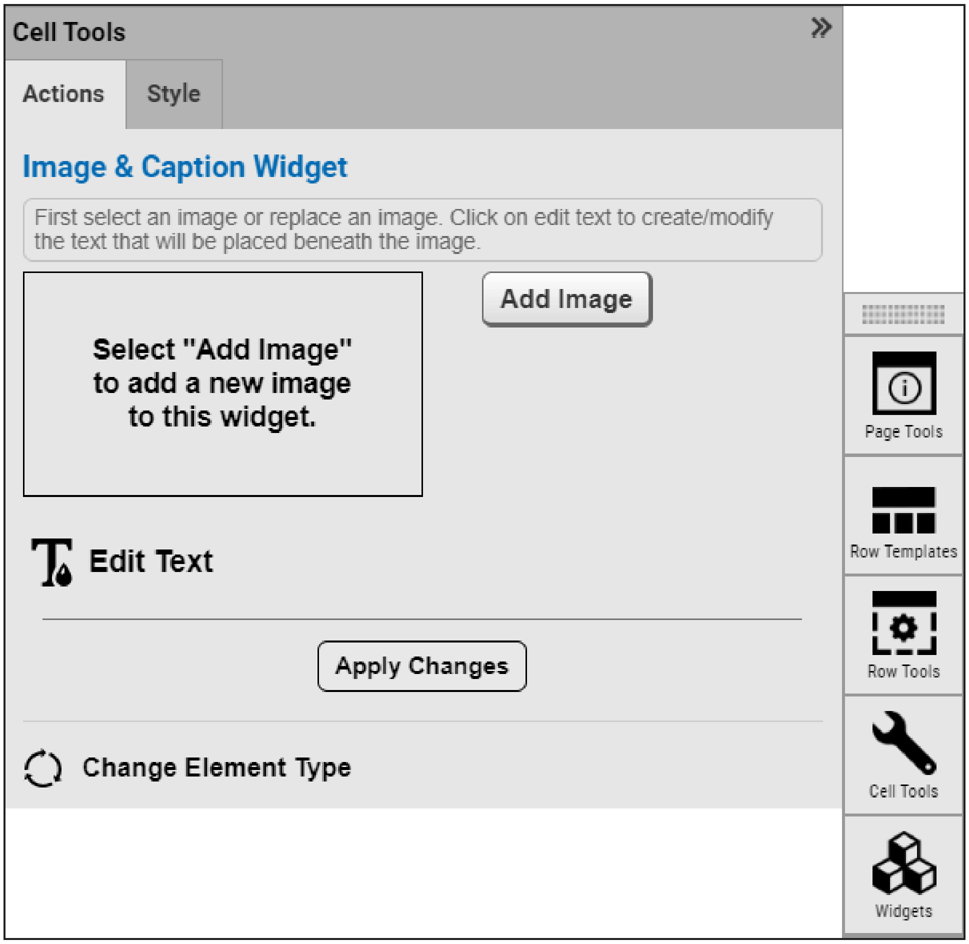


Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes. Select the Image Position.

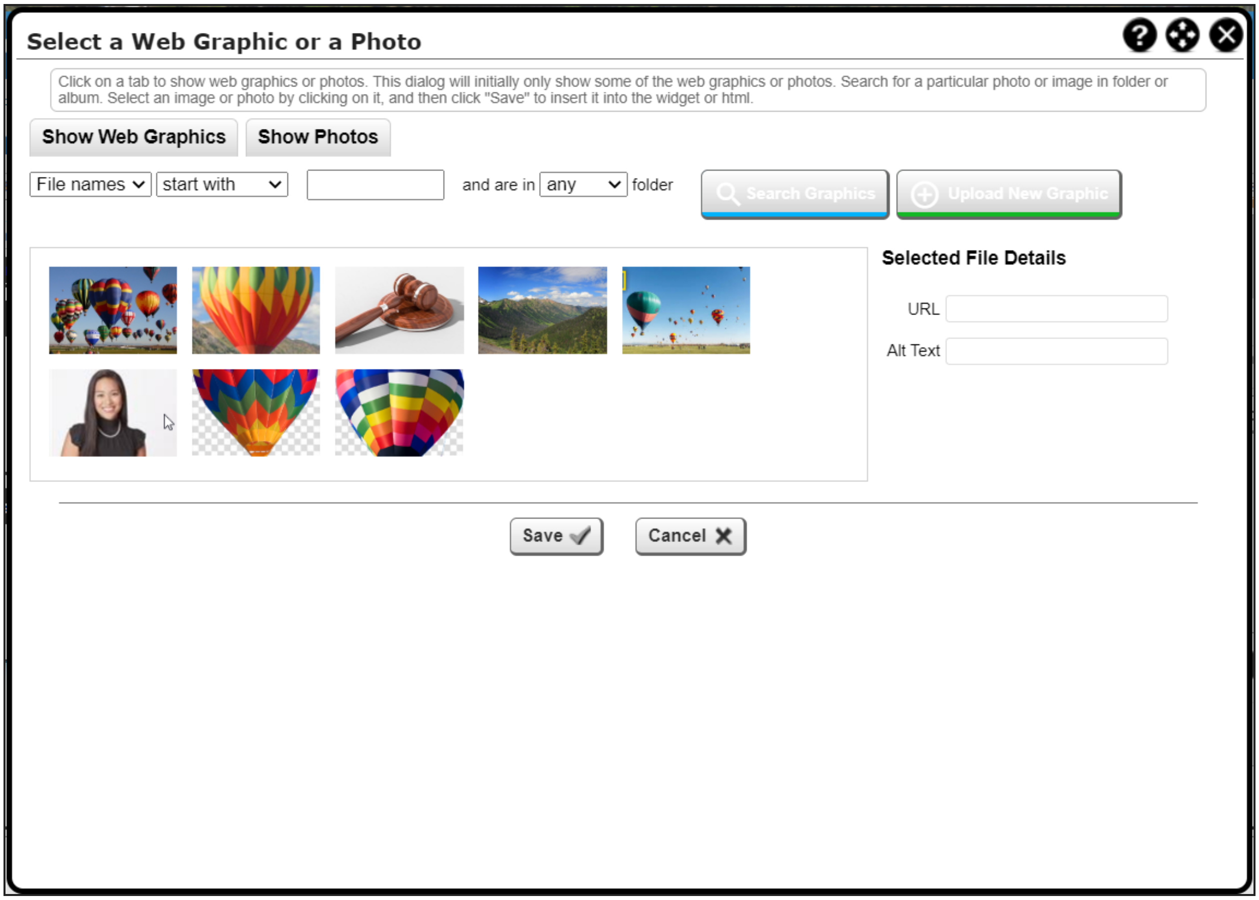
Edit text using the Formatted Text Editor.. Select Apply Changes to save your changes.

Image & Caption

An image with a text caption underneath.



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

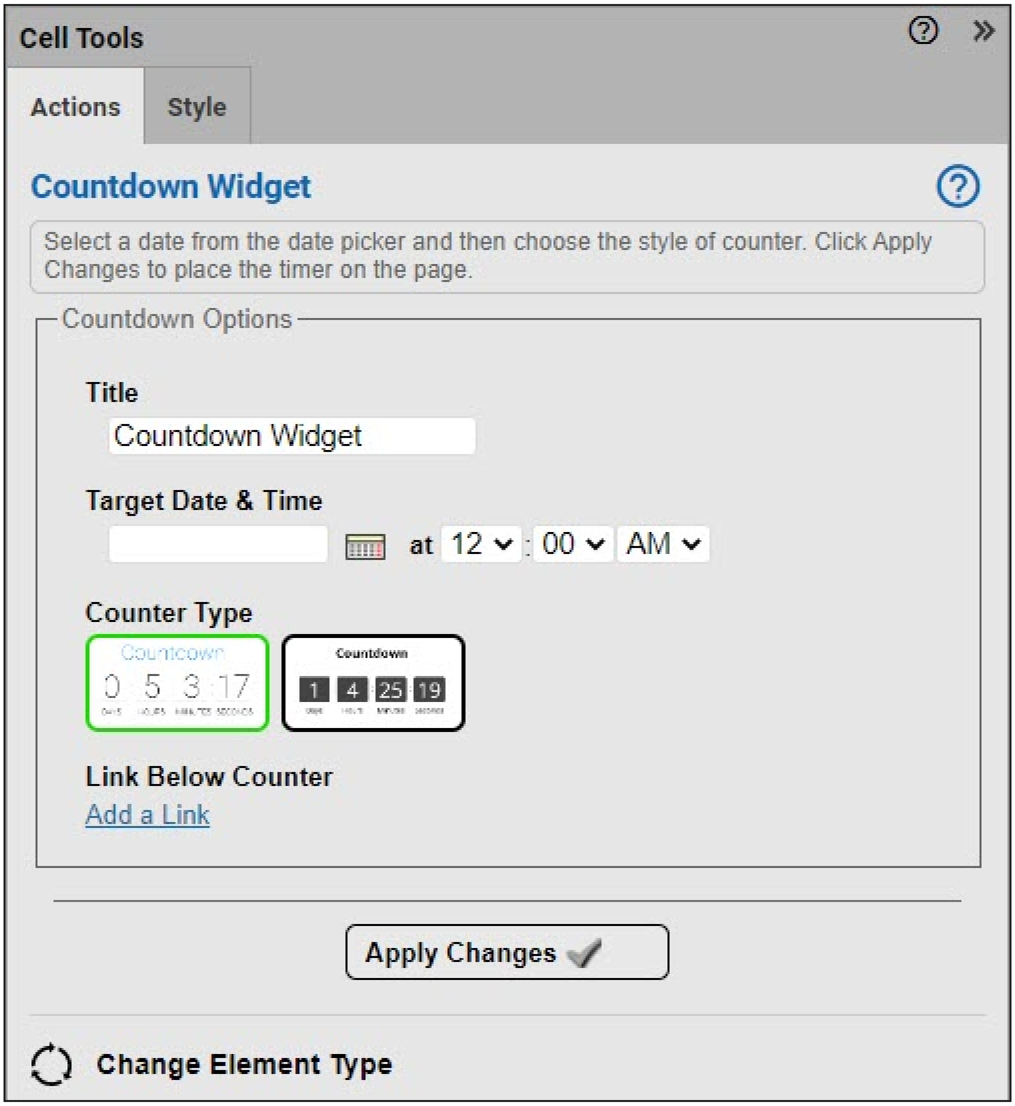


Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

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

Countdown

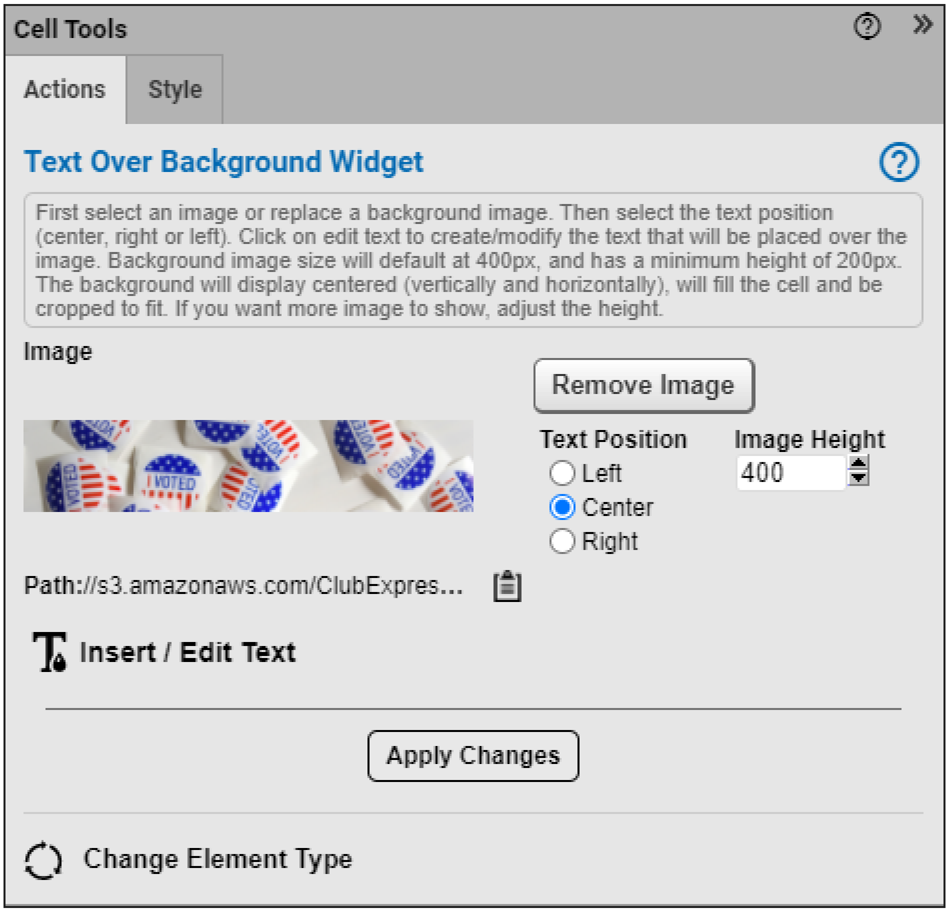
A countdown timer display.



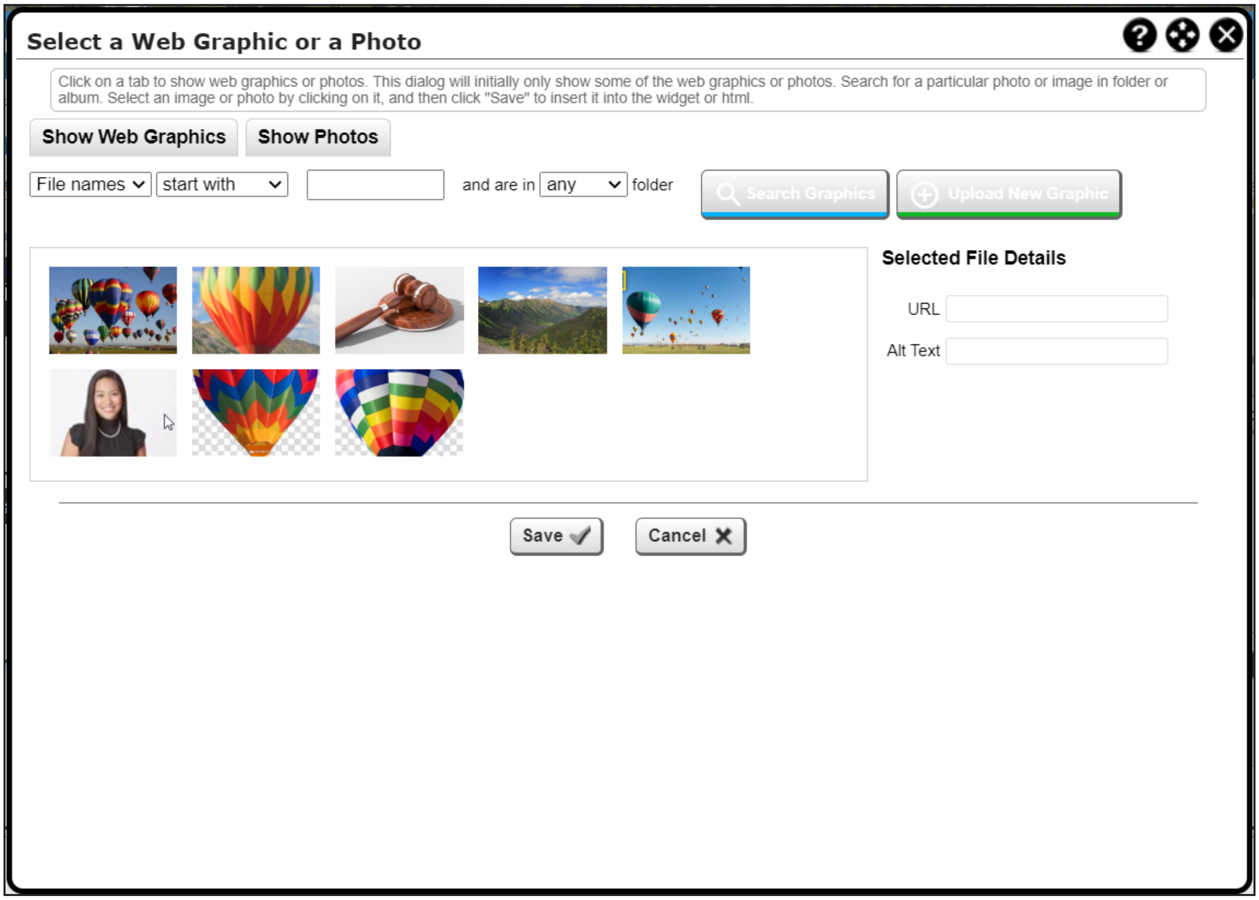
Enter the title of the timer or what the timer is counting down to; this title will display above the countdown timer. Enter the target date and time, then select the style of the timer. Optionally, add a link to the timer using the Link Builder.

Text Over Background

Text with an image as the background.



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

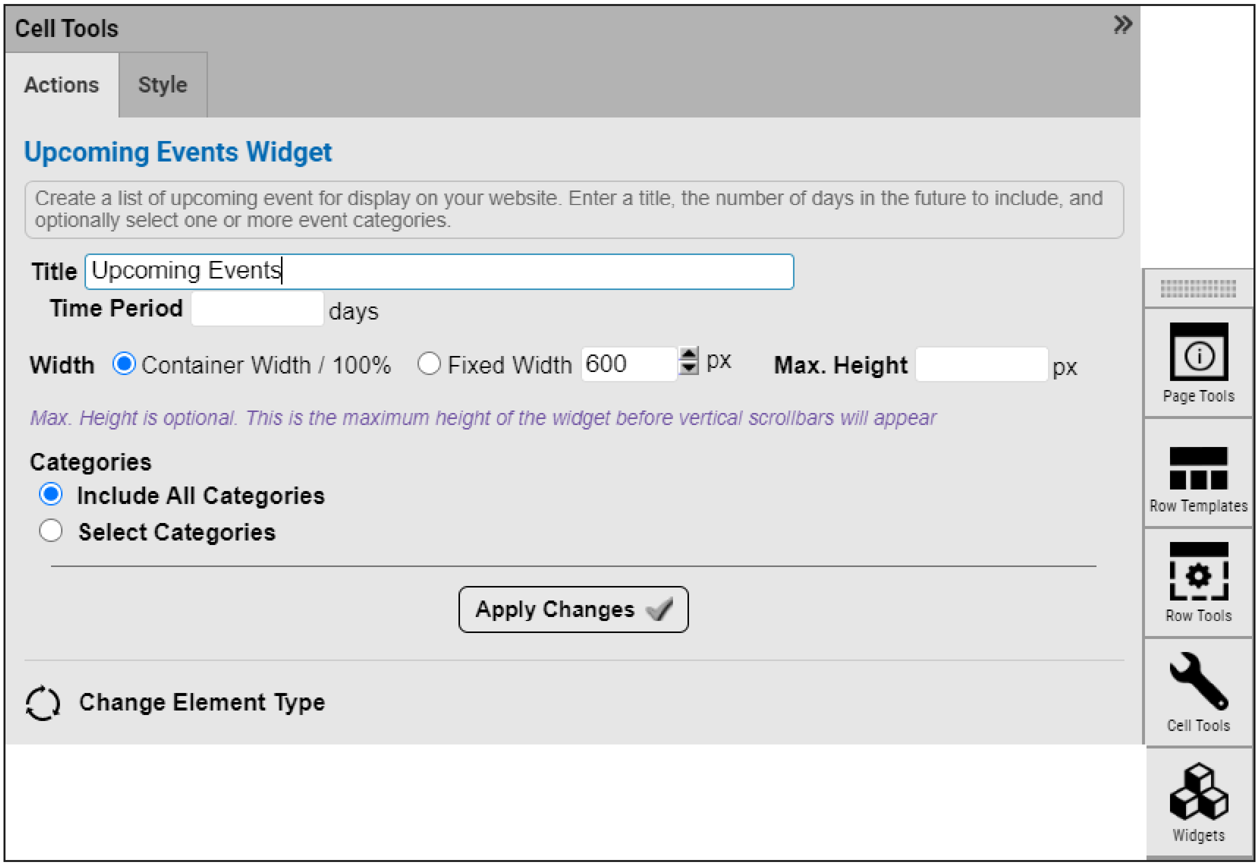


Search through Web Graphics, Photos or upload a new photo from your local hard drive. Select Save to save your changes.

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

 Upcoming Events

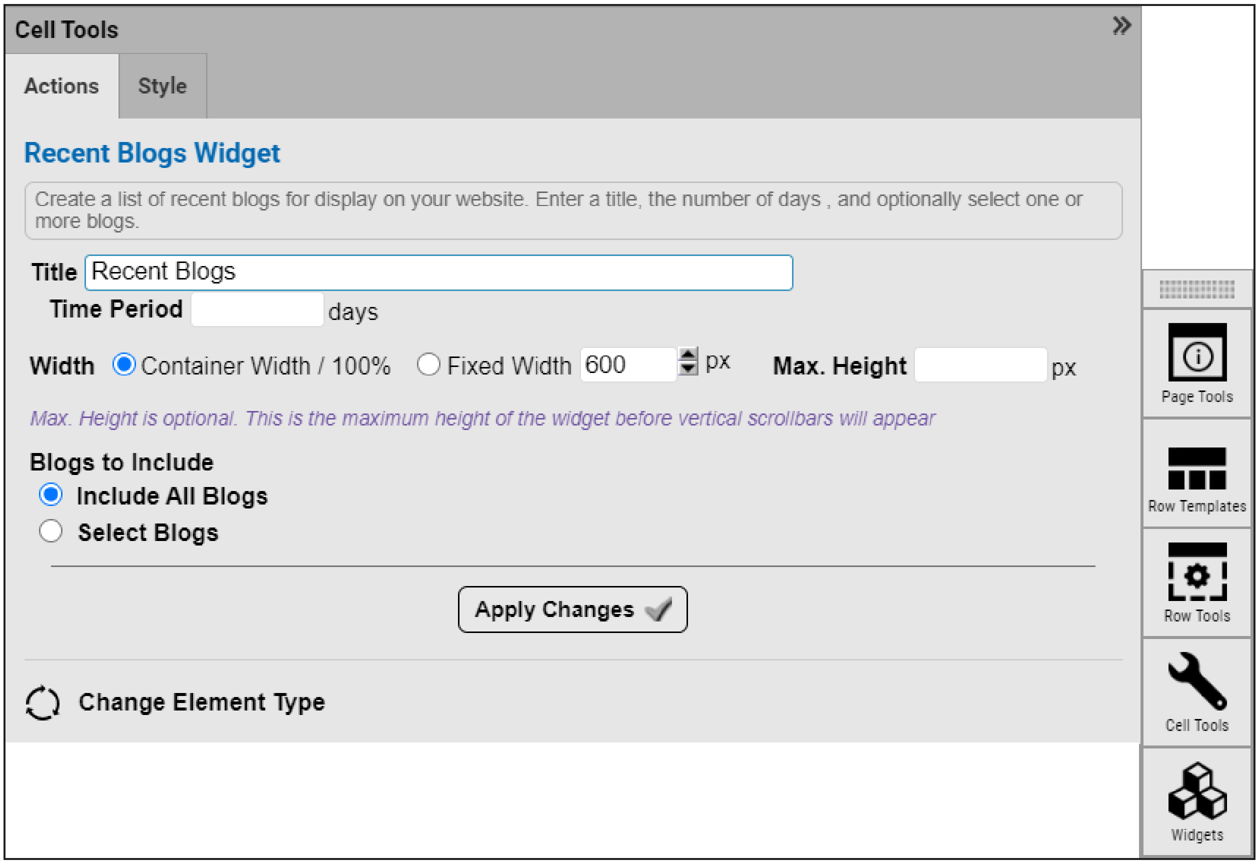
Insert a list of upcoming events.



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

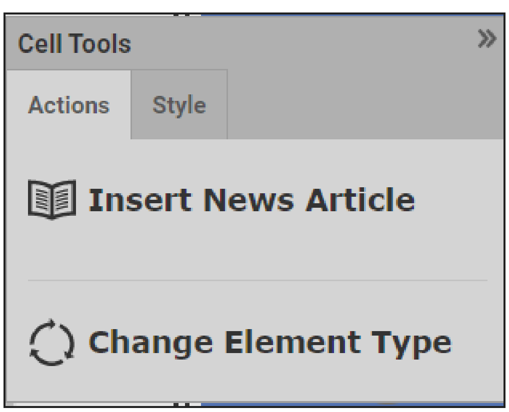
Insert a list of recent blog posts.



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.

 News Article

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

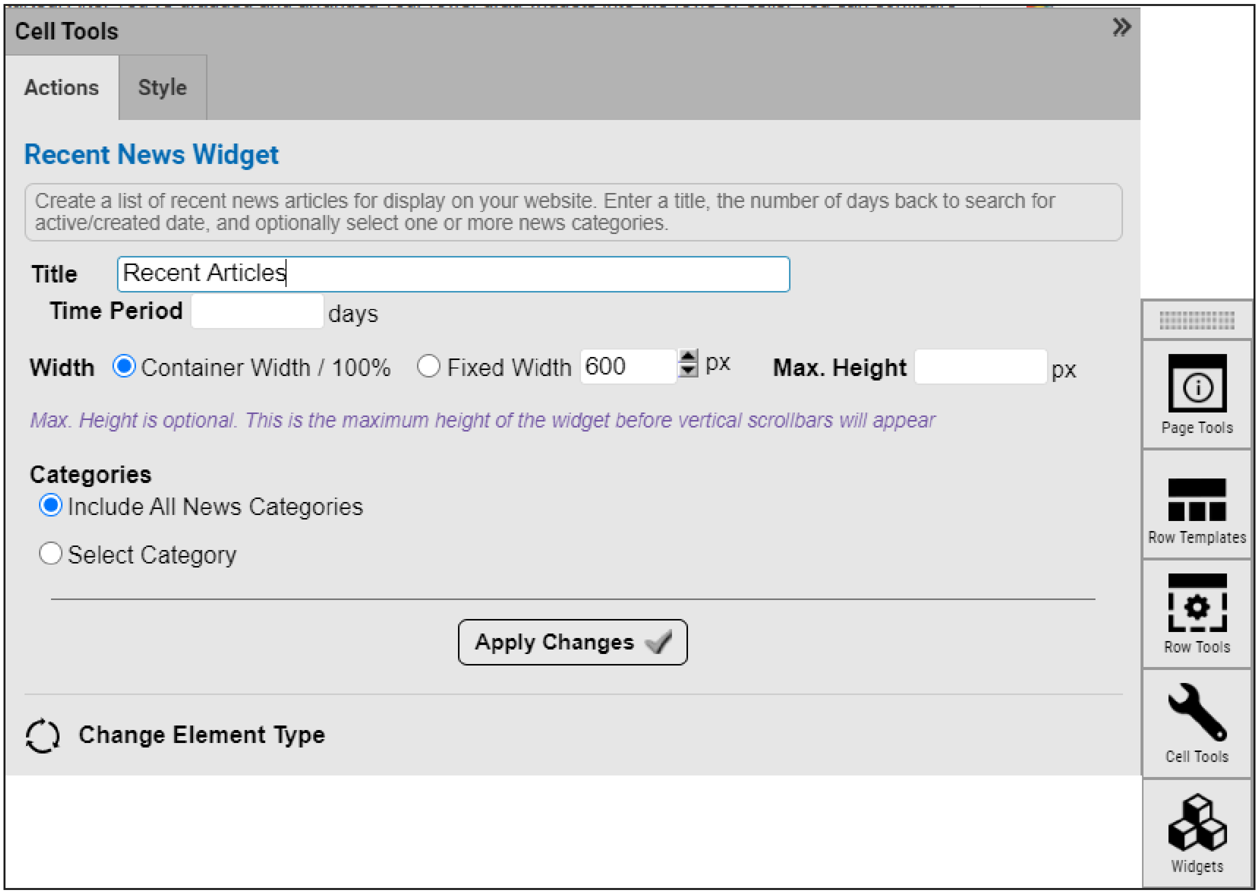


Select Insert News Article to see the following Insert News Article pop-up window:

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

News Feed

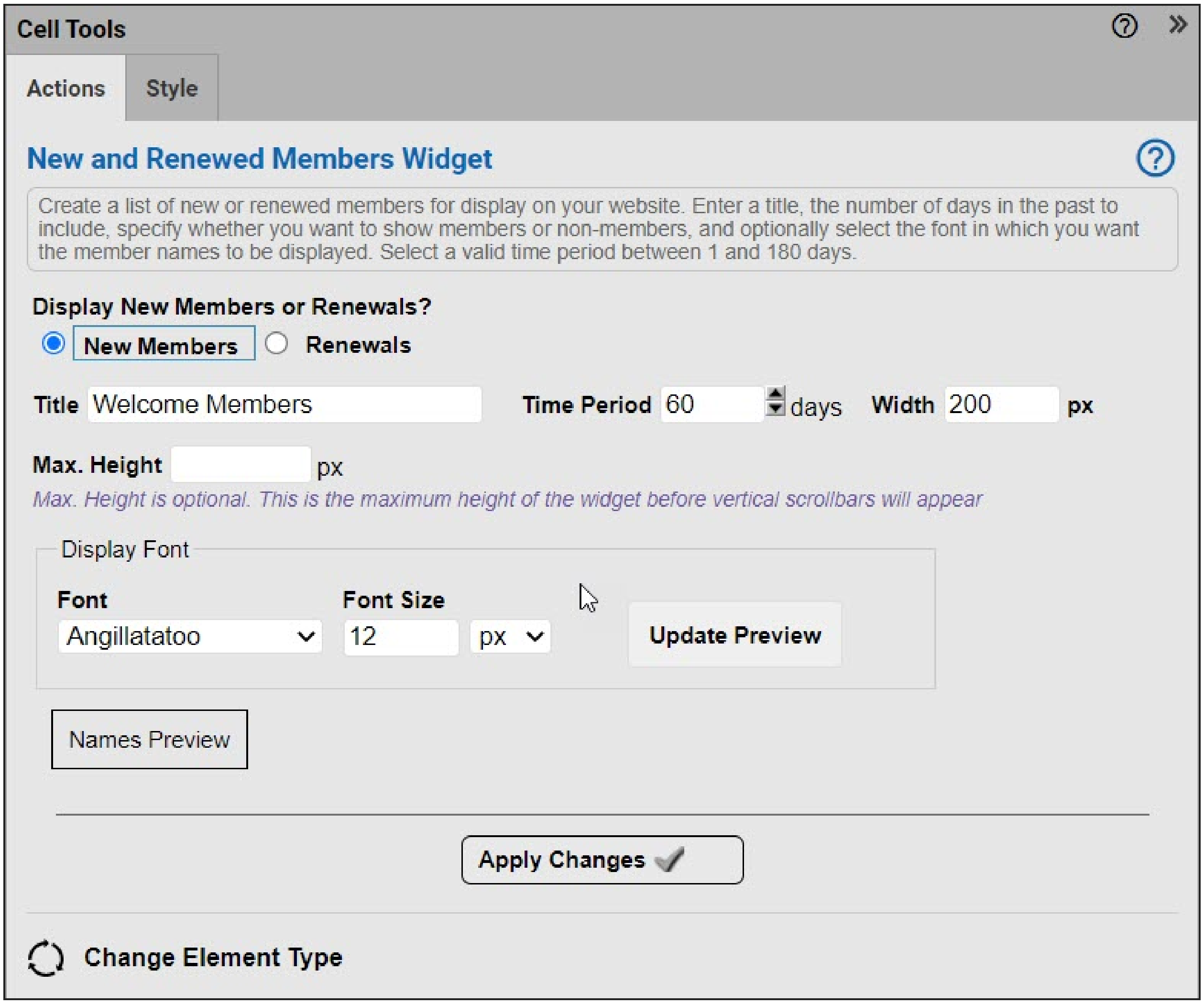
Insert a list of recent news articles posted in the News & Articles module.



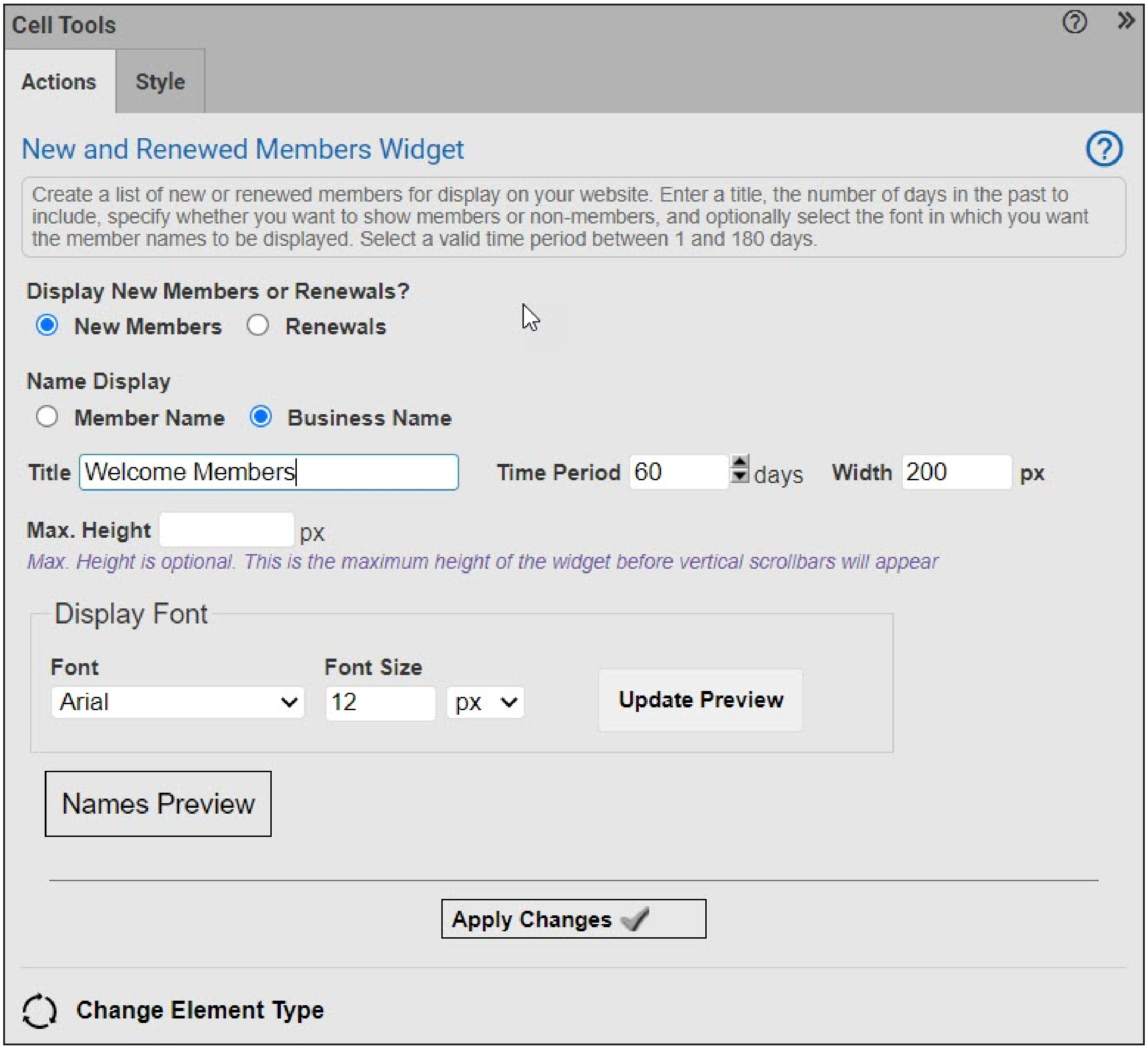
Enter a title to display at the top of the widget. Enter the number of days past to show recently posted articles. Choose a width that spans the width of the cell, or a fixed width, and a maximum height. Choose to include all news article categories, or only one category. Select Apply Changes to save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

New and Renewed Members

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



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.

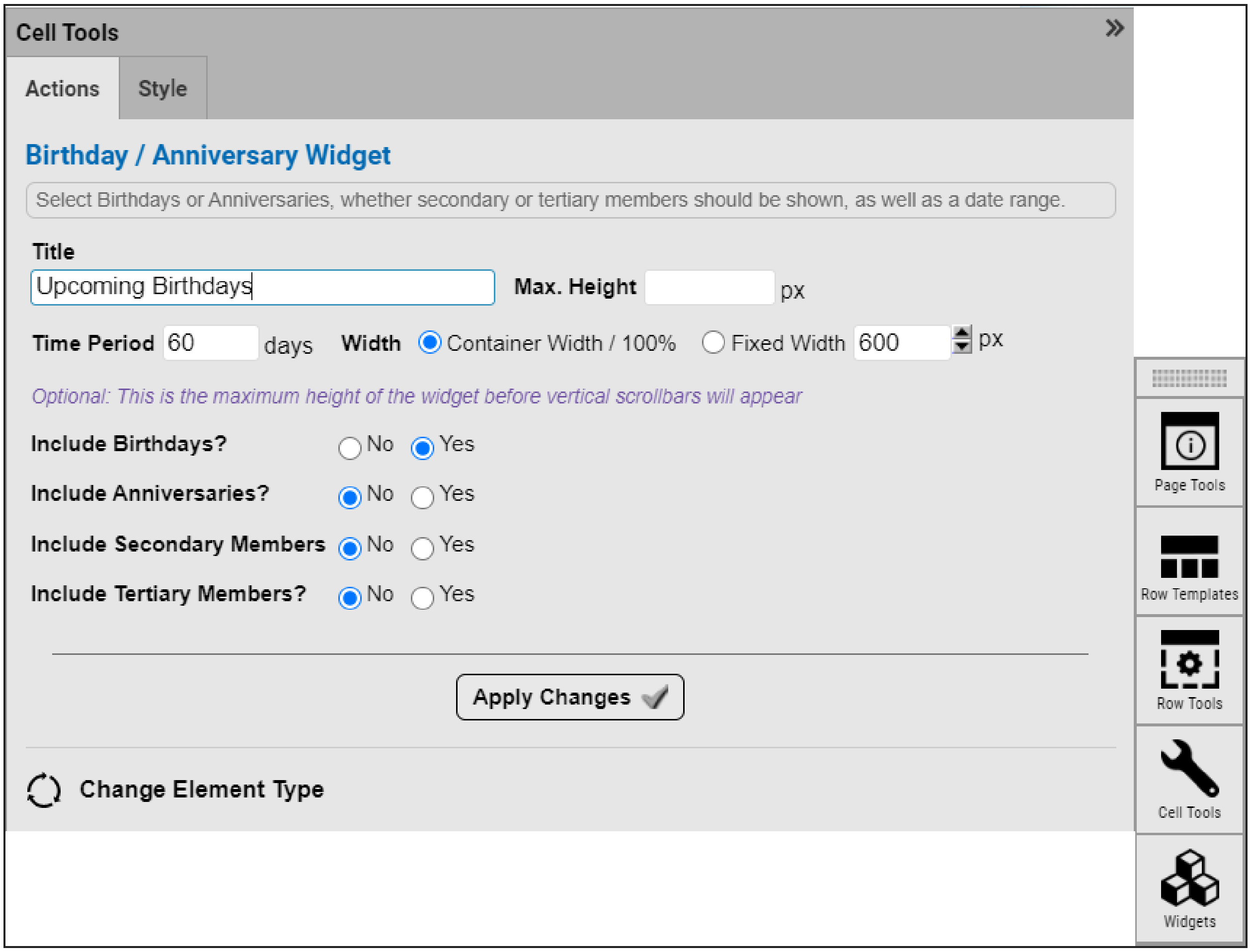


Select the members to display, either new or renewed. Remember, if your members join through their business lives and you select "Member Name", you'll be prompted to confirm whether you want to show the business name or individual member name.

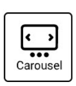
Enter the widget title to display, the time period and the width of the widget. Enter the font to be used for the member names. Select Save to save your changes.

Birthdays Anniversaries

Insert a list of upcoming member birthdays and anniversaries.

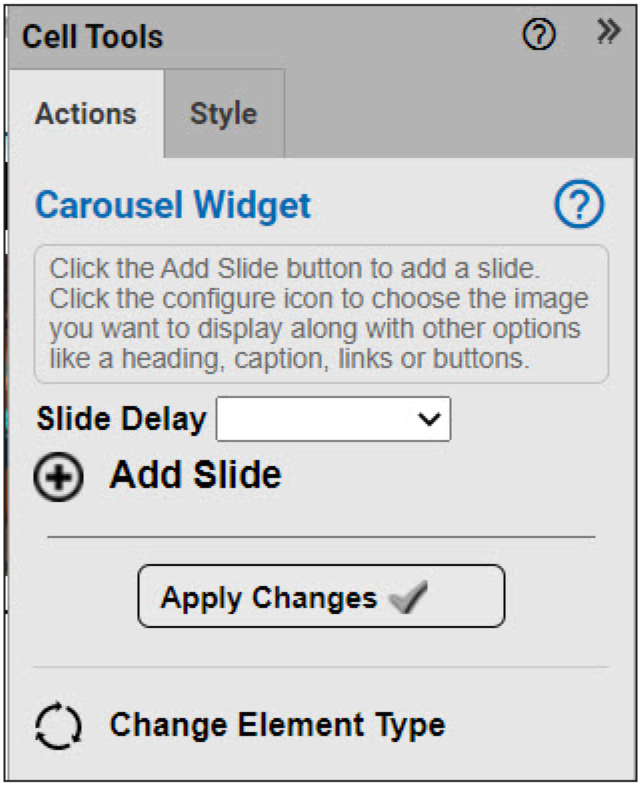


Enter the title of the widget and the time period to display information. Enter the width of the widget, either the width of the content box or a specified width, and the maximum height of the widget. Determine if the widget will display birthdays, anniversaries, and for primary members only or to include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



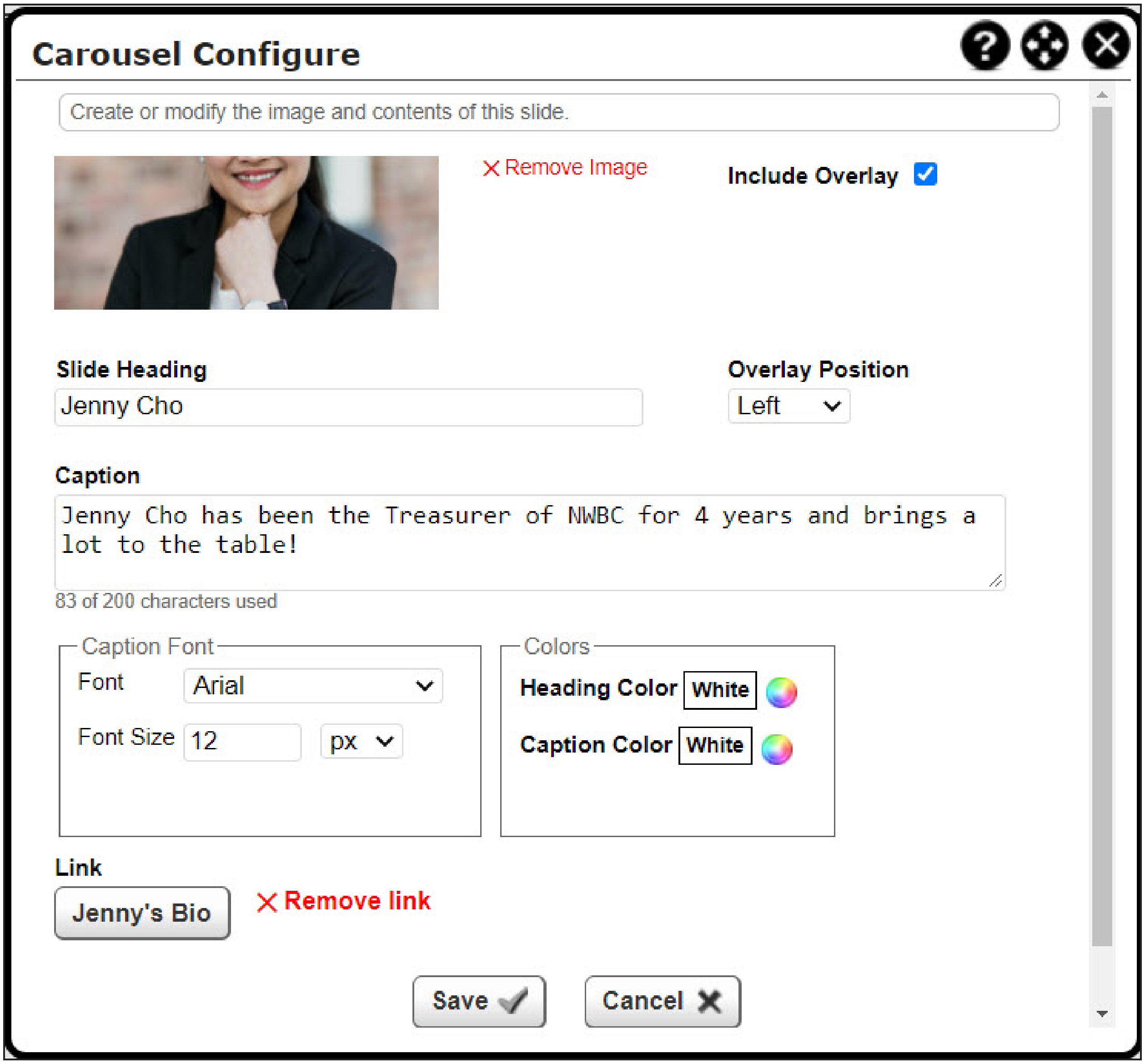
Carousel

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.

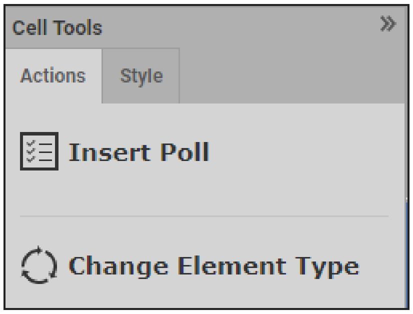
Next, you'll add an image by browsing your Web Graphics library. If you select the Include Overlay checkbox, you'll also be able to add and configure a text overlay and link.



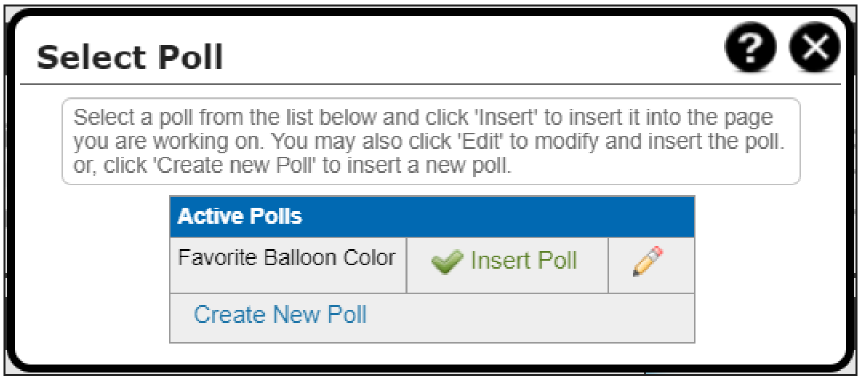
The trash can icon deletes the panel. Click Apply Changes to save your changes.

Poll

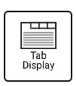
Insert a poll created in the Surveys module.



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

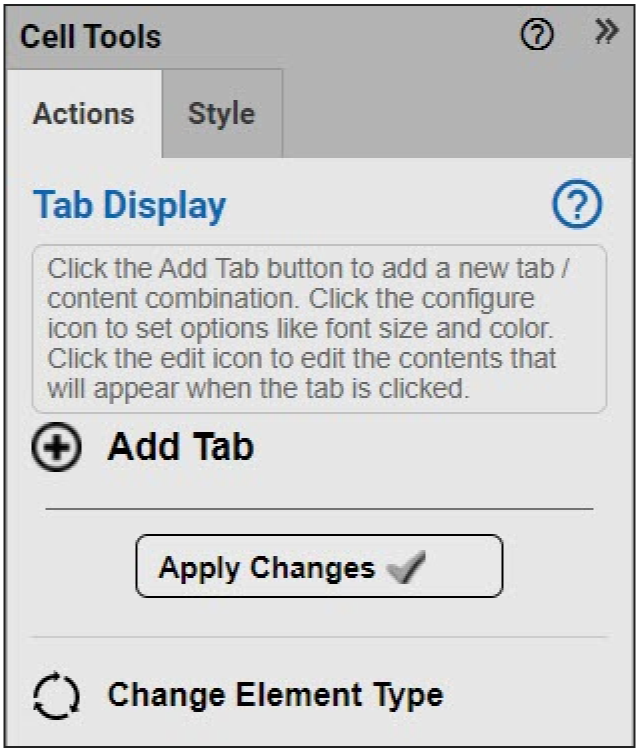


Select the green check mark to insert the poll. Select the edit icon to make changes to the poll.

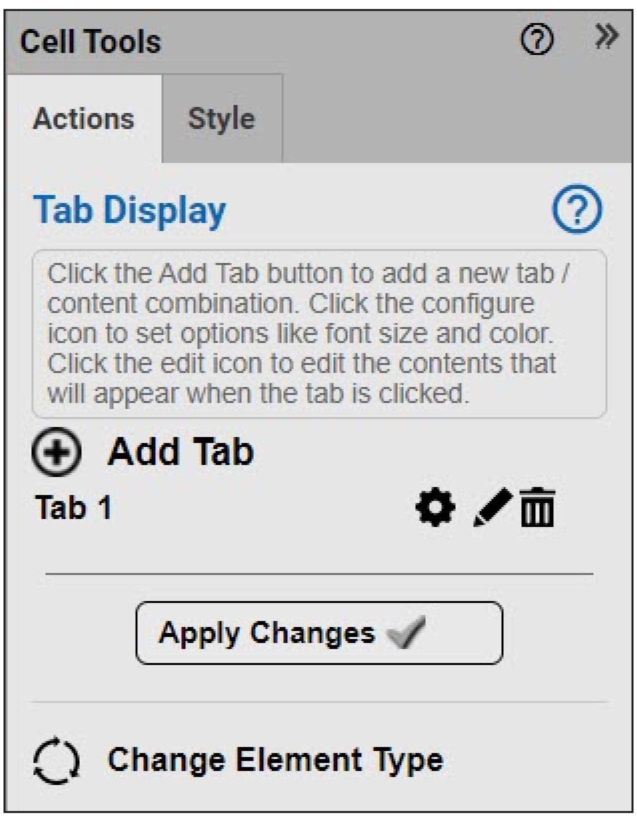


Tab Display

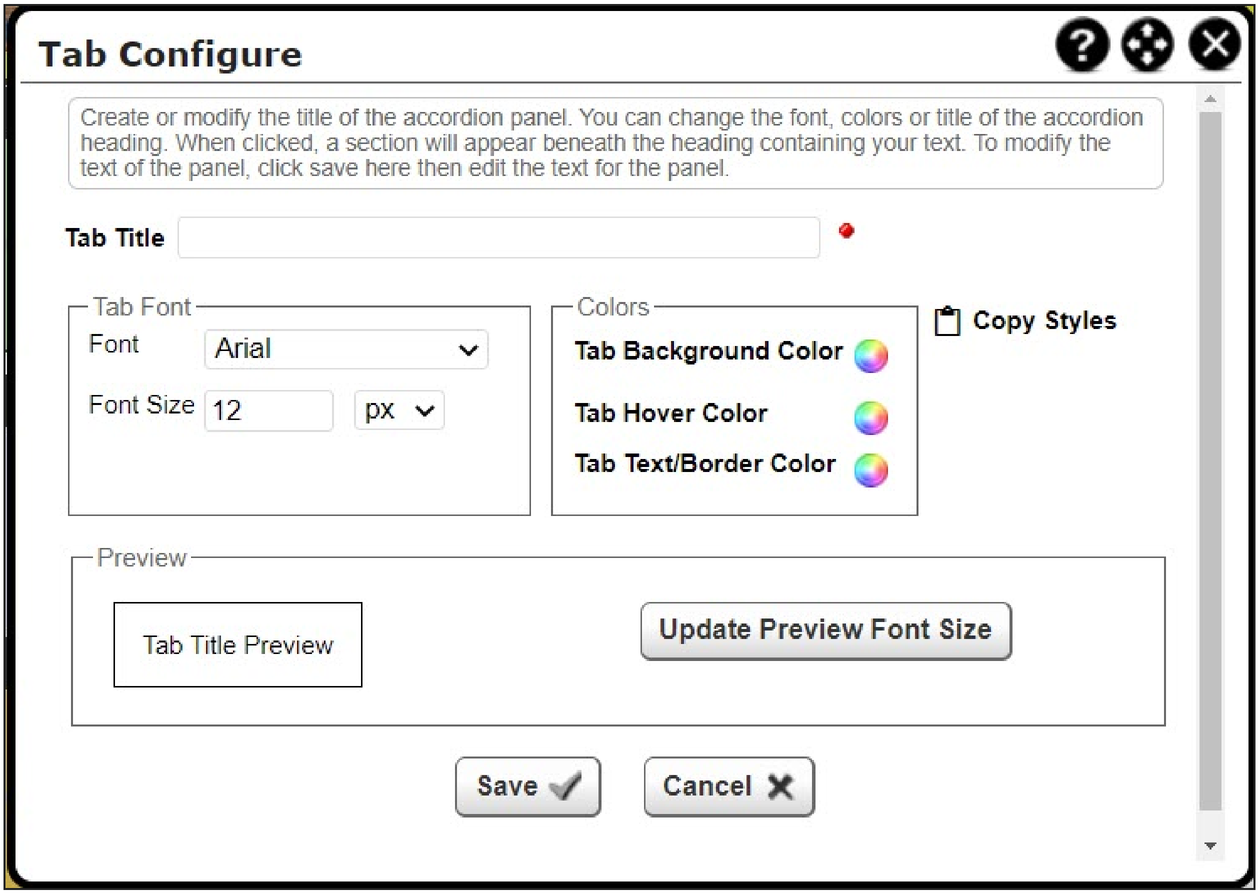
Insert sections of text in a tabbed format, where users can select a tab to display different content within the same cell.



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



Select the settings icon to configure the panel settings:



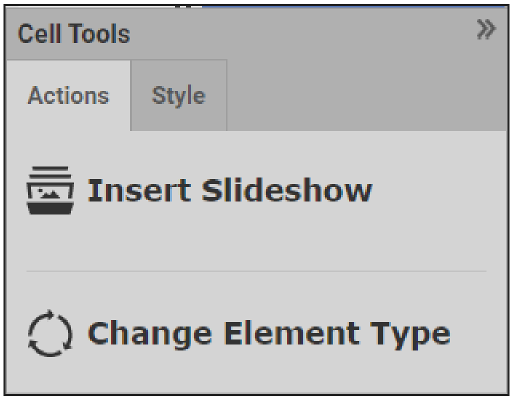
Enter the title of the tab. Select the font and size for the tab, as well as the background, hover and border colors.

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.

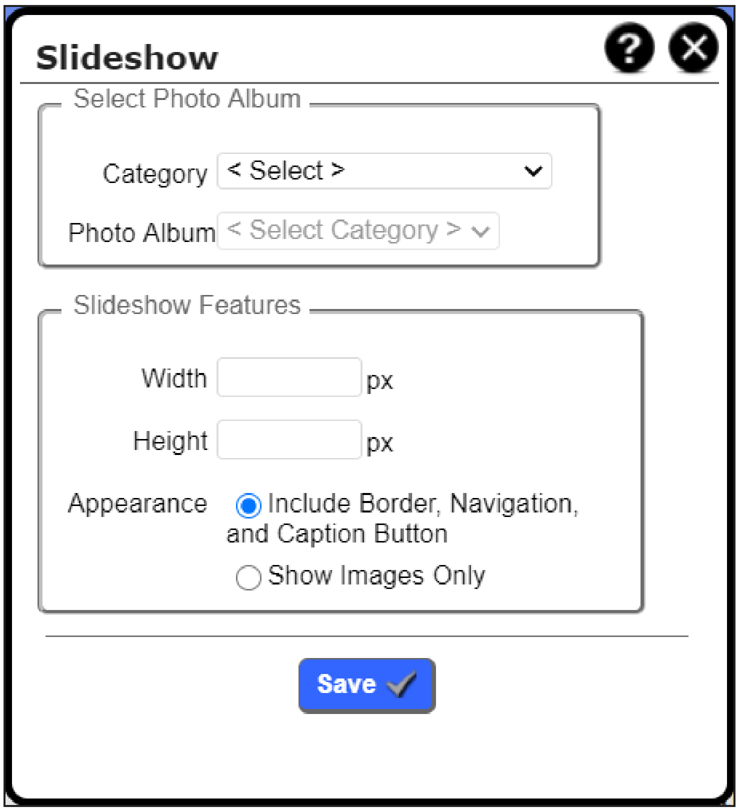
The trash can icon deletes the panel. Click Apply Changes to save your changes.

Slideshow

Show a photo slideshow.



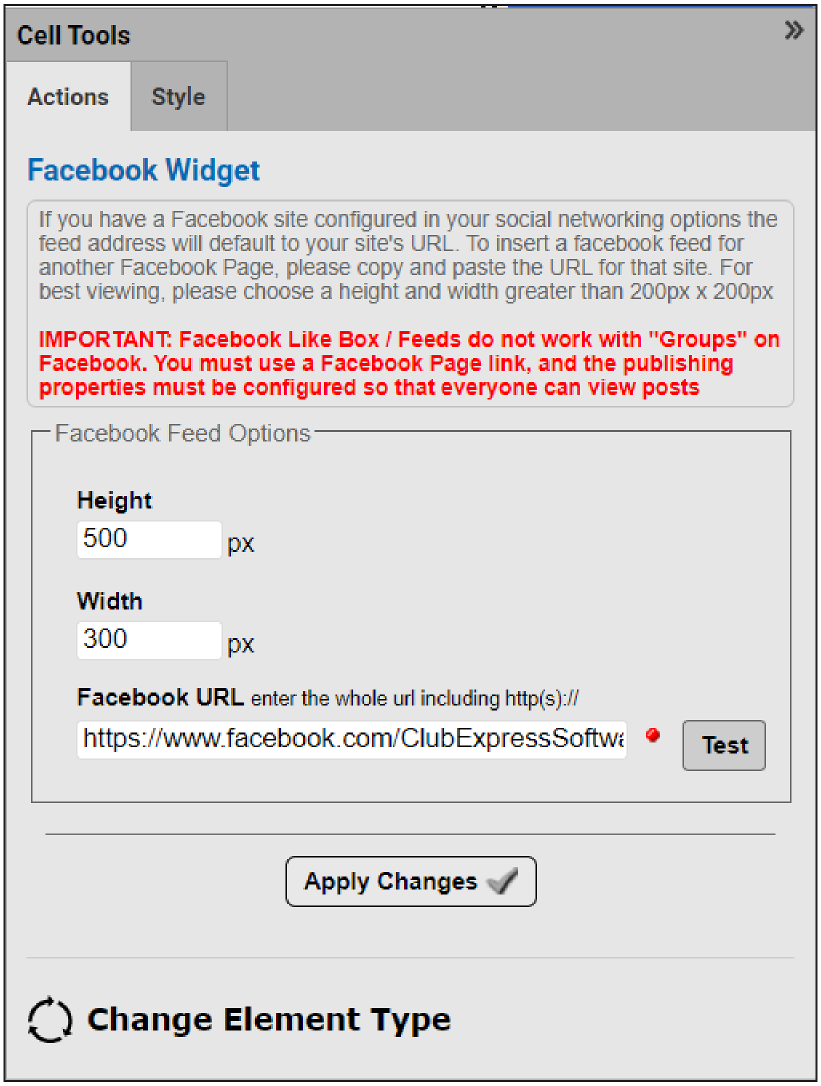
Select Insert Slideshow to show the Slideshow pop-up window.



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.

Facebook

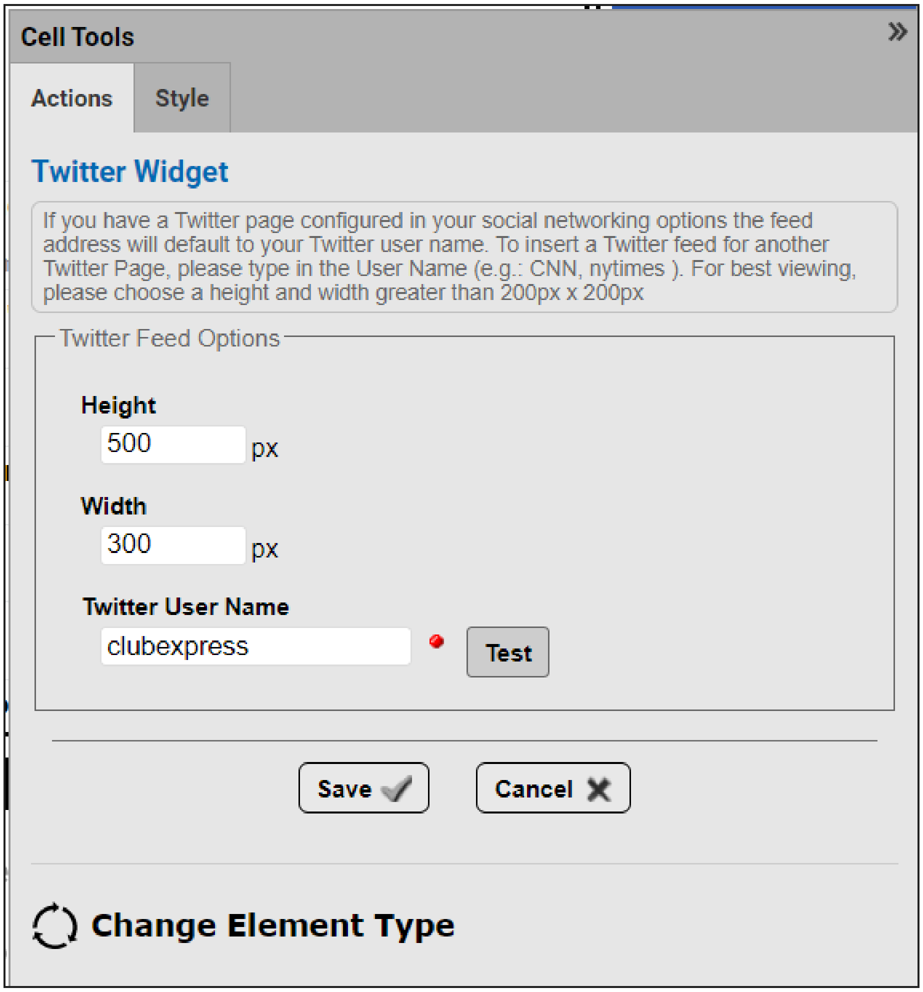
Insert a list of recent Facebook posts.



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

Twitter

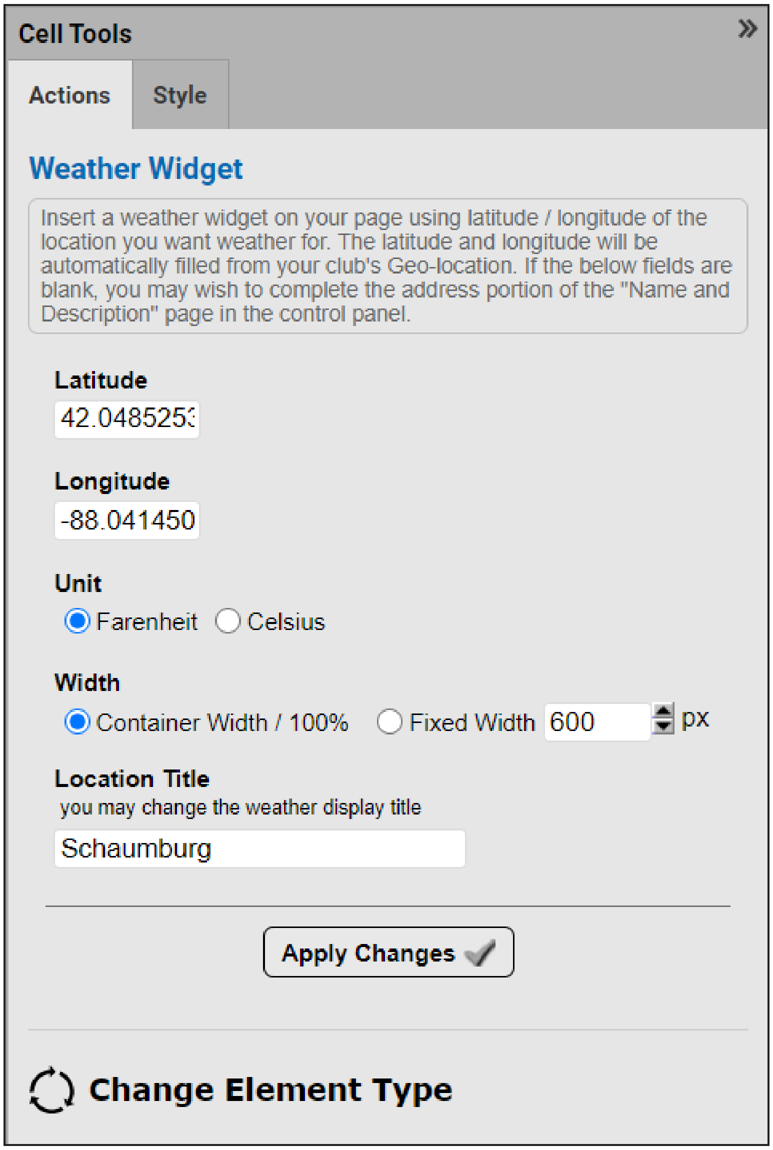
Insert a list of recent Twitter posts.



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

Weather

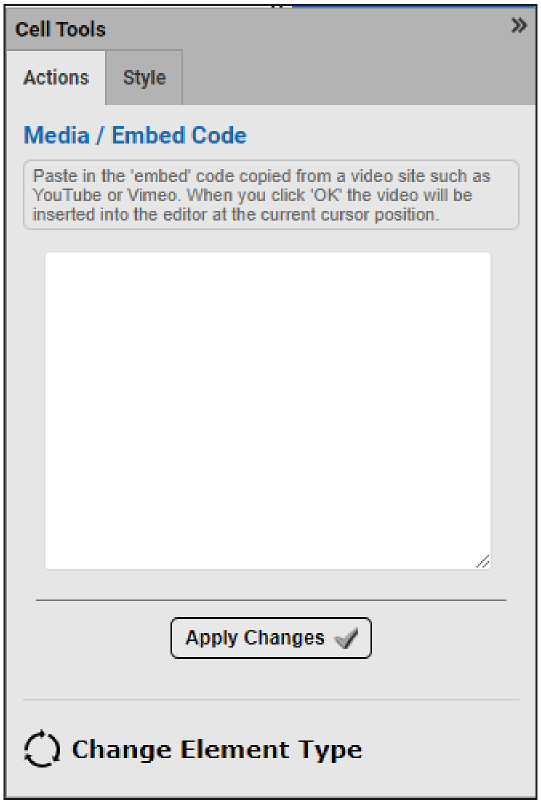
Display weather for a specific location.



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.

Media

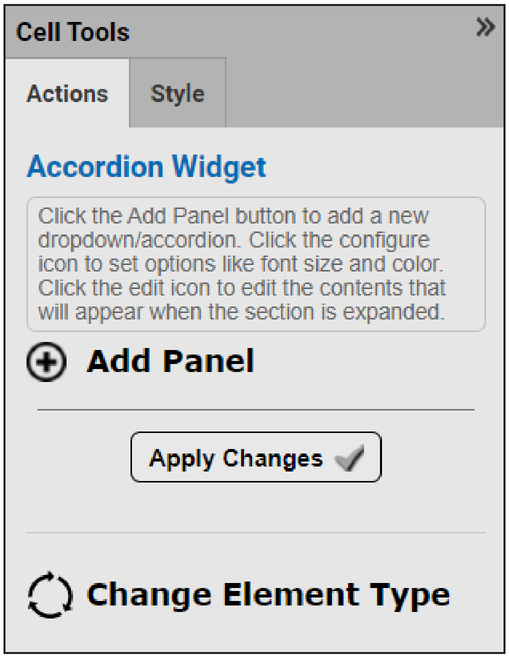
Insert a video using the media embed code. The video will display on your custom page.



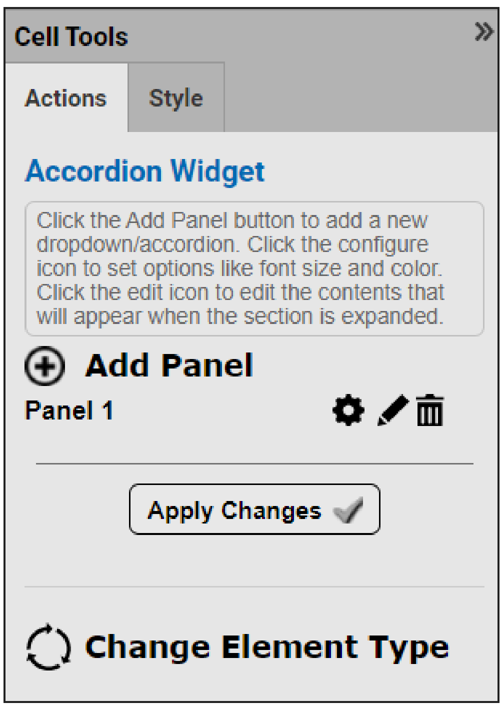
Paste the embed code from your video hosting site (such as YouTube or Vimeo) into the blank field. Select Apply Changes to apply the changes to the cell.

Accordion

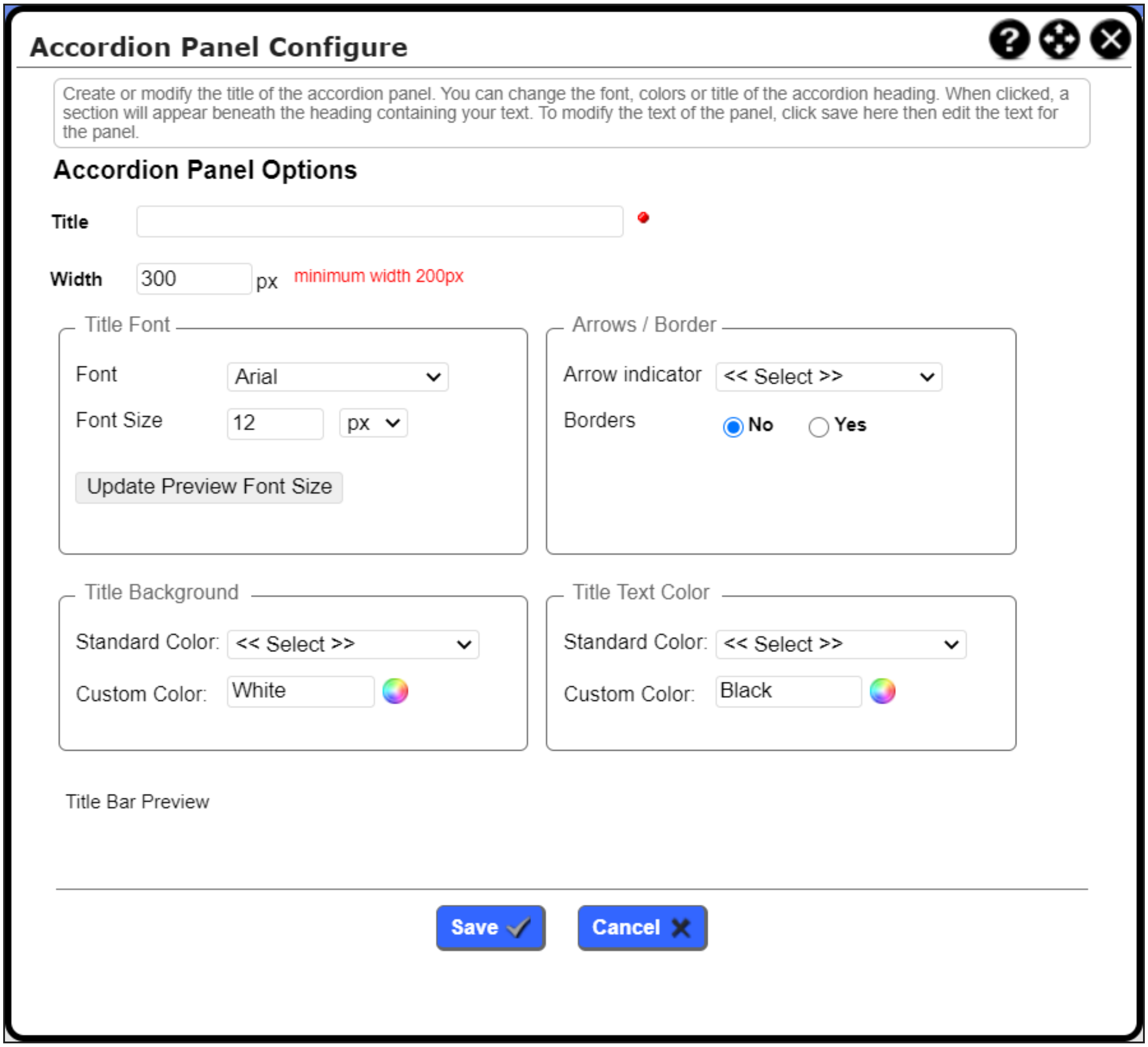
Insert expanding and collapsing text.



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

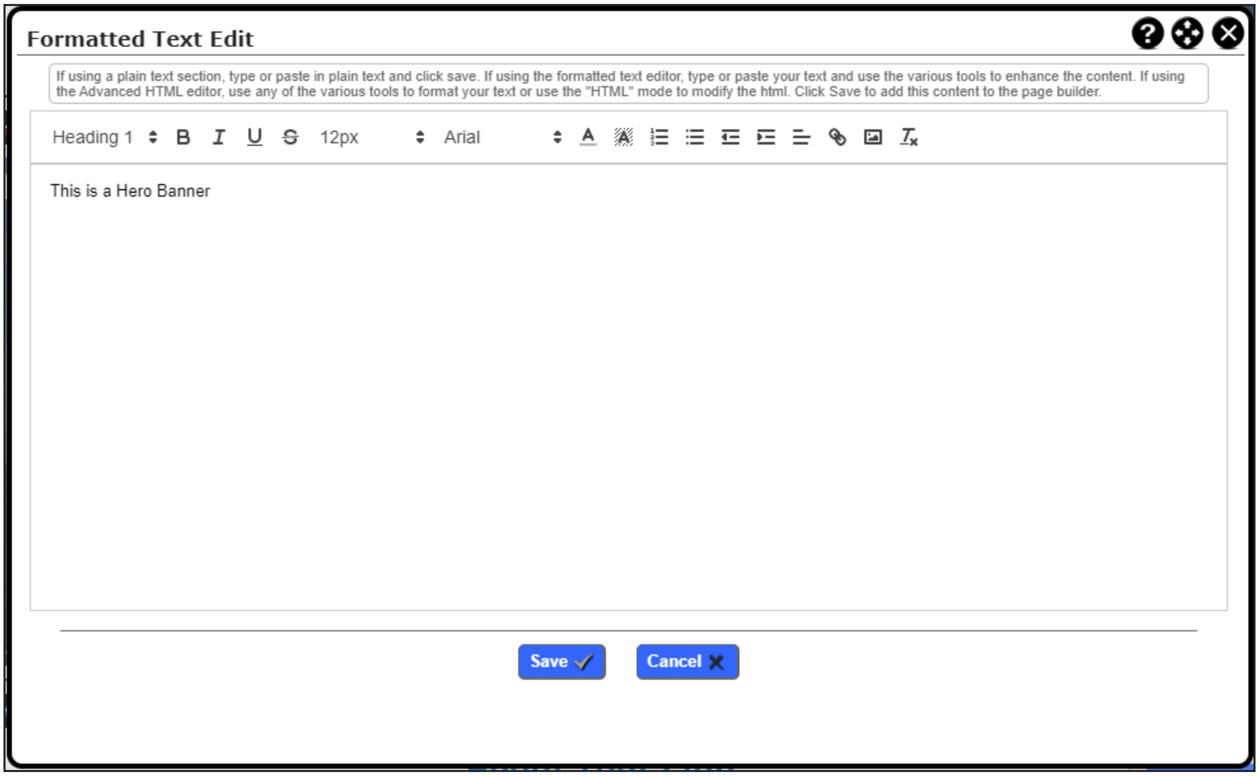


Select the settings icon to configure the panel settings:



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.

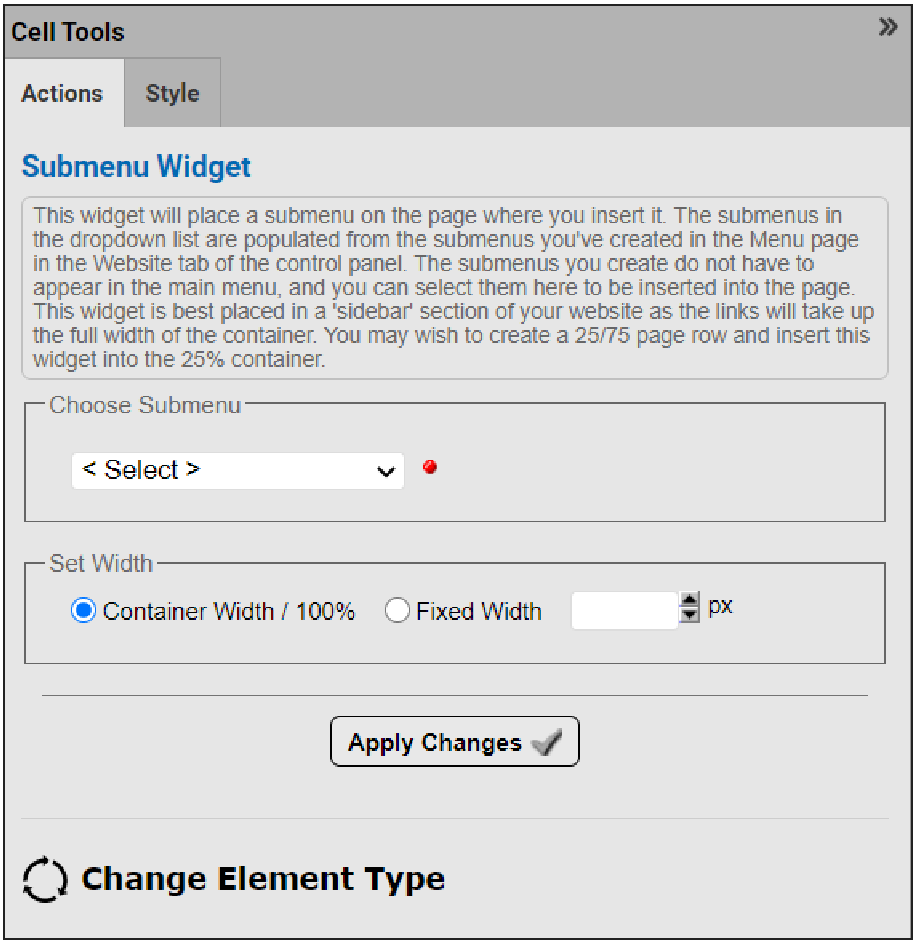
Select the edit icon to add text to the panel. This is the text that will be visible when the user clicks the "expand" icon on the custom page. Use the Formatted Text Editor to edit the text.



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

Submenu

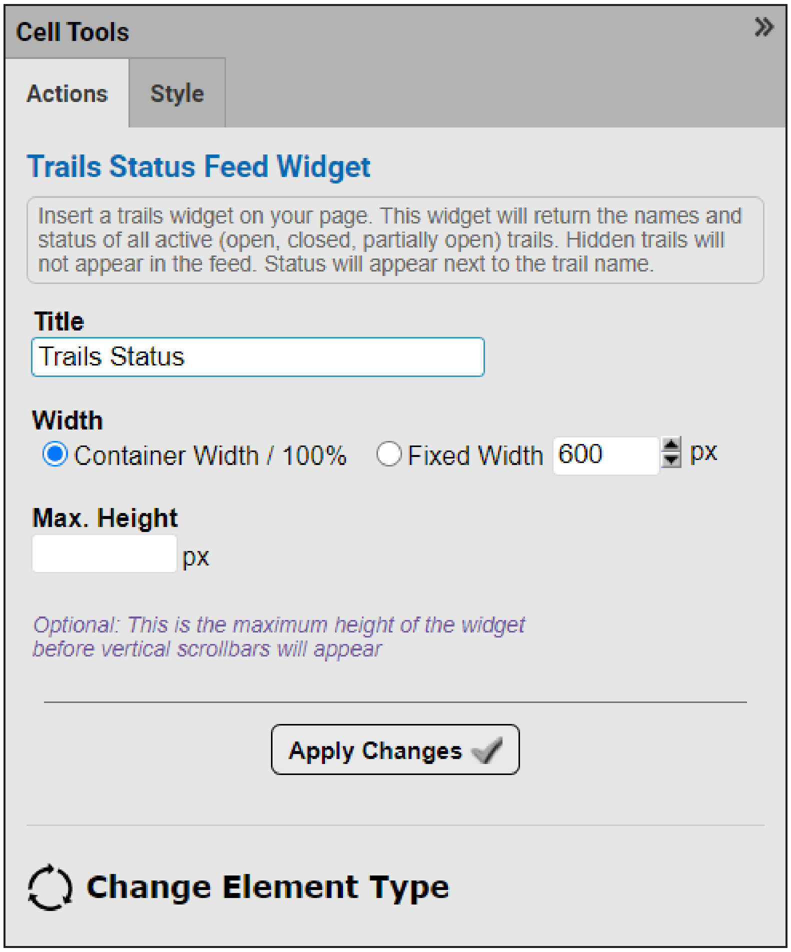
Insert a sub-menu sidebar.



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.

 Trails Widget

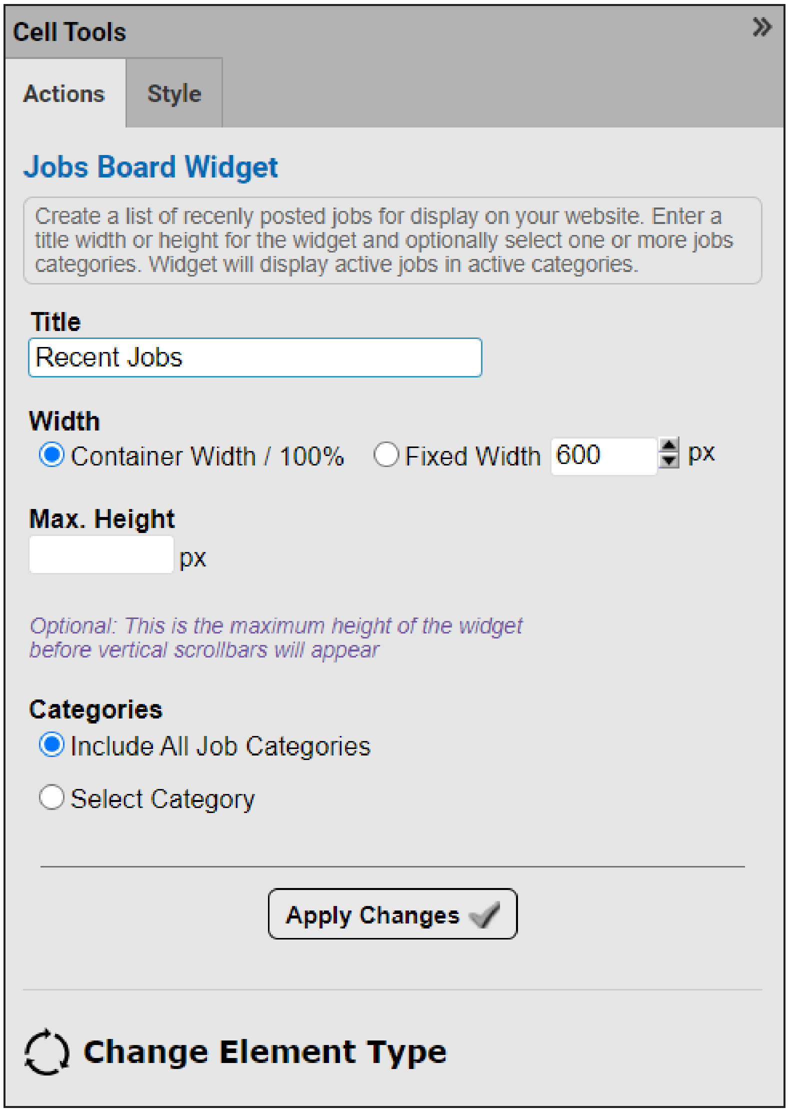
Insert the names and statuses of all active trails, if the Trail Status module is enabled.



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

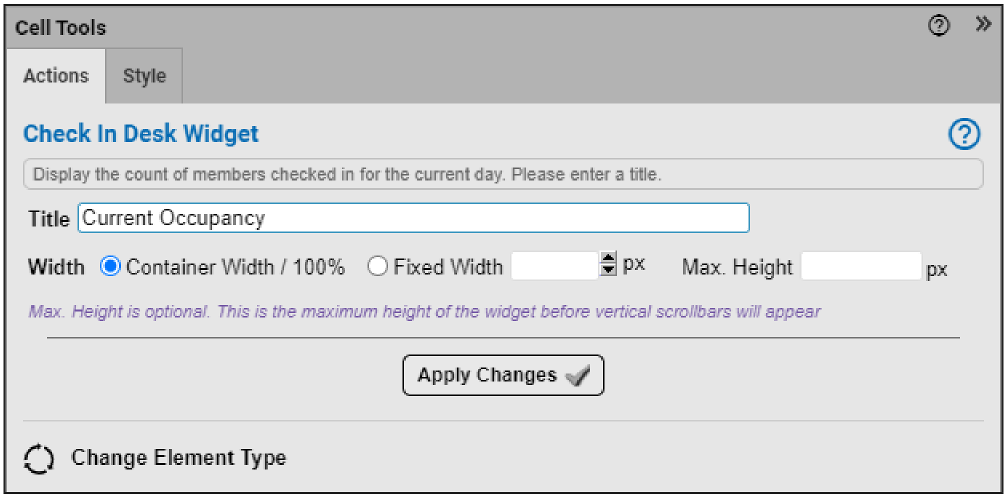
Insert a list of recent job posts, if the Jobs Board module is enabled.



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.

 Check-In Desk

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



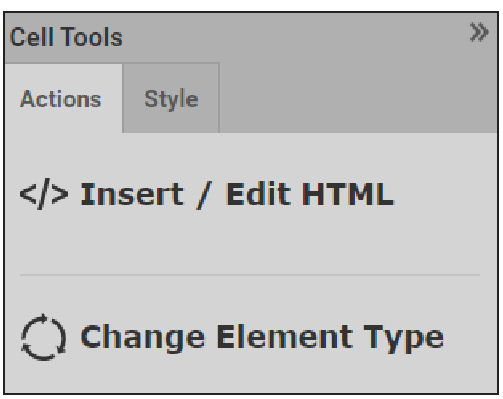
Enter a title to display at the top of the widget. Choose a width that spans the width of the cell, or a fixed width, and a maximum height. Select Apply Changes to save your changes.

 Horizontal Rule

Inserts a horizontal line spanning the width of the cell.

 HTML

Edit content for this cell in HTML mode.



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

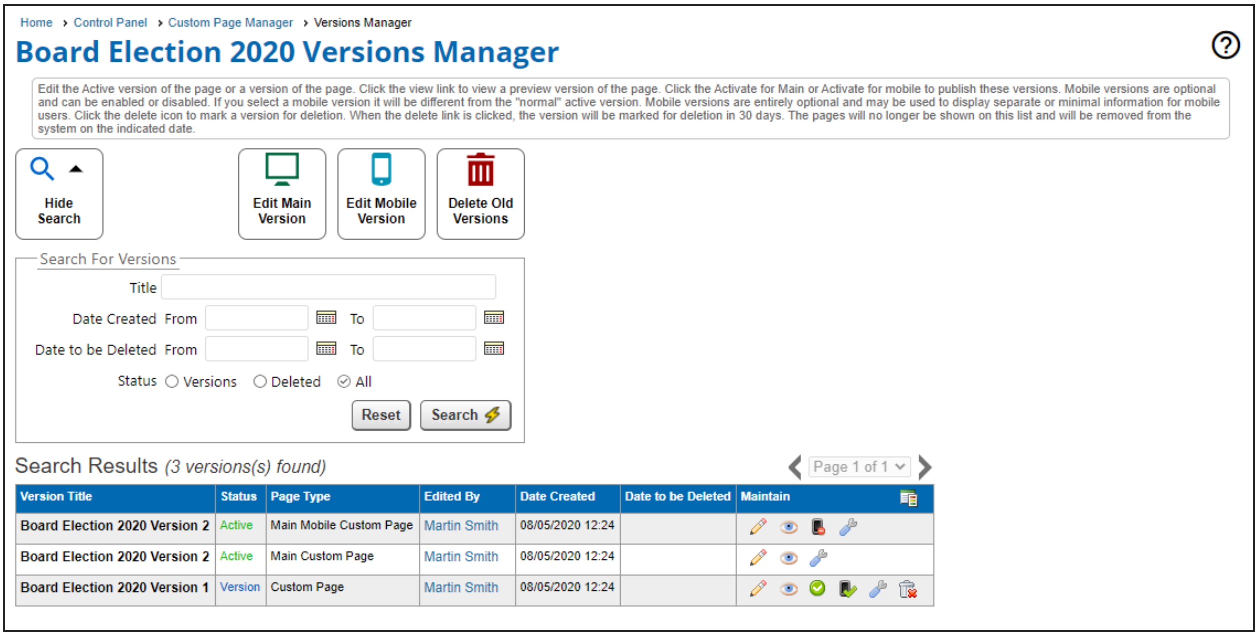
Edit the underlying HTML code. Select Save to save your changes.

Empty Widget

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.



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.

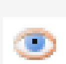
Select **Delete Old Versions** to view the Delete Versions popup. The option to delete old page versions will only appear if more than one version has been saved.

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.

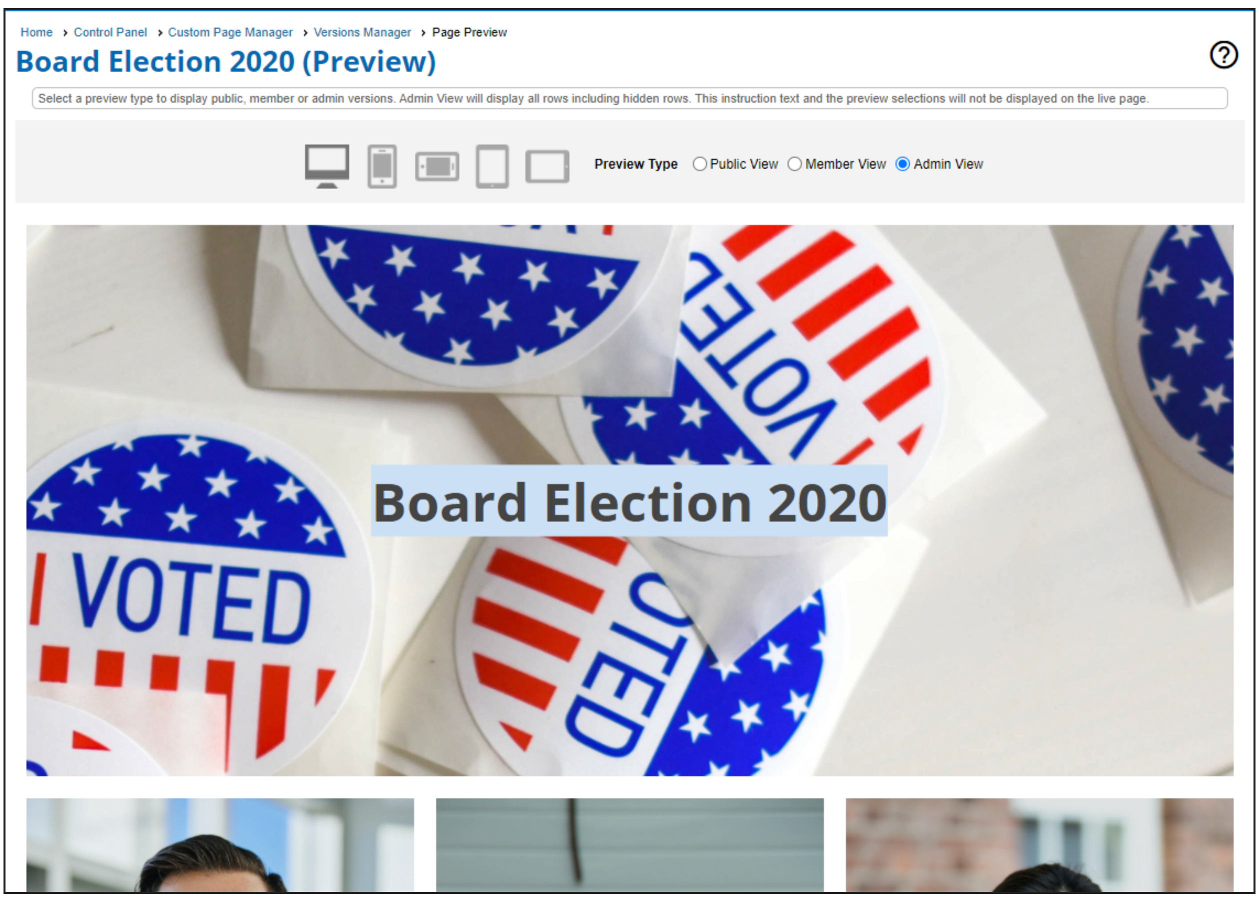
Icon	Description
 (Edit)	**Edit** the content of the page using the Page Builder Canvas.
 (View)	**View** a preview of this page.

Icon	Description
(Configure)	**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.
(Configure)	**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)

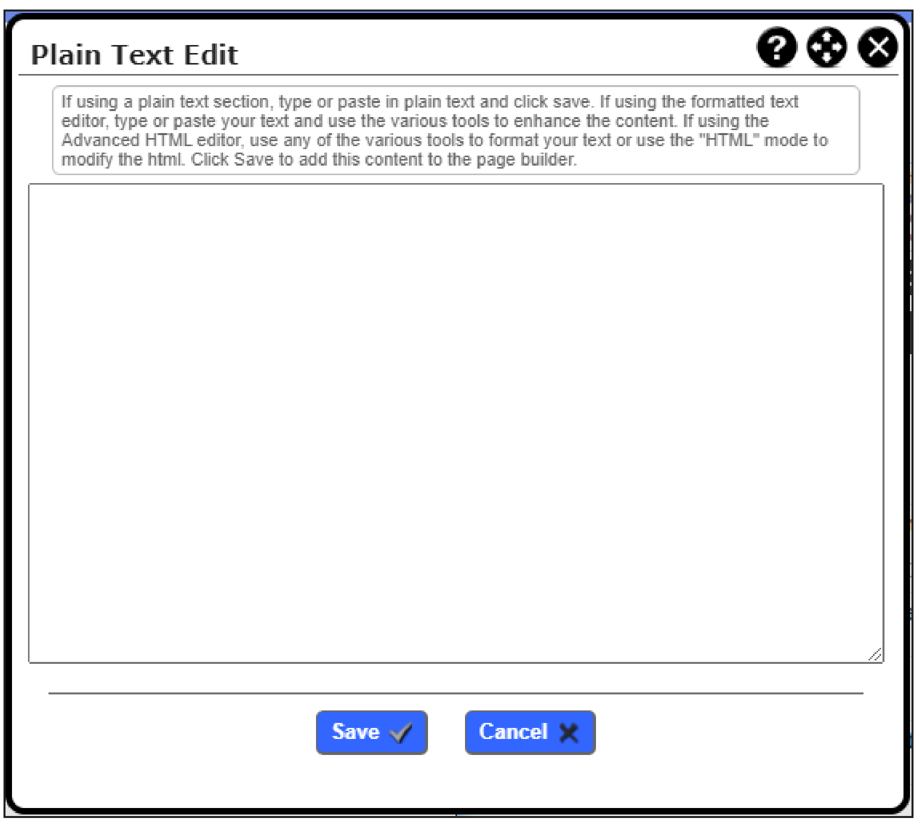
Select the output type and the user perspective to see a preview.

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:

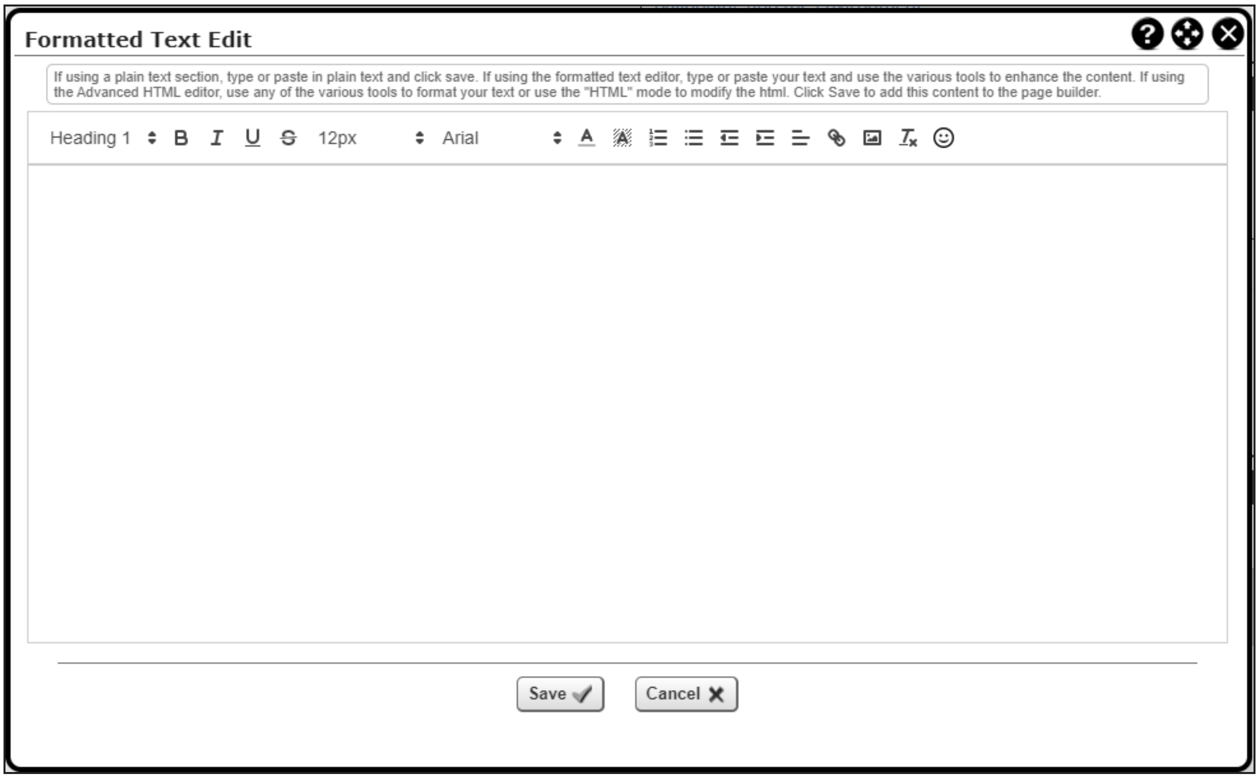


The text entered will display in the style set by default in Cell Tools > Styles. Formatting for the cell can be changed further by editing the settings in Cell Styles (see "Cell Tools" on page 148).

> **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

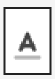
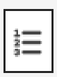
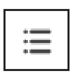
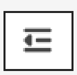
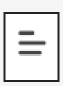
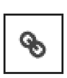
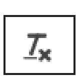
Editing text using the Formatted Text Editor displays the following pop-up screen:



> **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:

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

Icon	Description
B	[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.
	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.
	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.
	Outdent (decrease the indent) a selected line of text or the line of text containing the cursor.
	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.
	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.
	Removes any formatting previously applied and resets to the default cell styles.
	Opens the emoji selector drop-down menu.

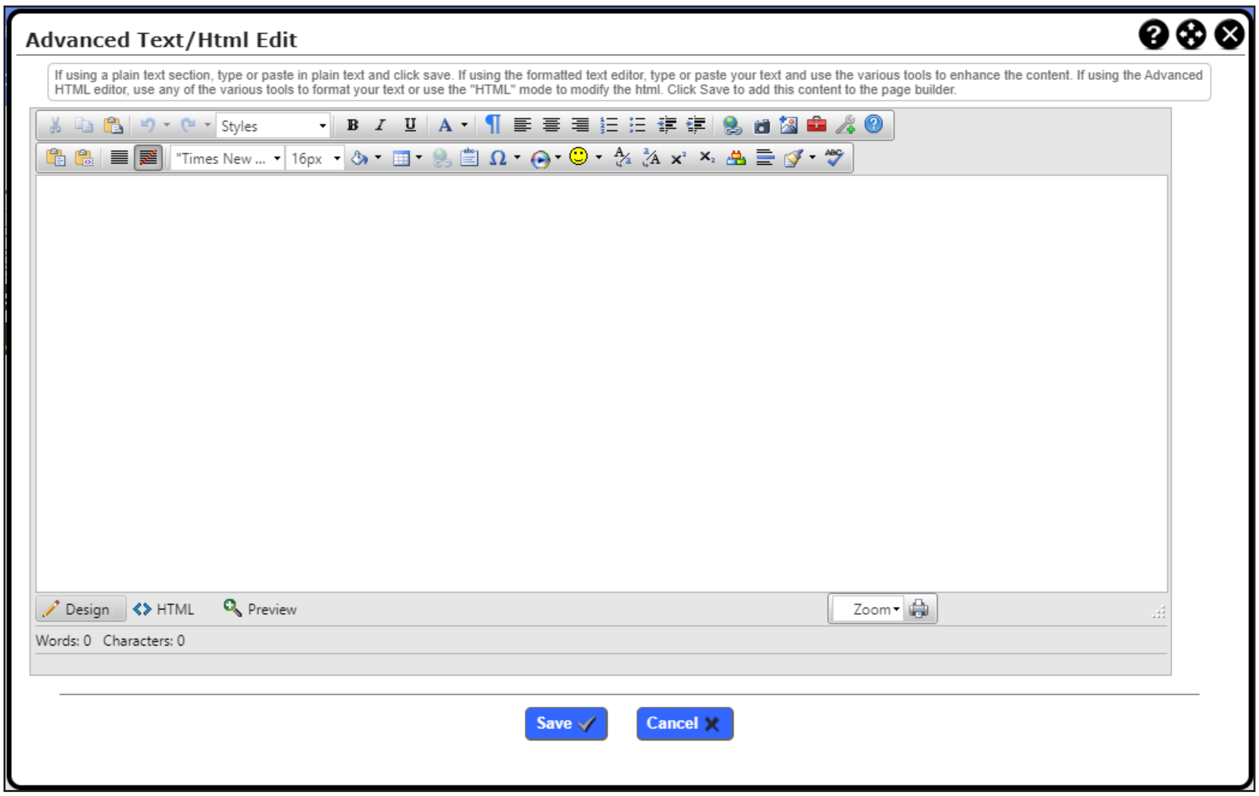
Icon	Description
	Note: Your browser may not support all available emoji.

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

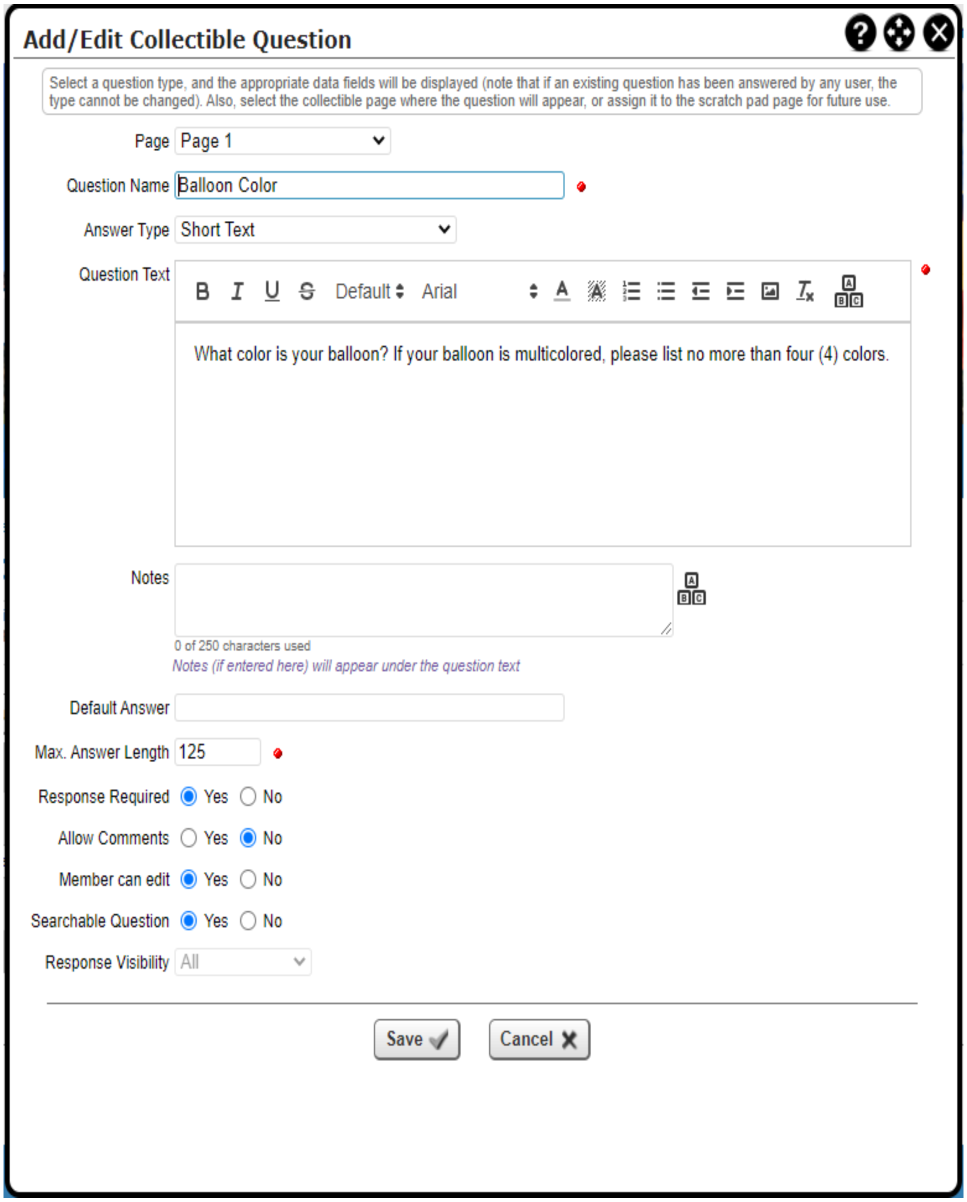
Explore answer types: See "Answer Types" on page 665

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.



- 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.

Type	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

Type	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 • Custom – Enter a Regular Expression and test the expression Regular Expressions 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, maximum 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, maximum 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

Type	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 selections that can be made. Allow other: yes/no Allow comments: yes/no
Radio Buttons	Vertical list of radio buttons; only one can be selected	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election) **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. **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.	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
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; anything 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 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-

Type	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.

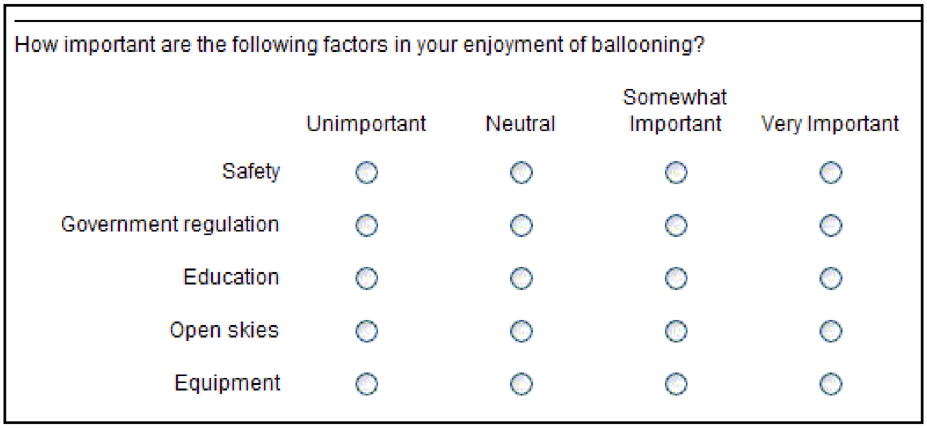
For more information about regular expressions, see the following websites:

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

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

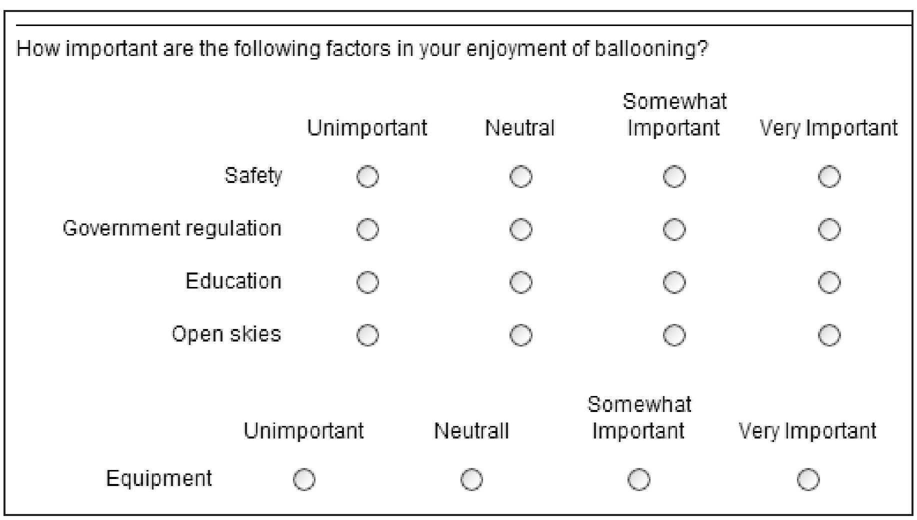
Scale Questions

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:



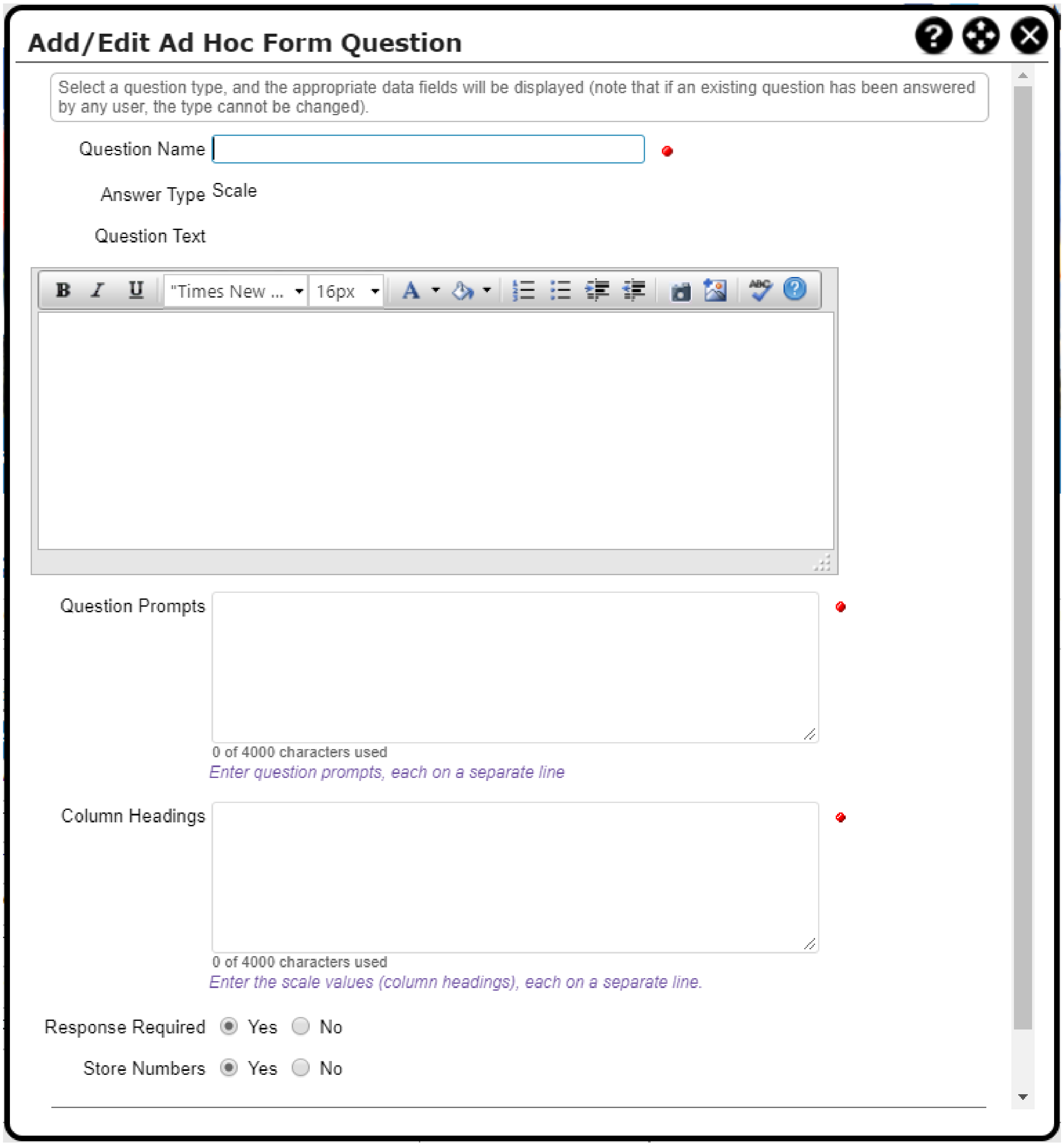
ClubExpress includes special functionality to display scale questions. If there's a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different 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.



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:



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:

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. 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.

Email Accounts

See "Email Accounts" on page 569

ClubExpress includes support for “forwarding” email accounts only.

> **Example:** President@MyClub.Org 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 10^{th}, 20^{th} 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 20^{th} of the month, we will send funds collected from the 8^{th} through the 17^{th} (ignoring weekends and public holidays.) These funds will then arrive in your bank account on the 22^{nd}.

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 sub-account 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 differ 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 honorary "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 concerned about sorting, consider using leading zeros.	If your club or association does not have numbers, you can assign them, or we will assign them based on the date joined. They must be unique for each member, including secondary and tertiary members. Be sure that the member numbers in the spreadsheet start after the member numbers already in your online database. 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.

Column	Format/Size
Work_company	100 chars
Work_title	100 chars
Work_phone	24 chars
Tollfree_phone	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_Number
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_Number
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:** Download a copy of the template 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.

Control Panel Help

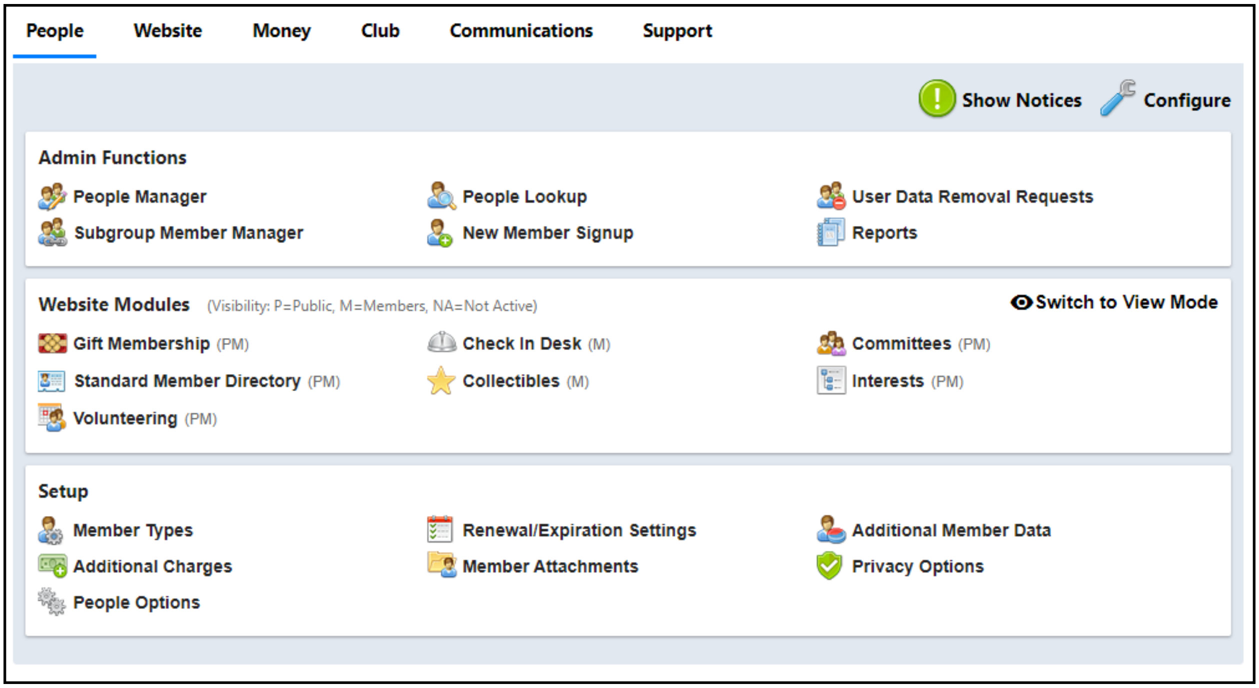
Our Control Panel is separated into six (6) tabs: People, Website, Money, Club, Communications and Support. Each tab contains databases, functions, modules and setup options. Use the links below to navigate to the online help for each tab.

- "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



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?

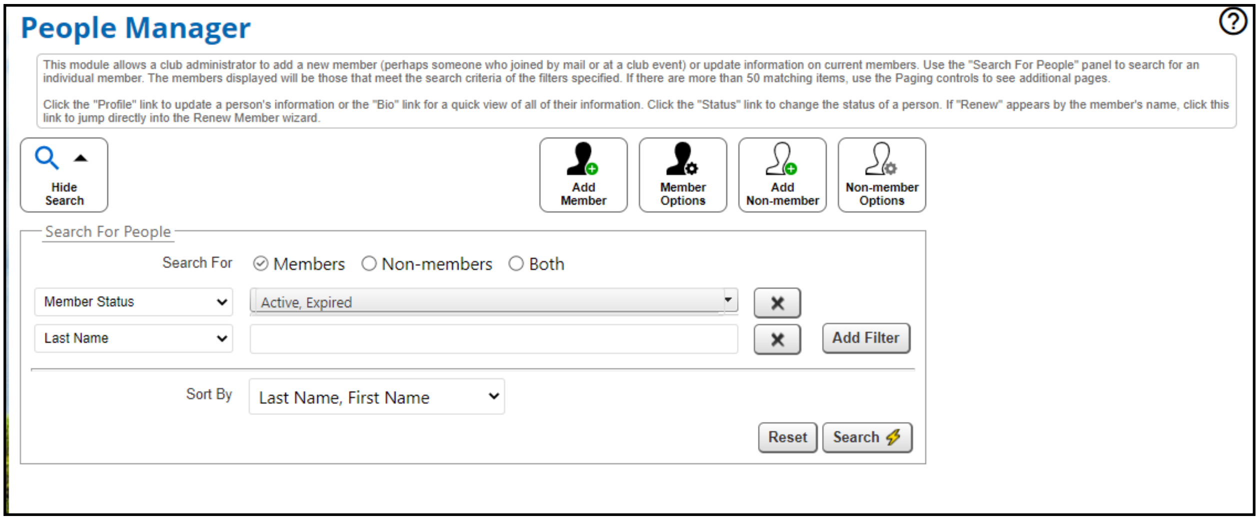
- For help with modules in the People section, see " ClubExpress Modules " on page 588
- Learn about the People Manager, your member and non-member database; see "People Manager" below
- Learn how to use the People Lookup, a read-only version of the People Manager; see "People Lookup" on page 260
- Use 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)./



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 payment	

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:

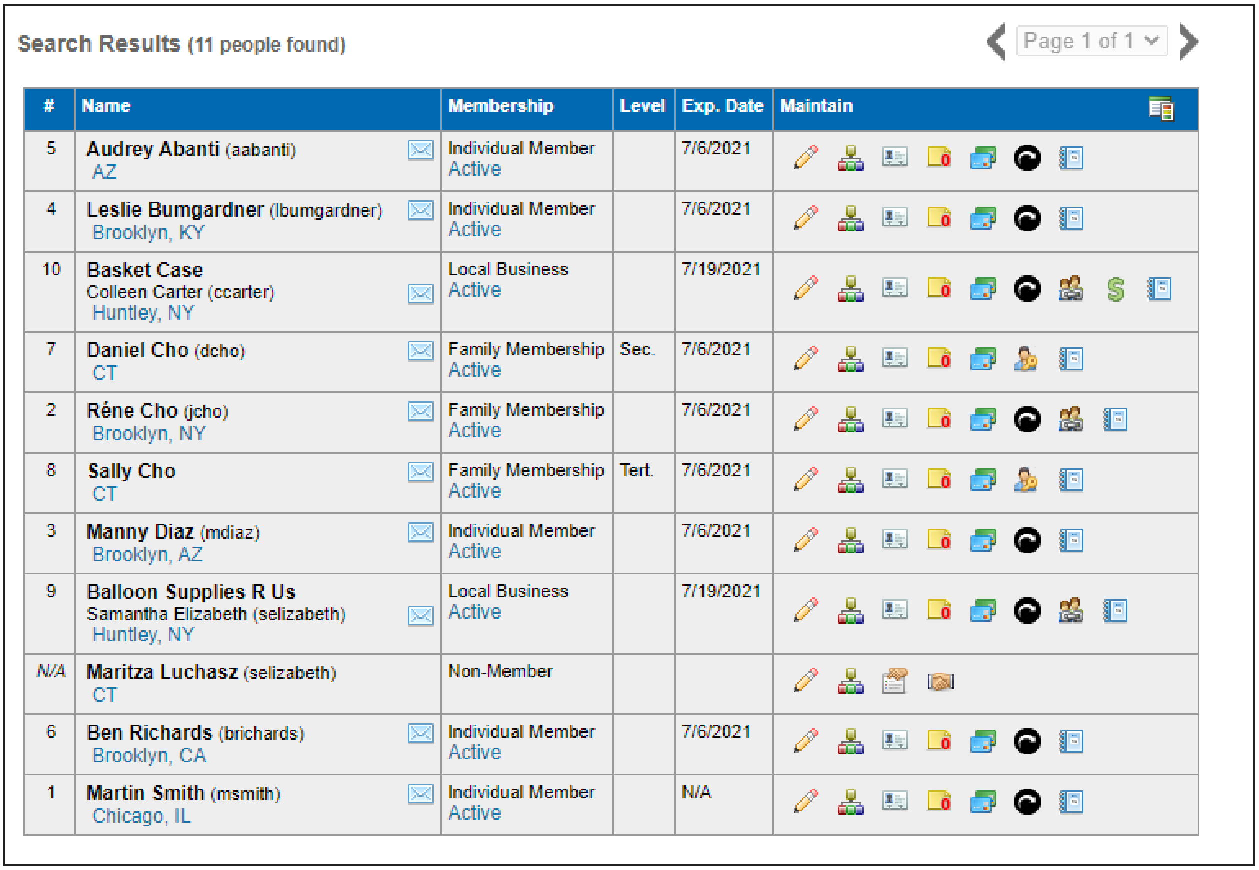
- Last Name, First Name
- First Name, Last Name
- Company Name, Last Name
- Member Number, Last Name

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:



Search Results (11 people found) Page 1 of 1

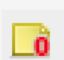
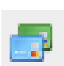
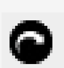
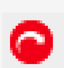
#	Name	Membership	Level	Exp. Date	Maintain
5	Audrey Abanti (aabanti) AZ	Individual Member Active		7/6/2021	
4	Leslie Bumgardner (lbumgardner) Brooklyn, KY	Individual Member Active		7/6/2021	
10	Basket Case Colleen Carter (ccarter) Huntley, NY	Local Business Active		7/19/2021	
7	Daniel Cho (dcho) CT	Family Membership Active	Sec.	7/6/2021	
2	Réne Cho (jcho) Brooklyn, NY	Family Membership Active		7/6/2021	
8	Sally Cho CT	Family Membership Active	Tert.	7/6/2021	
3	Manny Diaz (mdiaz) Brooklyn, AZ	Individual Member Active		7/6/2021	
9	Balloon Supplies R Us Samantha Elizabeth (selizabeth) Huntley, NY	Local Business Active		7/19/2021	
N/A	Maritza Luchasz (selizabeth) CT	Non-Member			
6	Ben Richards (brichards) Brooklyn, CA	Individual Member Active		7/6/2021	
1	Martin Smith (msmith) Chicago, IL	Individual Member Active		N/A	

#	Name	Membership	Level	Exp. Date	Maintain Options
Member Number 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, secondary or tertiary, and using the keywords defined by your club or association	The memberships' expiration 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  (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  (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.

Icon	Description
(Payments)	If this icon appears, this member owes money. Click to go to the Pending payments page.
(Reports)	Select this icon to run reports for this specific member. The standard report dialog 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.

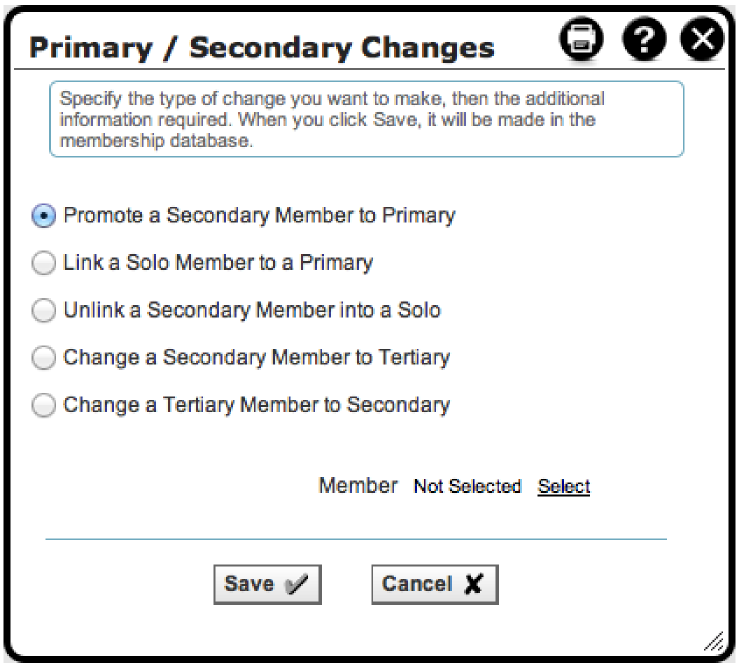
> **Note:** Once you drop a member you may need to update the search filters in the People Manager to show Dropped members in the search results in order to find the newly dropped member and convert them to a non-member.

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.



This dialog provides five options:

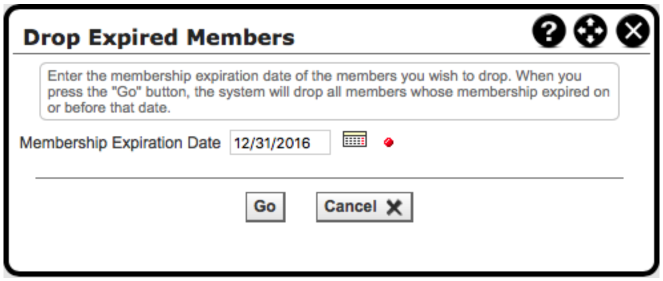
- Select the first option to promote an existing secondary member within a group to be the primary member. You will be asked to select a secondary member. When you click **Save**, the secondary member becomes the primary member, the current primary is demoted to secondary, and all other secondaries are 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:

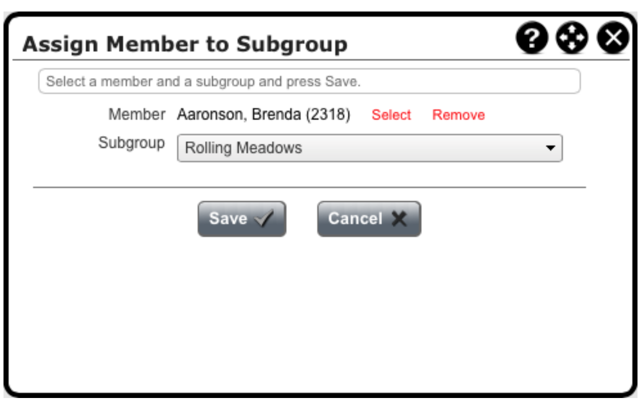


Specify a date and select **Go**. The system will convert all members with an expiration date less than or equal to the specified date to Dropped. Or select **Cancel** to close the dialog without making any changes.

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.

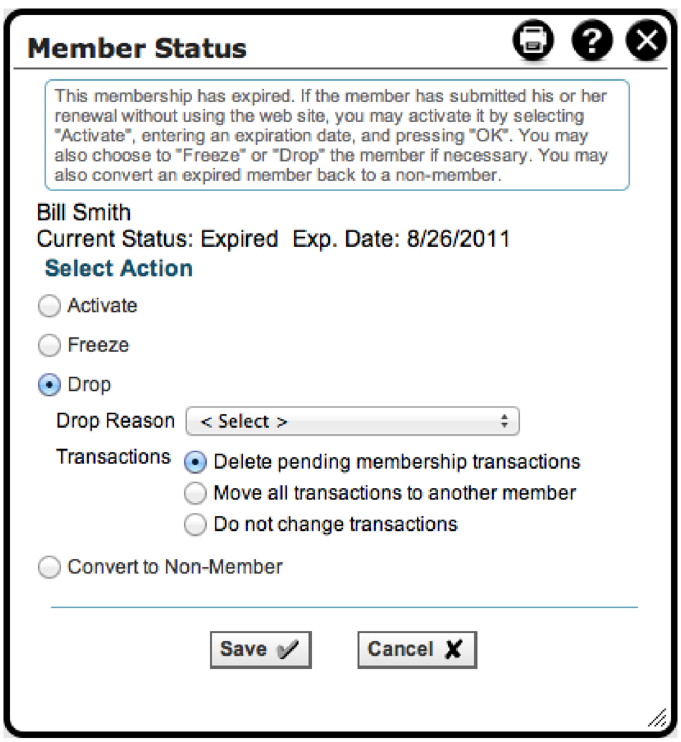
> **Example:** If the user is a district coordinator, only that district and the chapters under it will be shown.

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.



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.

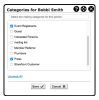
Member Profile

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 **Payment/Credit History** screens.
- Subgroup admins may be configured to have read-only access to member data. In this instance, the standard Profile screen is not displayed. Instead, these admins will see a version of the member bio page, with no editing options provided.
- 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:



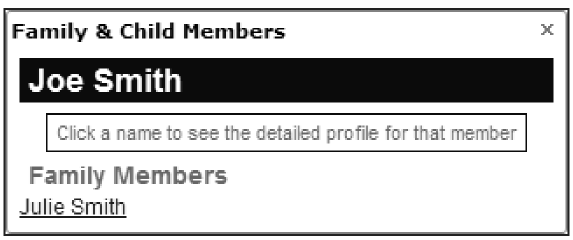
Select one or more categories and click the **Save** button or click **Cancel** to close the dialog without saving. There are a number of system categories but you can also define your own by going to Control Panel – Communications – Setup – Mailing List Categories.

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.

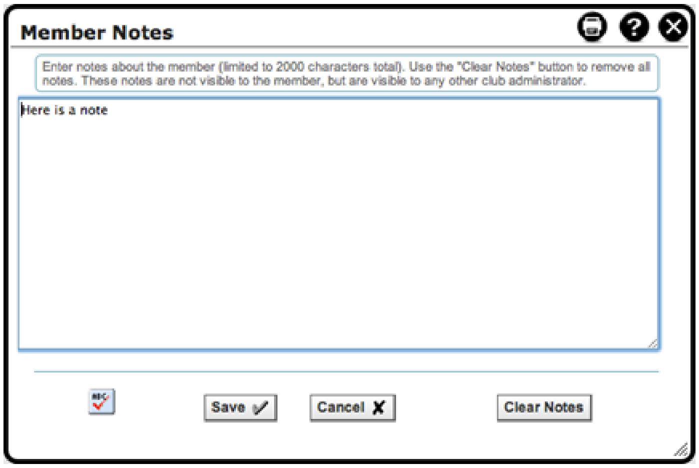
Primary members see an icon titled **Secondary & Tertiary Members** (but using the actual keywords defined by your club or association.) Clicking this icon displays a small popup window similar to the one below, showing the secondary and/or tertiary members managed by this primary member.



Click a name to display the profile for that member.

Notes

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:

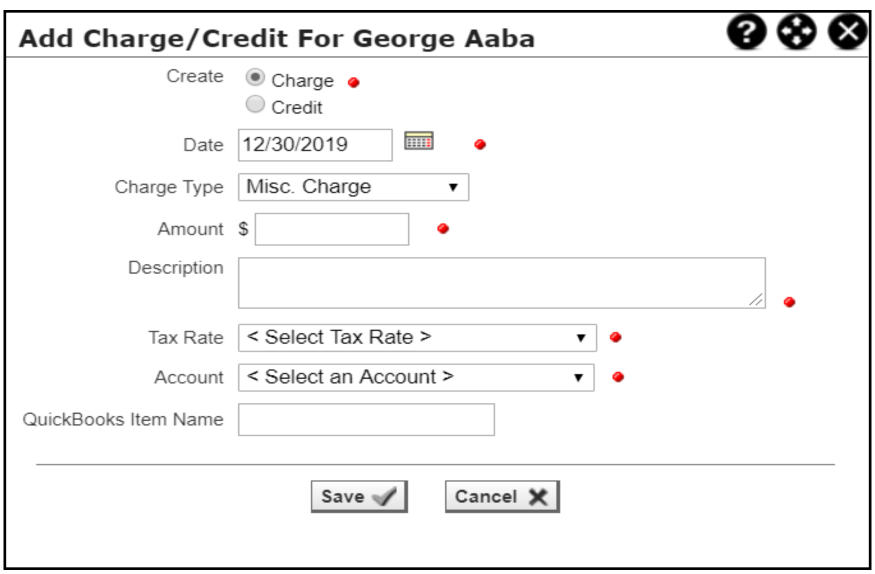


Enter up to 2000 characters of text. Click **Save** to save your changes and return to the People Manager, or **Cancel** to return without saving. Click **Clear Notes** to clear your entry completely; you will be prompted to confirm this action. The ClubExpress spellchecker is also available.

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:



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.

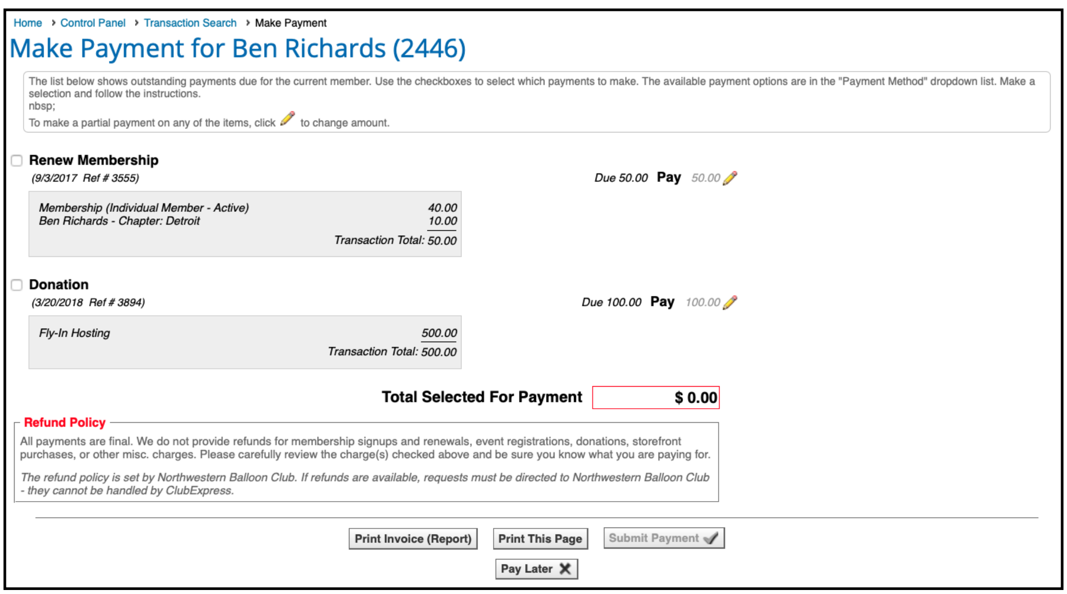
Enter the other information required and click **Save** to post a charge or credit to the current member's account; or **Cancel** to close the dialog without posting a charge or credit.

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:



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:

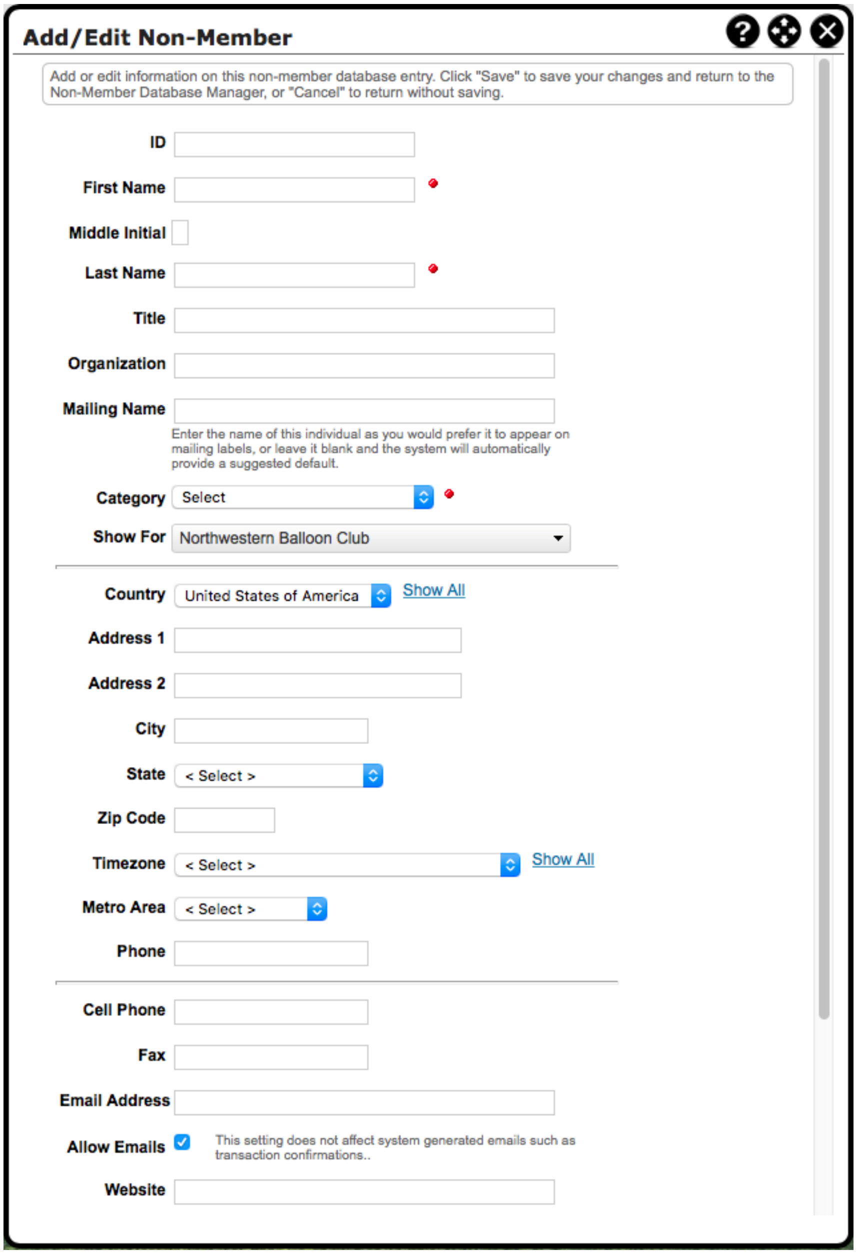
- Move the transactions and payments to a different member (used most often if the dropped member was a duplicate or user error.) You will be asked to select the other member account.
- Delete the transactions and payments (used most often for tests, user errors or admin errors.)
- Leave the transactions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



> **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

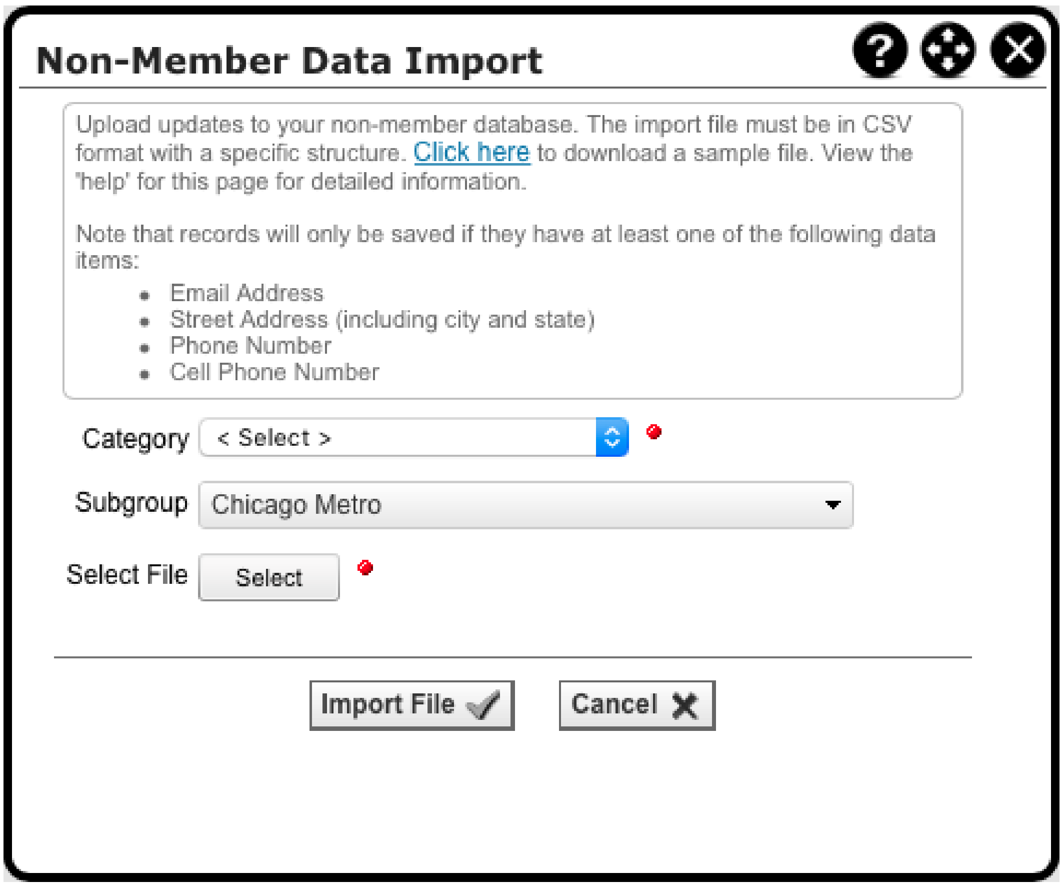
Customize the “How did you hear about us?” choices, when a non-member asks to be added to the mailing list and (optionally) when a member starts the signup process. There are a number of system choices and you can also add or remove your own. Click the **Add “How Heard” Method** button to add a selection. 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:



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.

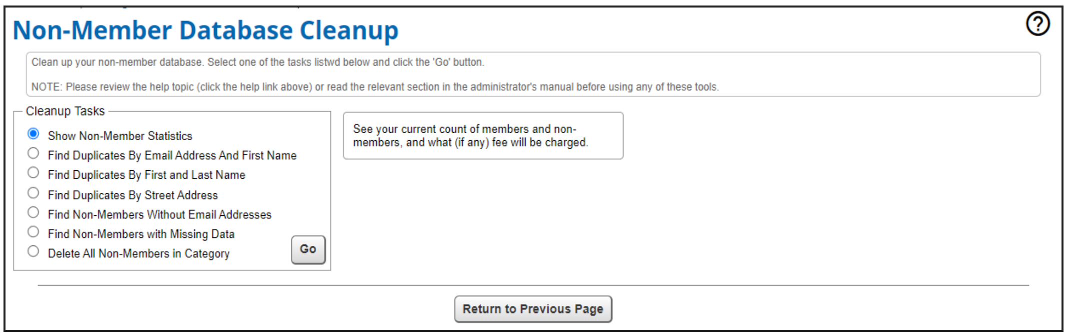
Cleanup Tools

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.

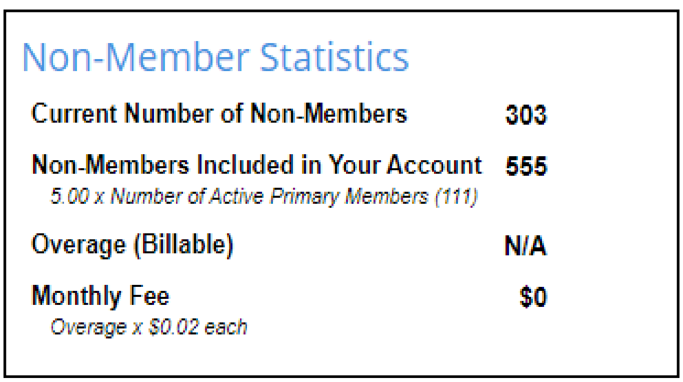
ClubExpress does not generally charge for the non-member database, as long as it's reasonably in proportion to the size of the active member database. Our standard is 5X the number of active members in your database.

> **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:

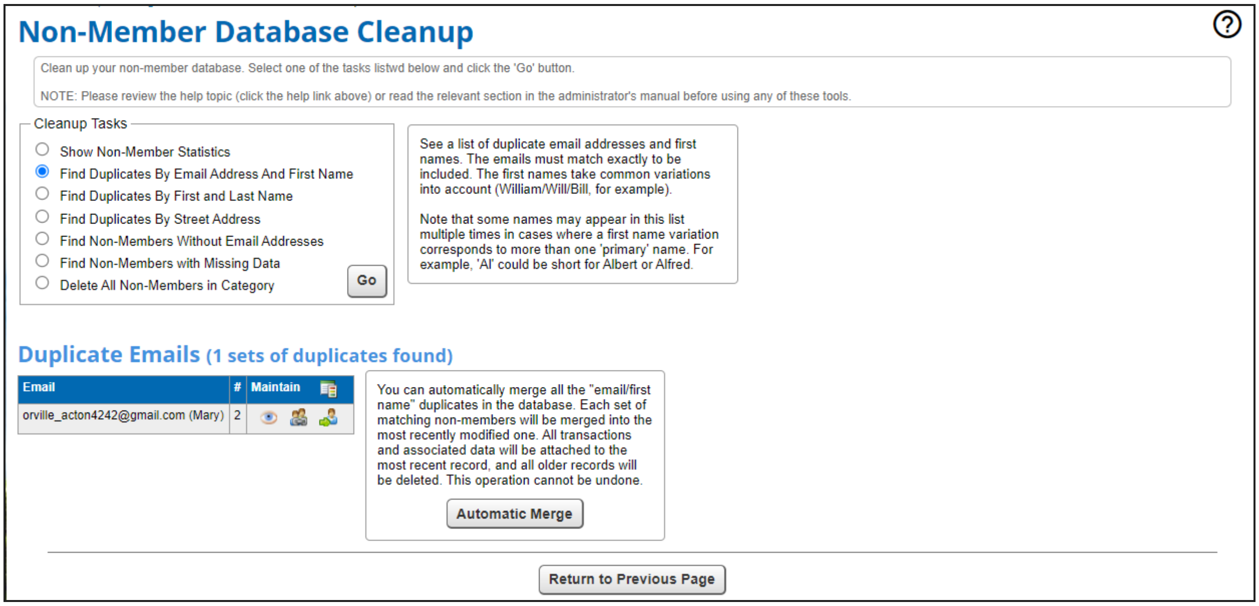


Select **Show Non-Member Statistics** to see a screen similar to the following:

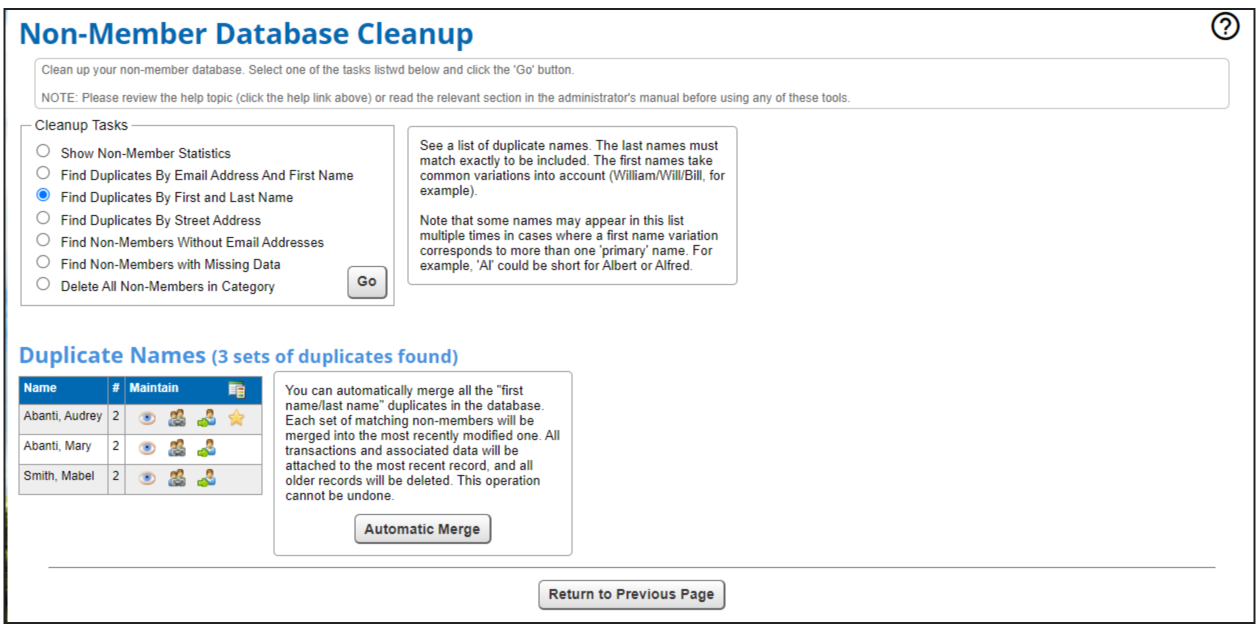


In the above case, the number of non-members is well below the 5X threshold and so there is no fee.

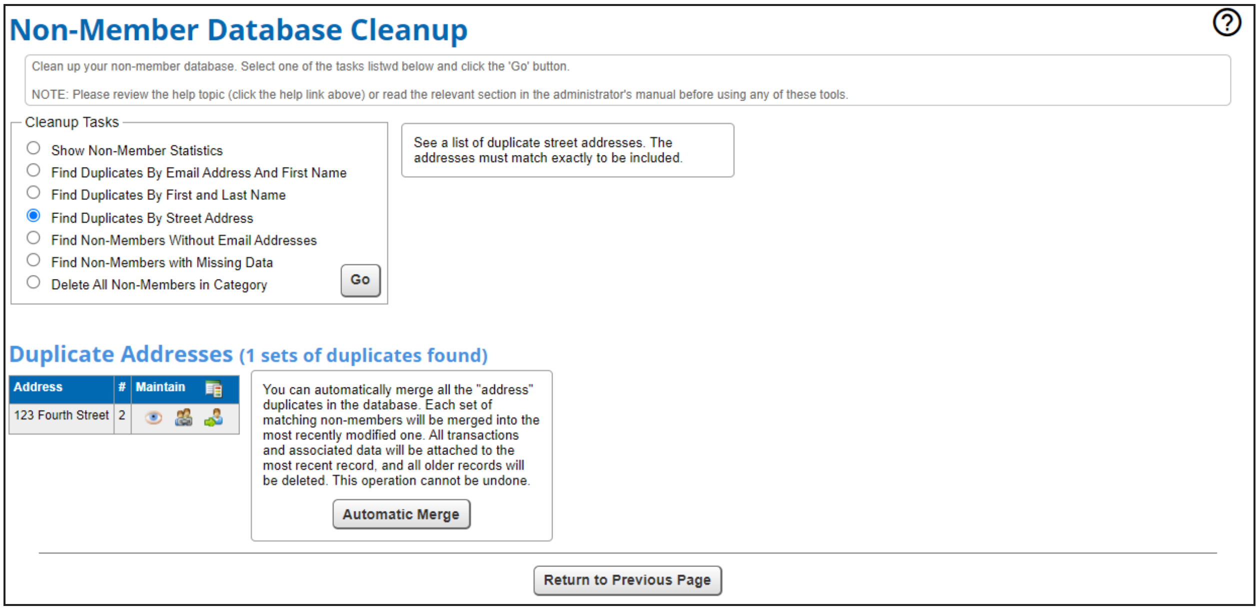
Find duplicates by email address and first name - locate entries in the non-member database where the email address appears more than once.



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.



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.

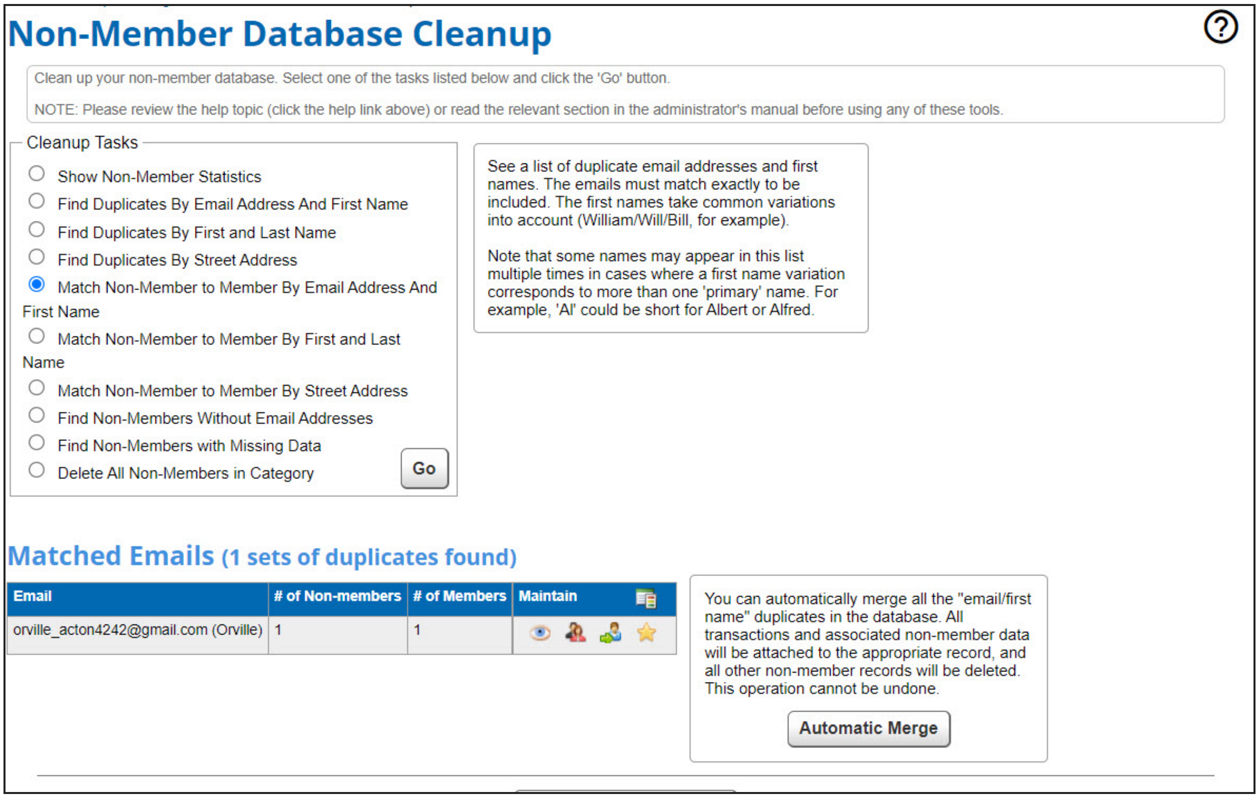
Select the **Merge All** icon to merge all entries to one entry. You will be prompted to confirm this action.

Select the **Merge All to Member** icon to select the member and merge the non-memebr entries to the member record.

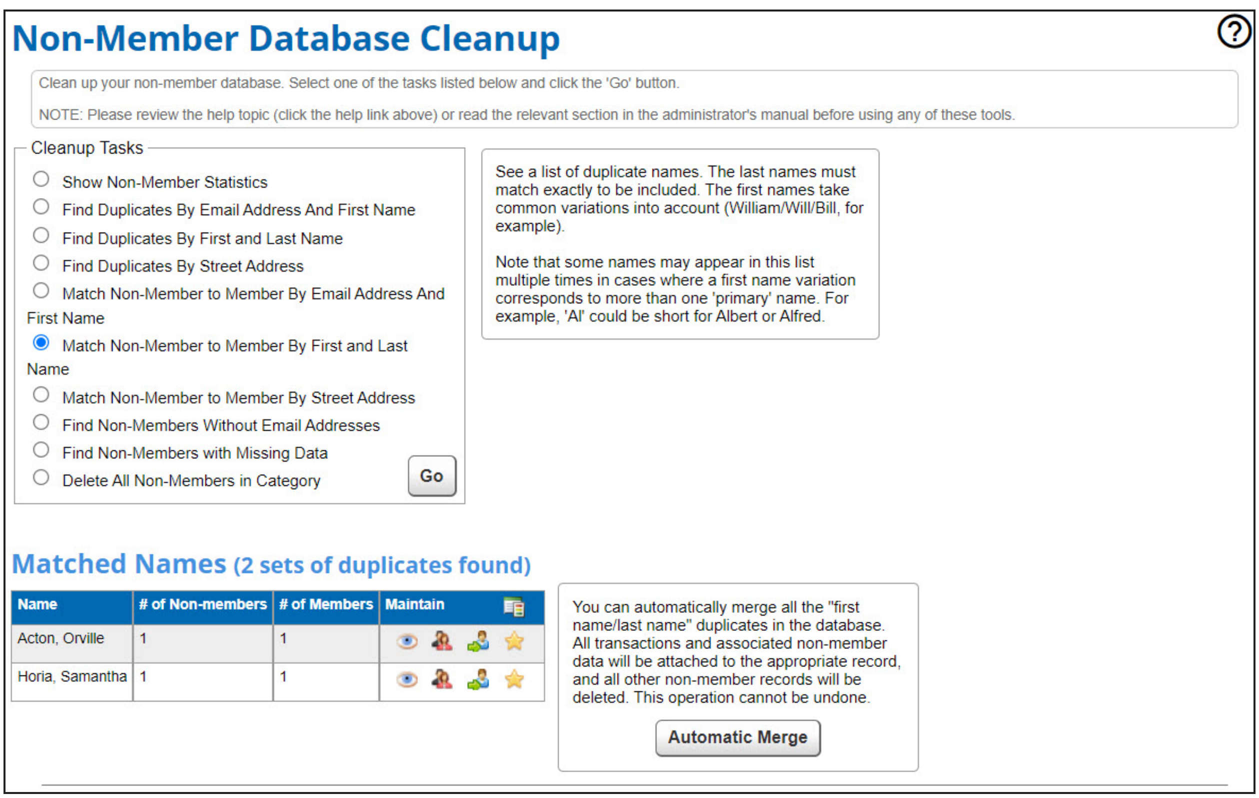
The **Merge All to Member "XX"** icon will appear if a member by the same name exists. Select this icon to merge all entries to the identified member record.

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.

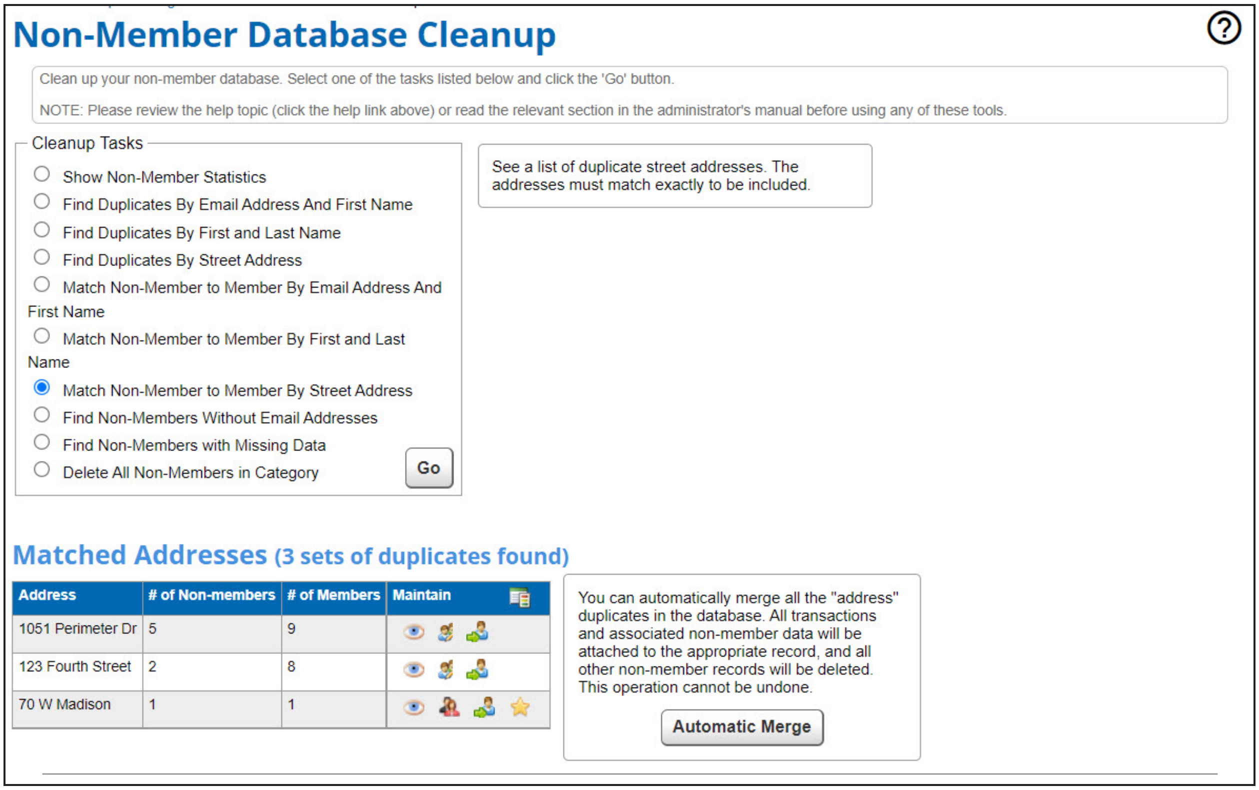
Match Non-Member to Member by Email Address and First Name - locate entries in both the member and non-member databases where the email address and first name match.



Match Non-Member to Member by First and Last Name - locate entries in both the member and non-member databases where the first and last names match.

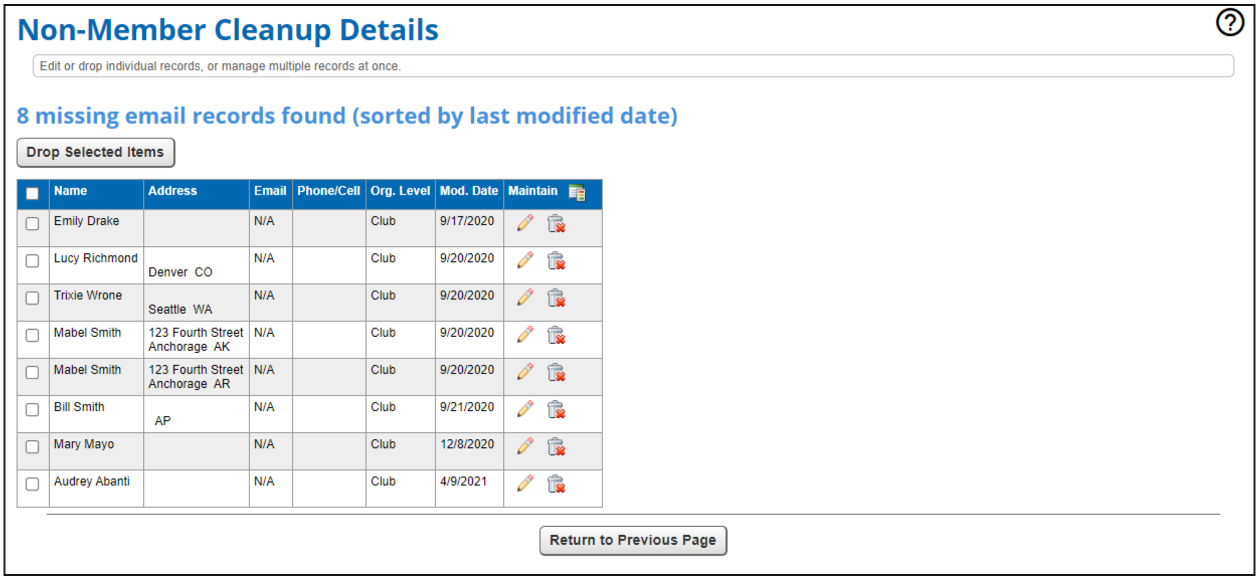


Match Non-Member to Member by Street Address - locate entries in both the member and non-member databases where the street address matches.



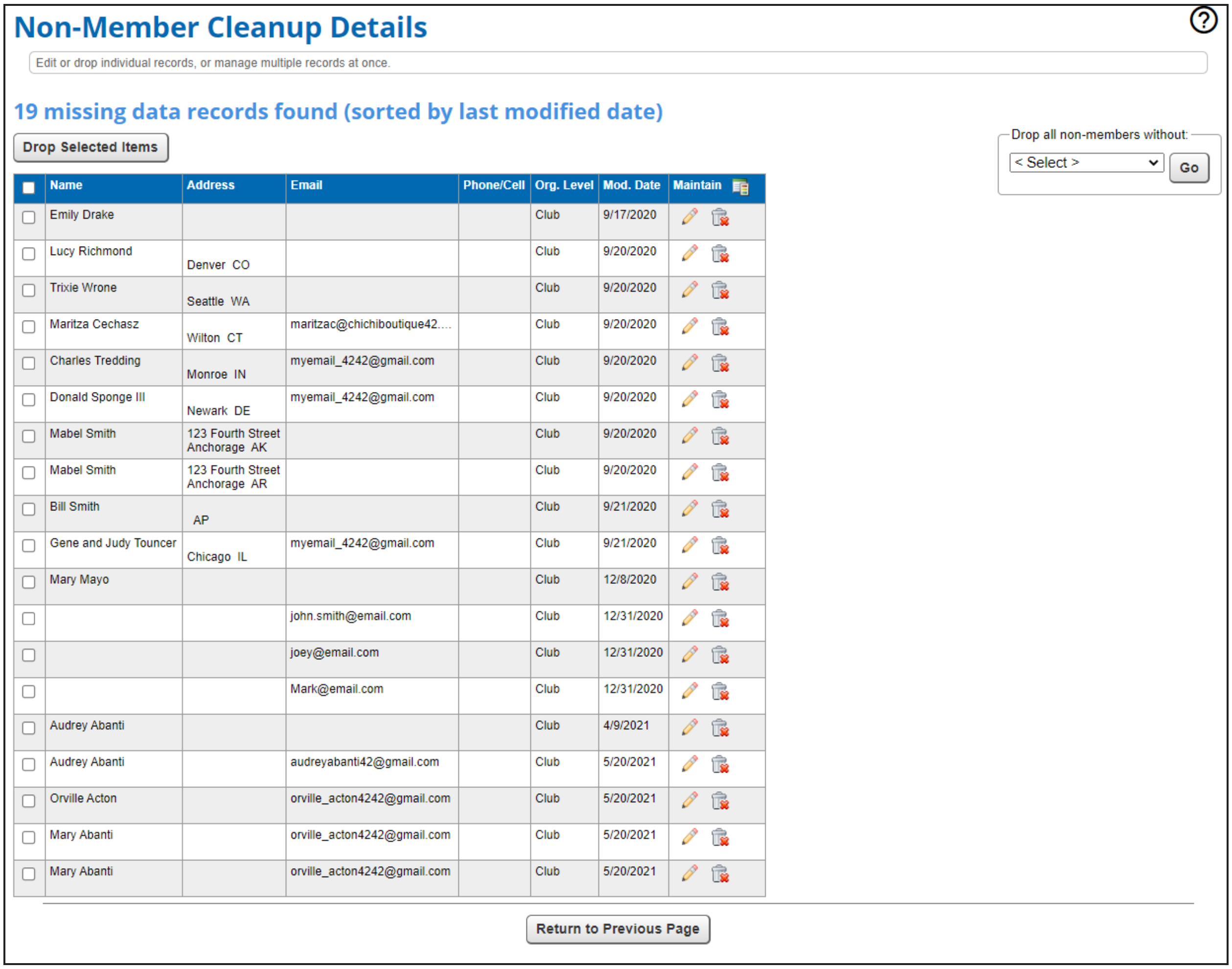
Search results will incllude the search criteria, number of non-members matching, number of members matching and maintain options. In each case, if there is only one matching member, you can view the member's profile and select the Merge icon to merge the non-member data with the member record. If more 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.



- 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.



Non-Member Cleanup Details

Edit or drop individual records, or manage multiple records at once.

19 missing data records found (sorted by last modified date)

Drop Selected Items

Drop all non-members without: < Select > Go

	Name	Address	Email	Phone/Cell	Org. Level	Mod. Date	Maintain
	Emily Drake				Club	9/17/2020	
	Lucy Richmond	Denver CO			Club	9/20/2020	
	Trixie Wrone	Seattle WA			Club	9/20/2020	
	Maritza Cechasz	Wilton CT	maritzac@chichiboutique42....		Club	9/20/2020	
	Charles Tredding	Monroe IN	myemail_4242@gmail.com		Club	9/20/2020	
	Donald Sponge III	Newark DE	myemail_4242@gmail.com		Club	9/20/2020	
	Mabel Smith	123 Fourth Street Anchorage AK			Club	9/20/2020	
	Mabel Smith	123 Fourth Street Anchorage AR			Club	9/20/2020	
	Bill Smith	AP			Club	9/21/2020	
	Gene and Judy Touncer	Chicago IL	myemail_4242@gmail.com		Club	9/21/2020	
	Mary Mayo				Club	12/8/2020	
			john.smith@email.com		Club	12/31/2020	
			joey@email.com		Club	12/31/2020	
			Mark@email.com		Club	12/31/2020	
	Audrey Abanti				Club	4/9/2021	
	Audrey Abanti		audreyabanti42@gmail.com		Club	5/20/2021	
	Orville Acton		orville_acton4242@gmail.com		Club	5/20/2021	
	Mary Abanti		orville_acton4242@gmail.com		Club	5/20/2021	
	Mary Abanti		orville_acton4242@gmail.com		Club	5/20/2021	

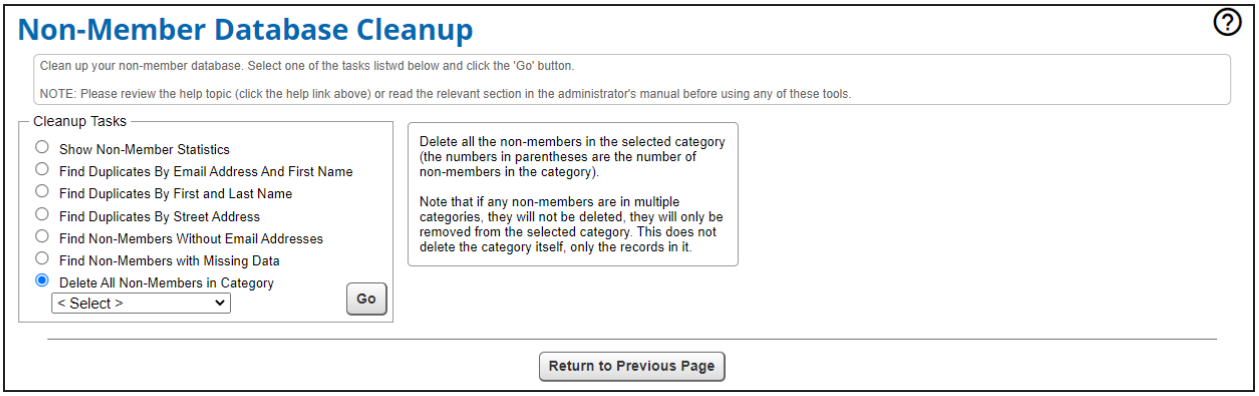
Return to Previous Page

- 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.*

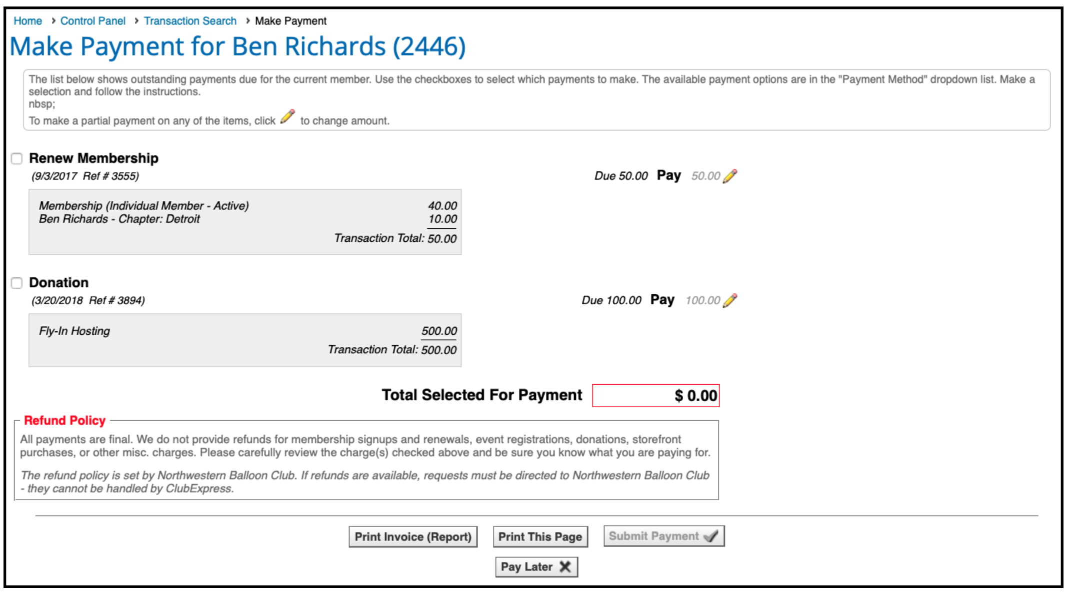
> **Note:** If any non-members are in multiple categories, they will not be deleted; instead, they will only be removed from the selected category.

> **Note:** Deleting non-member records does **not** change transaction or payment history. These reports and exports will still run and will still be correct.



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:



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!

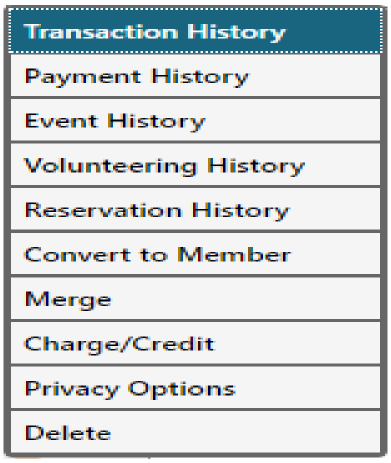
At ClubExpress, we have access to two additional options:

- **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:



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 non-member 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.

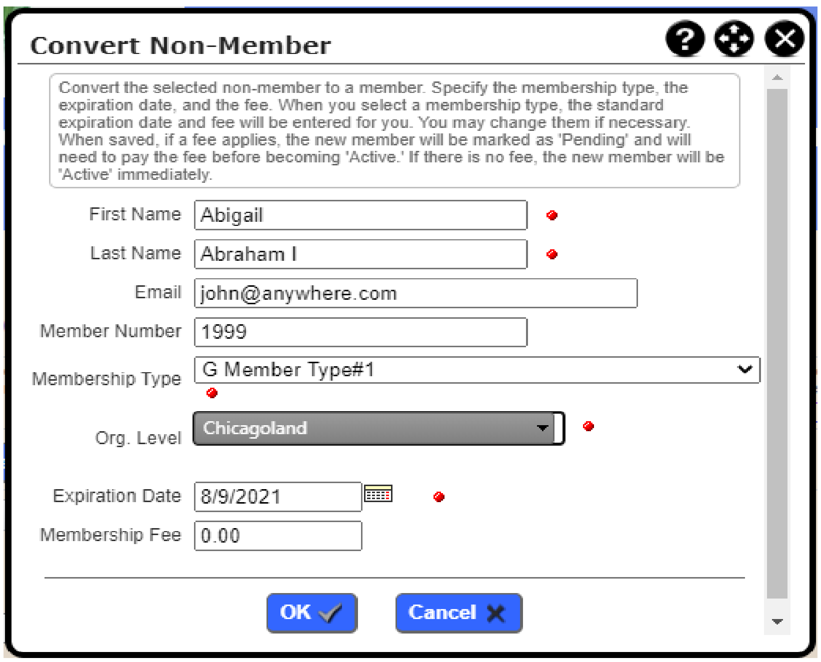
Select **Merge** to merge two non-member entries into one, or a non-member record into a member record.

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:

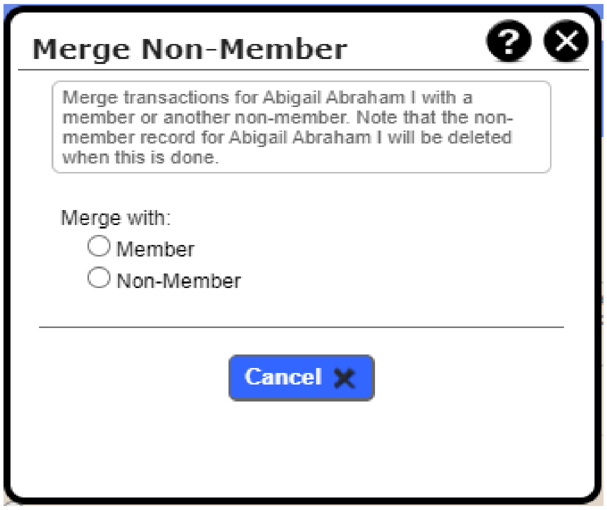


The first name, last name and email address will already be filled in (if defined.) Specify the member number, member type, expiration date and fee. If the member type requires a chapter selection, select the appropriate chapter, then click **OK**.

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.

Merge

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

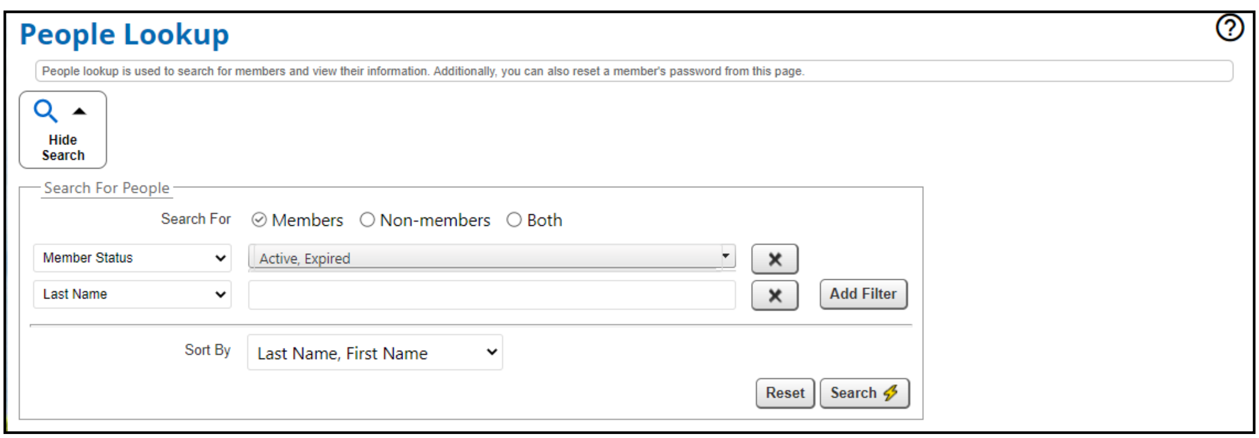


Select Member or Non-Member then click the link to select the destination name into which this non-member record will be merged. Click **Save** to complete the merge or **Cancel** to close the dialog without merging.

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:



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 business 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 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 payment	

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.

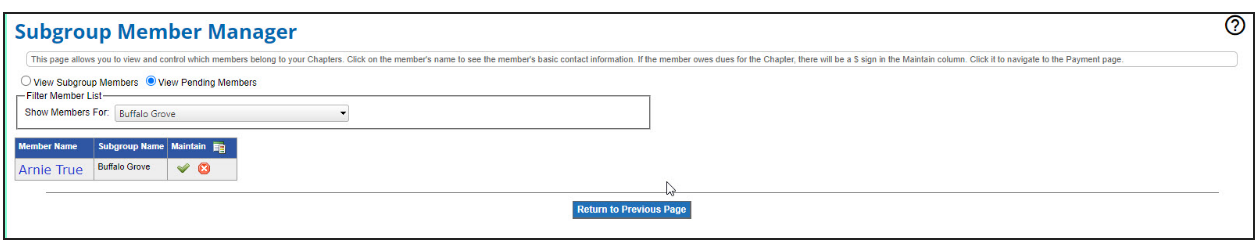
> **Subgroups:** For multi-tier organizations using the Multiple Websites model, the People Lookup function will show all members from all linked clubs. Note that, in this model, the People Manager only shows members belonging to the top-level club, not the members of linked clubs. The reason is that, 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:



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:

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.

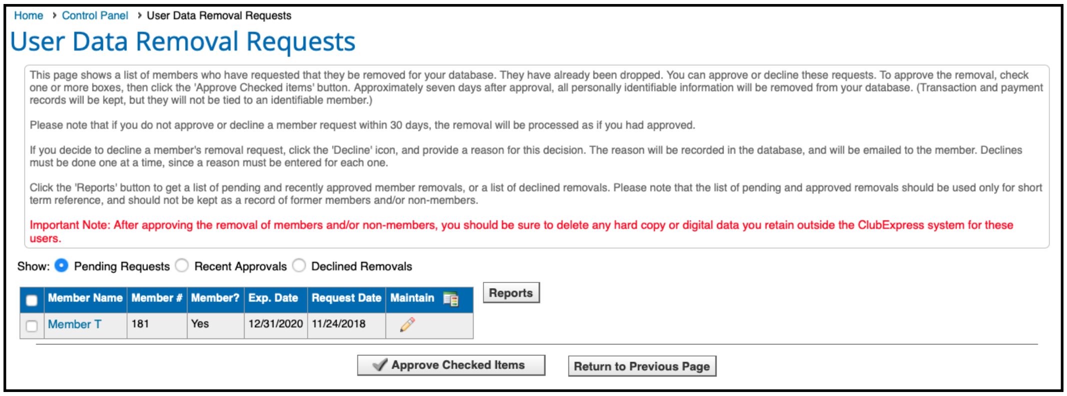
Note that if a tertiary member is added, the transaction is created at the primary member’s level.

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:



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".

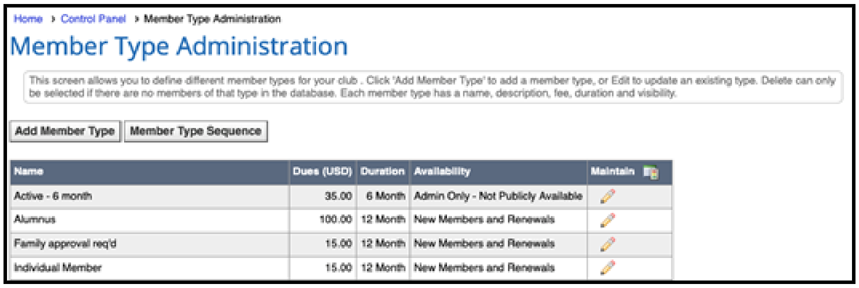
You can reverse a recent approval within 7 days from the Recent Approvals screen. You can reverse a declined removal at any time from the Declined Removals screen.

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:



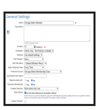
This screen allows a club or association to define its various membership types, including single, family, senior, youth, multi-year, complimentary and other options. Each membership type has an associated price, duration, and availability.

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:

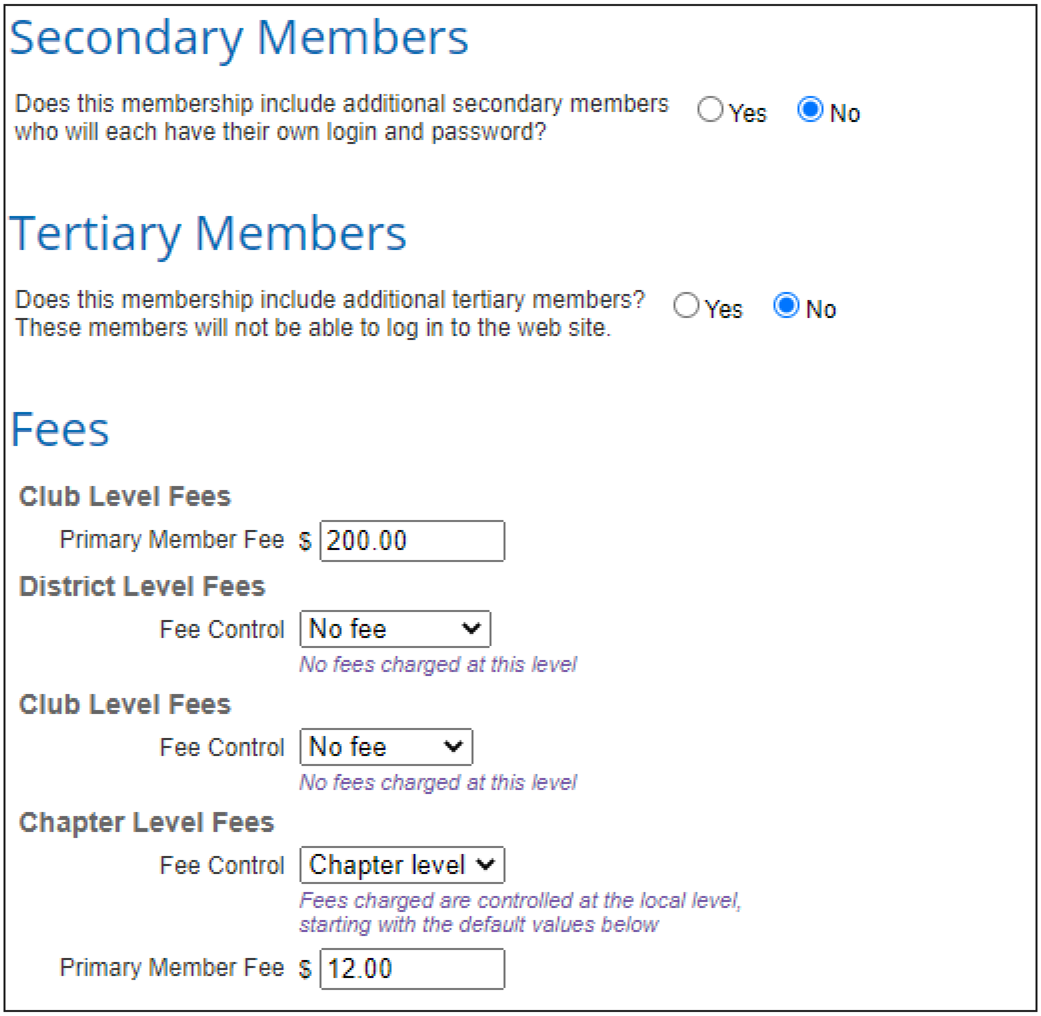
- **None.** This type does not allow members to join a chapter.
- **May select only one.** Members may select a single chapter, but this is not required. Use this option if you don’t have chapters in every part of your service region, so some members must join the top-level club only.
- **Must select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

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.

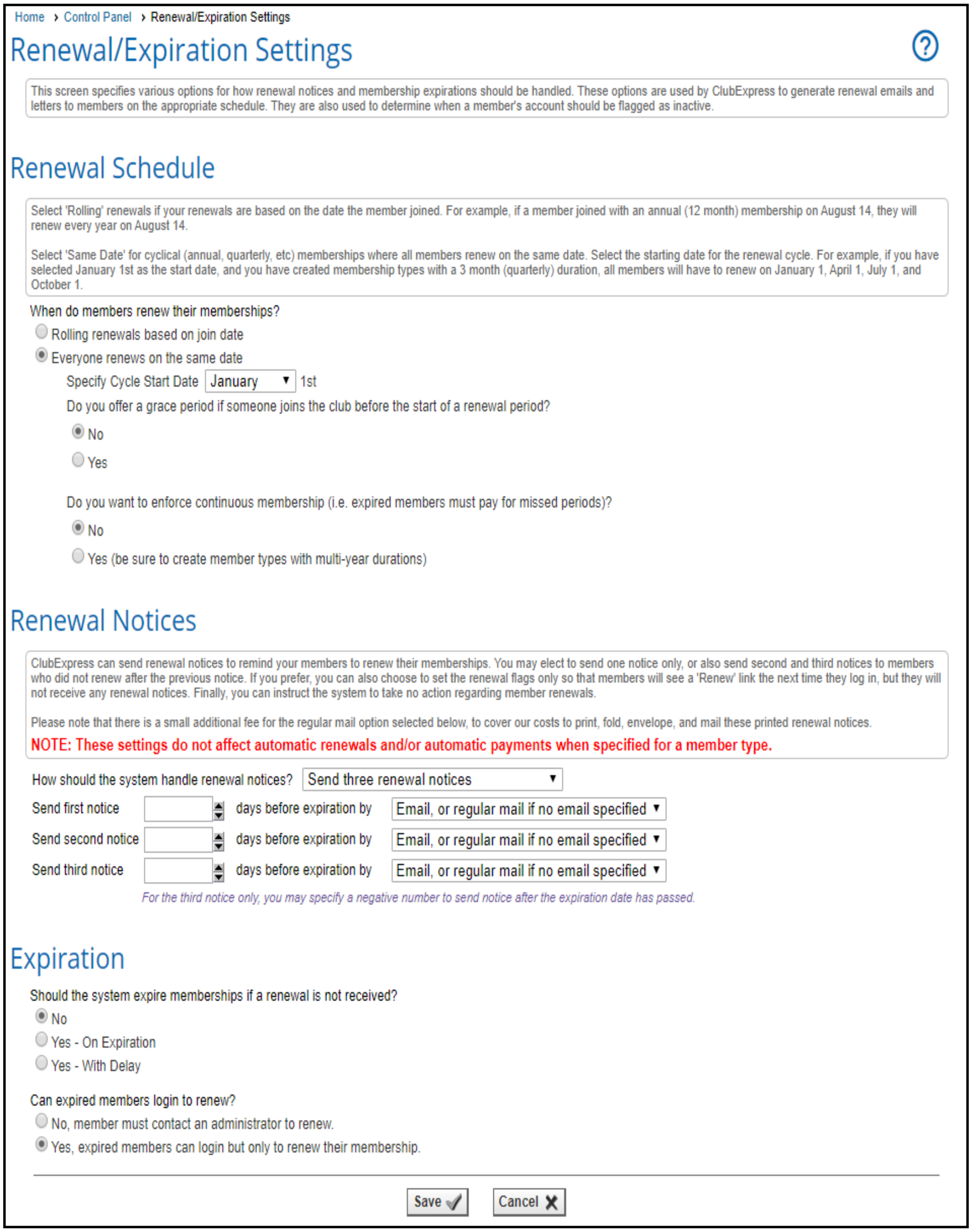
Note: if you have specified that fees are different for each chapter, district and/or region, be sure to select the **Edit Membership Fees** option when you are defining chapters, districts and/or regions.

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

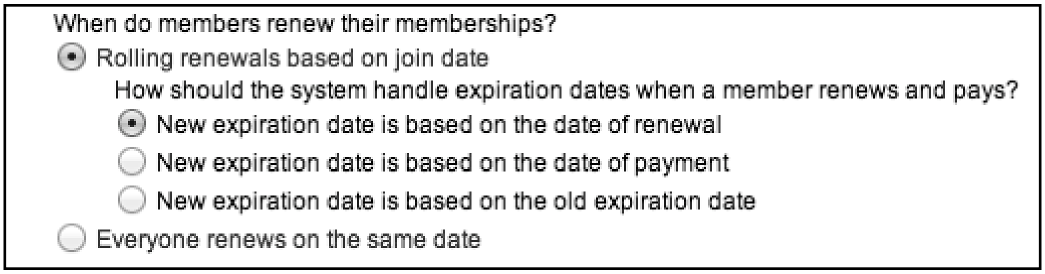


This screen governs various options for handling membership renewals and expirations.

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:

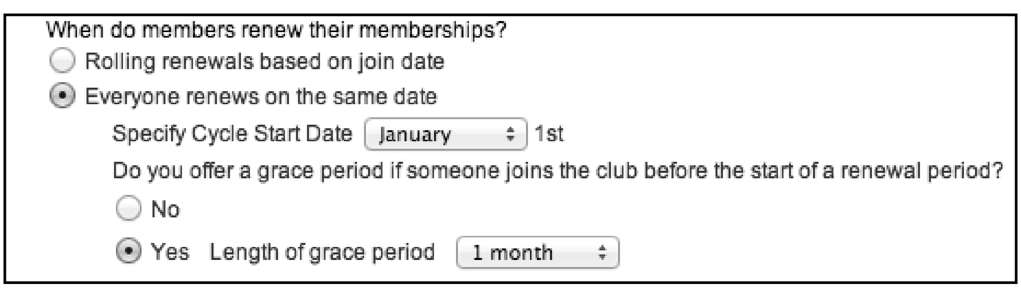


> **Note:** These choices only apply if the membership has expired when the member pays. If the membership is still active when the member pays, the new expiration date will be the old expiration date PLUS the duration. There are three choices:

- 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.

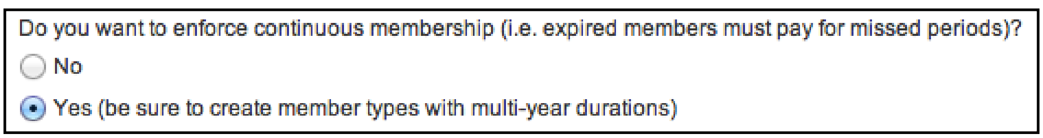
> **Example:** If everyone renews on January 1^{st}, some groups will allow new members who join in November to receive a slightly extended membership for the first year (for example, 14 months; without this option, no one would join near the renewal date!) If you provide such a grace period, click **Yes** 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 31^{st}.



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 **Email only (no regular mail)** if all members have an email address and you don't want to pay for printed notices. This option will not send a 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.

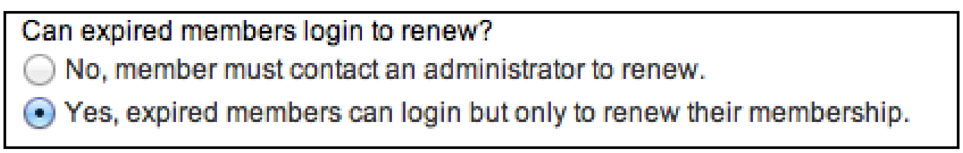
> **Example:** A membership will expire February 14 and the first renewal notice is configured to be sent 30 days prior on a Tuesday. The notice will be sent Wednesday.

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.



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.

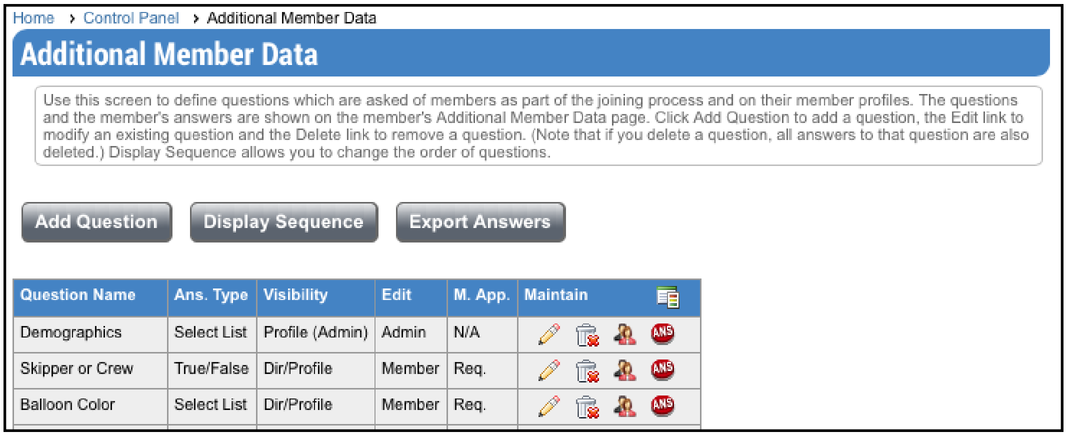
Additional Member Data

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:



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.

Type	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) • Email Address • Web Address (URL) • US Phone Number • US Zip Code • Canada Post Code • Australian Post Code • UK Post Code • Custom – Enter a Regular Expression and test the expression Regular Expressions are a powerful format string using dot characters, alternation, group-	Required: yes/no Allow comments: yes/no

Type	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, maximum 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, maximum 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 selections that can be made. Allow other: yes/no Allow comments: yes/no

Type	Display Format	Additional Values	Options
Radio Buttons	Vertical list of radio buttons; only one can be selected	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election) **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
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; anything 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 buttons representing the "strength" of the respondent'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 minimum of two (2) items must be specified.	Required: yes/no Store numbers: yes/no (If no is specified, values 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.

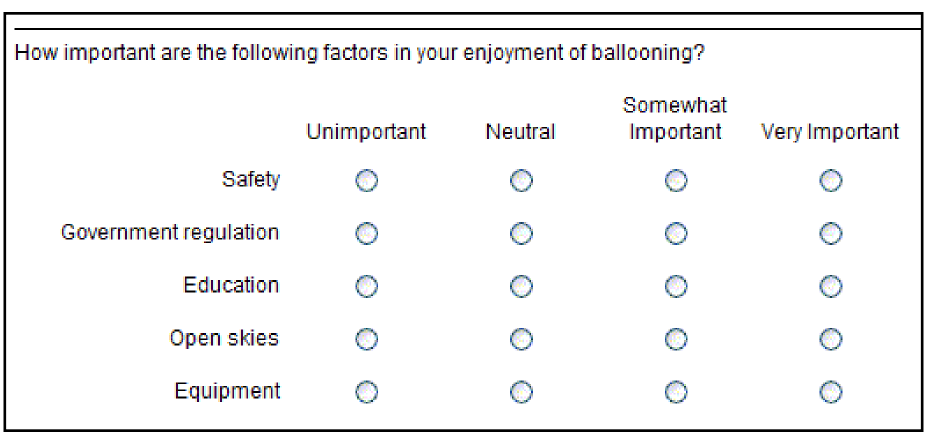
For more information about regular expressions, see the following websites:

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

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

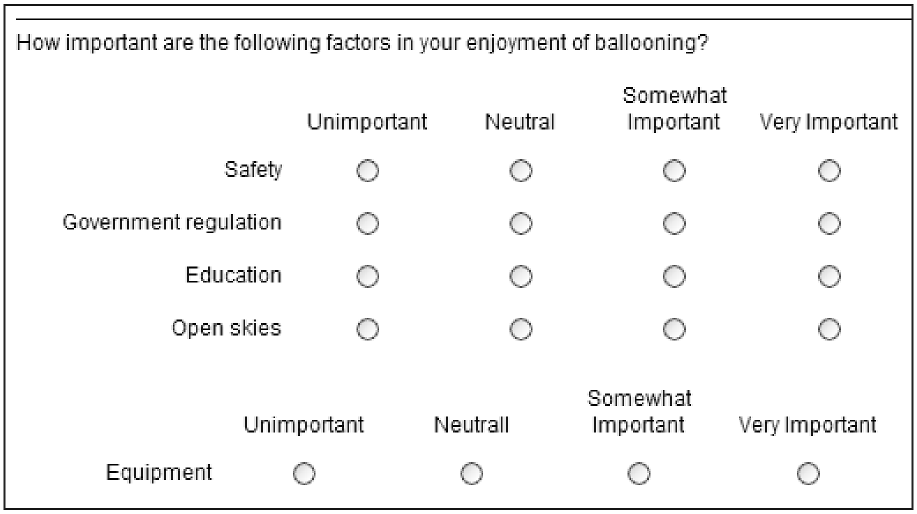
Scale Questions

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:



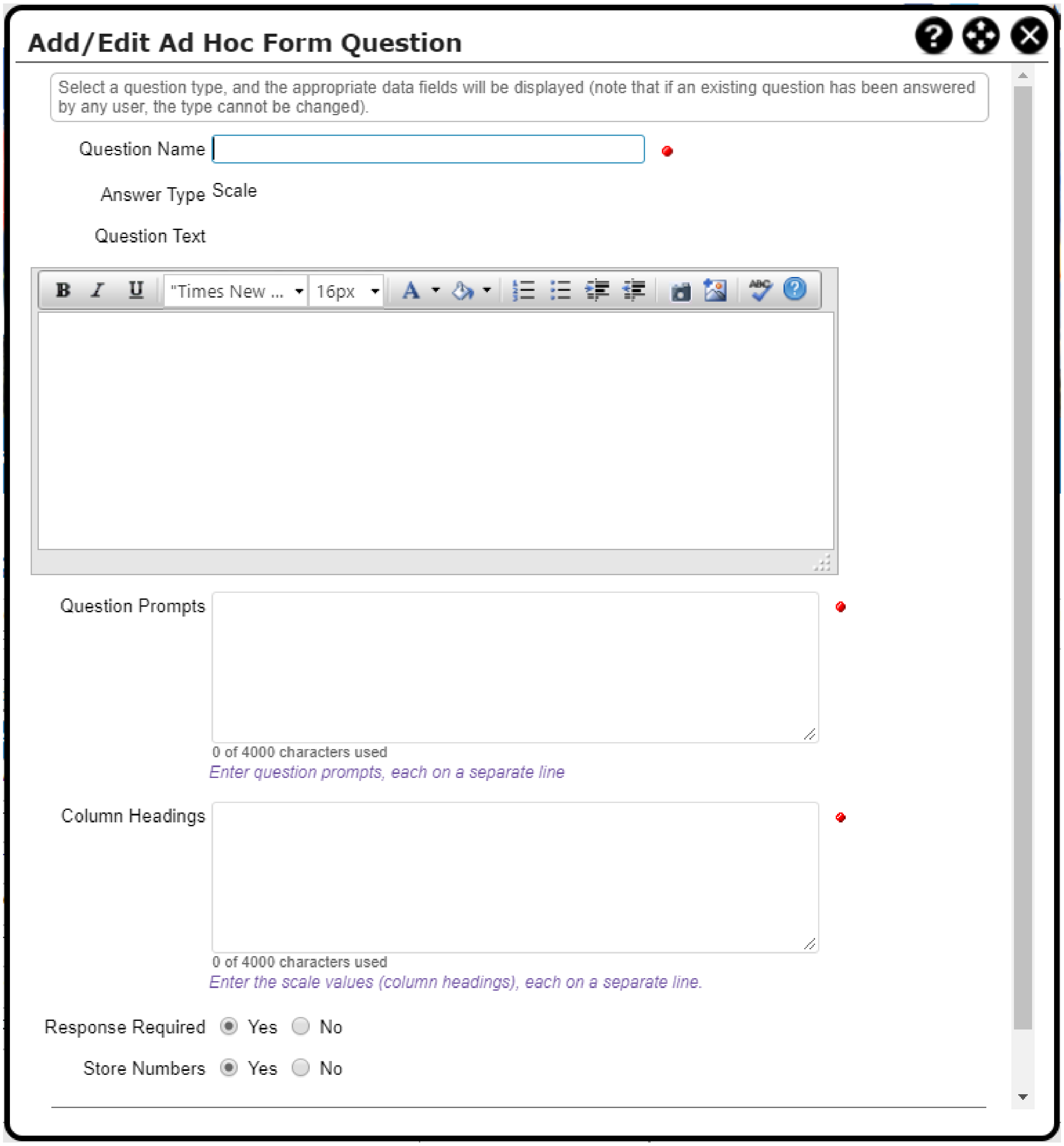
ClubExpress includes special functionality to display scale questions. If there’s a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different 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.



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:



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

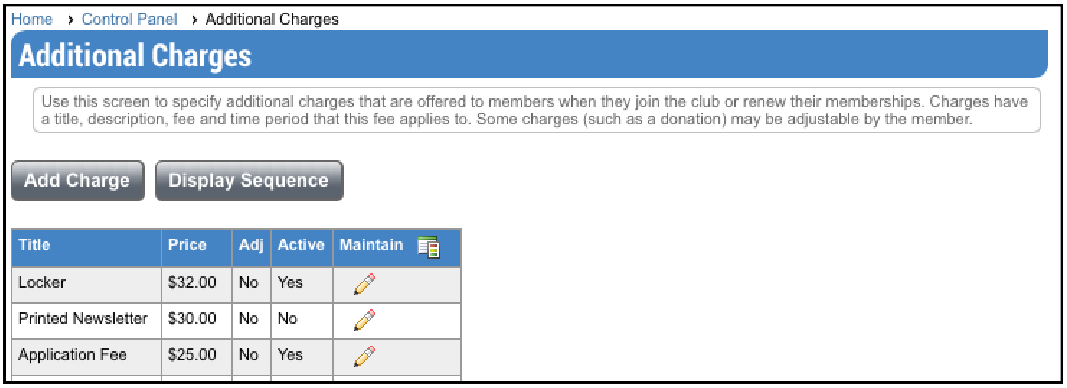
ClubExpress allows you to present a list of optional charges when members sign-up or renew their memberships. These can be one-time or periodic fees and are commonly used to sell club merchandise, or a printed newsletter, or fees for a national organization. You can also use this option to solicit a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

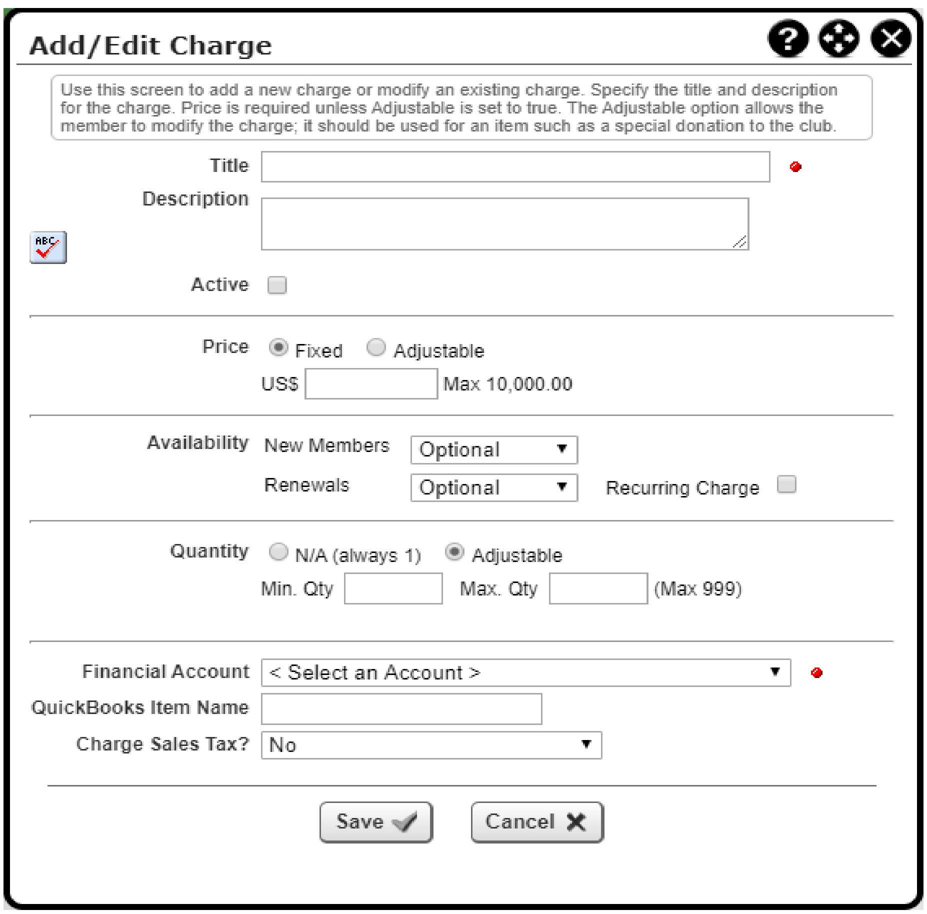
When members join or renew, additional charges are shown on a special screen in the new member signup and membership renewal wizards. They can also select the **Optional Additional Charges** choice on their Profile to “purchase” one or more additional charges at any time.

> **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:



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.

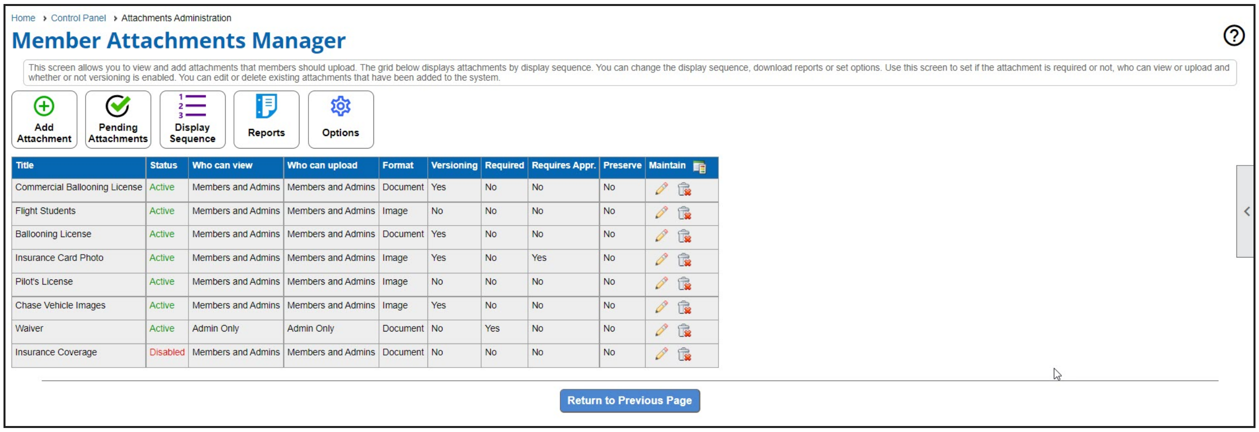
Click **Save** or **Cancel** to return to the list of additional charges.

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:

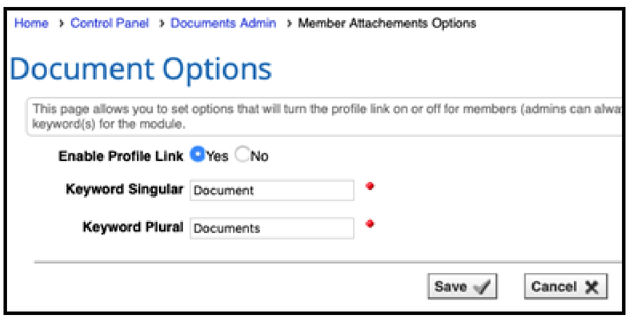


The grid lists each document or image that can be uploaded and attached to a member's Profile, and the properties defined for that file.

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

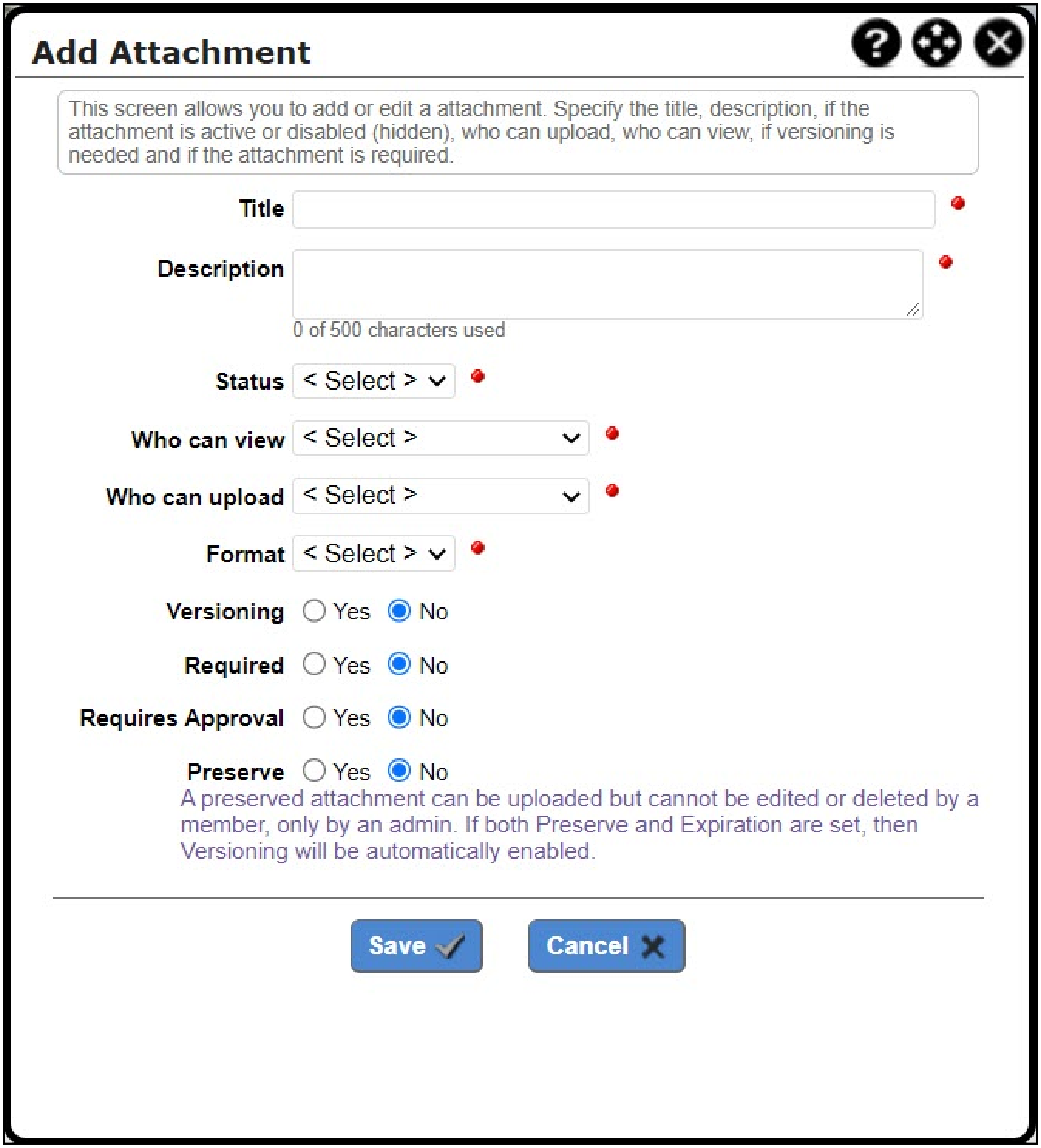
The following options are available in the Maintain column:

Icon	Description
 (Edit)	Click this icon to edit the properties of this attachment.
 (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:



For each attachment, specify the following properties:

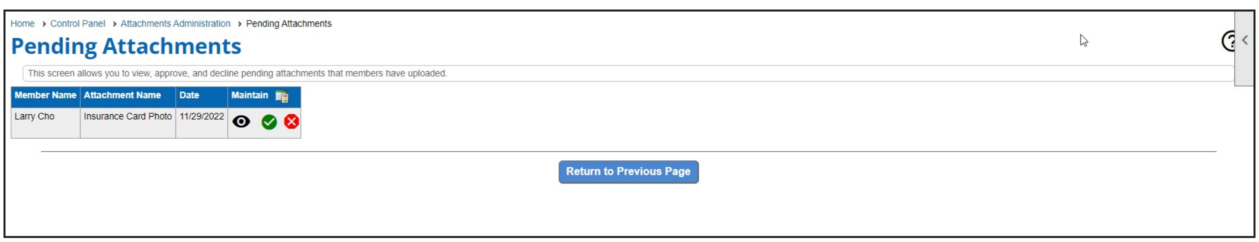
- The attachment **Title**.
- A longer **Description** (up to 500 chars.) of what should be uploaded.
- **Status** is either Active or Disabled. Use Disabled if you no longer want to collect this information from members but don't want to lose the information already uploaded.

- 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



> **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.

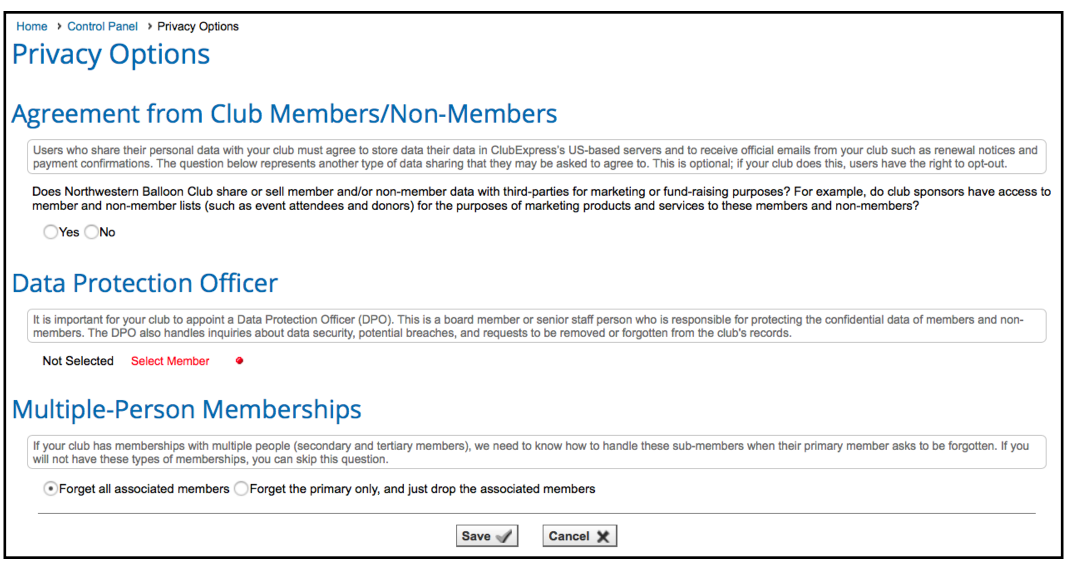
This Control Panel choice will only appear if you have asked us to enable a special feature that allows members to upload hi-res bio photos. Clicking this choice will download these photos in a single ZIP file, with each file in the zip named using the member name and number.

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.

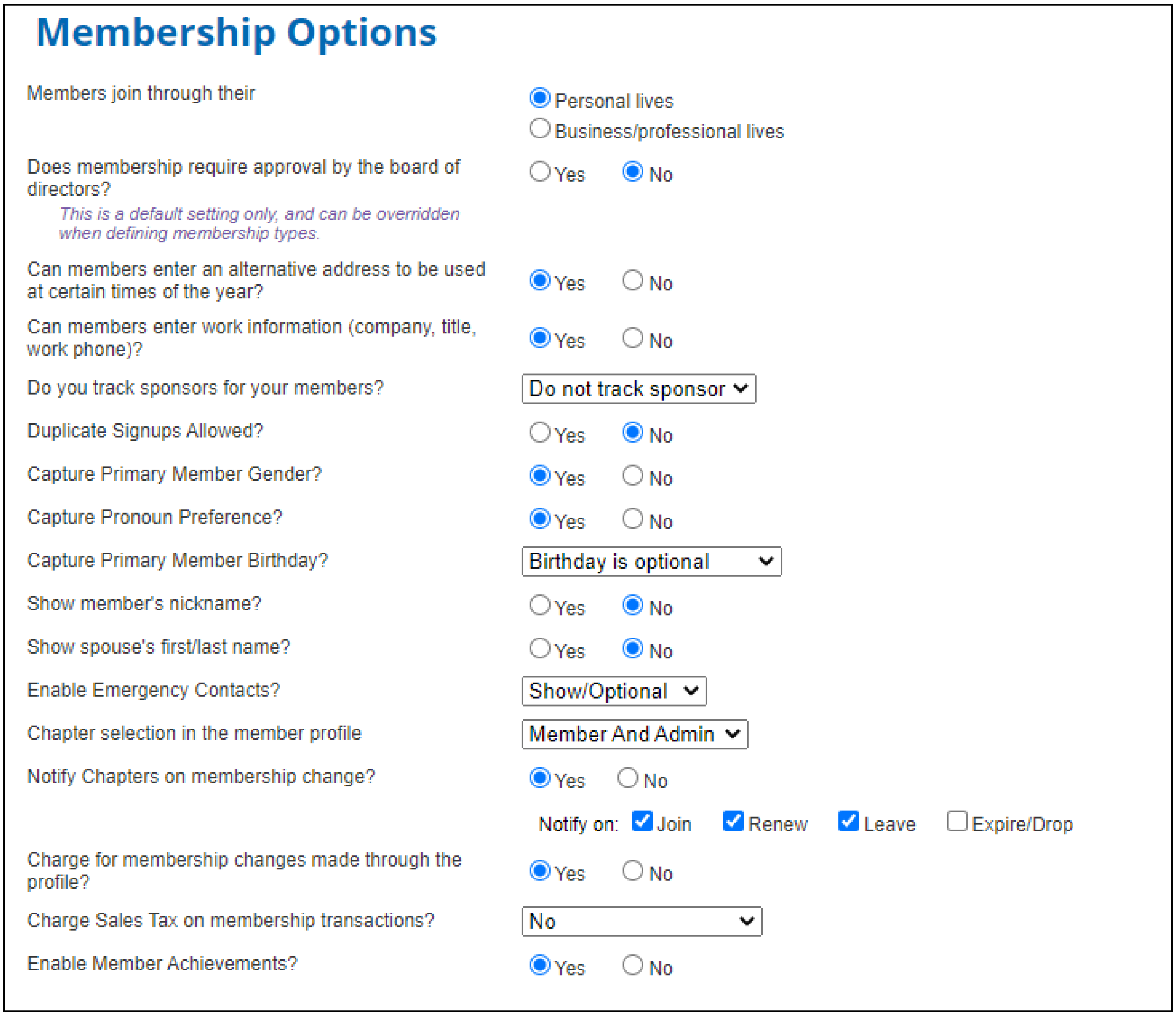
The first question on this screen controls whether your club or association shares member and non-member data with third parties for marketing and/or fundraising purposes. If you answer Yes, members and non-members will see an additional question giving them the ability to opt-out of being included in 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

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.

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 **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;

- 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.

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.

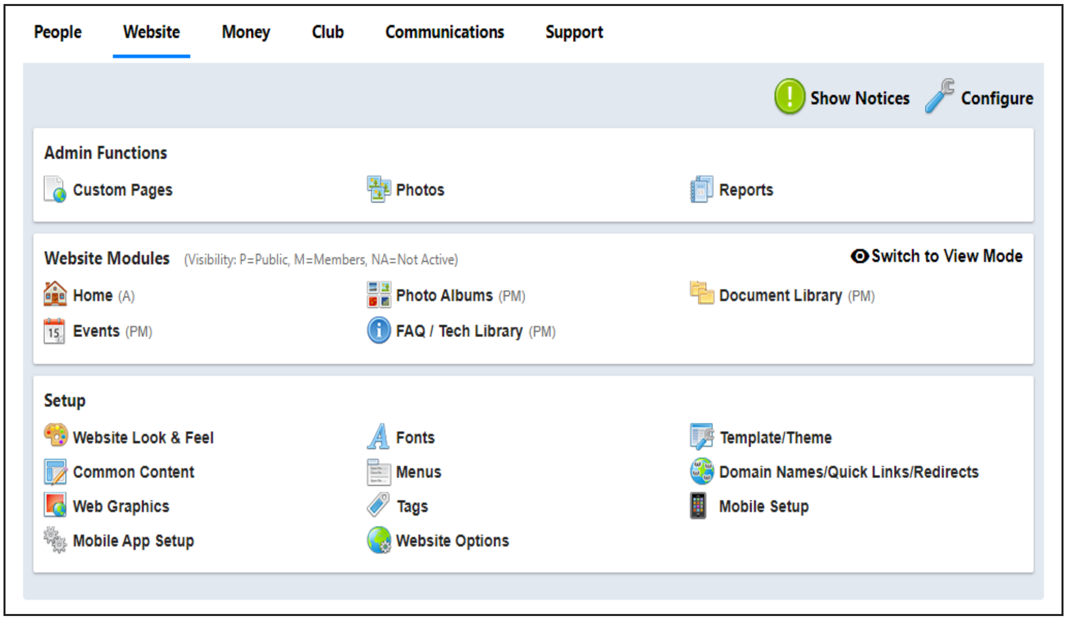
Exports

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



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.)

FavIcon

The Internet allows each website to have its own icon, which appears in the browser’s address bar beside the URL and the tab heading for your site. We have a default ClubExpress icon but you can replace it with your own icon. This icon must be 16 x 16 pixels or 32 x 32 pixels and created in the .ico format. Send it to us and we’ll install it for you. There is no fee for this option.

What would you like to do?

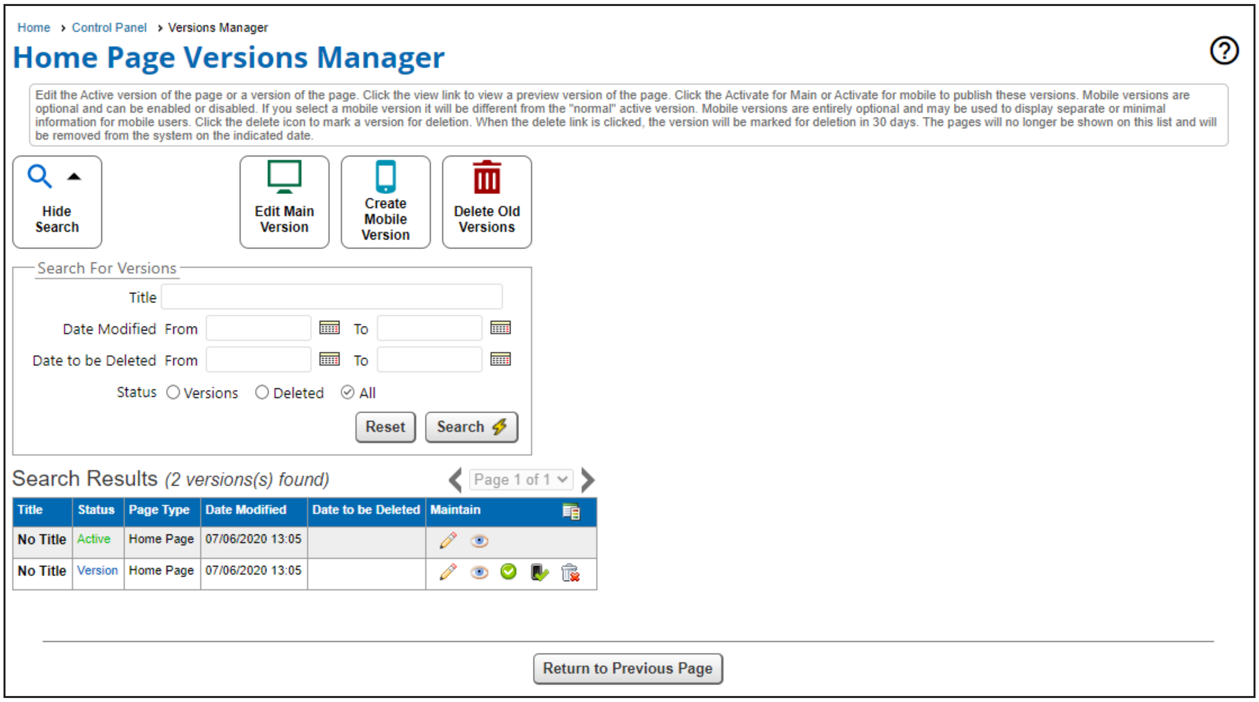
- For help with modules in the Website section, see " ClubExpress Modules " on page 588
- Edit your home page, or create and manage custom pages; see "Home Page and Custom Pages" below
- Maintain and edit photo libraries; see "Photos" on page 321
- Customize the look and feel of your site; see Website 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.

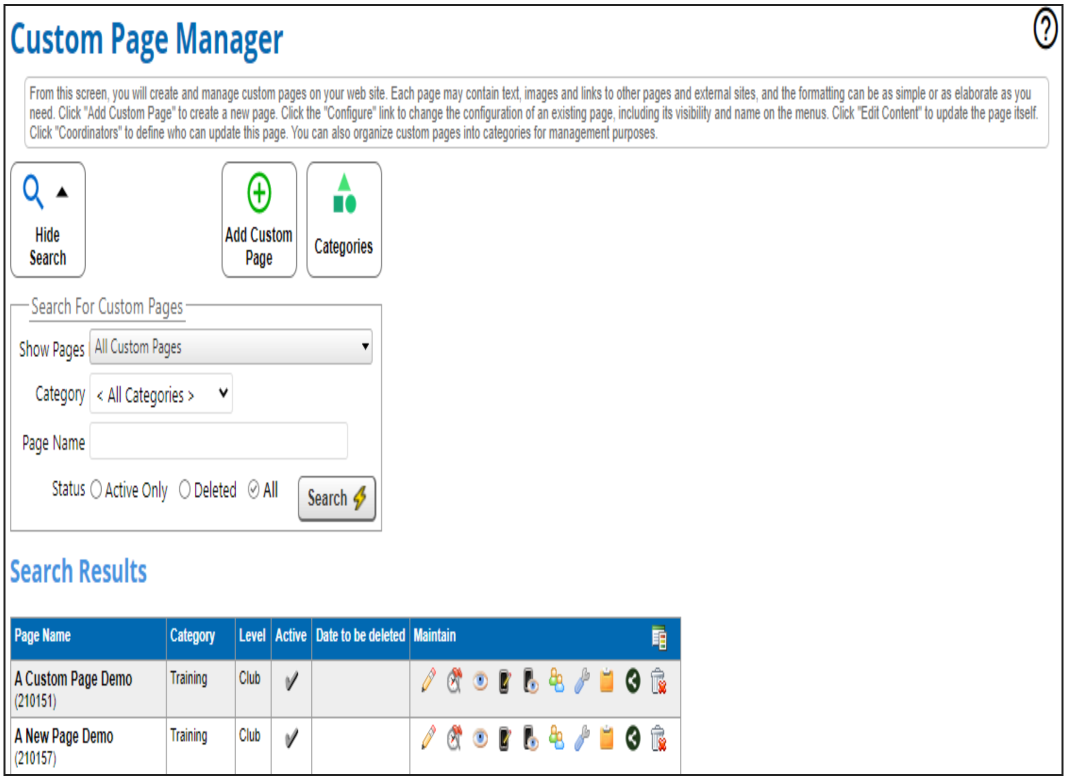
Your organization’s website can be expanded with any number of **custom web pages**. Custom pages are used to build out the unique content of your website, including information which is not represented in the built-in functions. Each page can contain text, images, videos and links to other pages and 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:



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:

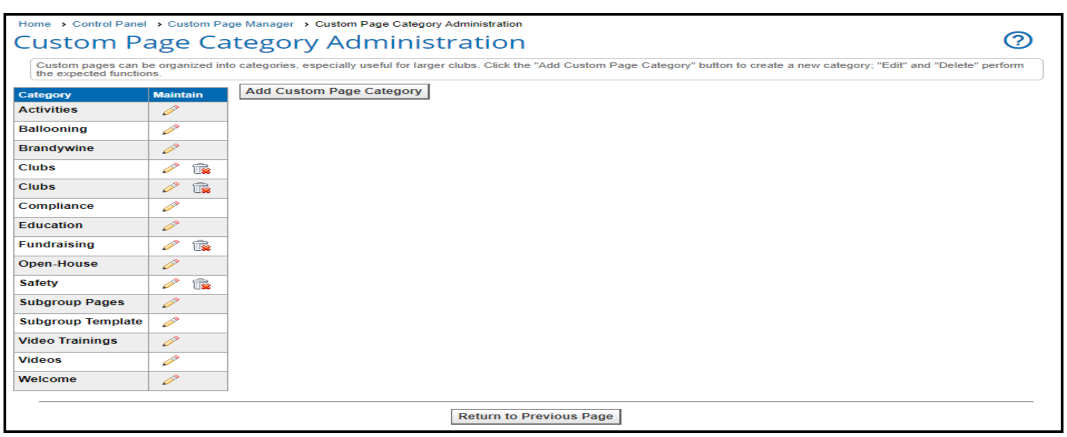


Select a category or type in all or part of the page name. You can also limit the list to only Active pages. Click **Search** to find all matching pages. From here you can create and edit custom page desktop and mobile versions using the Page Builder.

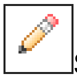
> **Subgroups:** If your club or association has subgroups defined, an additional filter option allows you to filter custom pages based on the subgroup level to which they are attached.

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:



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.

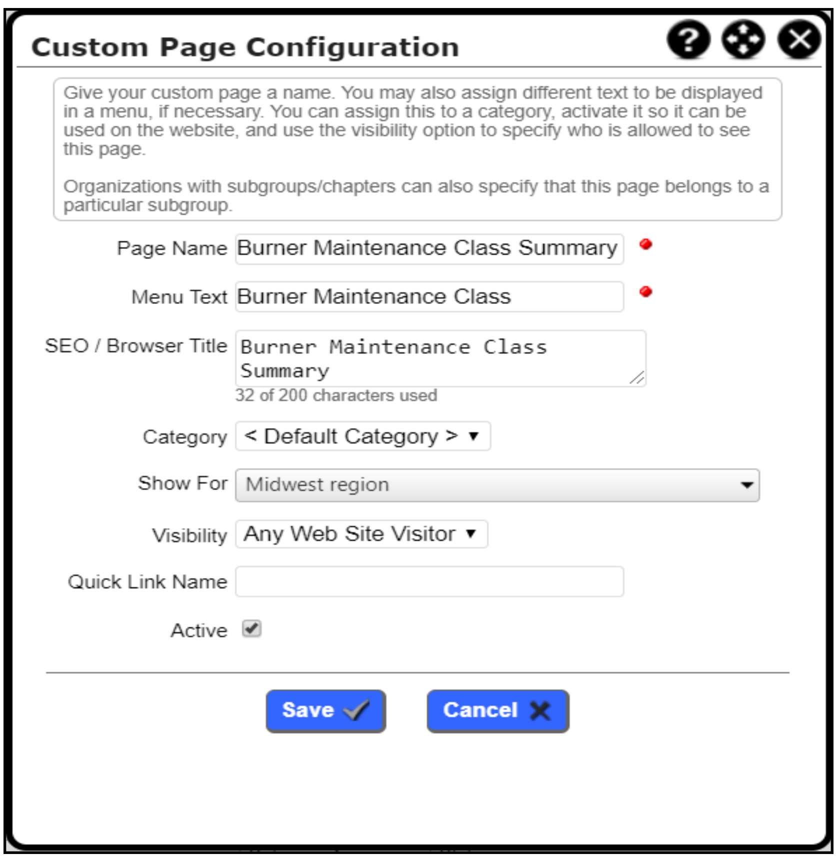
Select the pencil (Edit) icon to modify an existing category.

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:



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).

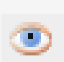
Optionally, select an image to use when the page is shared on social media. This can be an image you select from your computer or your web graphics library. When you select an image, a small preview will appear in the Custom Page Configuration window.

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

The following options are available in the Maintain column:

Icon	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.

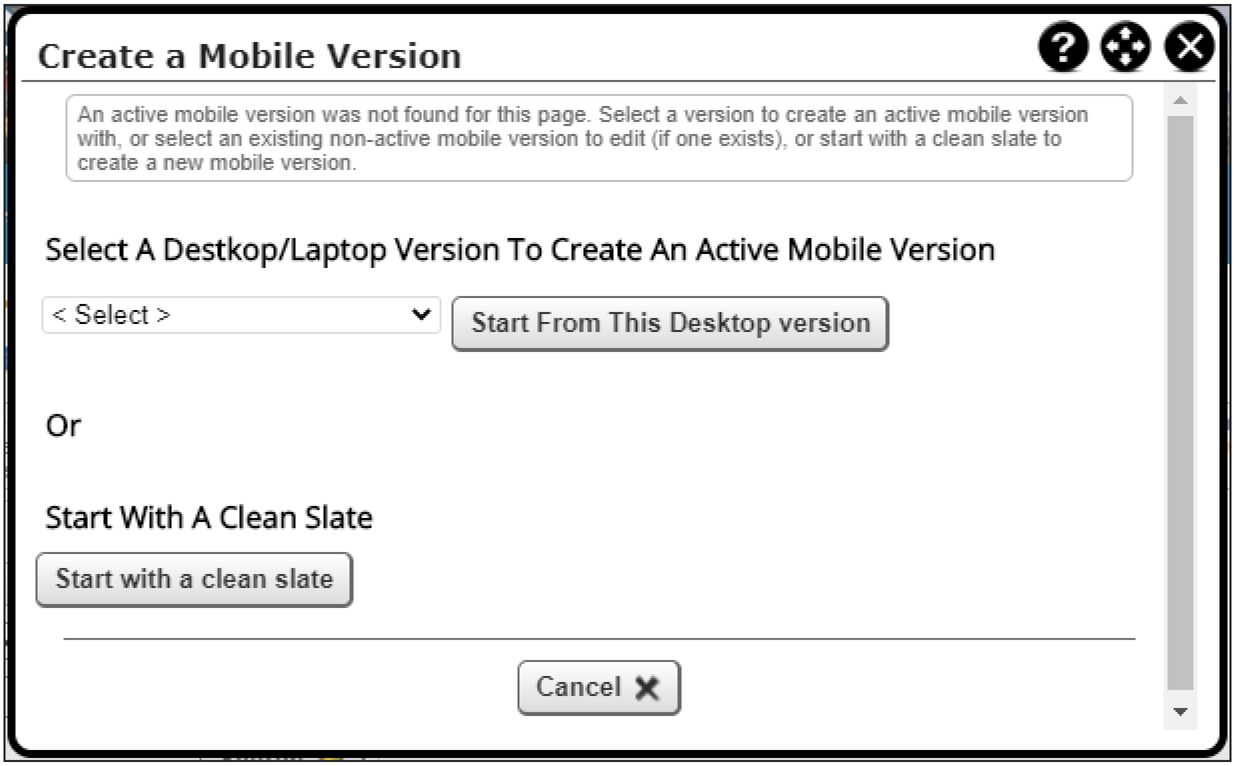
Icon	Description
(View Mobile Content)	Select the **View Mobile Content** icon to view a preview of the mobile version of the page.
(Manage Versions)	Select the **Manage Versions** icon to go to the Custom Page Versions Manager screen.
(Coordinators)	Select the **Manage Coordinators** icon to add one 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.
(Copy)	Select the **Copy** icon to make a copy of the page. You will see a version of the Custom 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 Twitter. (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

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:



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.

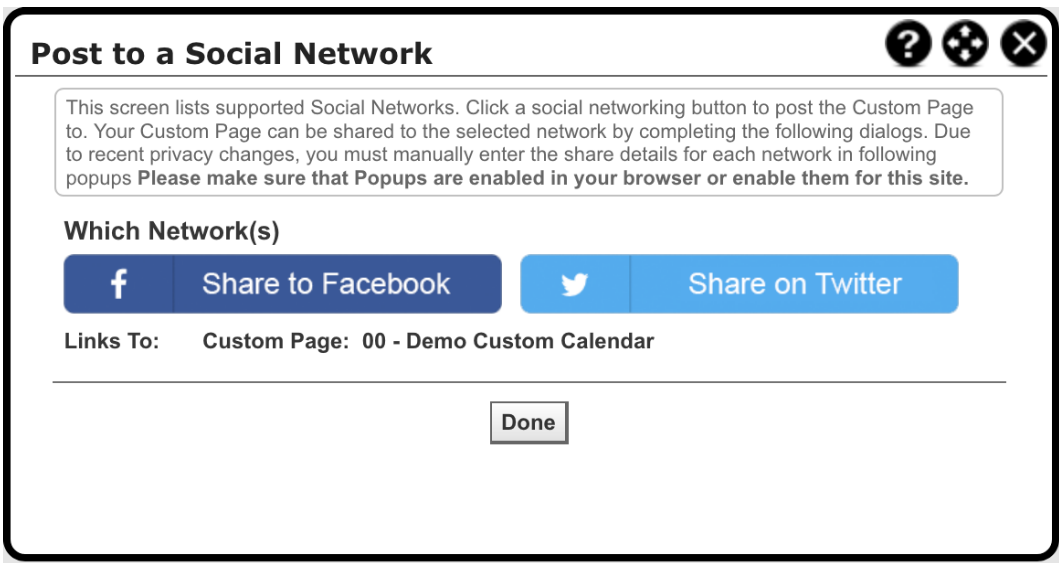
If your page has **desktop versions and inactive mobile versions** (no active mobile version), clicking the Edit Mobile Content icon will display the following popup window:

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.

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.

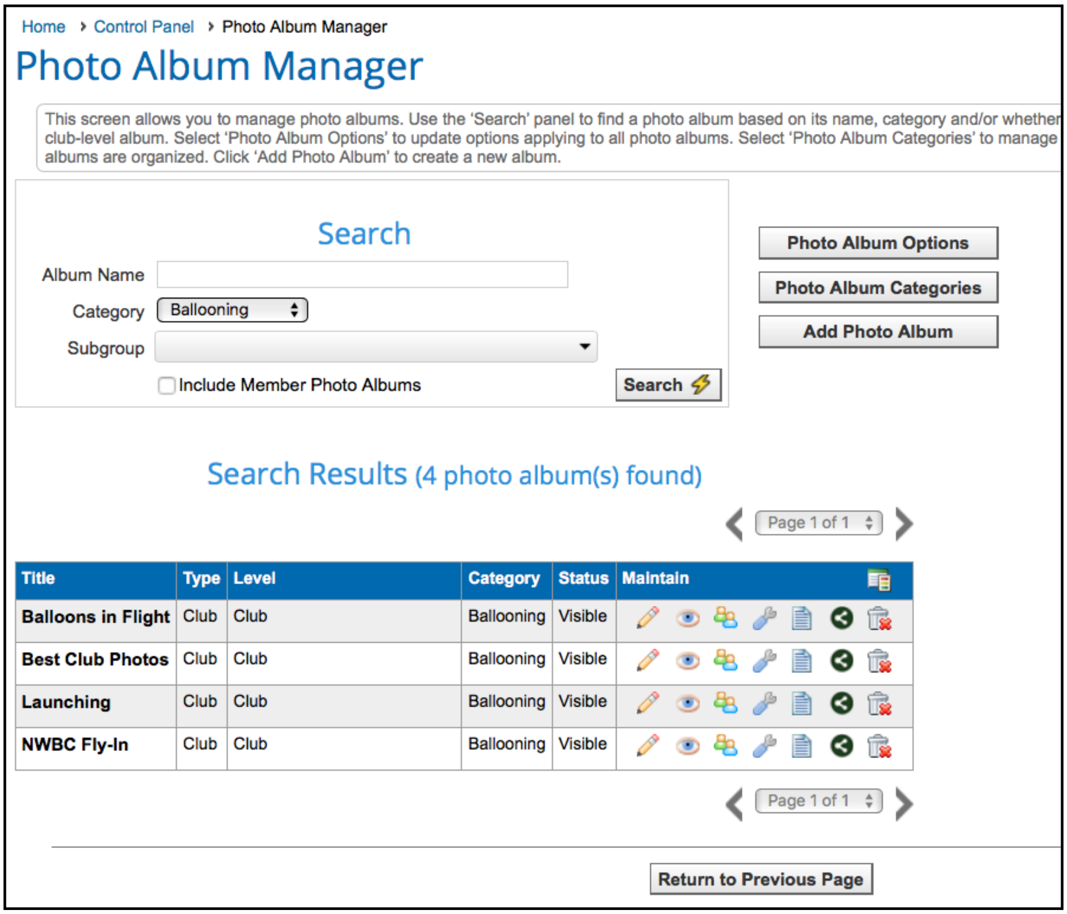
> **Note:** When you connect to each service for the first time, you will be prompted to authorize ClubExpress to generate posts in your account. This process is handled slightly differently by each service.

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:



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.

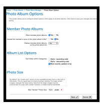
Note that the practical size limit for each photo album is 300 photos. If you have more photos you want to display, spread them across multiple albums.

> **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:



The following options can be set:

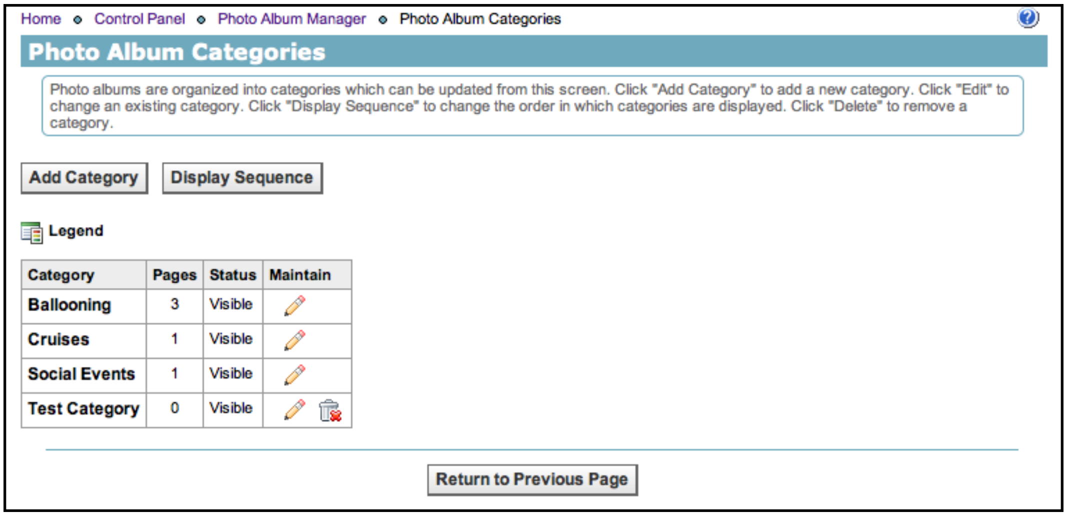
- **Allow member photo albums** controls whether members can create their own photo albums and upload photos into them. If this option is set to Yes, members will see a **Photo Albums** option in their Profile screen.
- **Include the member's name in the photo album title** – set this option to No if 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:



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.

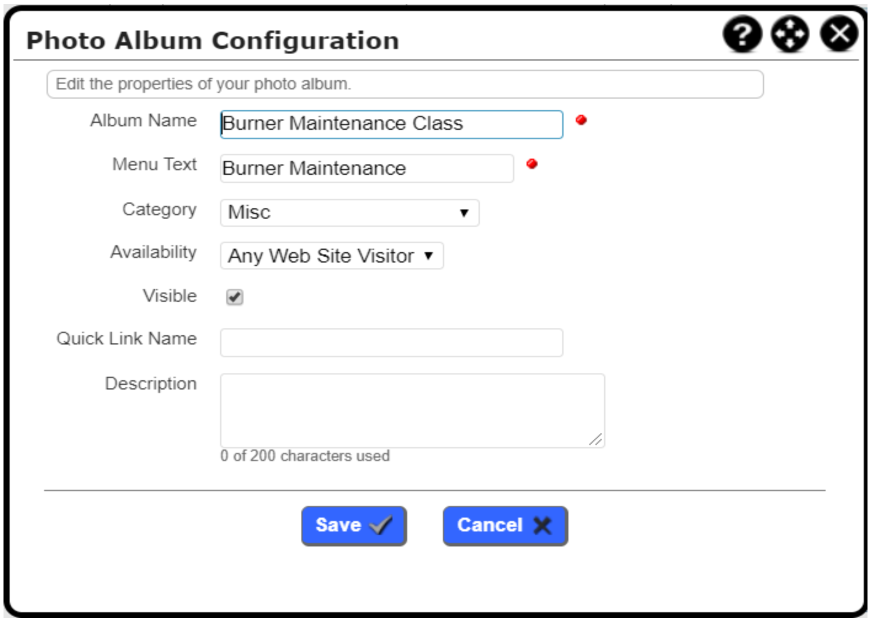
If the trash can (Delete) icon is displayed, the category has not been assigned to any photo albums, and it can be deleted.

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:



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:

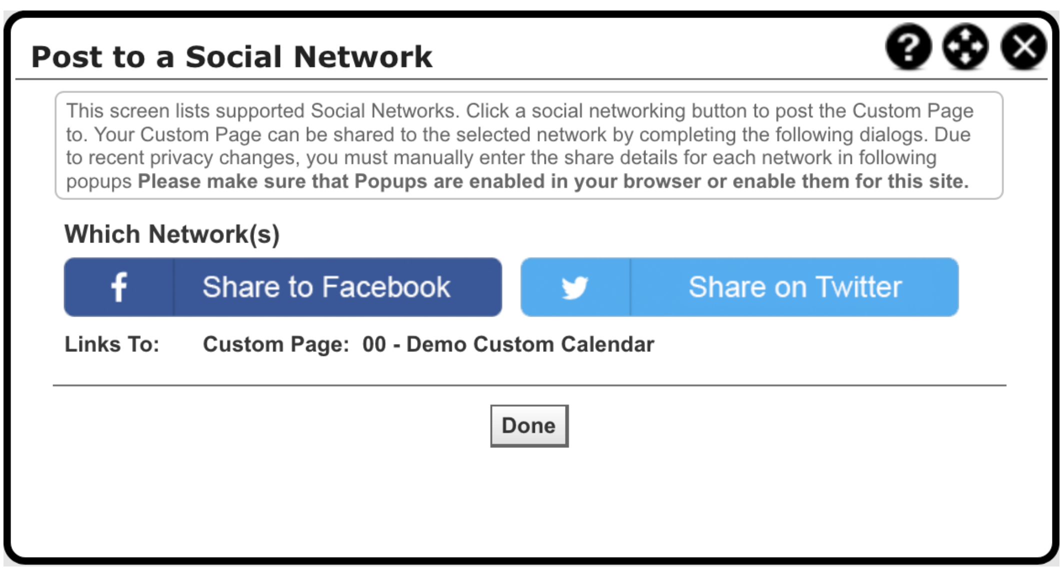
Icon	Description
 (Edit)	Click the **Edit Content** icon to manage the photos placed on the album, as well as a detailed description of the album.

Icon	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 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.

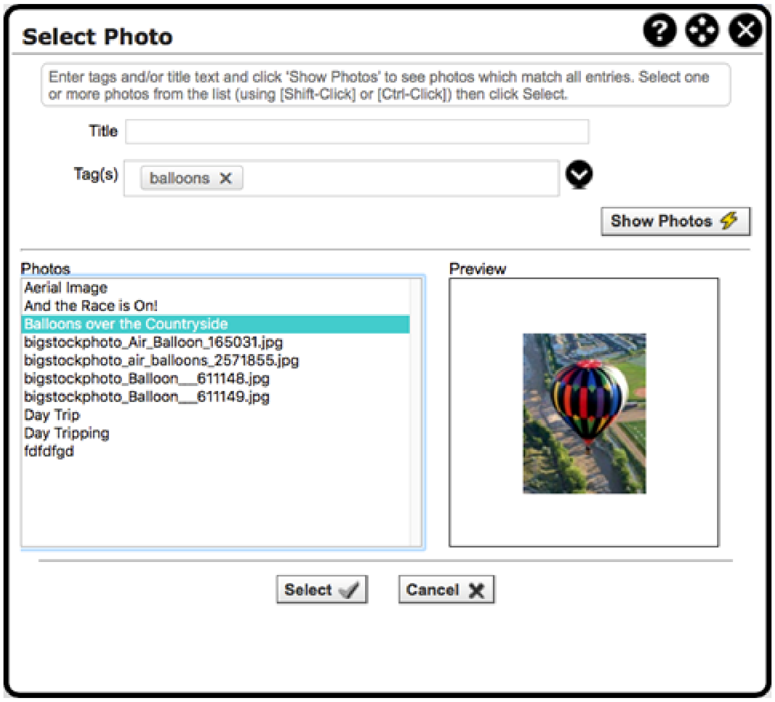
Editing A Photo Album

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.



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

Icon	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 brightness, or changing the size.

Maintain Options

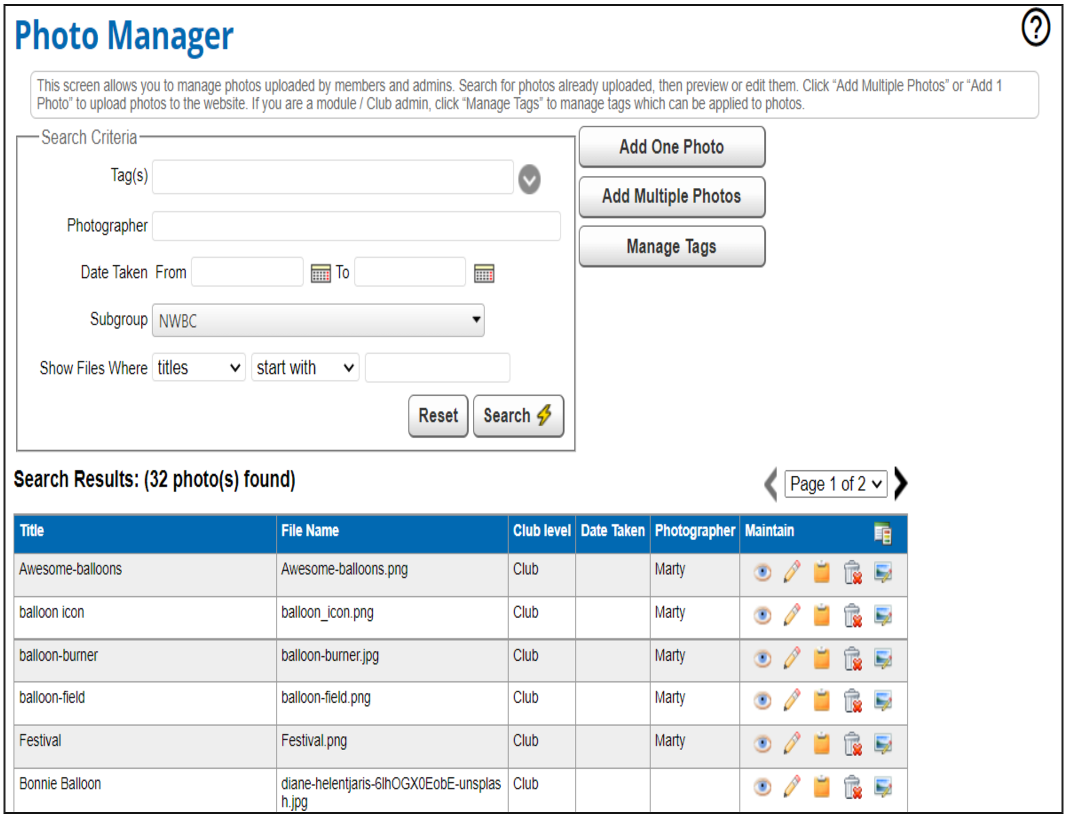
Photos

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:



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.

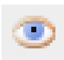
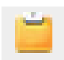
> **Subgroups:** If your club or association has subgroups, you can also filter by subgroup. Full administrators or module coordinators can select any subgroup; subgroup administrators can only filter by the subgroups they have access to.

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.

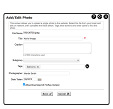
Maintain Options

Icon	Description
 (Preview)	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 brightness, 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:

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.

Once photos have been uploaded, you might want to edit each photo to further customize titles and captions.

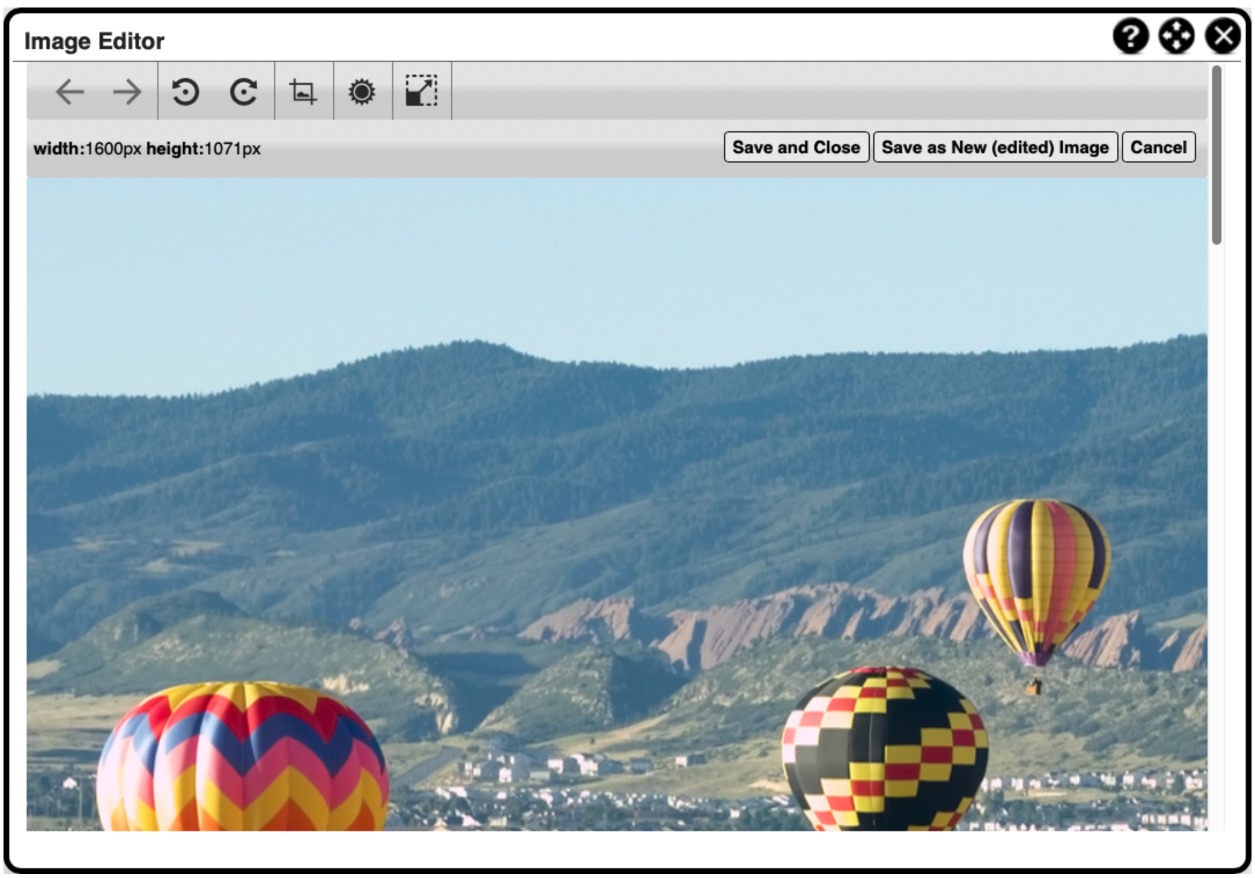
> **Subgroups:** If your club or association has subgroups, you can also link a photo to any subgroup. Subgroup administrators can only link photos to the subgroups they have access to.

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:



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 “✓ ” 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 “✓ ” 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 “✓ ” 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

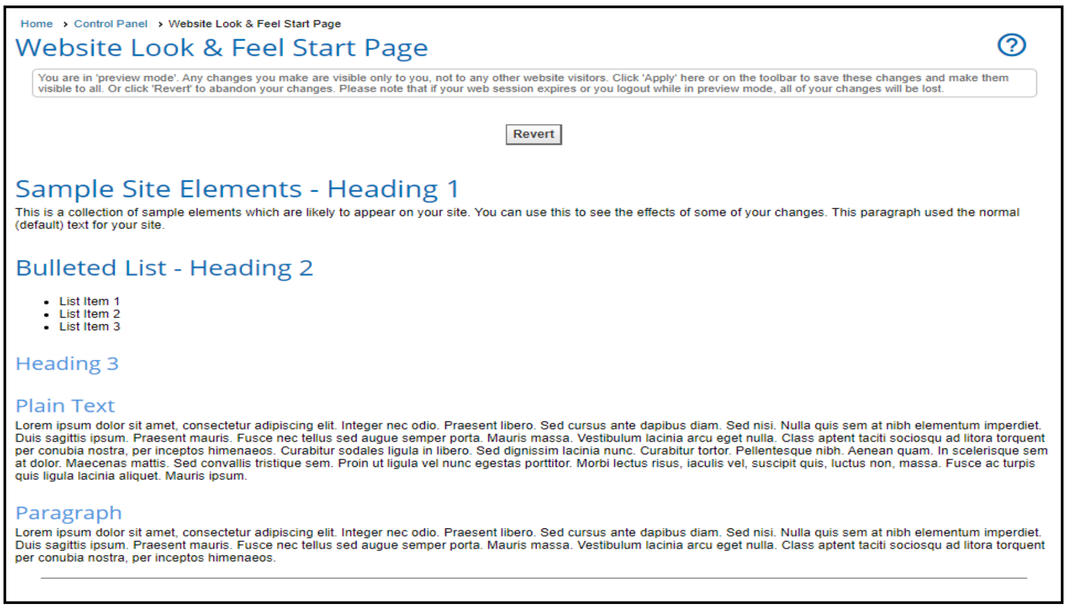
Control Panel > Website Tab > Setup

Select this option to customize the look and feel of your website.

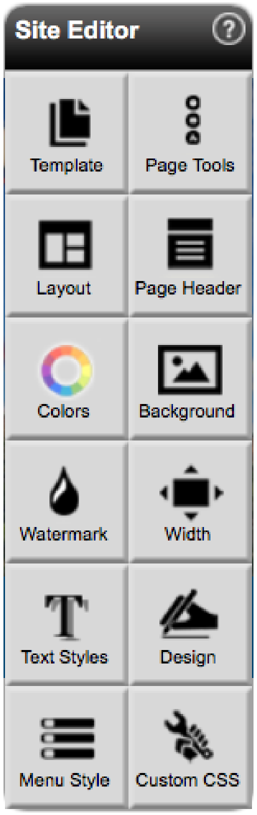
> **Note:** An existing club running under the old "Template/Theme" model will initially see a message which explains how to preview the new Look and Feel tools, how to revert to the old template, or how applying the changes will convert the website to the new Look and Feel tools.

> **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:



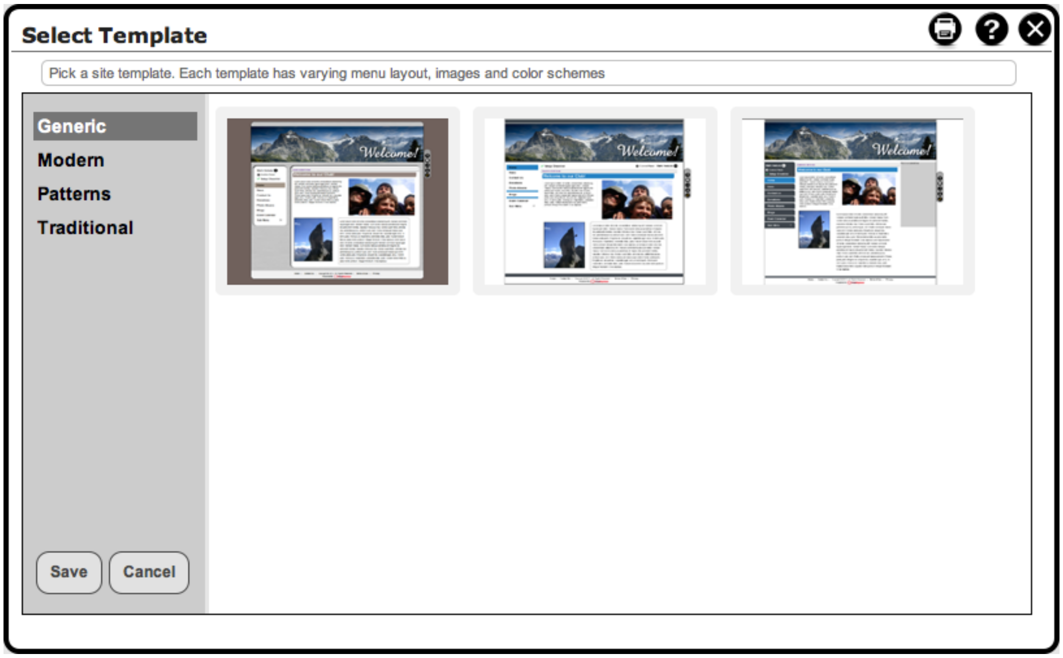
This screen shows the various elements of the page, including headings, buttons, instruction text and normal text. The look and feel site editor is floating on the right side:



Template

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:



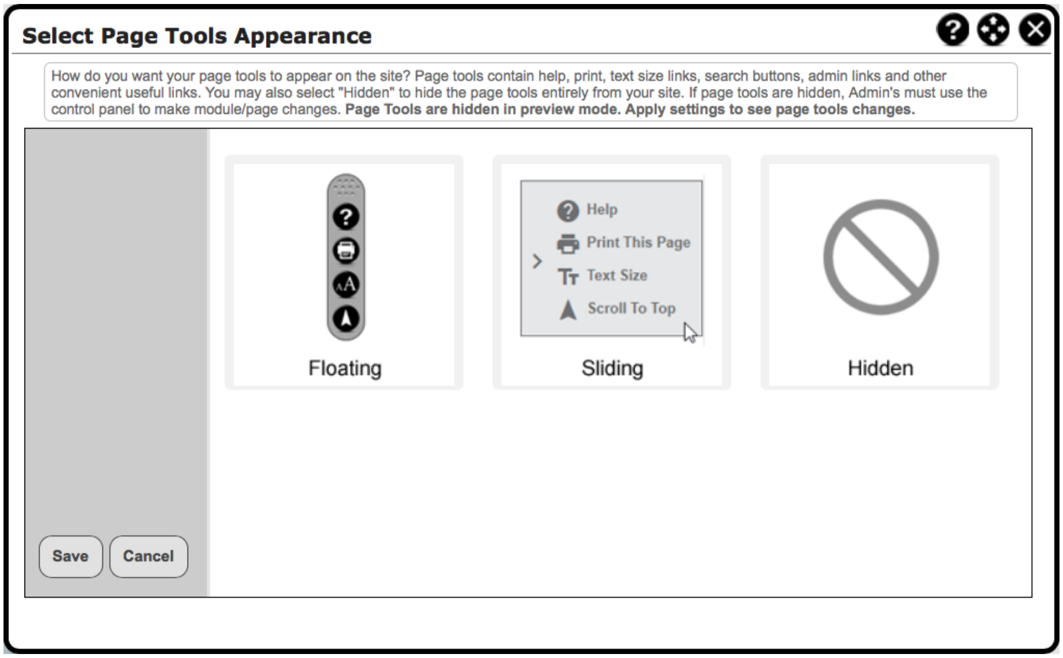
Remember that templates are simply a starting point, a way to pick an initial layout, design scheme, color scheme, and menu scheme. Once selected, you can change each of these elements individually.

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:



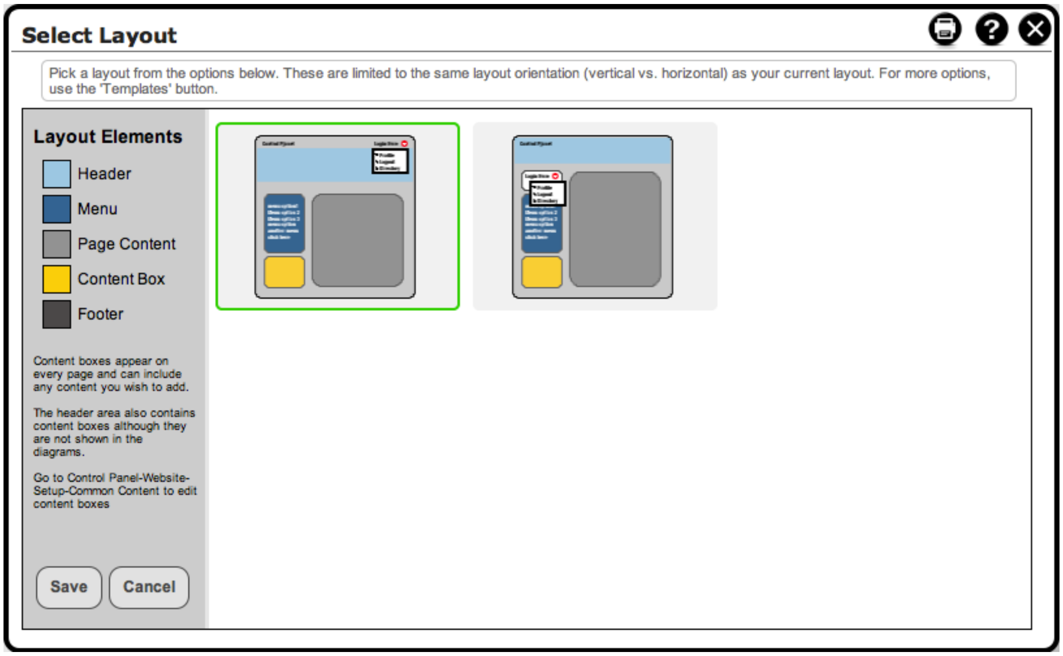
With this dialog, you can specify whether the Page Tools Widget should be:

- 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:



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:

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.

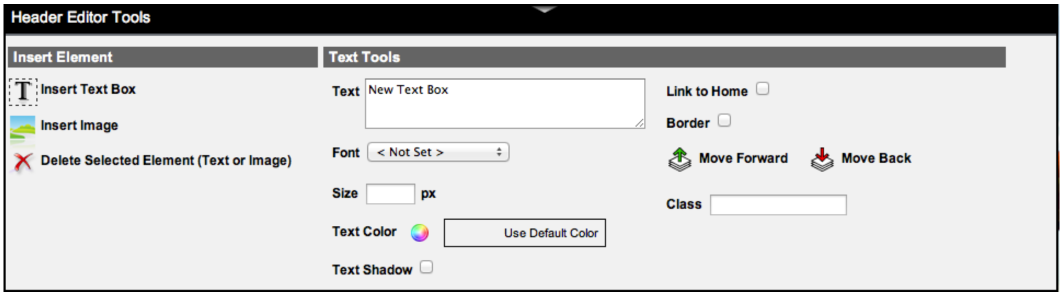
When you click **Set Background Image**, you will see the standard web graphics selector that allows you to select an image already uploaded or to upload a new one. Once the image is uploaded and selected, you can specify **Tiling** that is most appropriate for the image. The image will immediately appear 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:



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.

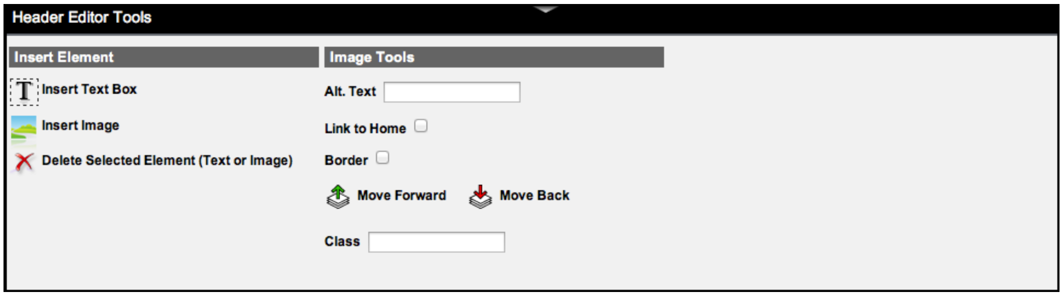
There is also a **Class** option to specify a custom style to be applied to this text. Custom styles are defined in the **Custom CSS** option of the Site Editor.

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:



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

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

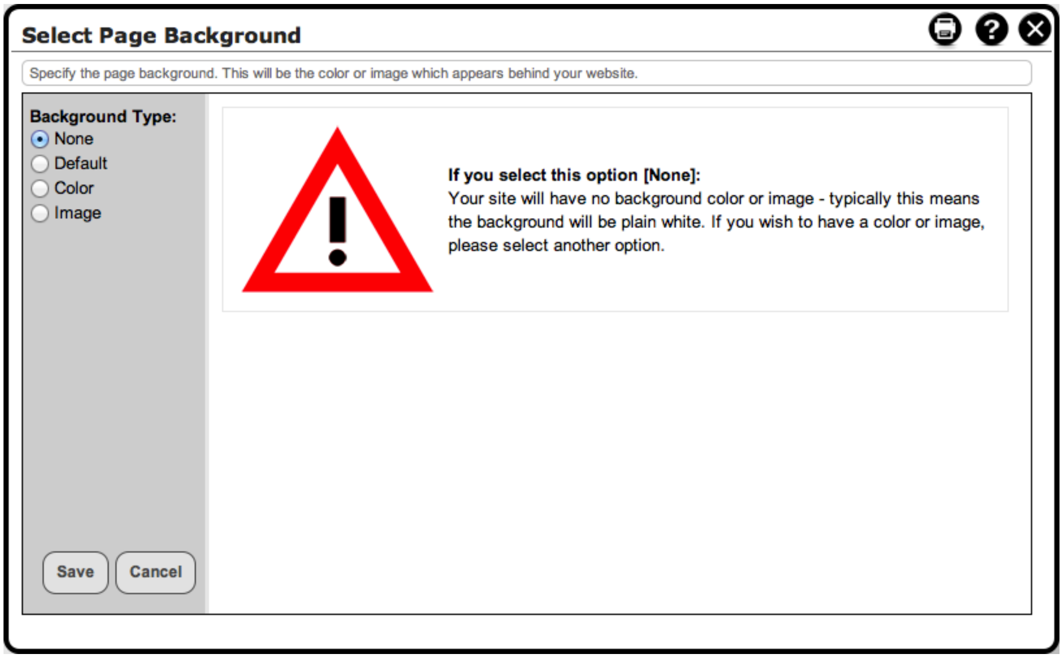
Click **Colors** to see the following dialog:

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:

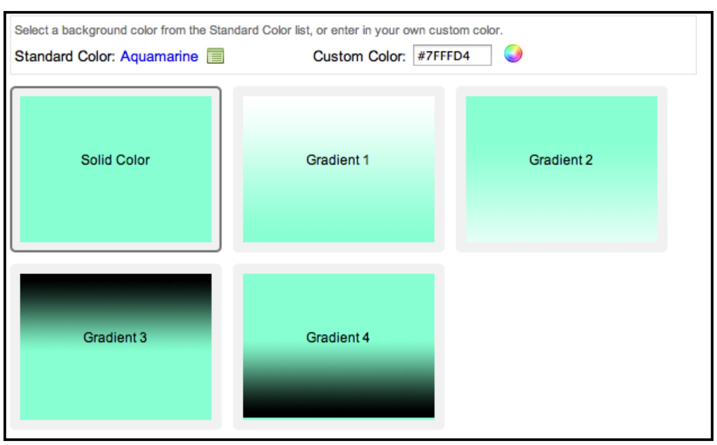


This dialog controls what color or image will appear outside the website layout, between the left and right edges of the website and the borders of your browser window. You can use any color or image to add life to your website.

Select **None** to have no background at all, effectively the same as White.

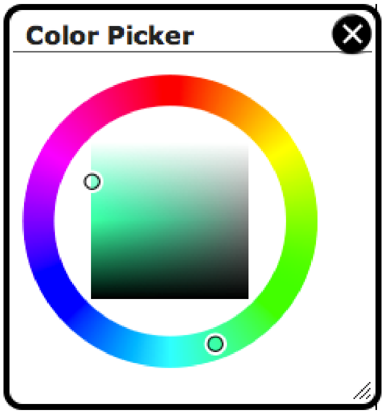
Select **Default** to use the background defined with your selected template. Some (but not all) templates have a background predefined.

Select **Color** to pick any color for the background and then to pick a gradient. You will see a panel similar to the following:



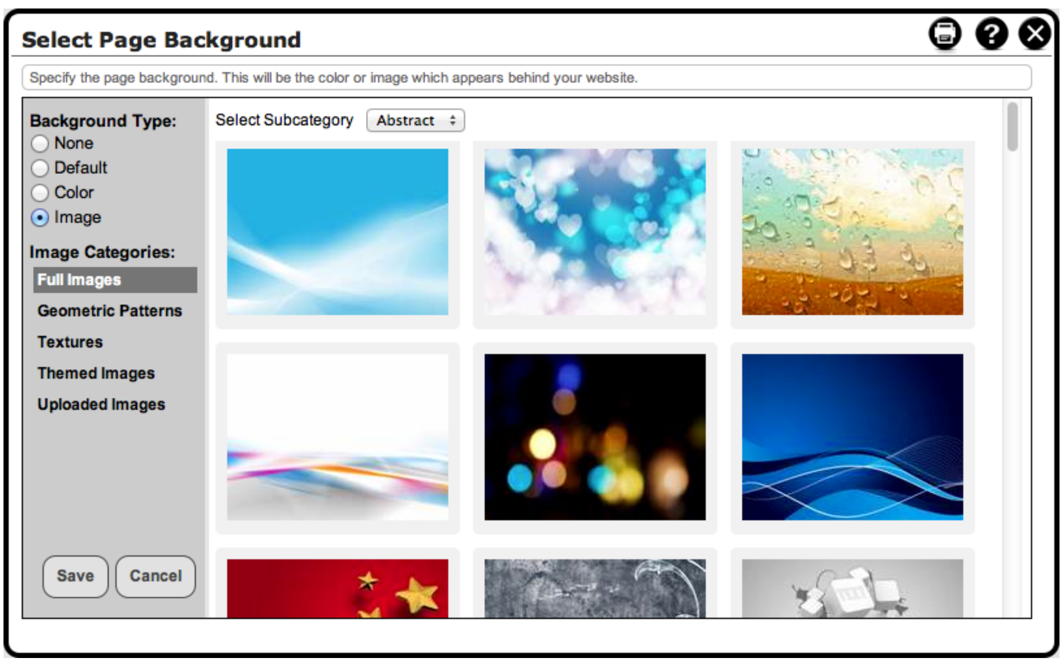
There are three ways to select a color:

- 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.)

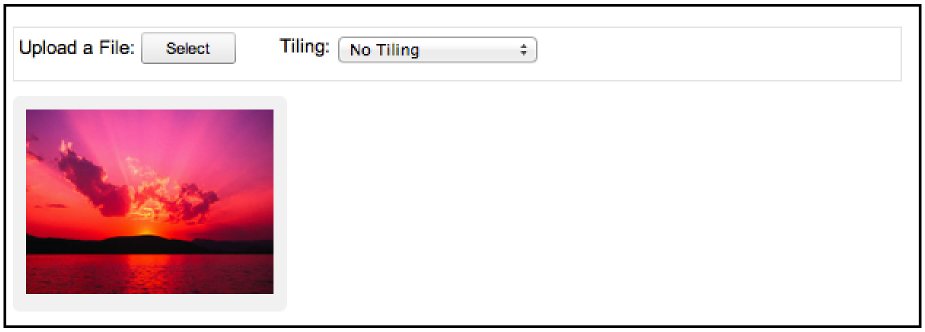
Select **Image** to use an image as the background for your website. You will see a dialog similar to the following:



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:

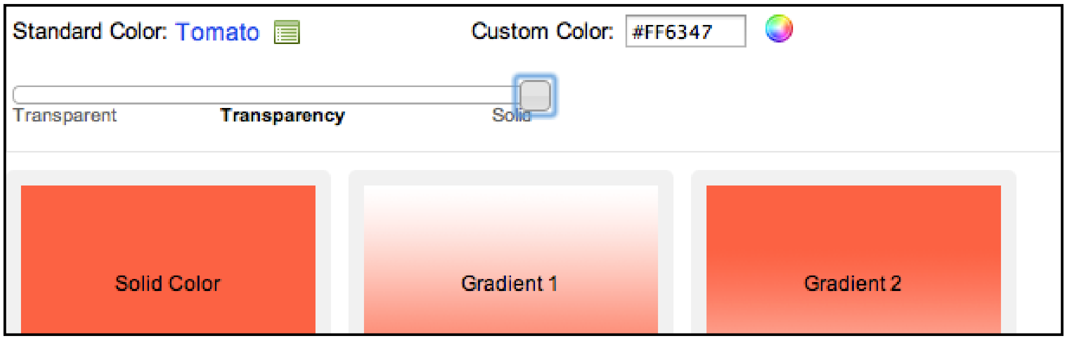
Plain White means that there is no watermark color or image. Content will appear over a white background.

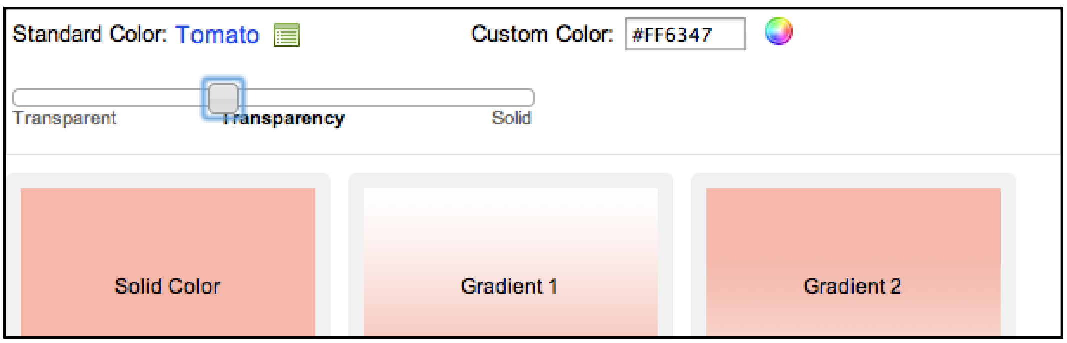
Select **Default** to use the watermark defined with your selected template. Some (but not all) templates have a watermark predefined.

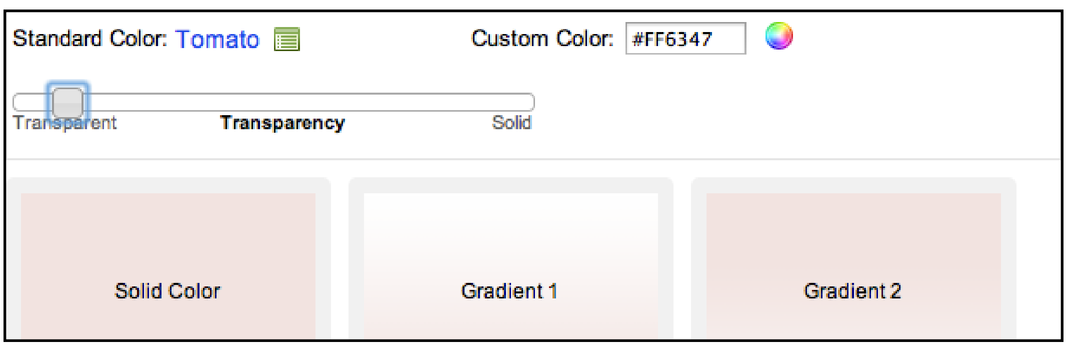
Select **Color/Transparency** to specify a color (selecting a web-safe color from the drop-down list, specifying an RGB hex triplet, or selecting a color from the popup color picker.)

Once you have selected a color, you can also specify its transparency, from 0% (not transparent) to 100% (fully transparent), in 10% increments.

> **Example:** The screen shots below show “Tomato” at 0% transparency, then 60%, then 100%.

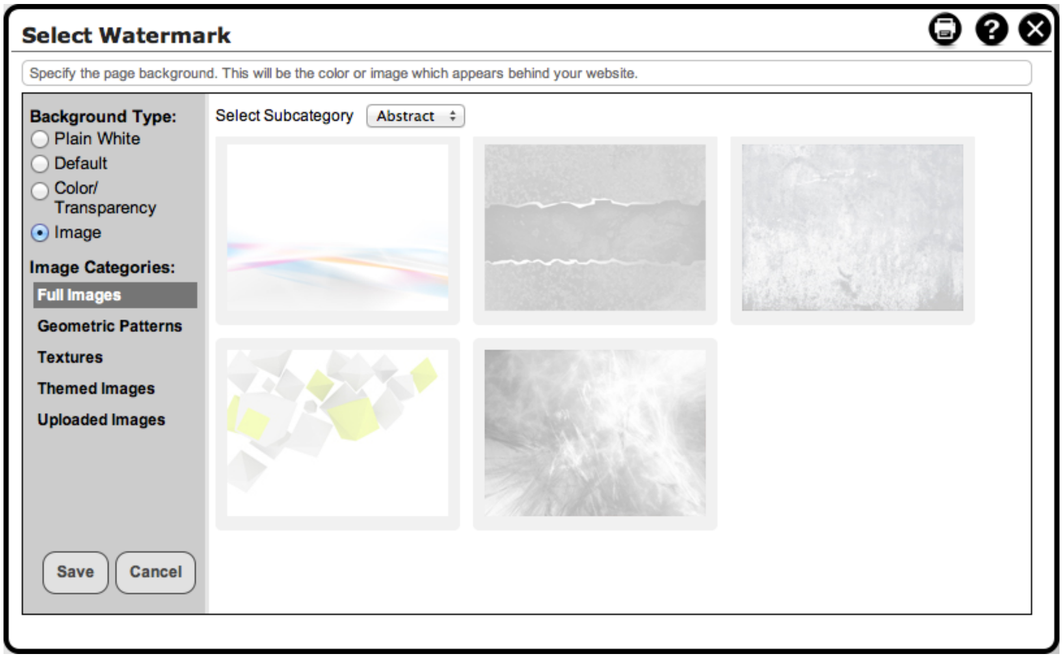






Note that some older browsers (IE7 and 8 in particular) do not properly recognize transparency settings.

Use the **Image** option to select or upload an image as your watermark.



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.

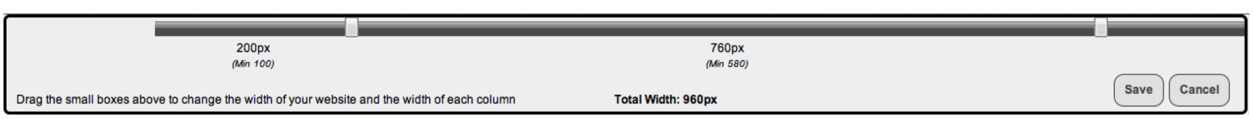
Full sized images will be positioned and scaled to fill the background of your browser window, without tiling. The system also includes geometric patterns and textures that are designed to tile seamlessly.

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.

Width

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:



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.

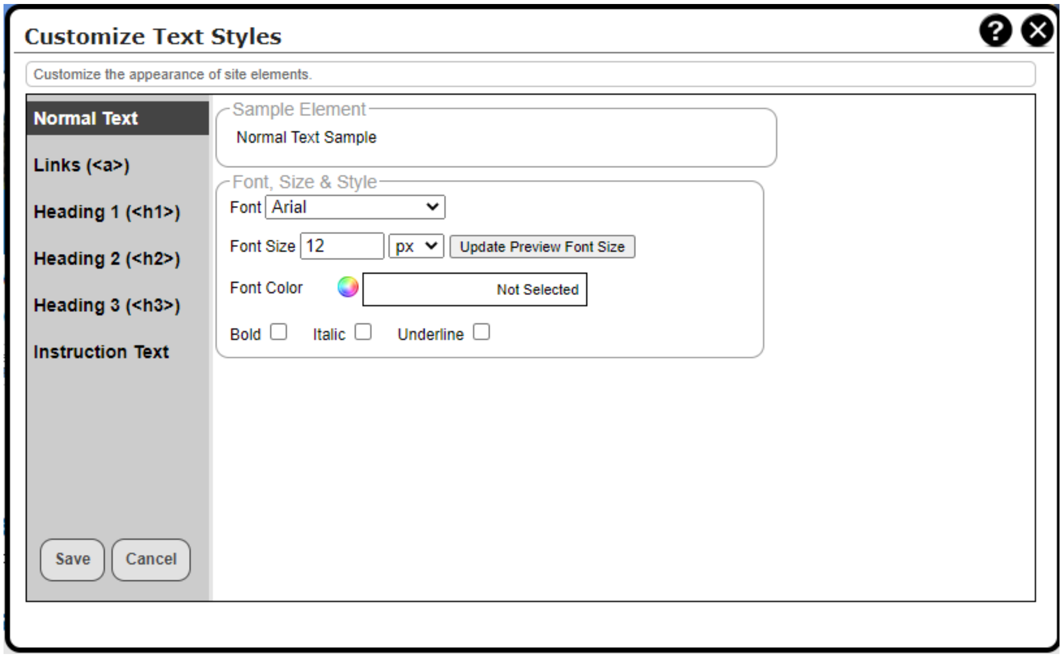
You should also be cognizant of the overall width and how your website will display for members with smaller screens. Nowadays, almost everyone has a screen with at least 1024px across; many have 1280px, 1366px, 1440px or more of horizontal resolution. But if your member demographic skews older, they 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:



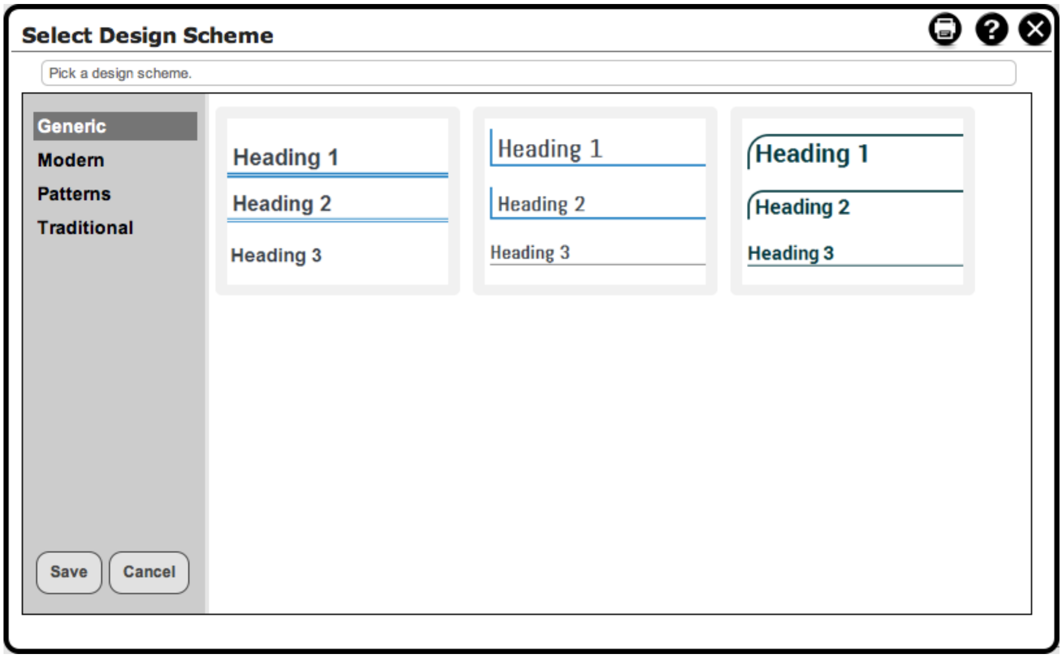
On the left is a list of text elements that can be customized. Select an element to customize it. The main panel shows a sample and then the different customization options:

- 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:



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:

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.

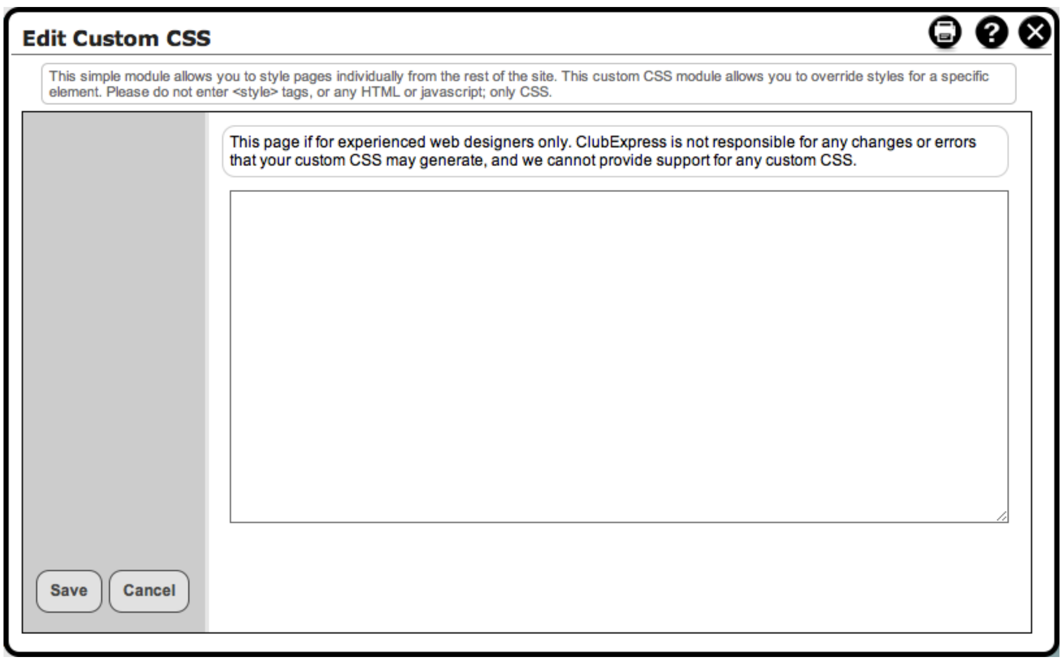
Some styles include colored elements; the colors may or may not change dynamically based on the color scheme chosen. Menu styles without dynamic colors are usually available in multiple, pre-defined colors.

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:



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 **[Crtl-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.

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” drop-down 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 <span> 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;
```


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 (<p>, <div>, and <h1>, <h2>, etc. tags).

> **Example:** p.orange-text /* editor:"Orange Text" */ {
> color:orange;
> text-decoration:none;
> }

This will insert <p class='orange-text'></p> into the editor. If any text is currently selected, it will be included inside the <p>. Otherwise, an empty <p> will be inserted.

You can also use block styles to insert block level elements (<p> 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.

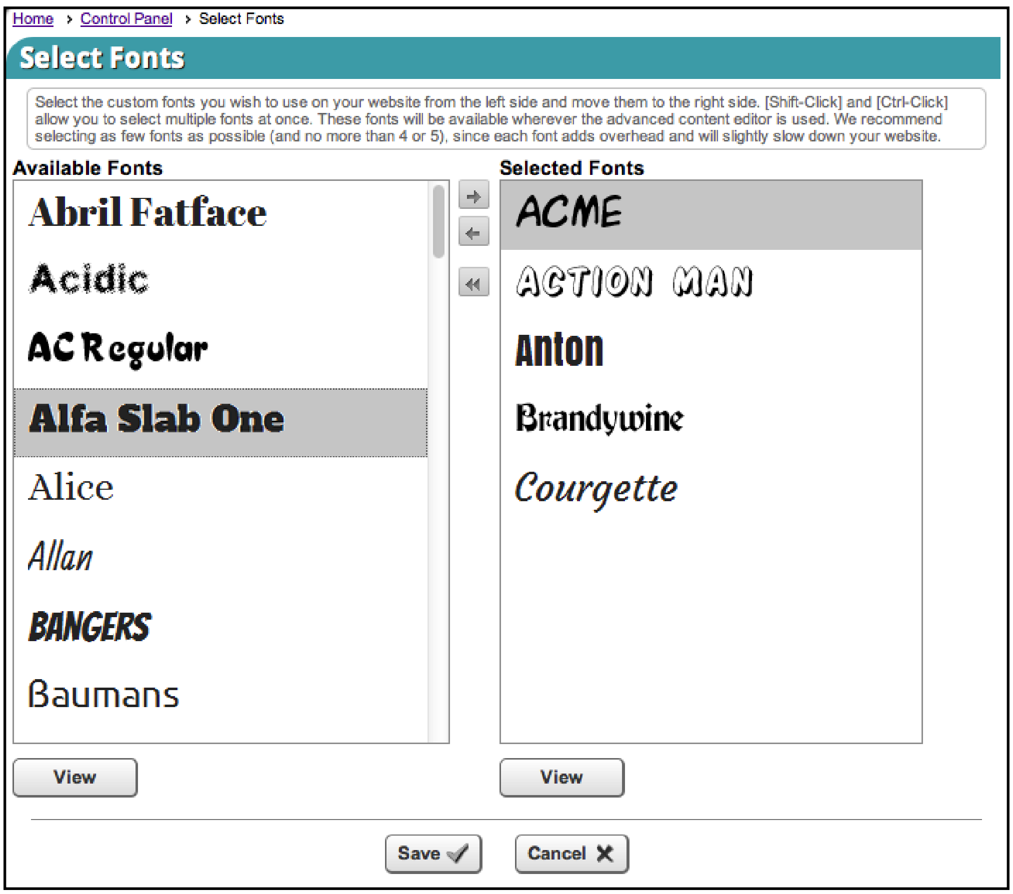
Click the **Revert** button to leave preview mode without saving your new design. The original design is restored.

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:



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.

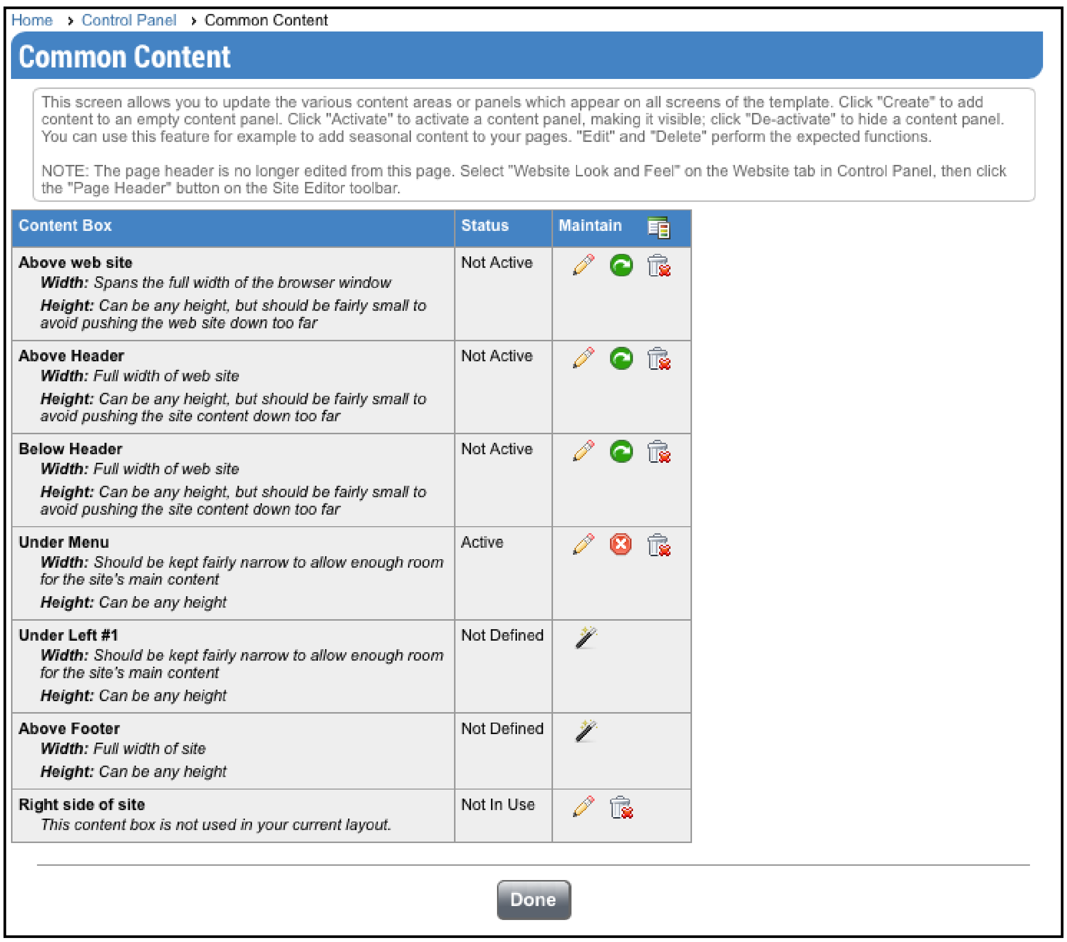
Common Content

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:



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
(Create)	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. **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.

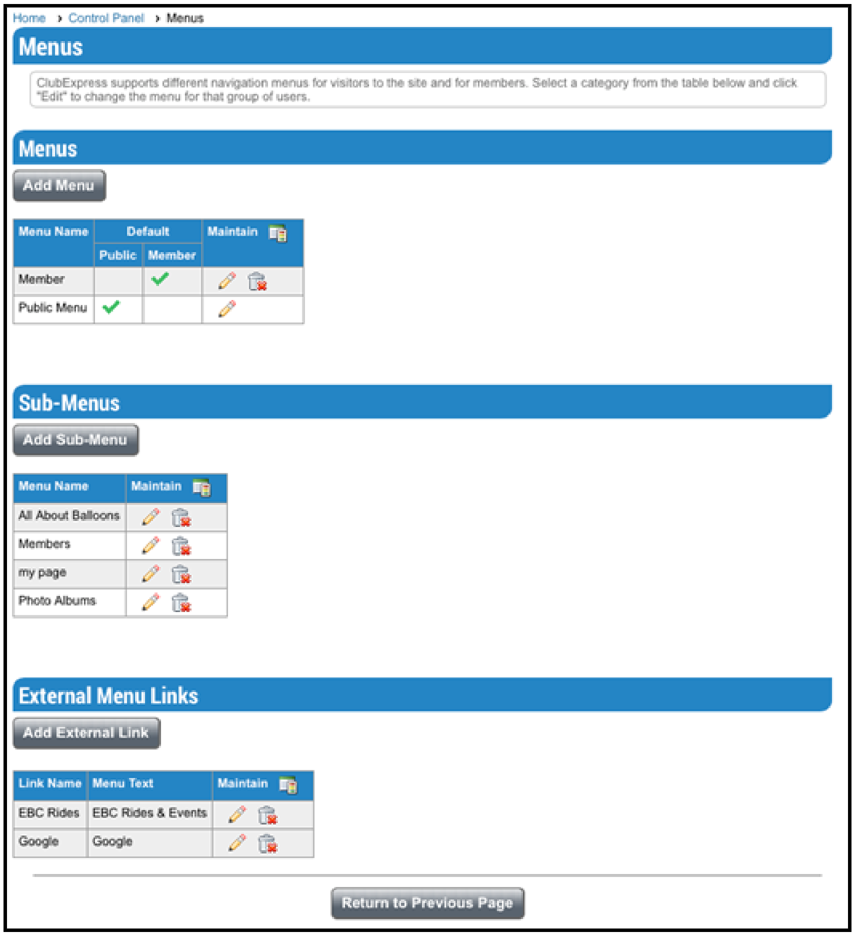
You should also be careful not to provide back-door access to features that are not on a specific menu.

> **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.

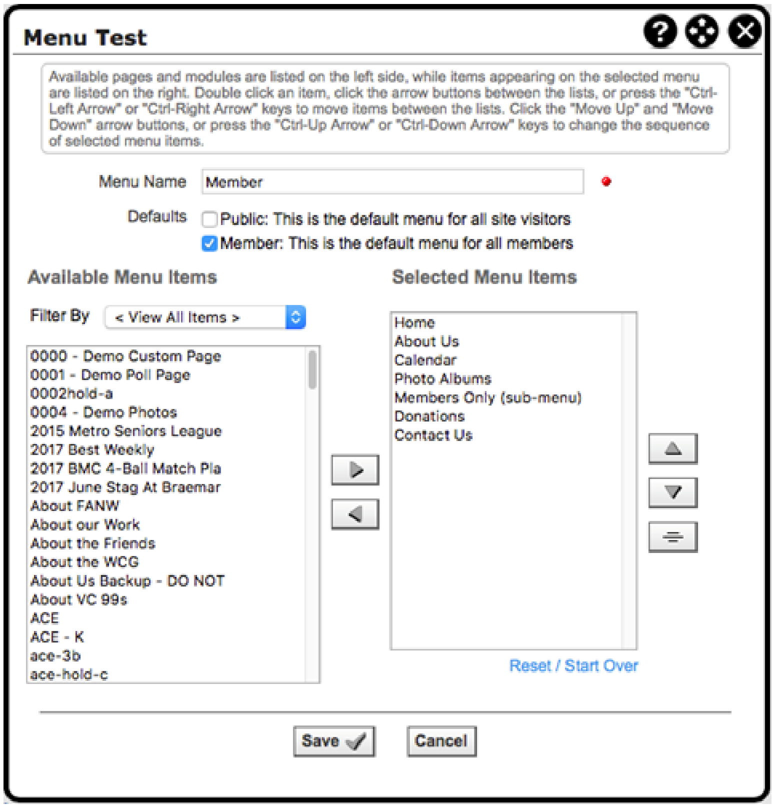
Click Menus to display a screen similar to the following:



Menus

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:



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.

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.

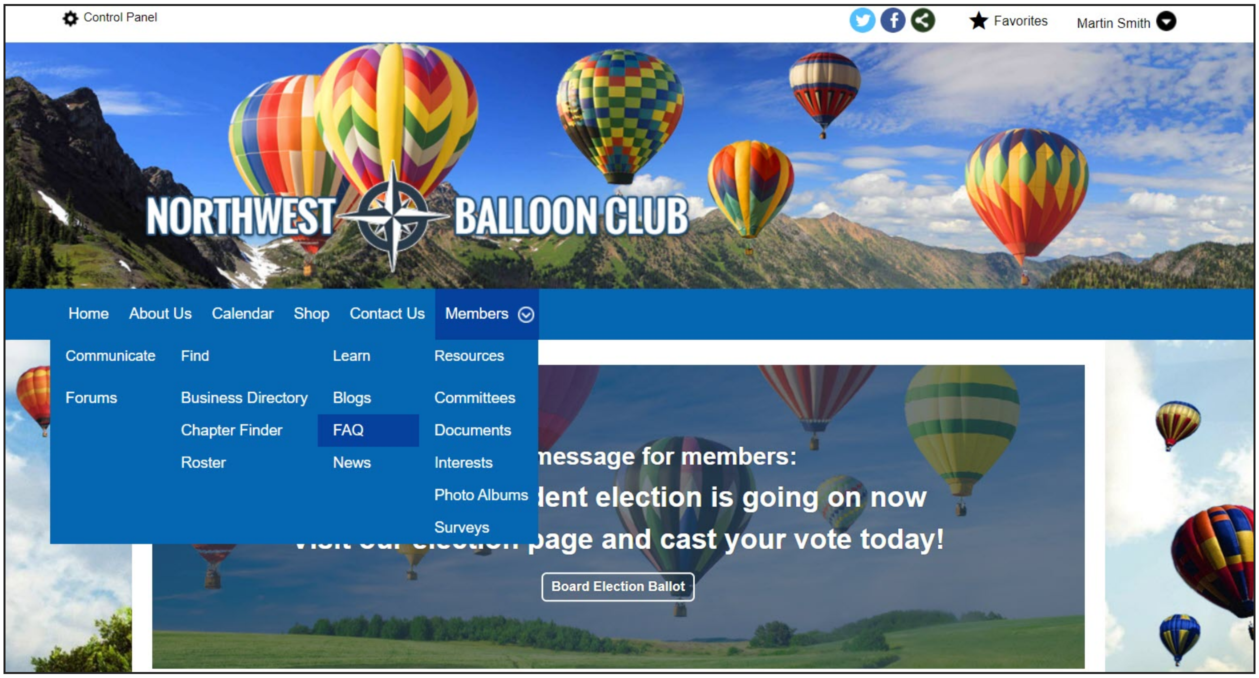
Submenus can also be placed on the home page or a custom web page, using the Submenu Widget in the Advanced Content Editor (see "Widgets" on page 155). This feature allows you to create a “sub-website” within the main website, with its own local navigation.

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.

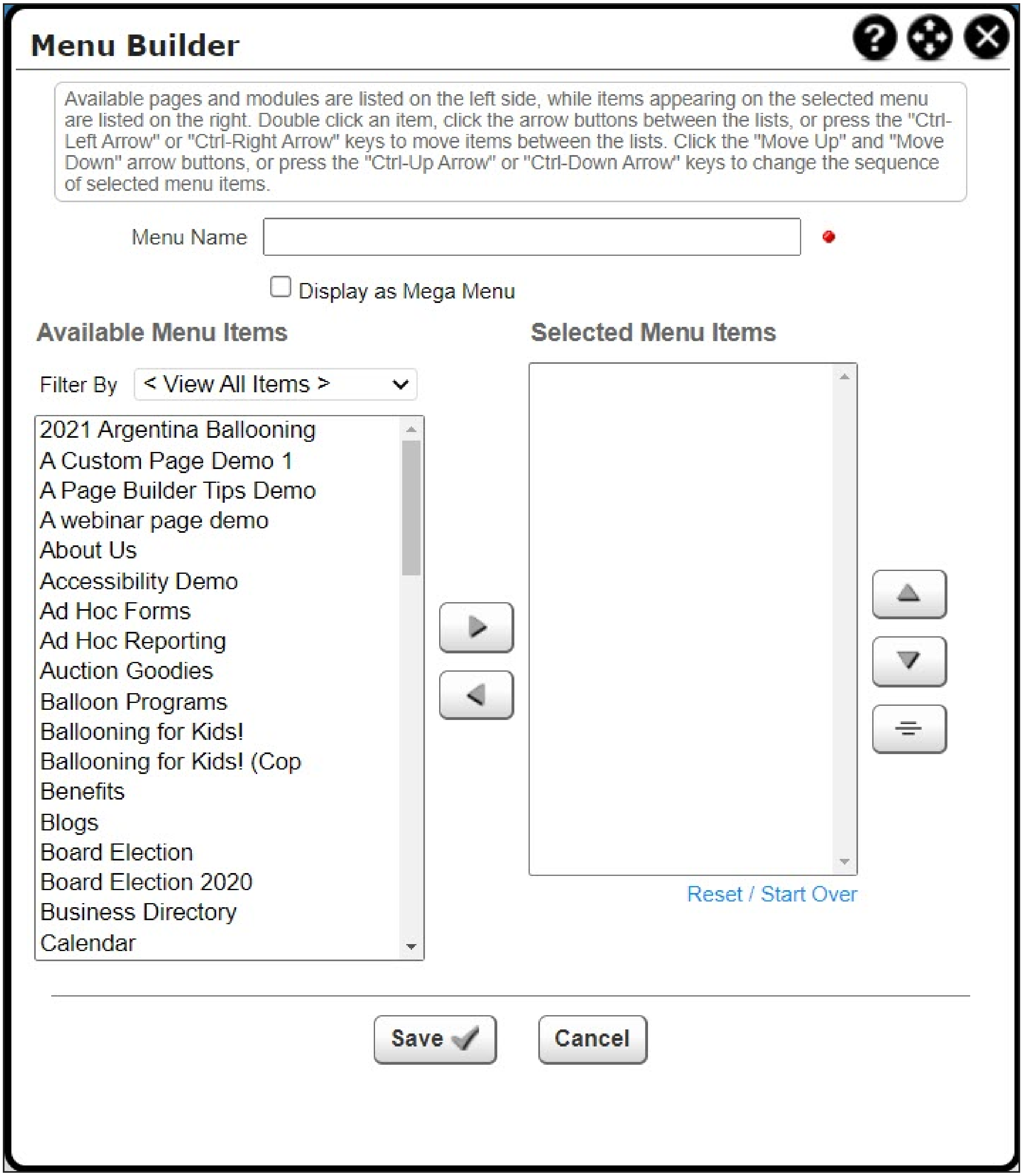
Then, when you are building a top-level menu, the available submenus will appear in the list of available menu items.

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".



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

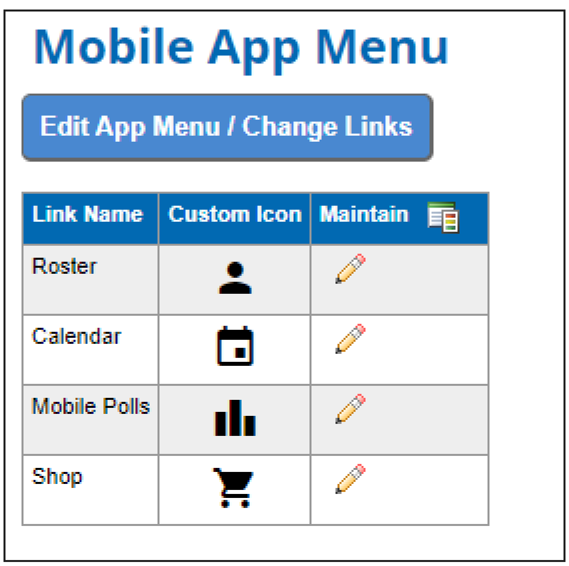
> **Administrators:** This option is only available to clubs who have purchased the Mobile App.

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.



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:

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:

Icon	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.

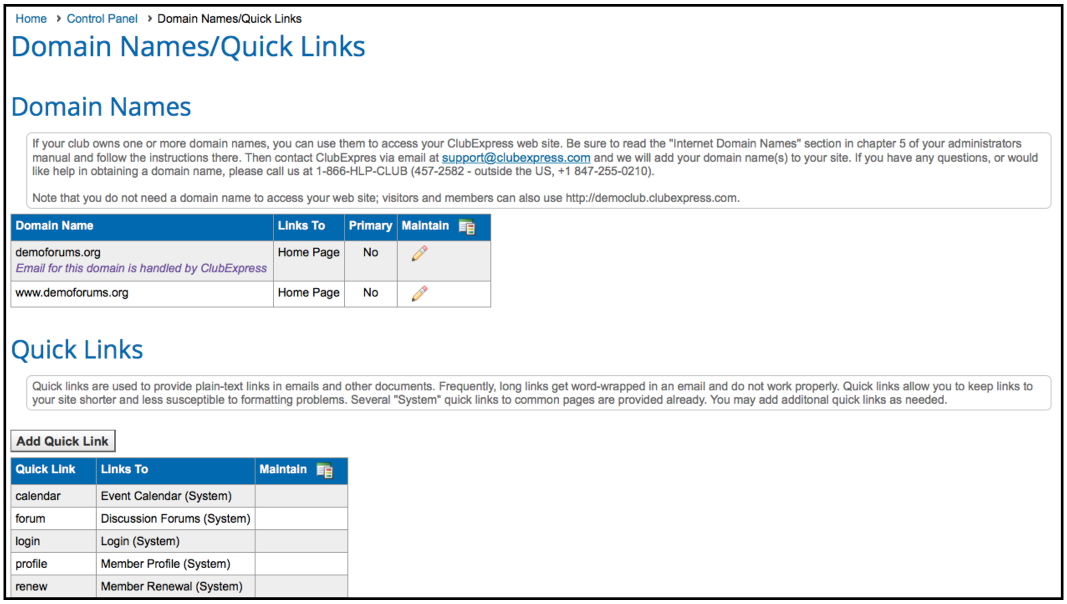
QuickLinks allow you to define a shortcut to jump to a specific page or module or even an individual event or survey. They are described in more detail below.

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 support@clubexpress.com with the domain name. We also need to know whether we are handling email for this domain name or whether you will keep email with 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:



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.

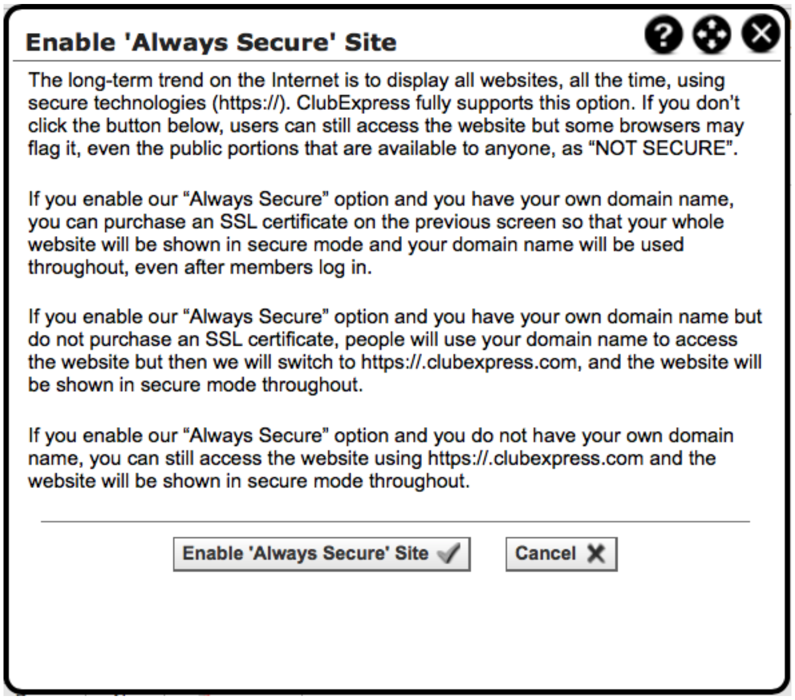
You have two options for SSL certificates with ClubExpress:

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:



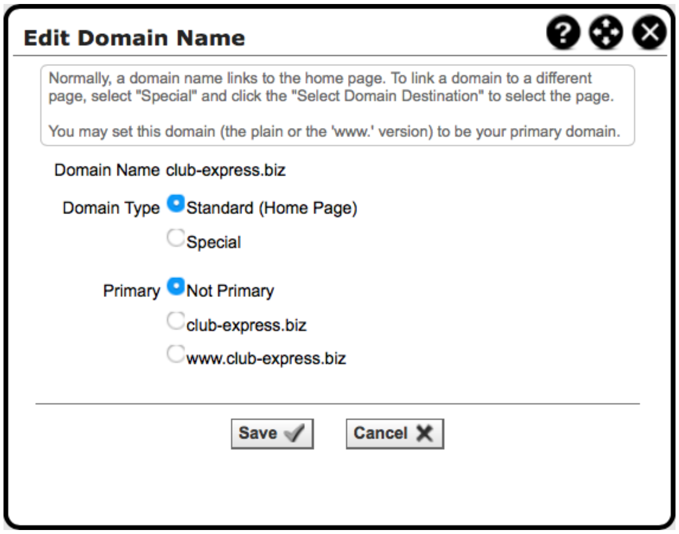
Click the **Enable 'Always Secure' Site** button at the bottom or **Cancel** to close the dialog without switching to 'Always Secure' mode.

For the domain names list, the following options appear in the Maintain column:

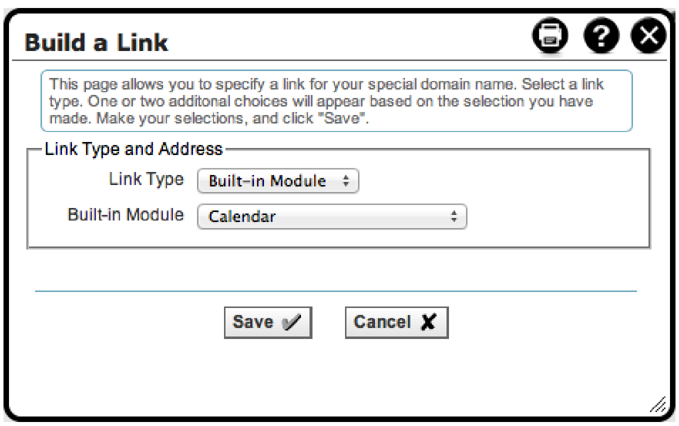
Icon	Description
 (Edit)	Click the **Edit** icon to modify the properties of a domain.
 (SSL Certificate)	Purchase an SSL Certificate for this domain or update the settings for this certificate. This option is only available you have switched your website to "Always Secure" mode.

Domain Options

When you click the **Edit** icon, the following popup window is displayed:



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:



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:

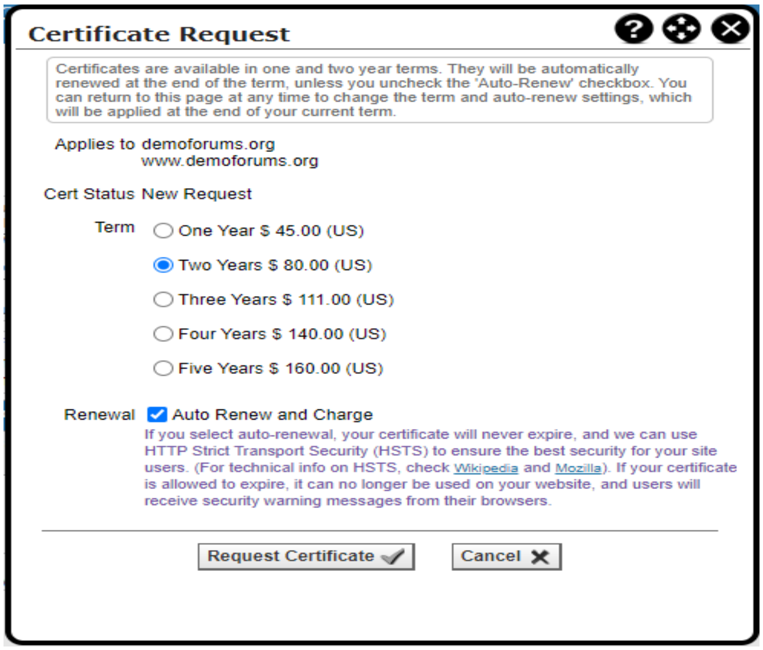
ChicagoCorvettes.clubexpress.com

> **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 Wikipedia and Mozilla.
> *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	

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:

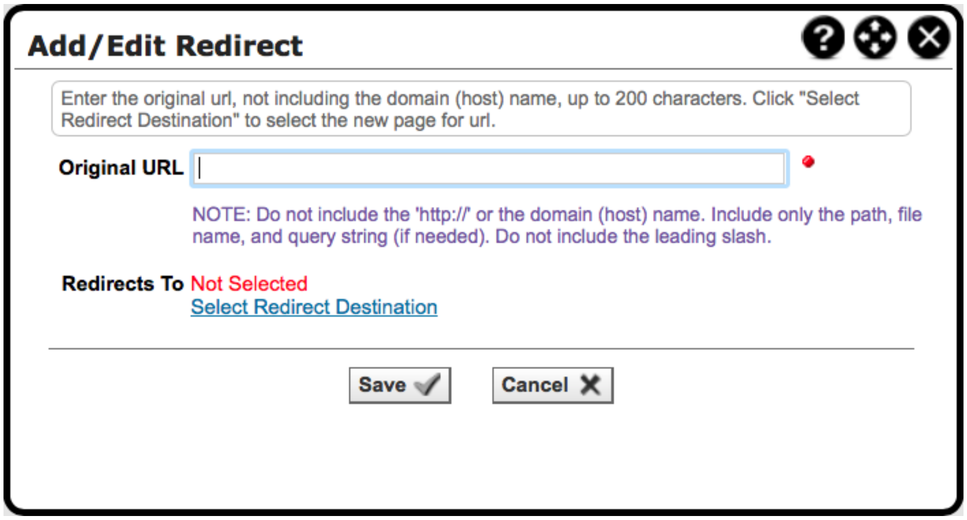
Specify the name of the Quick Link. Click the **Select Quick Link Destination** option to display the Build a Link dialog.

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:



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.

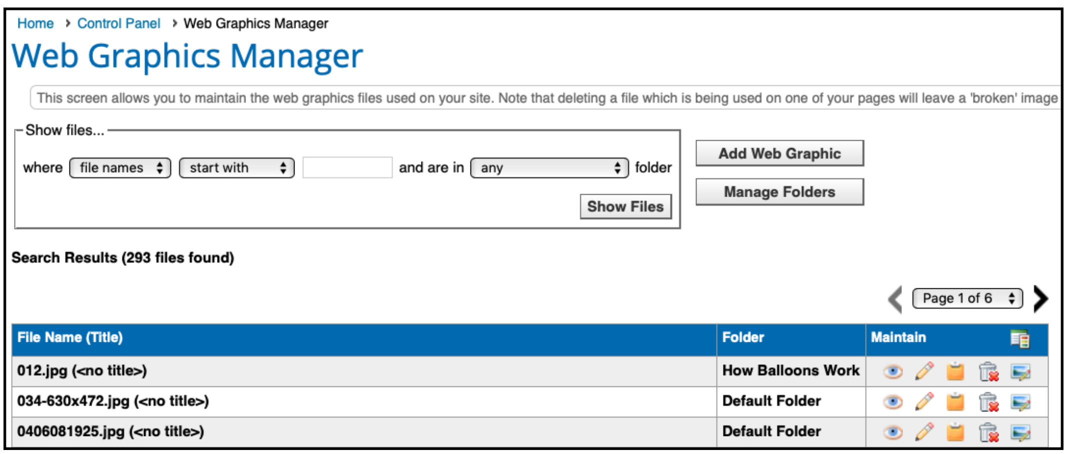
Note that if you do not see 'Use TLS 1.2' in the list, you will not be able to access the secure areas of the site on that computer.

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:



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.

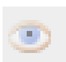
Filtering criteria can be based on file names or titles. Use “file names contain” to search for extensions such as JPG or GIF. You can also filter by specific folders. Use the “are anything” option to display files in one folder only.

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

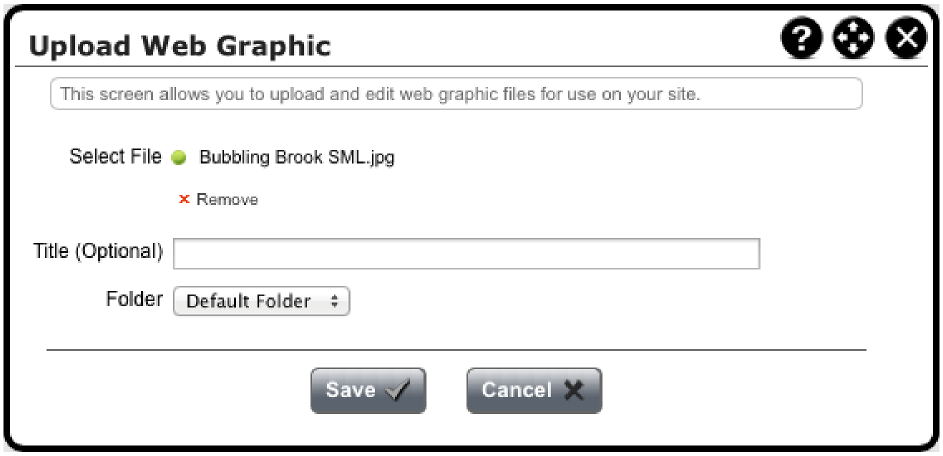
The following options can be found in the Maintain column:

Icon	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 URL)	**Copy** a URL to clipboard that can later be used to download this web graphic from anywhere (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 brightness, 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:

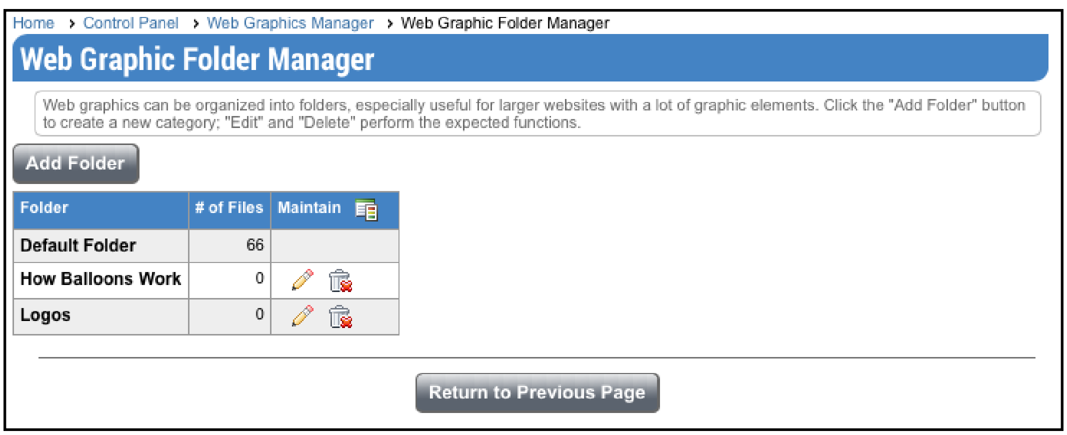


Browse to the file on your local hard disk or network. The filename will appear, together with a **Remove** option if you selected the wrong file. Specify an optional title and folder, then click **Save** to upload the image or **Cancel** to return without uploading.

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:



This is a standard ClubExpress admin screen, showing a list of folder and the number of graphics in each folder.

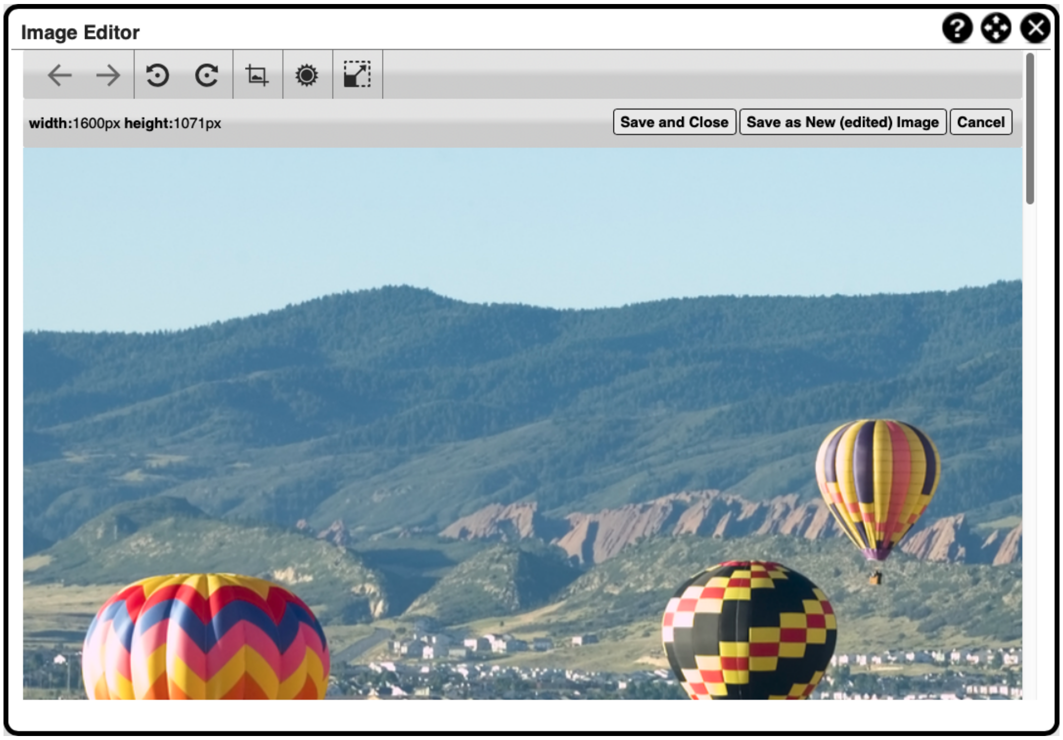
Click the **Add Folder** button to create a folder. You will see a small popup to specify the folder name. Spaces are allowed but duplicate folder names are not.

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 “✓ ” 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 “✓ ” 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 “✓ ” 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

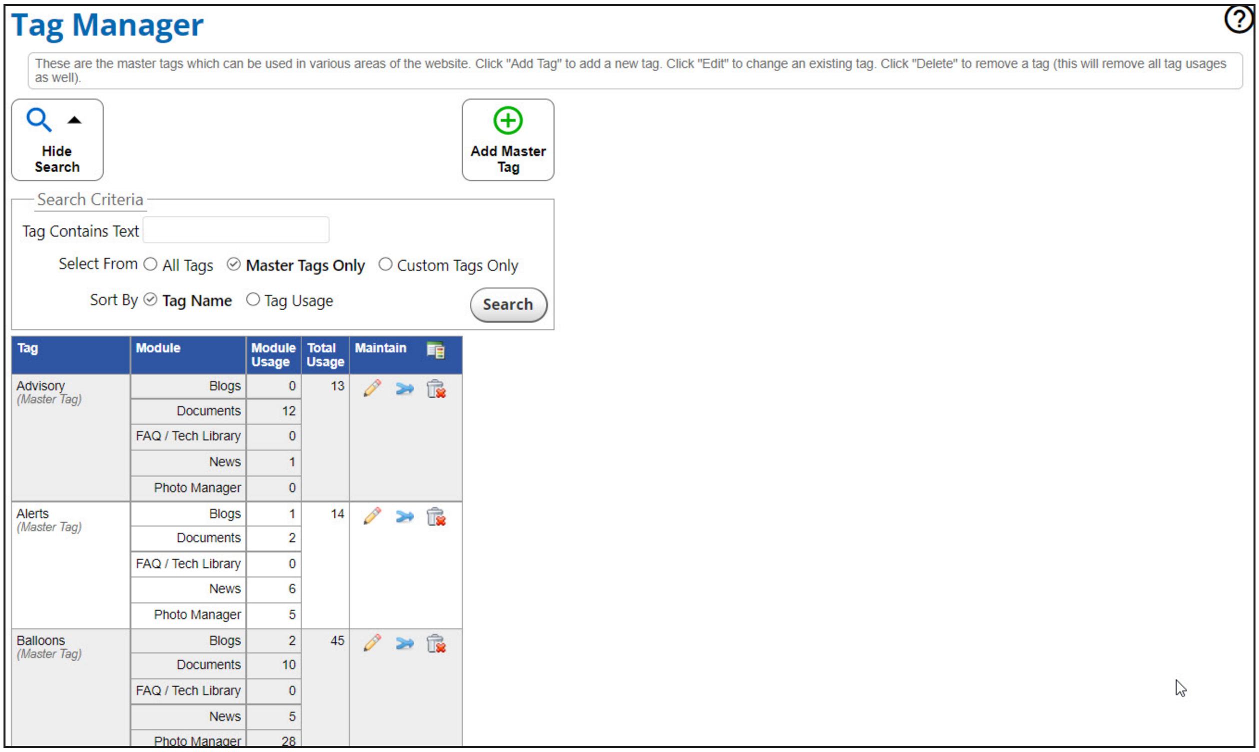
Control Panel > Website Tab > Setup

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.

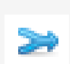
> **Note:** You may add a maximum of five (5) tags to any single item (document, photo, etc.)

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



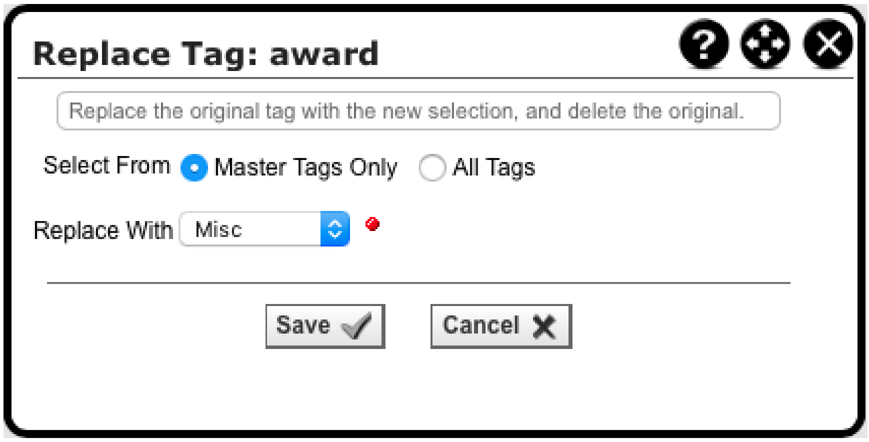
The search panel allows you to filter the tag list by text and type and to sort the results in two different ways. The grid shows each tag, with an indication of the Master Tags. It also shows the three modules where tags are currently used the usage for each.

Maintain Options

Icon	Description
 (Edit)	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.
 (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

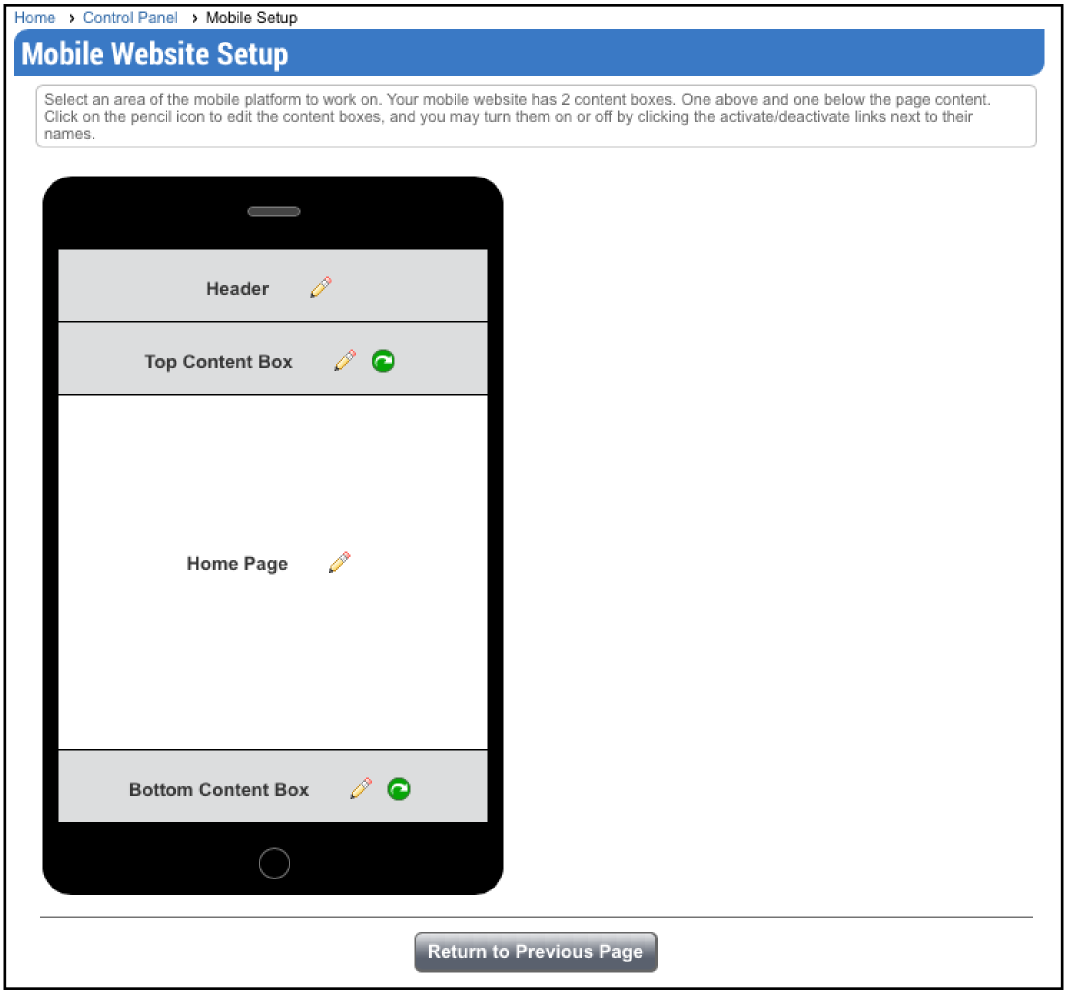
When you click the **Merge** icon, the following dialog is displayed:



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:

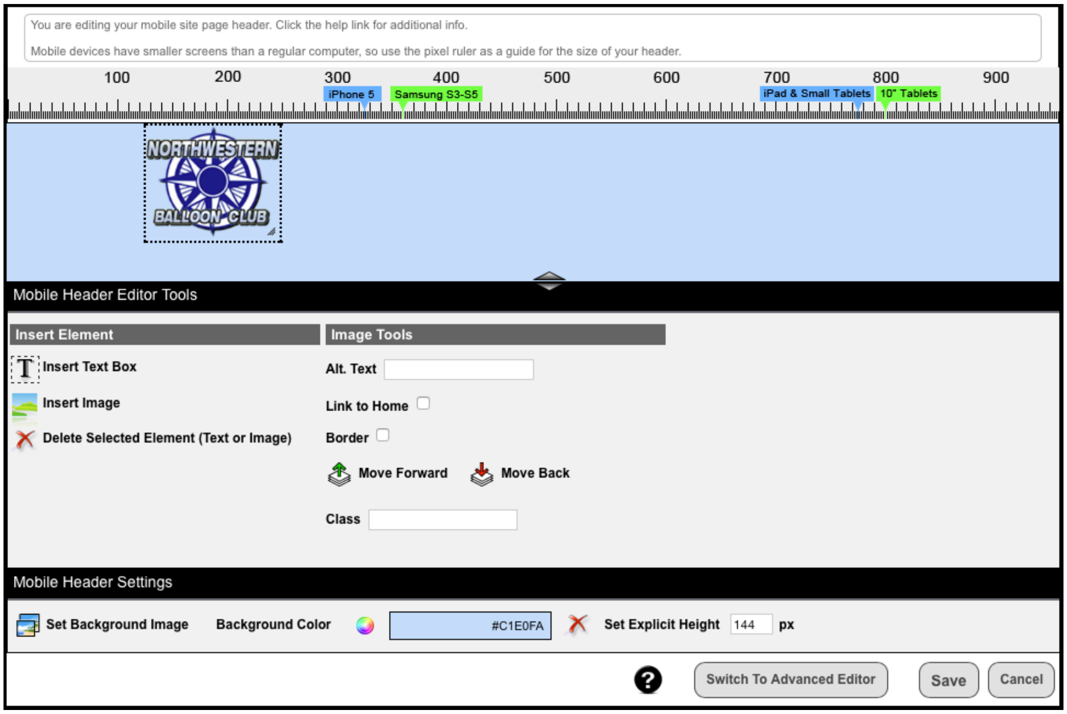


This screen has four panels that will be displayed only on mobile devices:

- 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.

Header

Click the Edit (pencil) icon to display the mobile home page editor. You will see the following screen:



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.

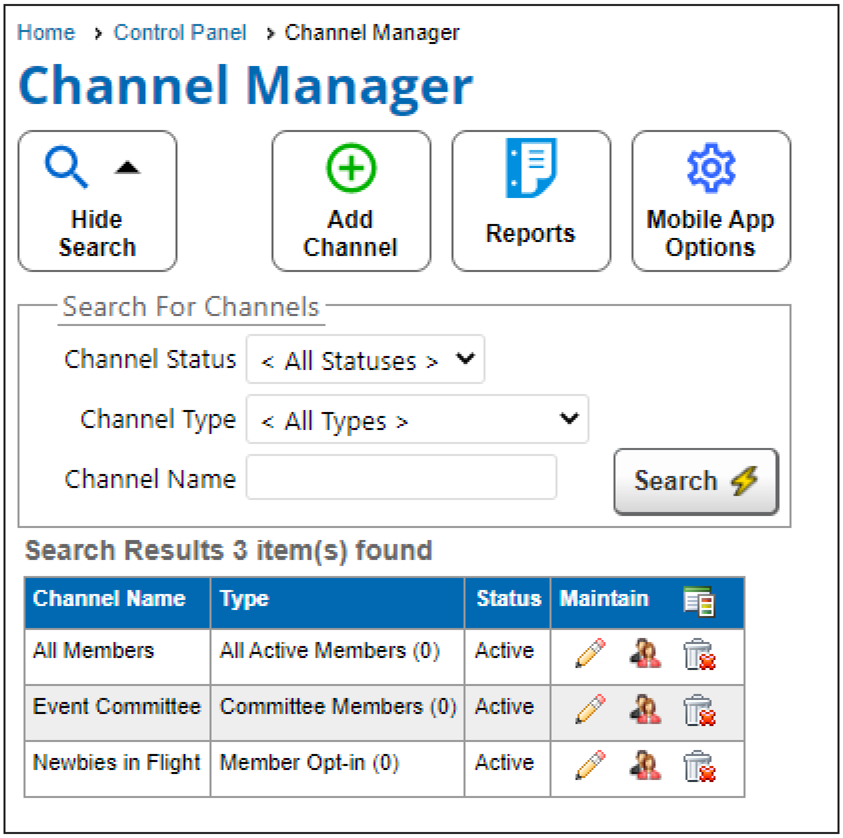
Mobile App Manager

> **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.



Maintain Options

The following options are available in the Maintain column:

Icon	Description
(Edit)	Click the **Edit** icon to edit the existing the properties of a channel.
(Members)	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

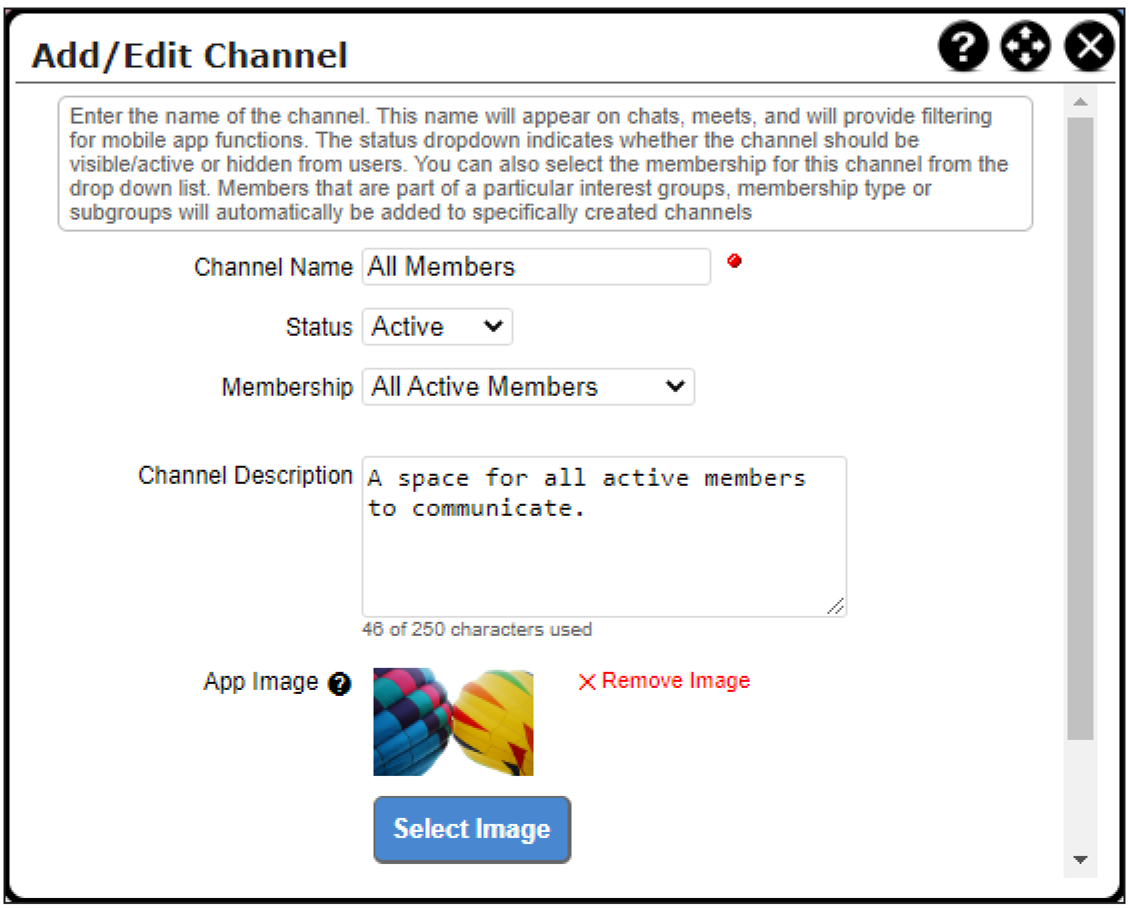
A channel is a dedicated space for specific conversations, similar to a forum. Members can only view or participate in a channel's chat if they are a member of that channel.

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.



> **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.

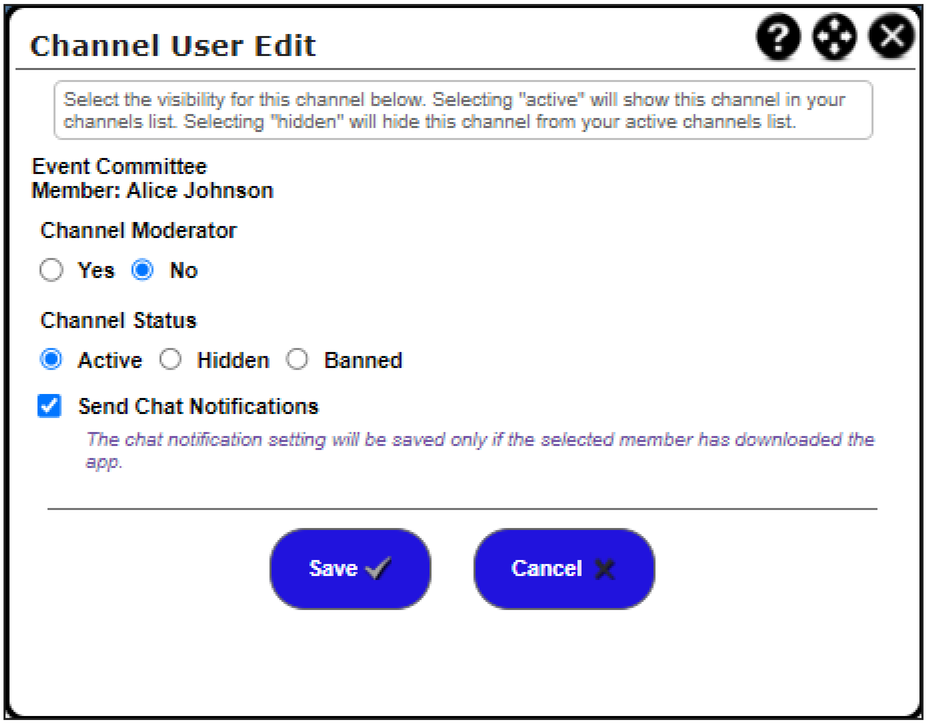
Select the Edit (pencil) icon to manage the member's status within the channel.

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

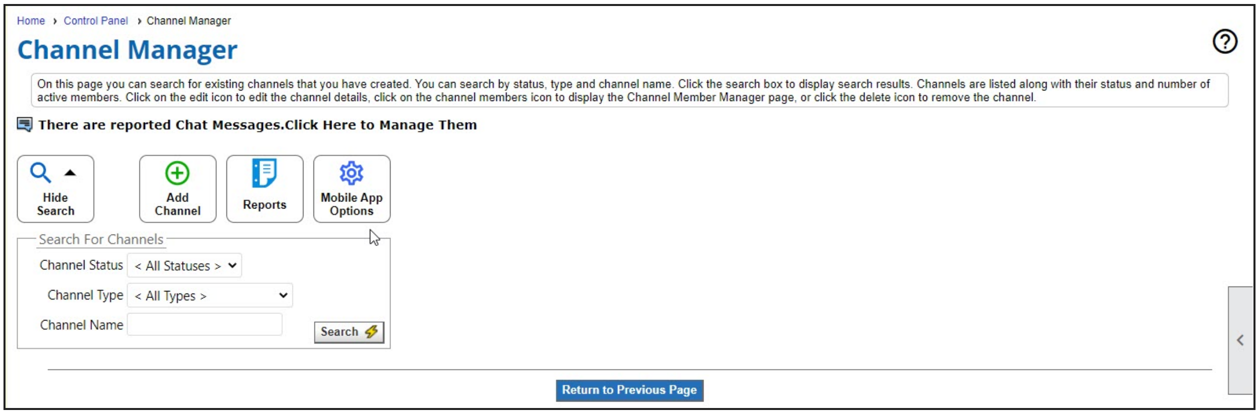
If your mobile app is activated, you can edit the name of the app (which appears underneath the app icon on the device) and the logo image used for the app.

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).

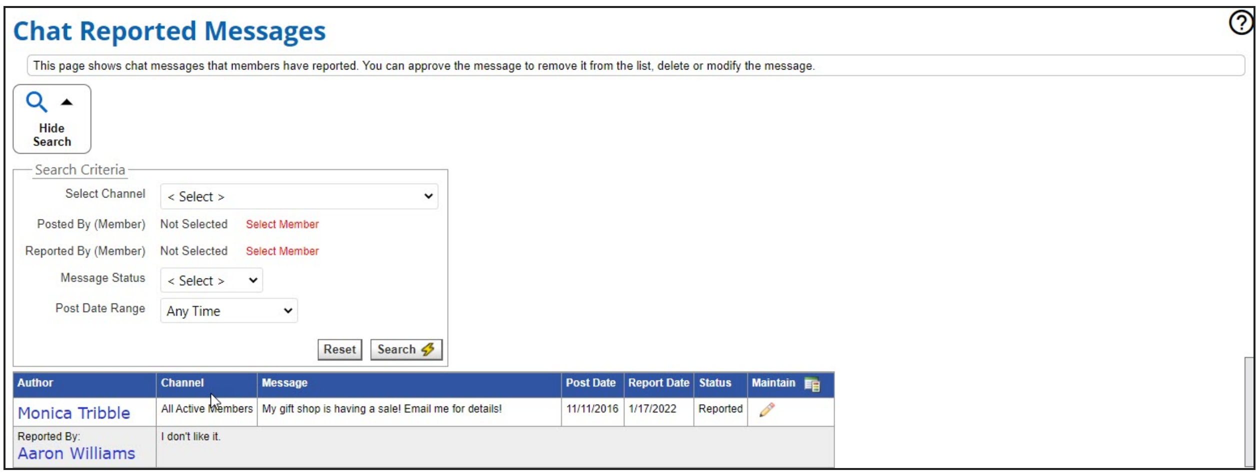
Managing Reported Messages

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.

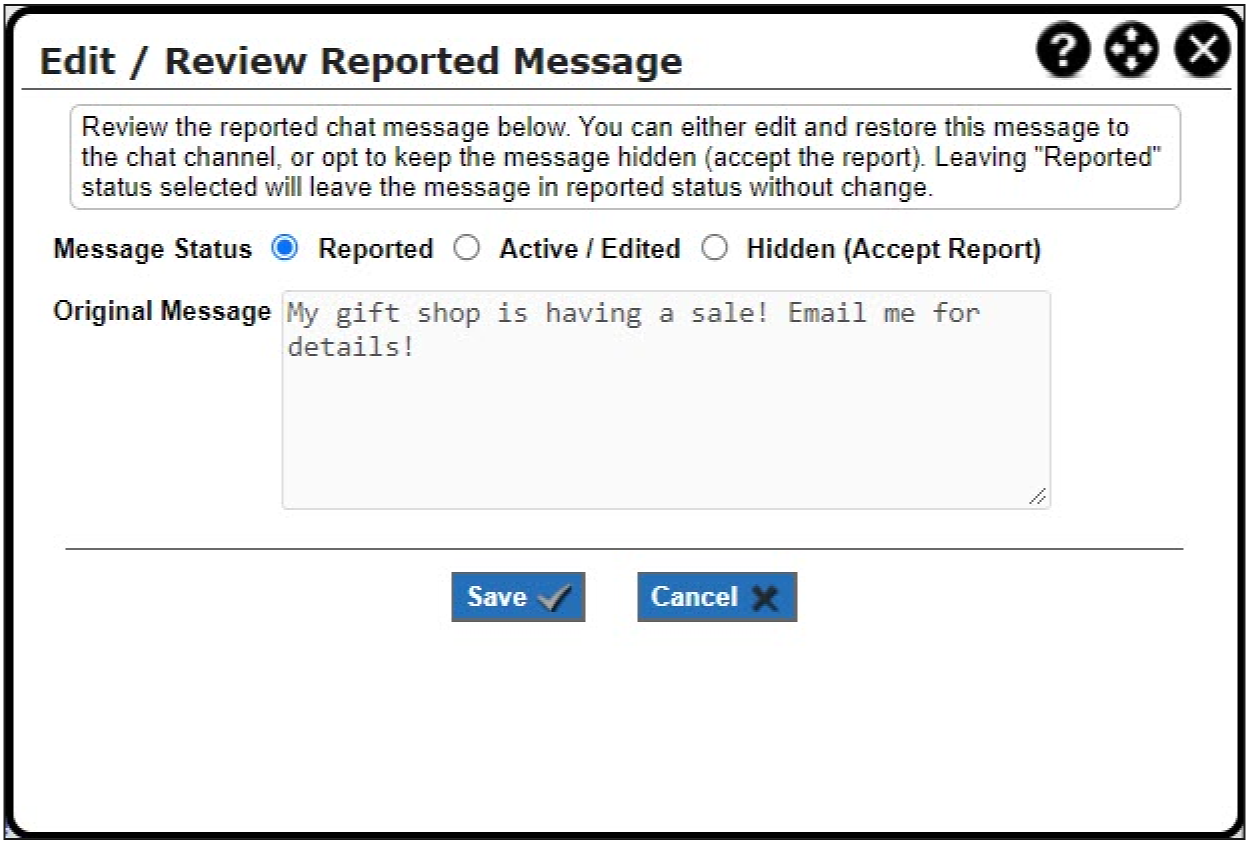


Select the message to navigate to the *Chat Reported Messages* screen.



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.



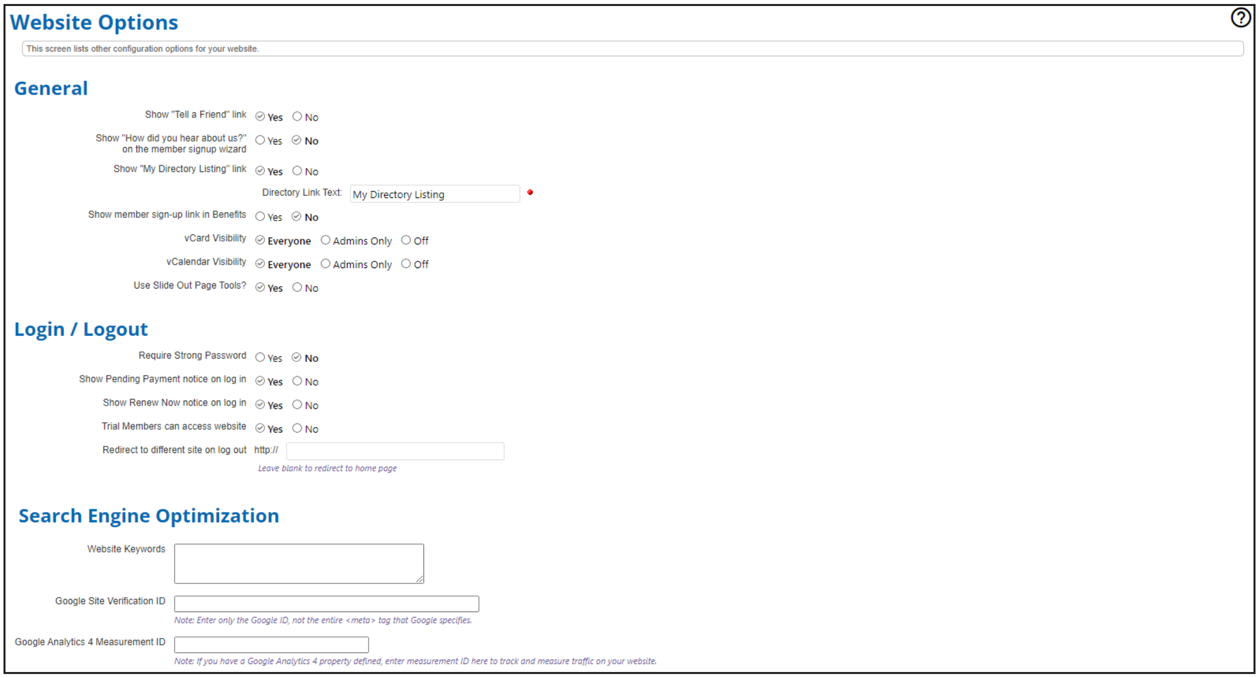
- Reported - This option will be selected by default. Leave this option selected and click Save to leave the message status set to Reported and the message in the list of reported messages without any change.
- Active/Edited - Select this option to edit the message content. When you're satisfied with 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:



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" />	.add-me-link
<club:ControlPanelLink runat="server" id="control_panel_link" cssclass="control-panel-link horizontal" />	.horizontal.control-panel-link or .vertical.control-panel-link
<club:CheckListLink runat="server" id="checklist_link" cssclass="checklist-link horizontal" />	.checklist-link
<layout:user_panel id="user_panel" runat="server" />	#user_panel
<club:SocialPanel id="social_panel" runat="server" />	.social-network-panel
<div id="header_cell" runat="server" />	#header_cell
#layout_wrapper (can surround portions or entire site, used to position "page tools")	#layout_wrapper (.layout-wrapper will also inherit width)
<layout:Menu id="menu" menuOrientation="Horizontal" runat="server" /> or <layout:Menu id="menu" menuOrientation="Vertical" runat="server" />	ul.horizontal.site-menu or ul.vertical.site-menu
<div id="crumb_trail_container" class="crumb-trail-container" runat="server" />	.crumb-trail-container
<div id="content_column"></div>	#content_column (should wrap page content)
<div id="left_column"></div>	#left_column (typically wraps left content boxes)

ASCX Control	Rendered as:
<div id="right_column"></div>	#right_column (typically wraps right content boxes)
<div id="page_content" clientidmode="static" runat="server" />	#page_content
<layout:footer ID="footer" runat="server" /> (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)

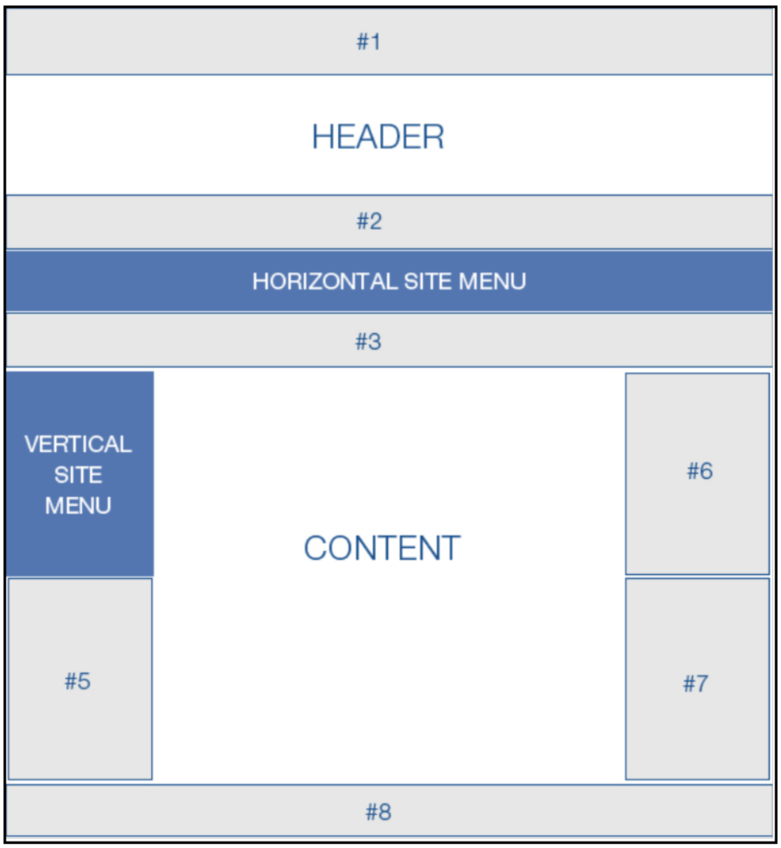
Content boxes contain information that is constant from page to page. They can be used for sponsor listings, upcoming events, etc. They should be placed in various locations within the layout to give the club maximum flexibility:

- 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.

A	B
<club:contentbox id="box_1" boxnumber="1" runat="server" />	.cb-1
<club:contentbox id="box_2" boxnumber="2" runat="server" />	.cb-2
<club:contentbox id="box_3" boxnumber="3" runat="server" />	.cb-3
<club:contentbox id="box_4" boxnumber="4" runat="server" />	.cb-4
<club:contentbox id="box_5" boxnumber="5" runat="server" />	.cb-5
<club:contentbox id="box_6" boxnumber="6" runat="server" />	.cb-6
<club:contentbox id="box_7" boxnumber="7" runat="server" />	.cb-7
<club:contentbox id="box_8" boxnumber="8" runat="server" />	.cb-8

Content Boxes



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">
```



```
        <layout:Menu id="menu" menuOrientation="Horizontal" runat="server" />
      <div class="clear"></div>
    </div>
       <div class="clear"></div>
    </nav>
    <div class="clear"></div>

    <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.

Menus

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>

<ul class='site-menu horizontal'>

<li class='selected-menu-item'><span><a href="">Menu Text</a></span></li>

<li><span><a href=" ">Menu Text</a></span></li>

<li><span><a href=" ">Menu Text</a></span></li>

<li class='sub-parent'><span><span>Menu Text</span></span>

<ul class='sub-menu'>

<li><span><a href=" ">Menu Text</a></span></li>

<li><span><a href=" ">Menu Text</a></span></li>

<li><span><a href=" ">Menu Text</a></span></li>

<li><span><a href='#' target='_blank'>Menu Text</a></span></li>

</ul>

</li>
```


<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_ui.css	Framework/master styles. Default styles for all elements are contained in this 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_color.css	Loaded only if needed, and may contain special colors for a layout.
menu_color.css	Loaded only if needed. Colors chosen from the color palette which are applied to particular menu.
design_color.css	Loaded only if needed. Related to color.css, colors from color.css are applied to specially 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.

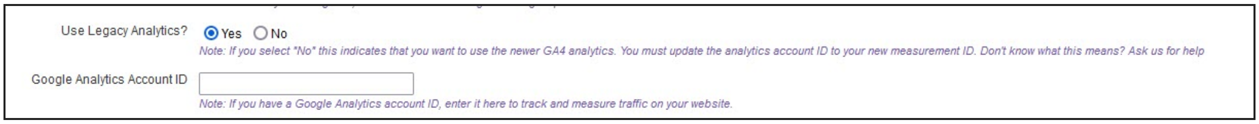
CSS Hierarchy

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.

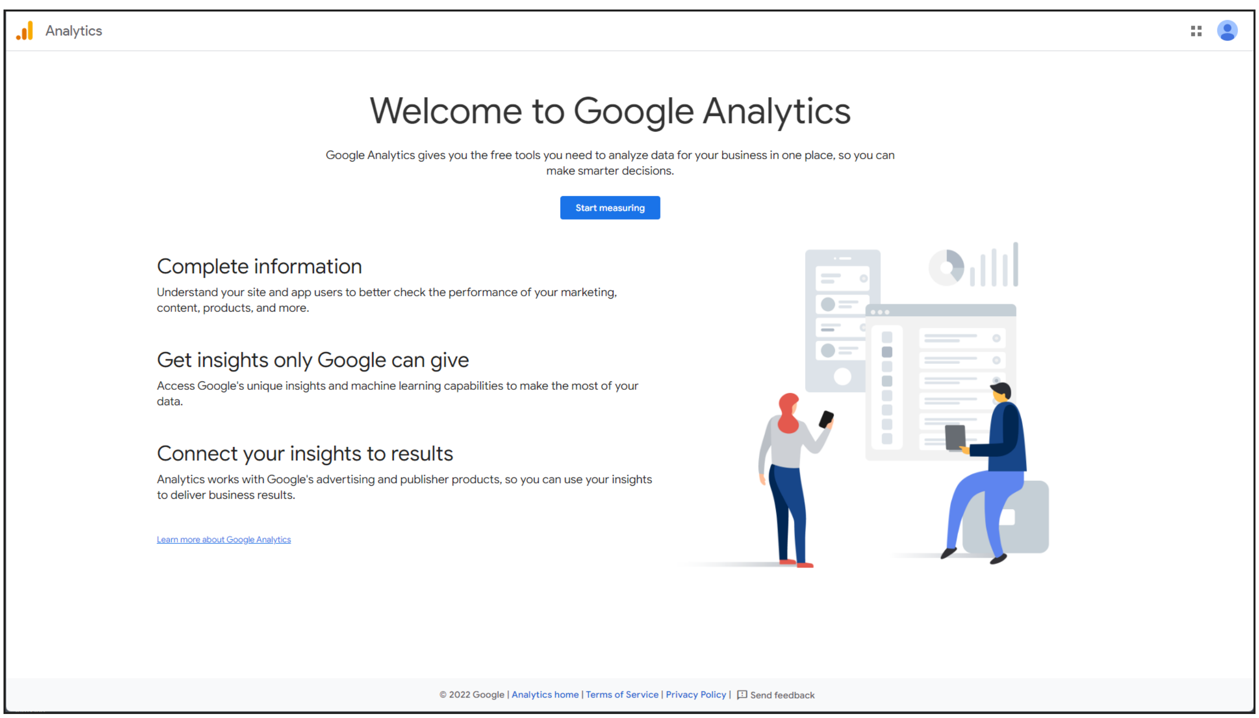


By default, Yes is selected while you are using the legacy version of Google Analytics. To switch to using GA4, select No. The field asking for your Google Analytics Account ID will now ask you for the Google Analytics 4 Property ID.

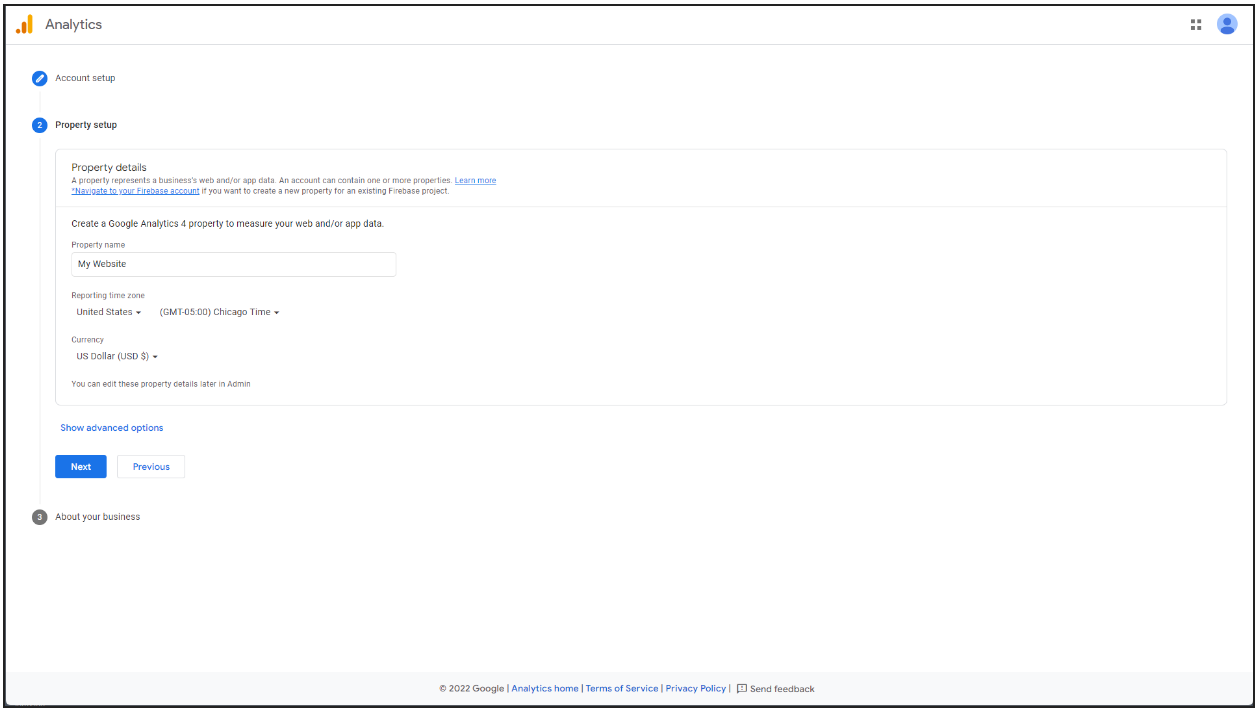
> **Administrators:** For instructions on how to set up dimensions using the legacy version of Google Analytics, see "Legacy Google Analytics (Universal Analytics)" on page 404. Universal Analytics will stop processing data from your website beginning July 1, 2023. To continue processing data, you must 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

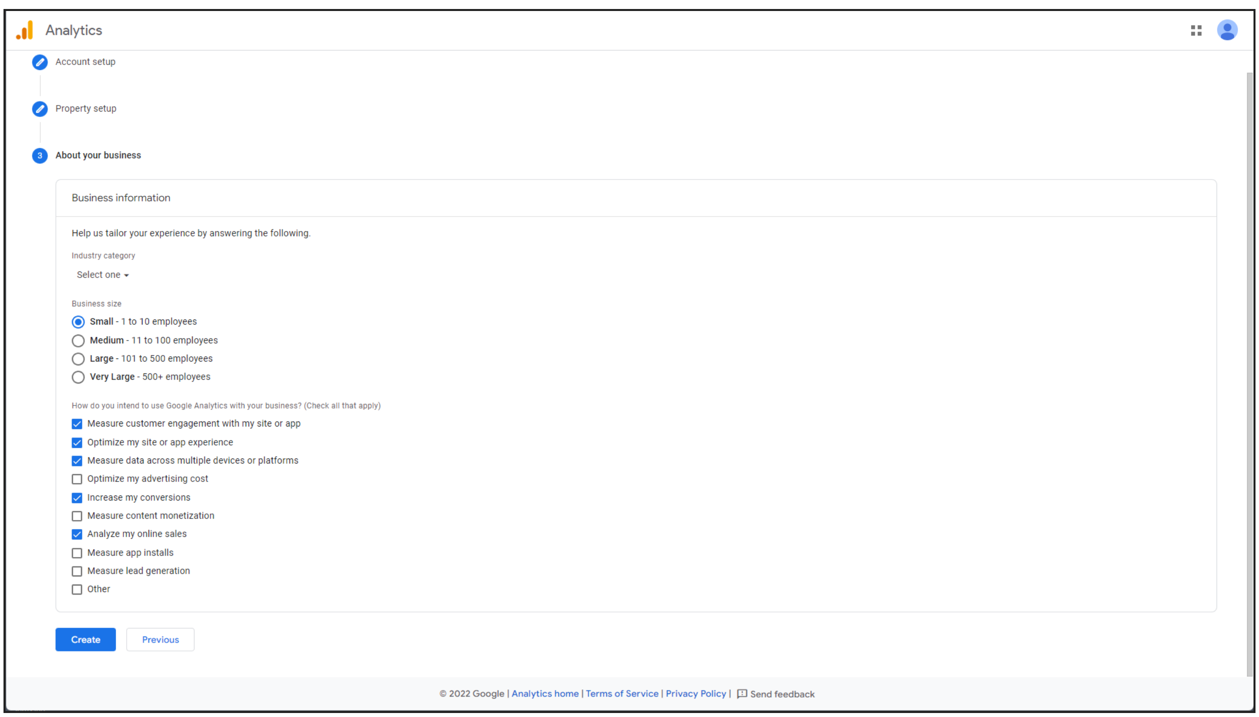
To set up Google Analytics, you'll need a Google account. Once you've signed in to your Google Account, navigate to analytics.google.com



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.

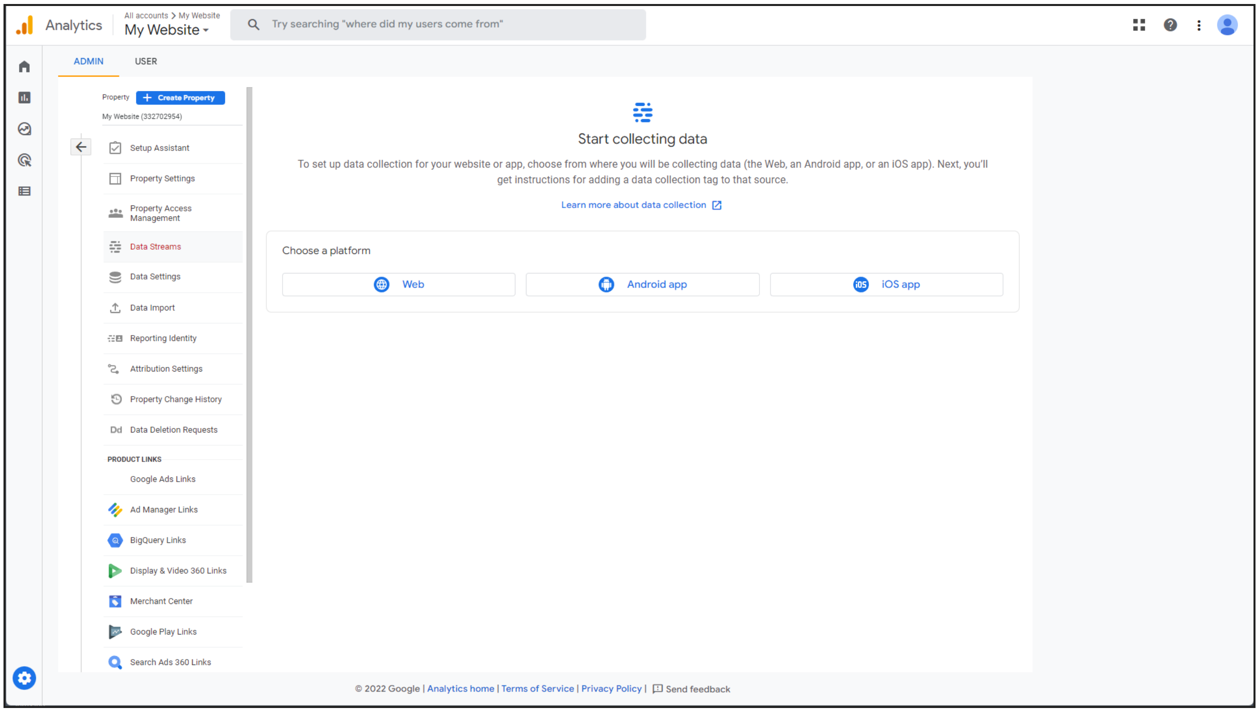


In the next section, add details about your organization, like type and size. Then, choose how you intend to use the data you collect. Identifying your needs helps Google Analytics show you the most relevant data collections on your dashboard and helps them improve their insights and predictions.

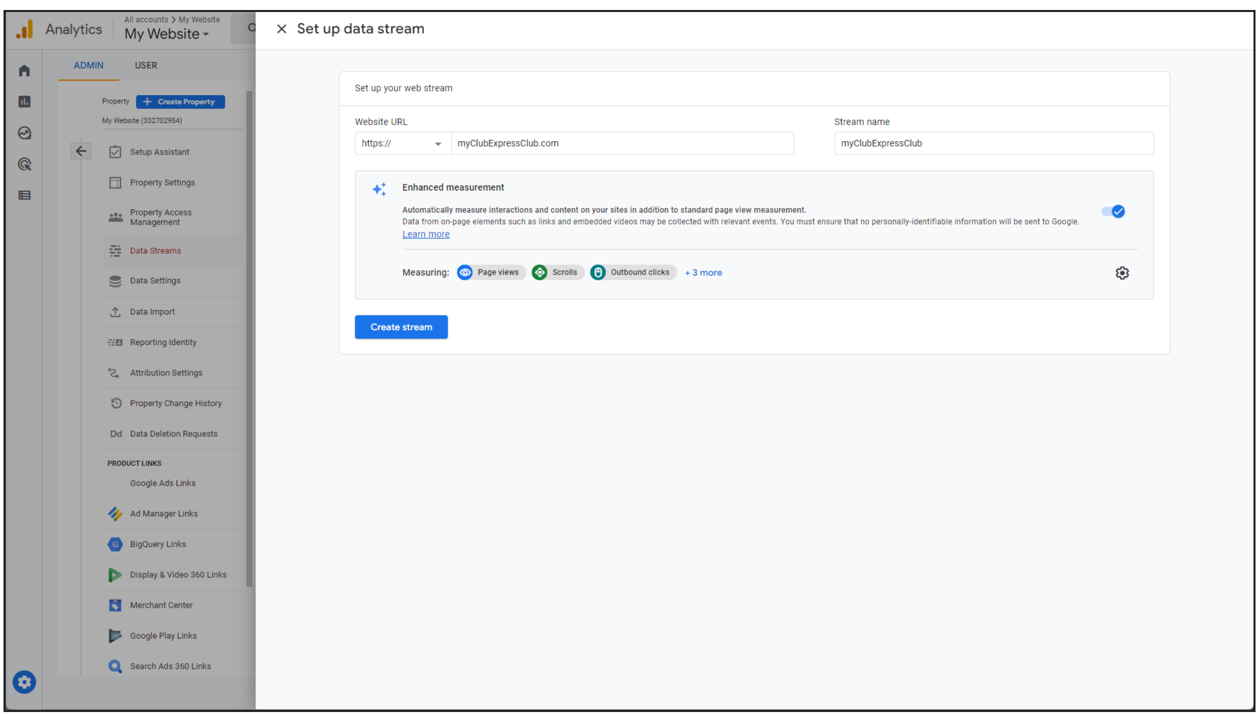


Website

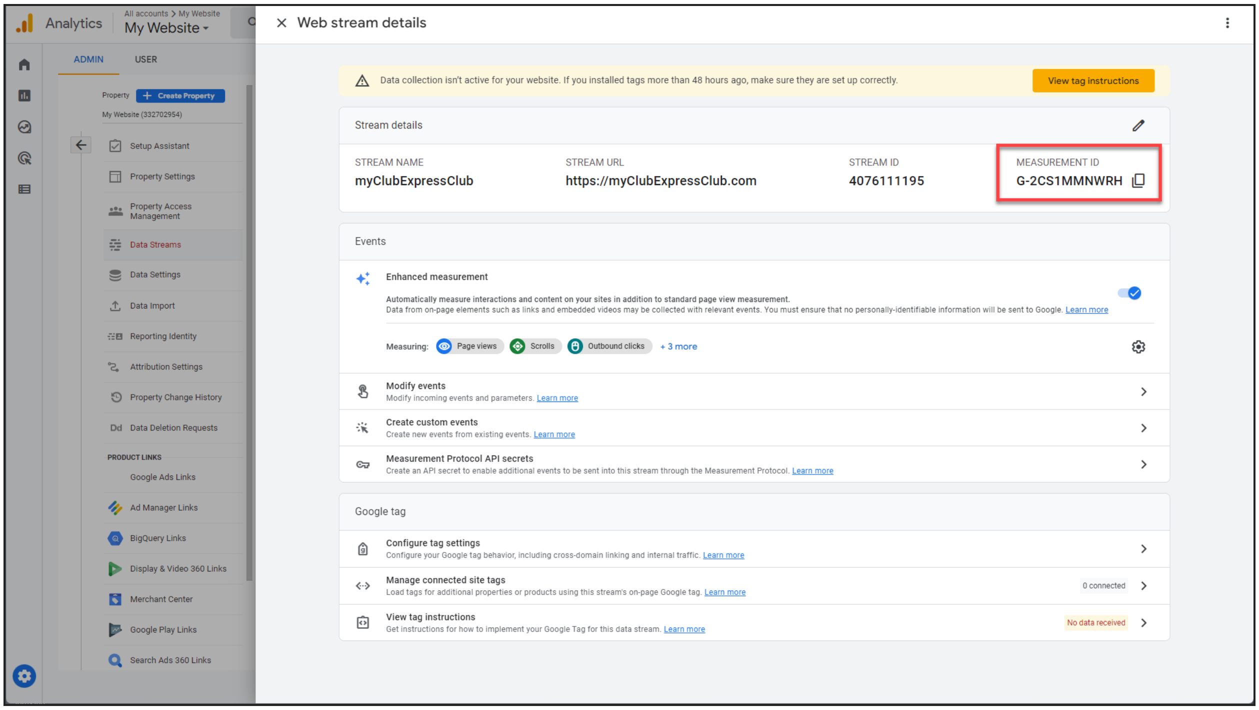
Agree to the terms and conditions, then you'll set up your website as the platform from which you want to collect data.



Next, enter the URL of your website and name the data stream (this can be your organization name).



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.



Setting Up Dimensions

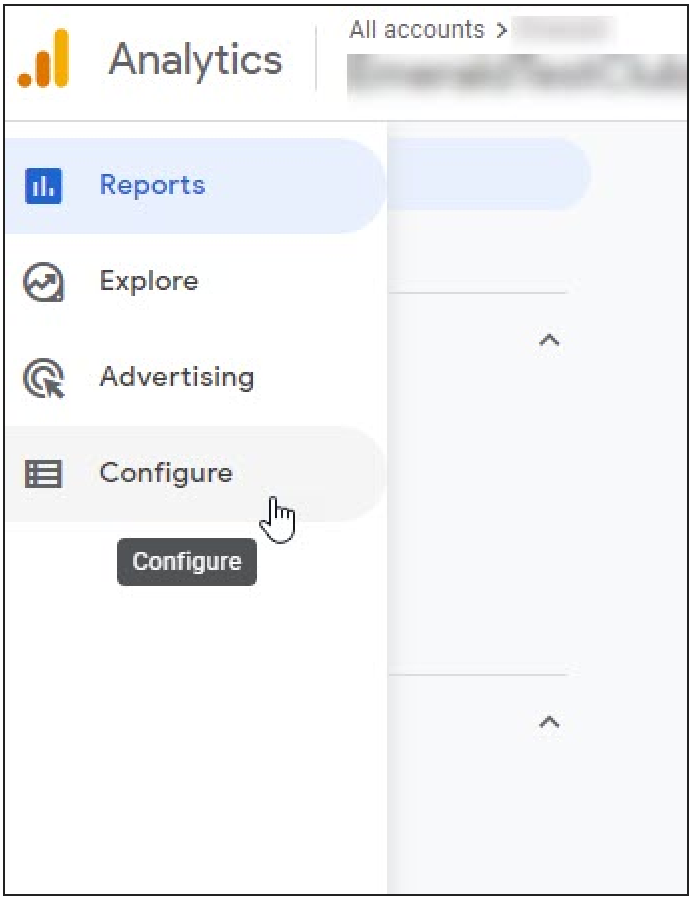
Dimensions are the qualitative data (data that represents a category) you use to organize your metrics (quantitative data, or data which represents an amount).

ClubExpress sends three dimensions:

- ModuleName (dimension1)
- PageName (dimension2)
- DetailName (dimension3)

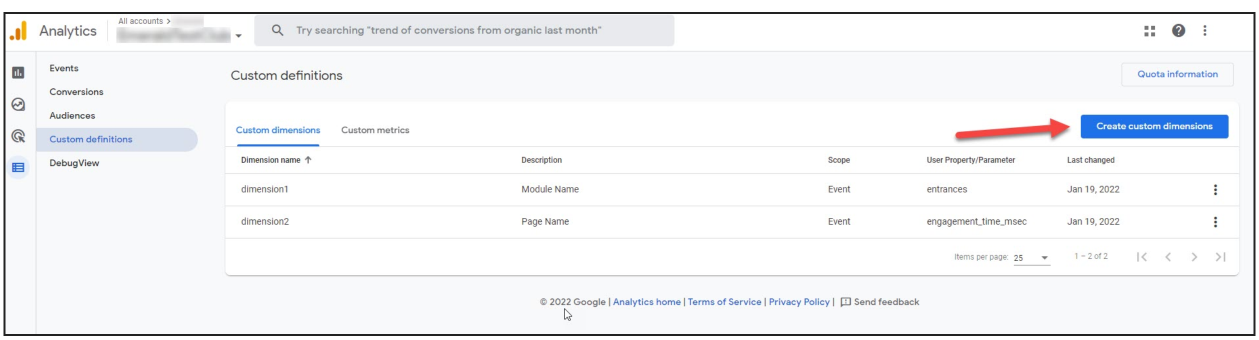
You will need to create custom dimensions and can name them whatever you want, but the name should be somewhat indicative of the dimension data. The order we send them is important and you cannot reorder the dimensions or the way data is received by Google Analytics.

Log into your console at https://analytics.google.com/analytics/web/ and select “**Configure**”, 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.

On the next page, select Custom definitions. On the Custom definitions page, select Create custom dimensions to create a new dimension.



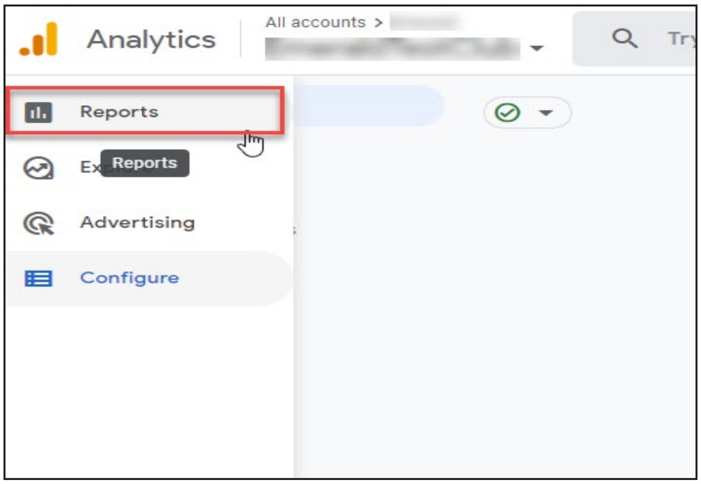
You'll use this screen to create the three (3) custom dimensions required for your ClubExpress website. Enter the following data into the fields:

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

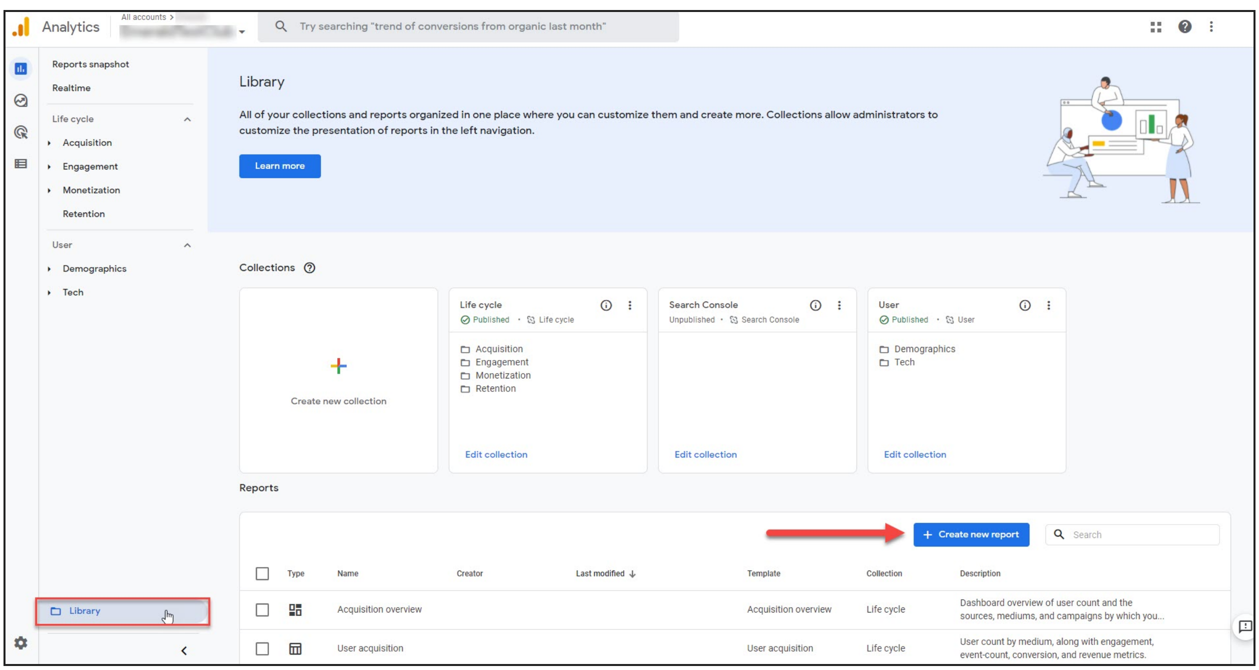
GA Custom Dimension Data

Creating Reports

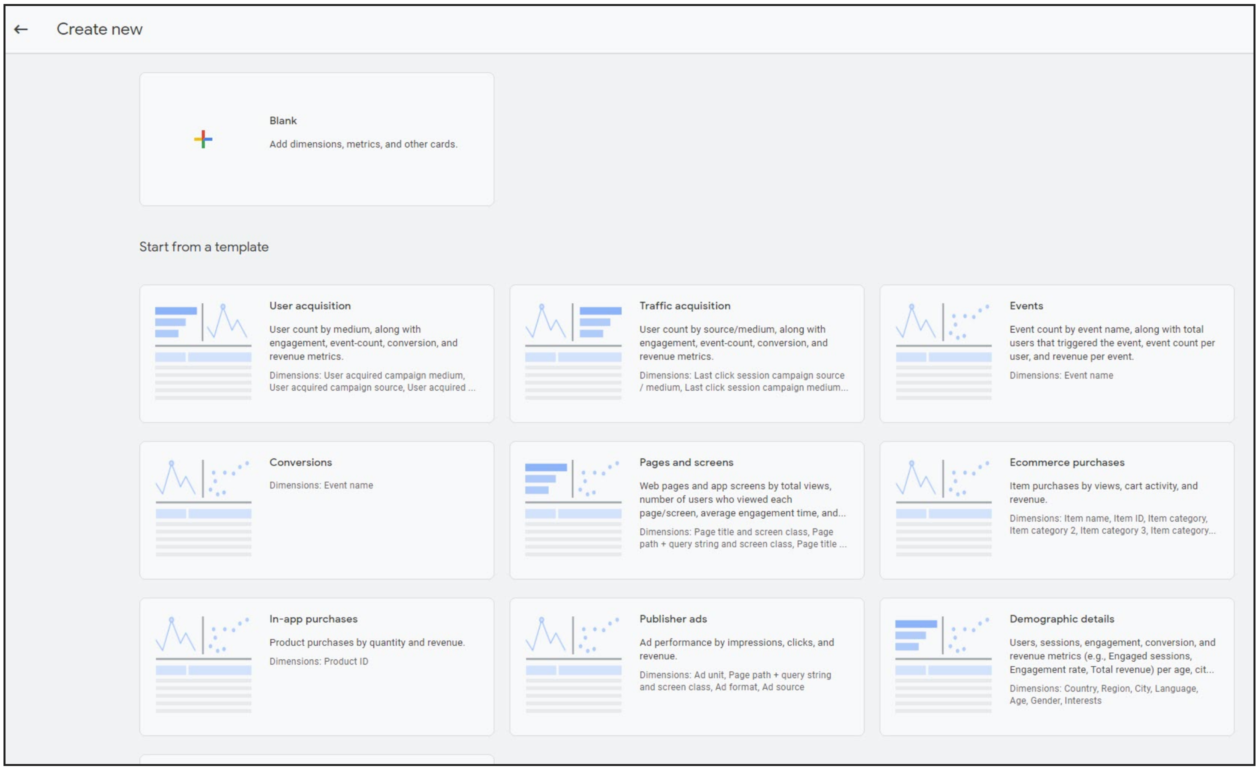
After you have defined your dimensions (and have started collecting statistics), you can then click on the **Reports** icon on the left-hand menu to create a new custom report using the dimensions that you have defined.



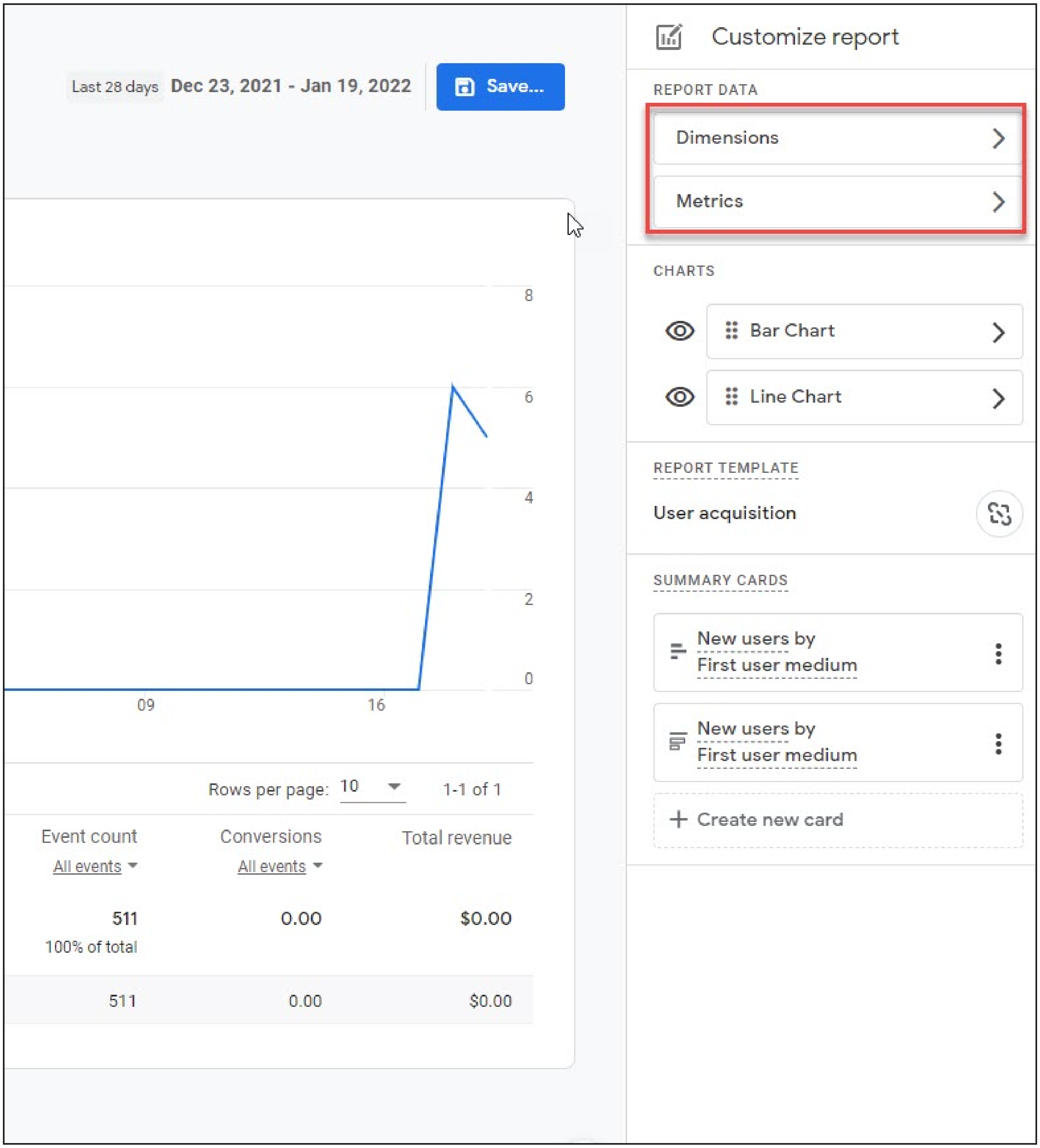
Select Library, then select the **+ Create New Report** button, then **Create Detail Report** to begin building a new report.



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:



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:

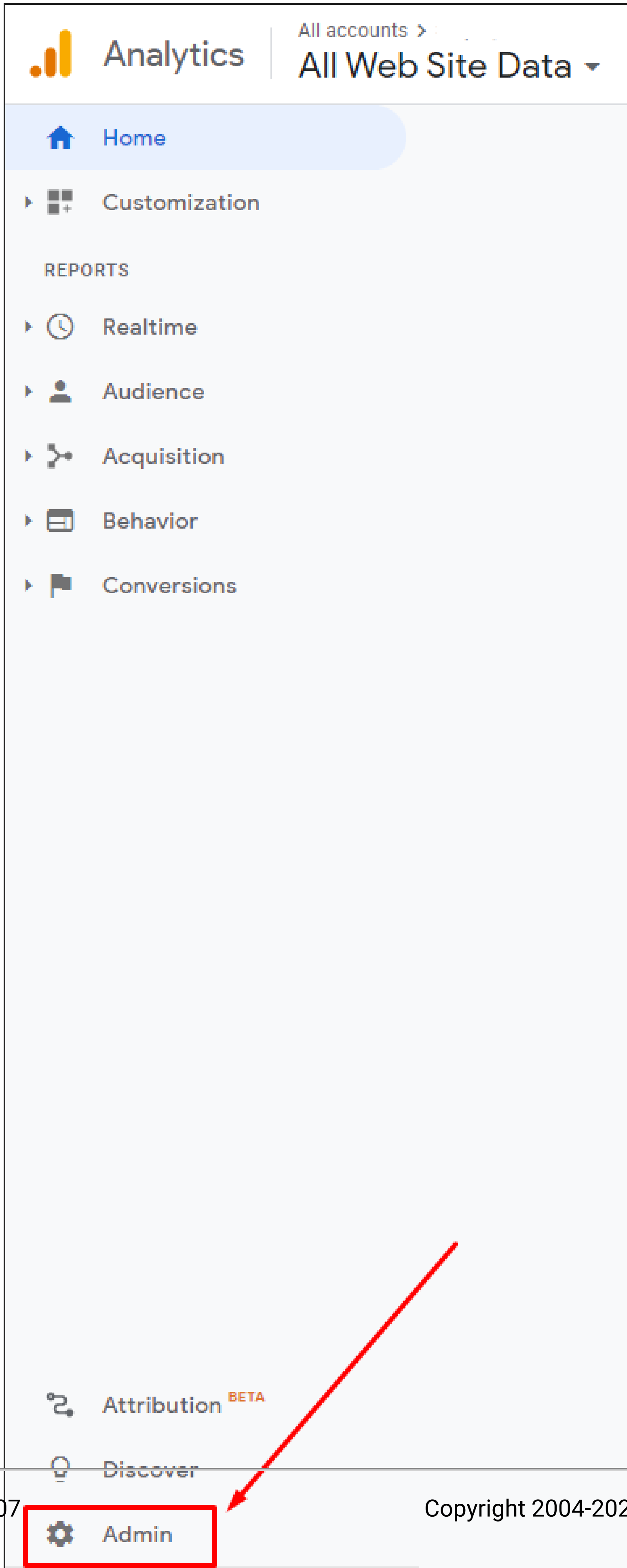
- ModuleName (dimension1)
- PageName (dimension2)
- DetailName (dimension3)

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

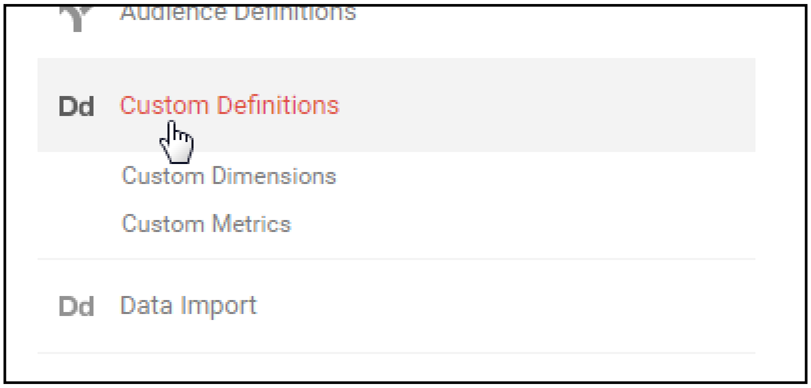
Log into your console at https://analytics.google.com/analytics/web/ and select "**Admin**", the last option on the left-hand menu.

Website


Analytics
All accounts >
All Web Site Data
Home
Customization
REPORTS
Realtime
Audience
Acquisition
Behavior
Conversions
Attribution BETA
Discover
Admin

> **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.

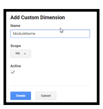
In the center column of the Admin page labeled “**Property**” scroll down to “**Custom Definitions**” and click on the option to expand the section. Now click on “**Custom Dimensions**”



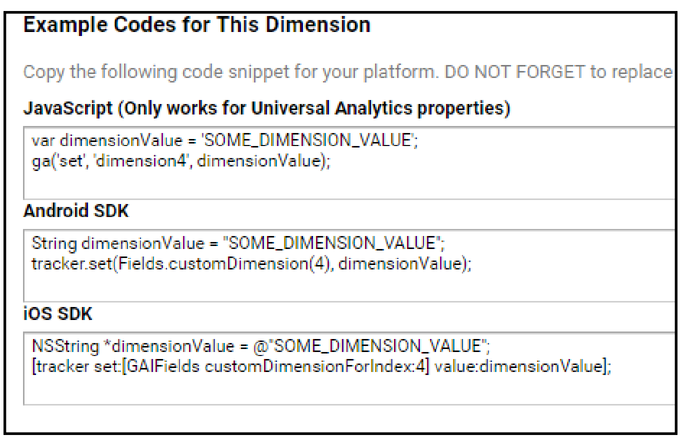
Create Custom Dimension

Click on the red **+ New Custom Dimension** button to begin creating a new dimension.

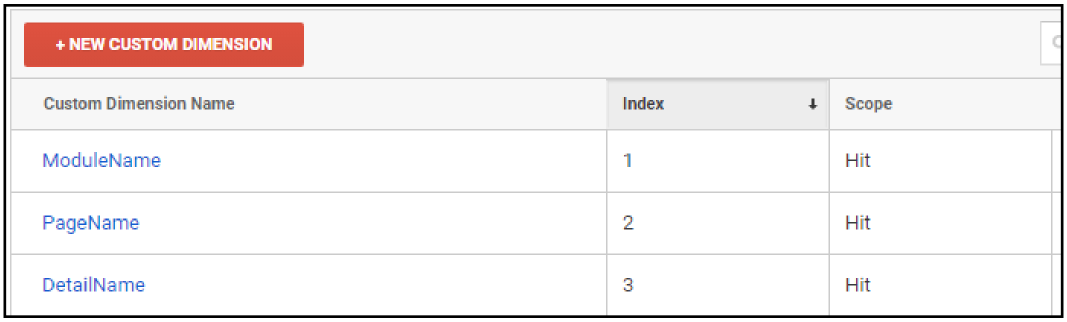
On the following screen create a custom dimension named ModuleName. Repeat again for PageName and DetailName. Again, you may name these whatever you want, but the order which we send them is ModuleName, PageName and DetailName and your names should be recognizable.



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.



After you have completed creating your 3 custom dimensions, you should have a table that resembles the following:

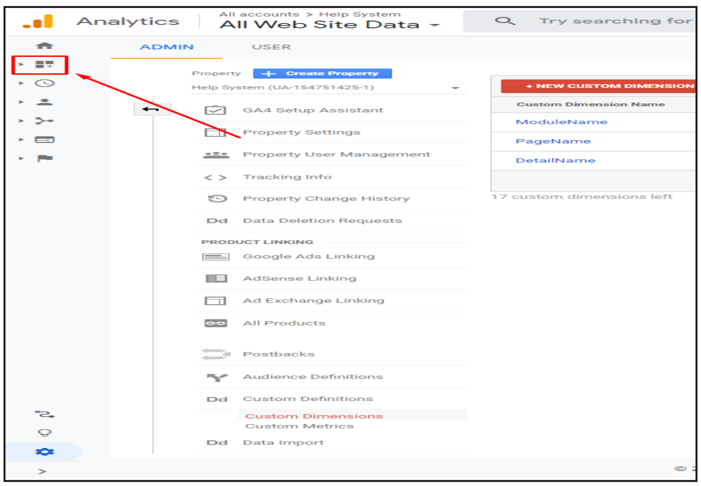


+ NEW CUSTOM DIMENSION

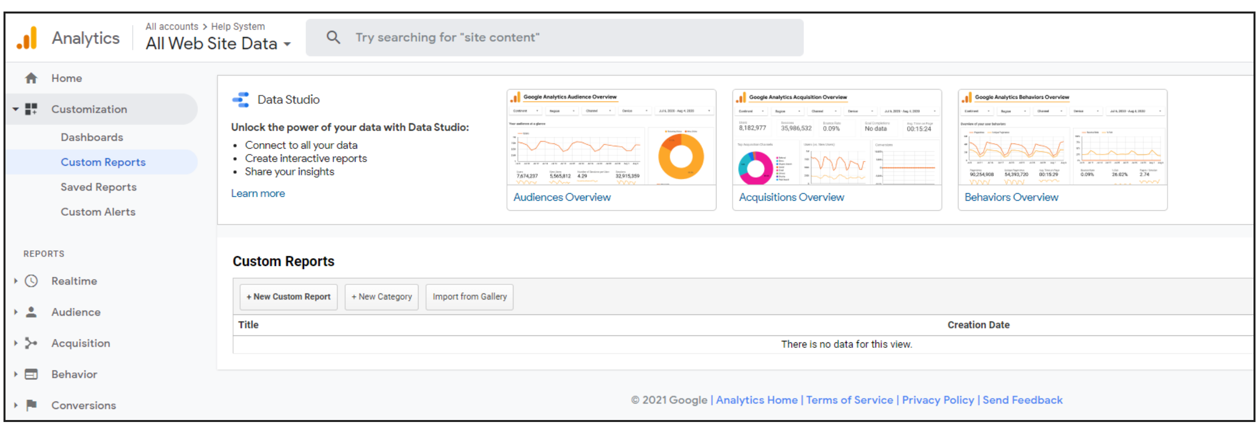
Custom Dimension Name	Index	Scope
ModuleName	1	Hit
PageName	2	Hit
DetailName	3	Hit

Using Custom Dimensions

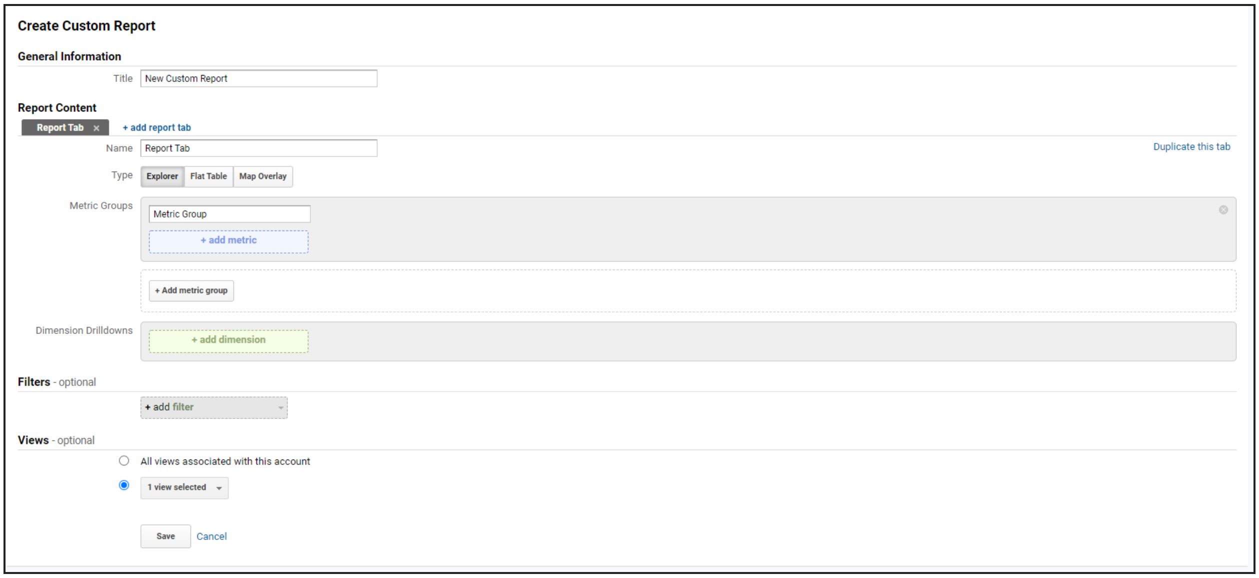
After you have defined your dimensions (and have started collecting statistics), you can then click on the **Customization** icon on the left-hand menu to create a new custom report using the dimensions that you have defined.



Select Custom Reports to view the Custom Reports Screen, then select the **+ New Custom Report** button to begin building a new report.



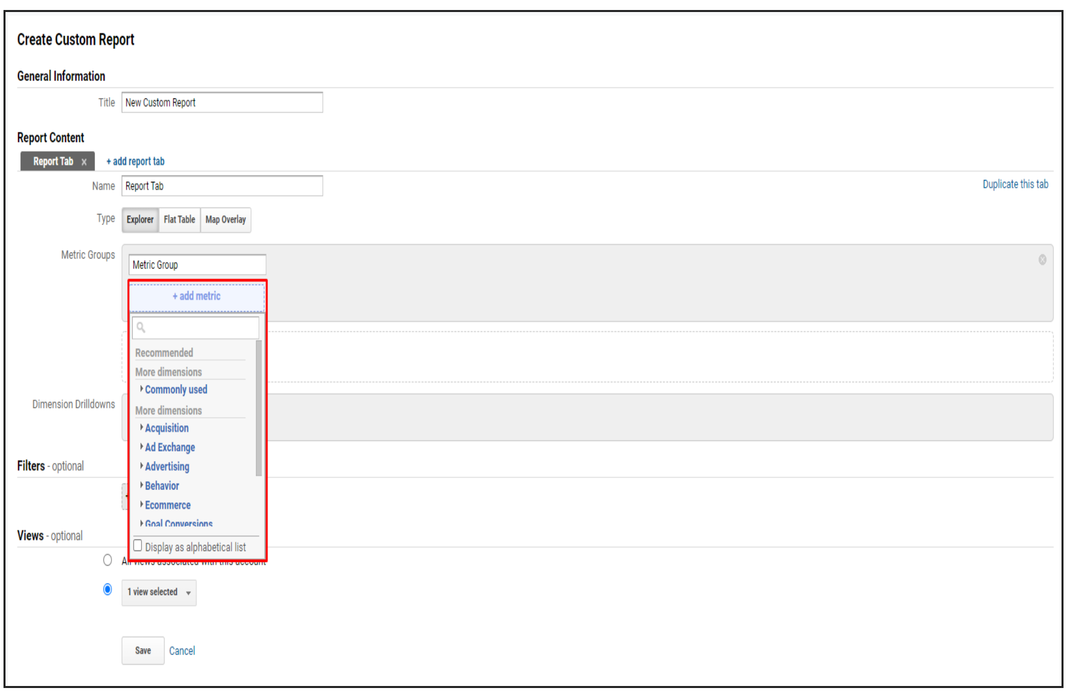
Give your report a title, and name the current tab.



Metric Groups

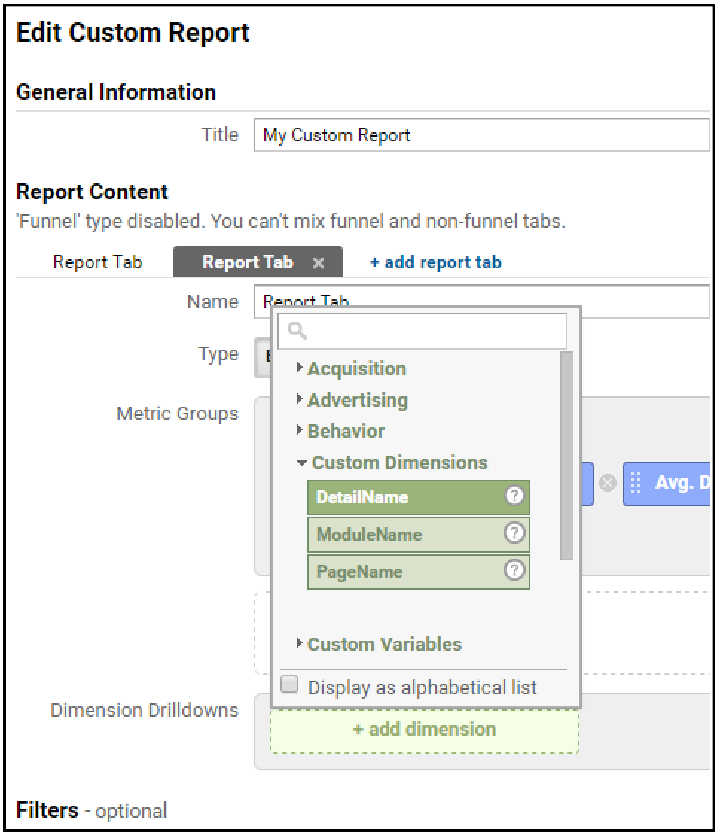
Metrics are quantitative measurements. The tables in most analytic reports organize dimension values into rows, and metrics into columns. There are many advanced ways to format your report, such as adding secondary dimensions to the dimensions which ClubExpress supplies. You may wish to consult the Google 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.



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.



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.

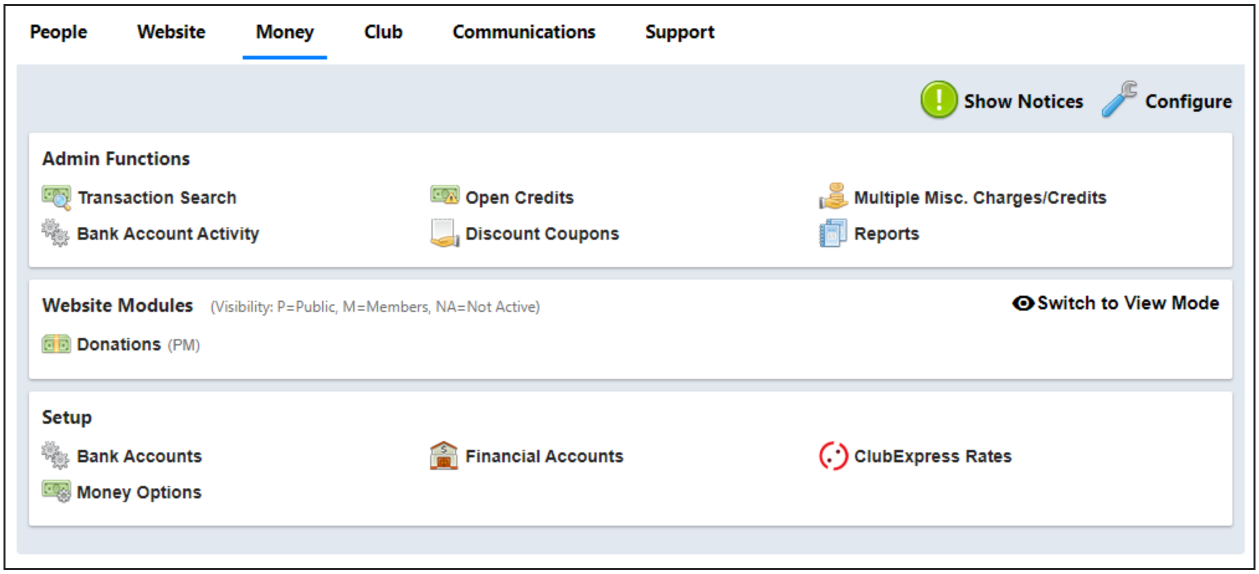
Exports

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 Referrals	View and print referrals sent by member, who recommended the most people and their success rate.

Website Tab Reports

Money



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.

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 "QuickBooks® 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

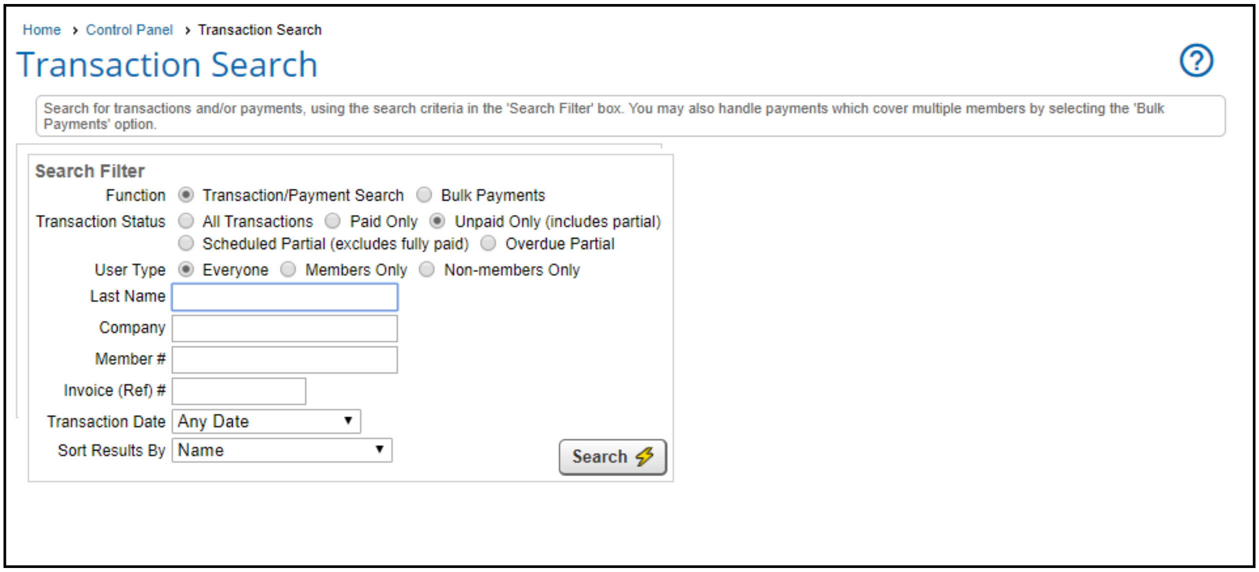
- Learn about chargebacks and how they affect your club; see "Chargeback" on page 494
- Learn more about the reports available; see "Reports/Exports" on page 495

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:



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.

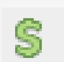
> **Example:** The above screen show shows unpaid transactions from members only and entered this year. The results can be sorted in different ways using the last option.

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

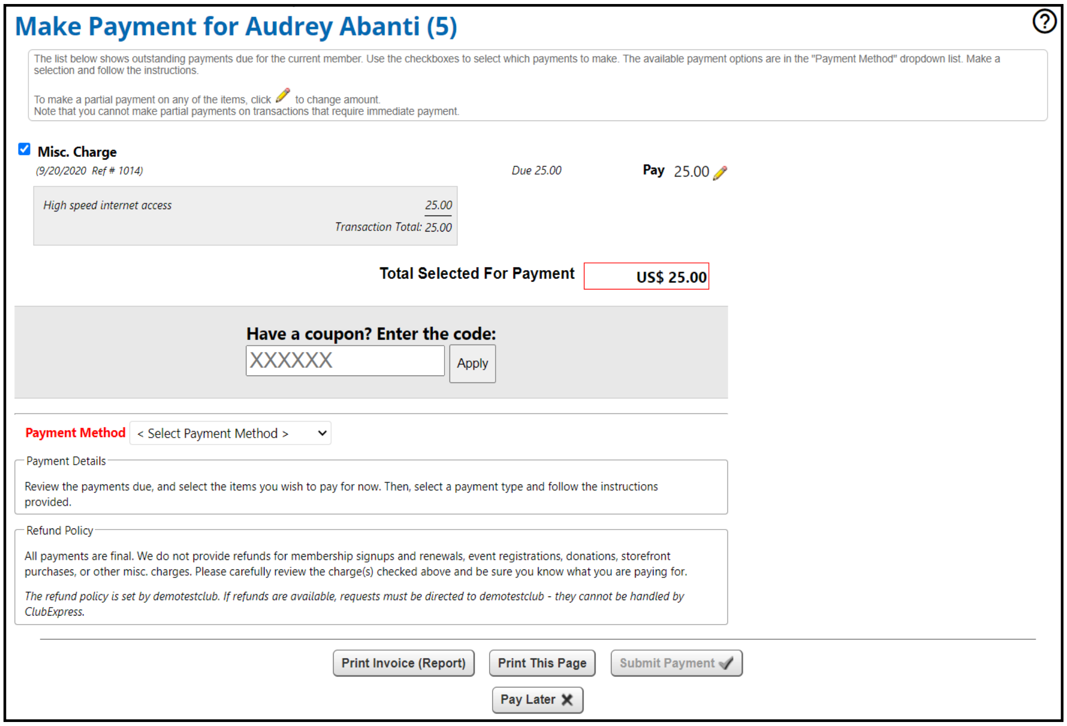
The following options are available in the Maintain column:

Icon	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:



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!

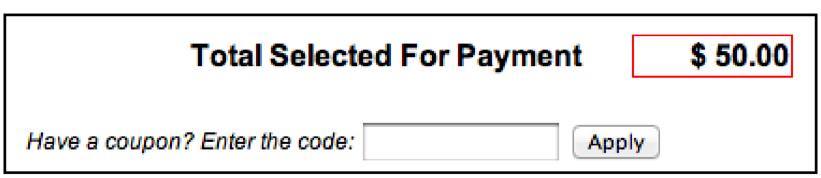
To complete the transaction, click the **Done** or **Submit Payment** button, which will appear once the processing method has been selected.

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:



Once the code has been entered, the screen changes as follows:

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.

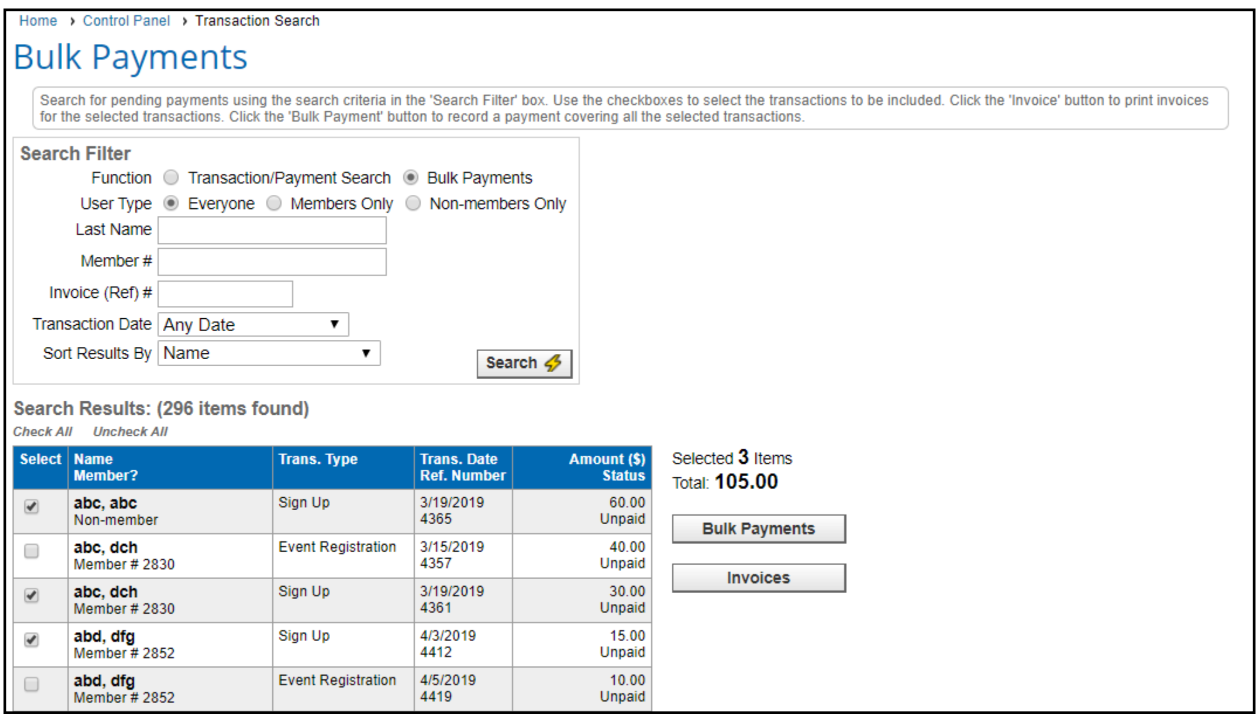
Note however that your club or association may have chosen to disable checks or credit cards, so some of these options may not be present.

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.

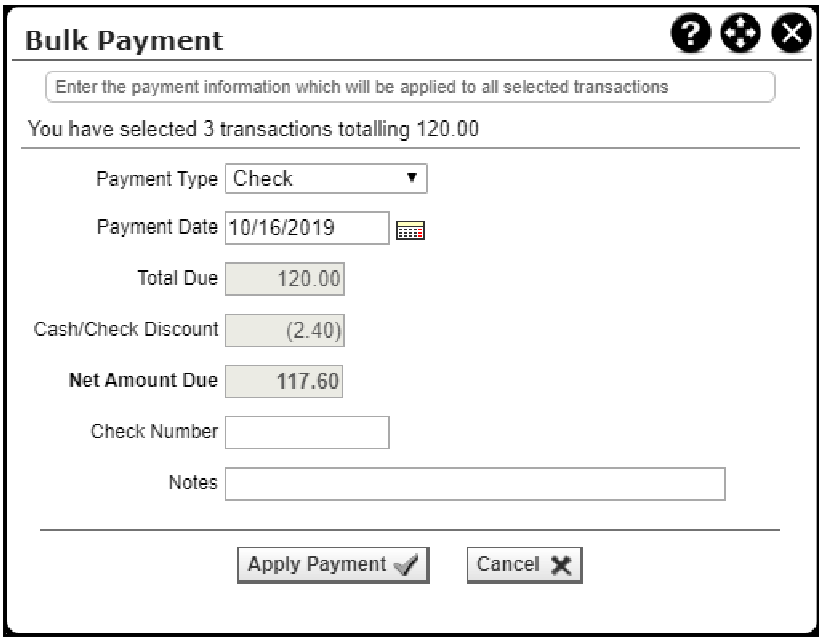
Bulk Payments

When the **Bulk Payments** radio button is selected, the search changes as follows:



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:



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.

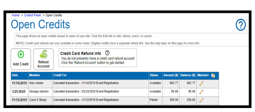
Open Credits

Control Panel > Money > Admin Functions

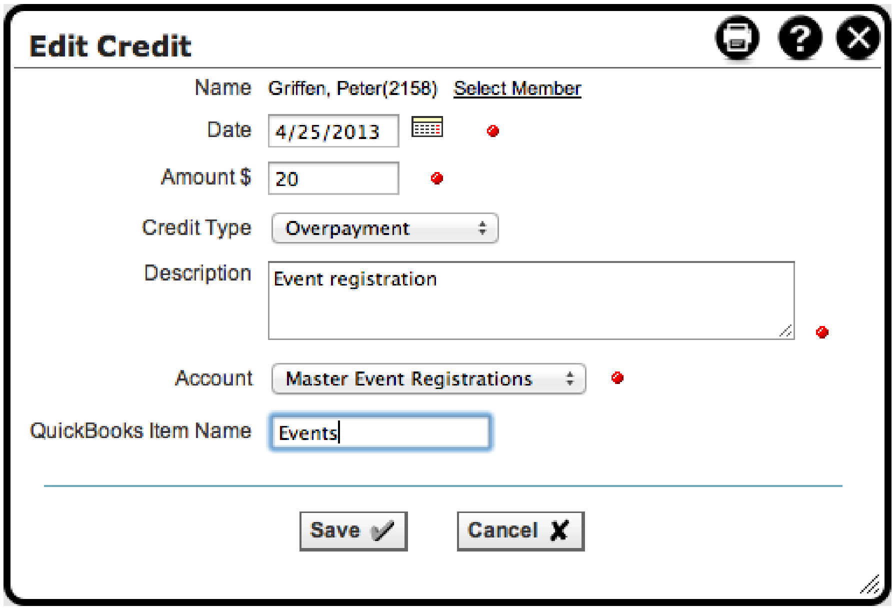
When you select this option, you will see a screen similar to the following, with some variations depending on whether or not your organization is configured to issue refunds to a member or non-member credit card.

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.

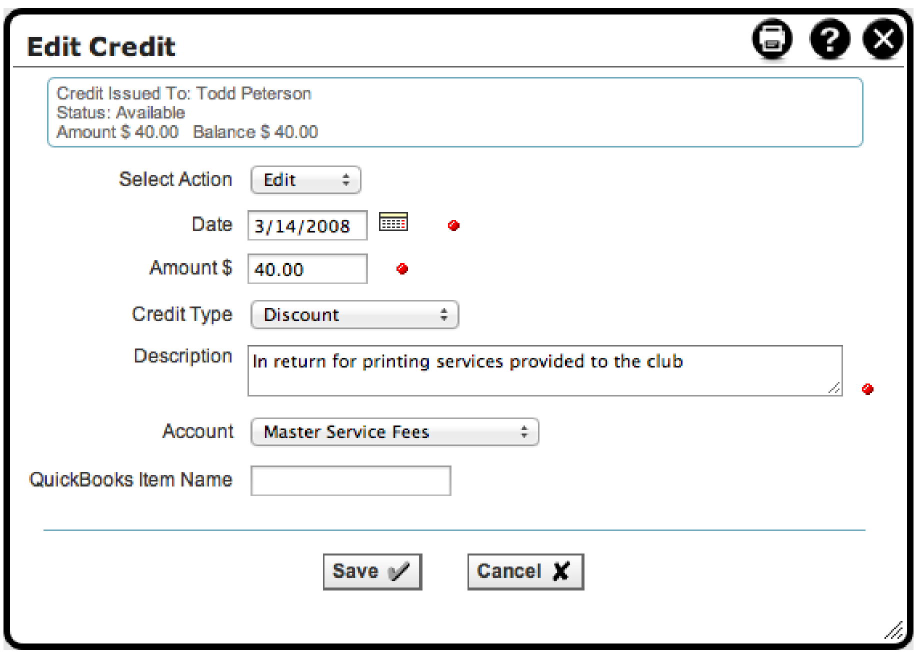


This screen shows open credits, including the date, member, description, status and amount. You can add a credit or edit an existing open credit. Click the **Add Credit** button to see the following screen.



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:



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

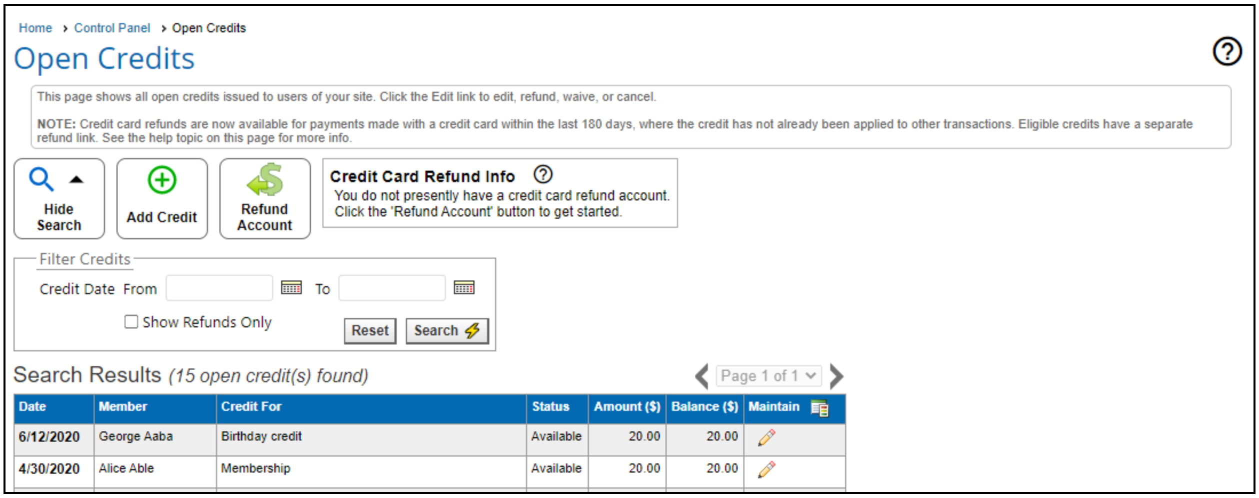
> **Alert:** (Jan 2023) **To customers using the built-in ClubExpress Merchant Account**
> As part of our change to a new merchant processor, the credit card refund process is temporarily changing, as each processor requires its own refund account. If you have switched to the new merchant account and 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.

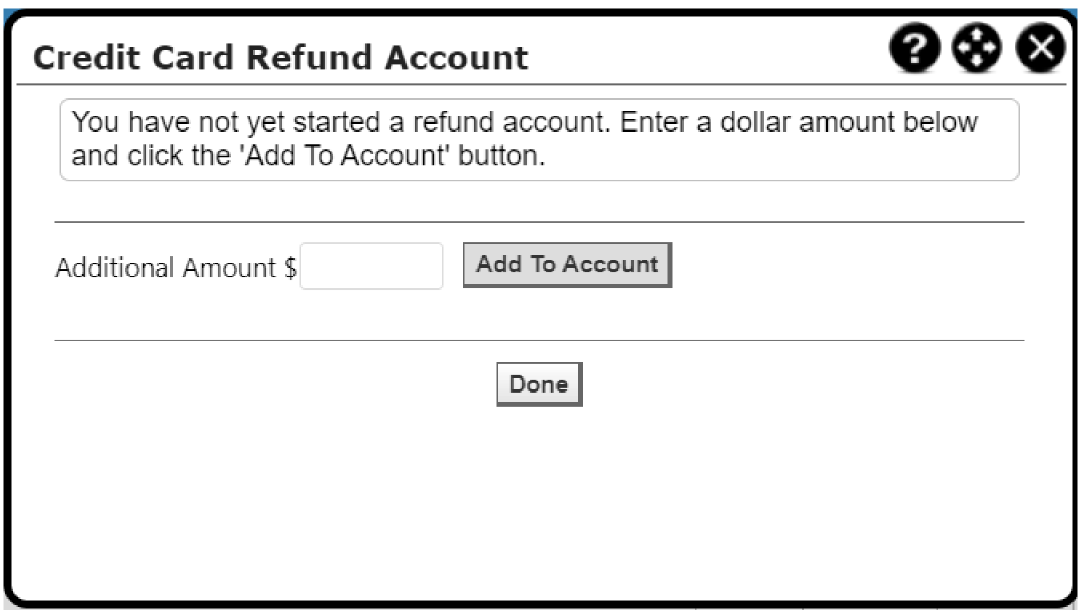
If you are using the ClubExpress merchant account, in order to provide refunds you must have a separate account set up with ClubExpress (Refund Account) which is used only to hold funds to provide refunds to site users. Once this account has been set up, all credit card refunds are processed by ClubExpress 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:



To request a refund account, click the Refund Account button.



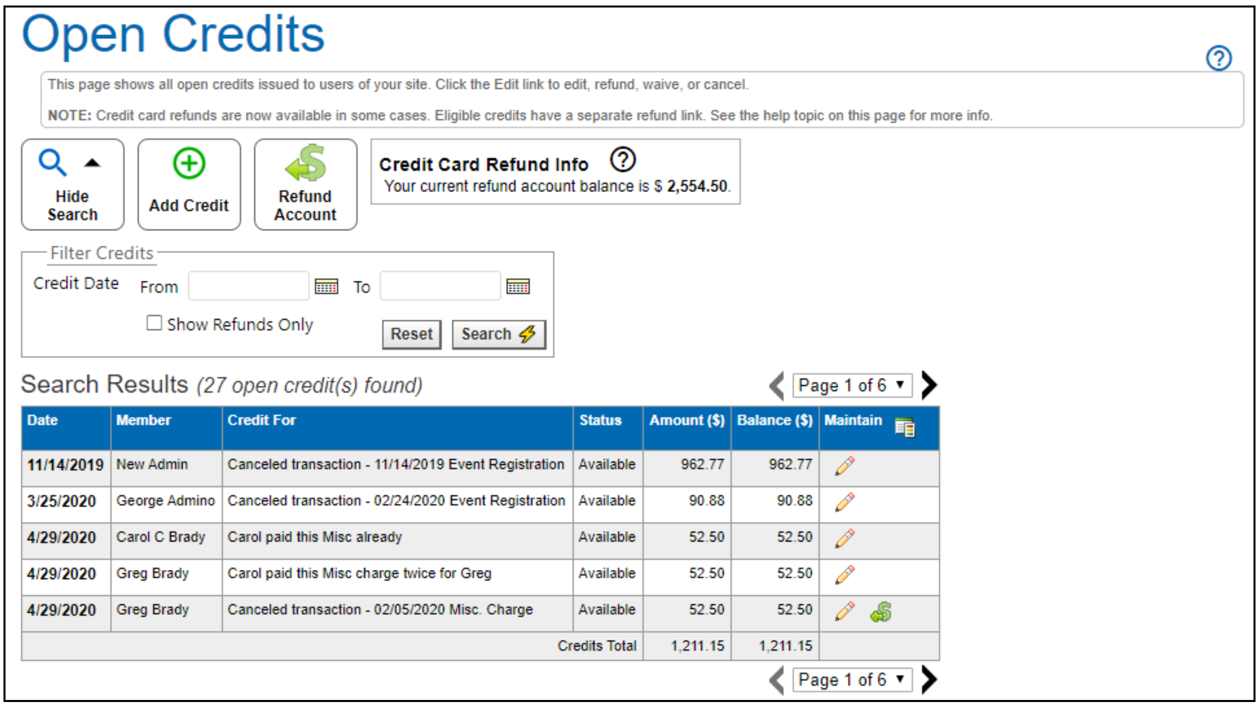
To get started, you must request to add funds to your Refund Account. You may enter any amount between 10 and 5,000. Once you click "Add", the account status will list as Pending. After the request is received, we will perform an ACH request to retrieve the funds from your bank account. **This process 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.

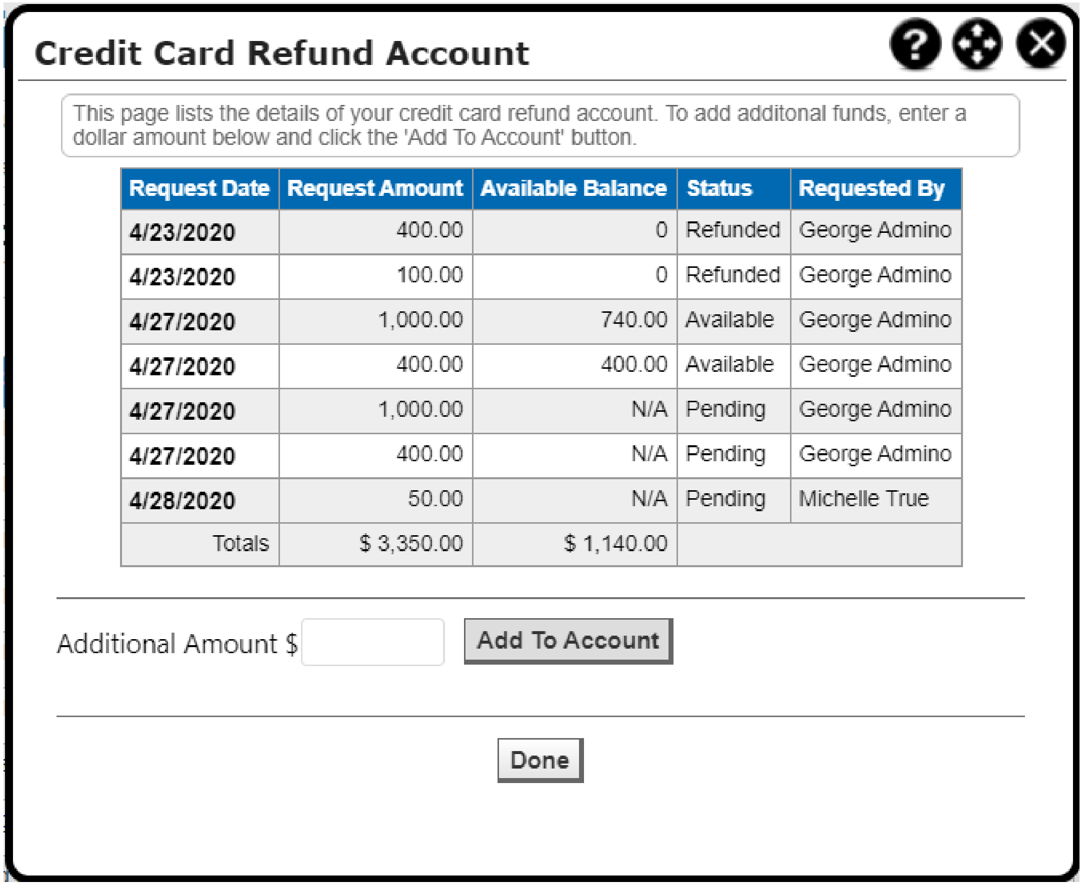
> **Example:** You may wish to add $100 to process five (5) separate refunds of $20 each. You would **not** add $20 five separate times to your account.

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.



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.



Credit Card Refund Account

This page lists the details of your credit card refund account. To add additonal funds, enter a dollar amount below and click the 'Add To Account' button.

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		

Additional Amount $ 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.

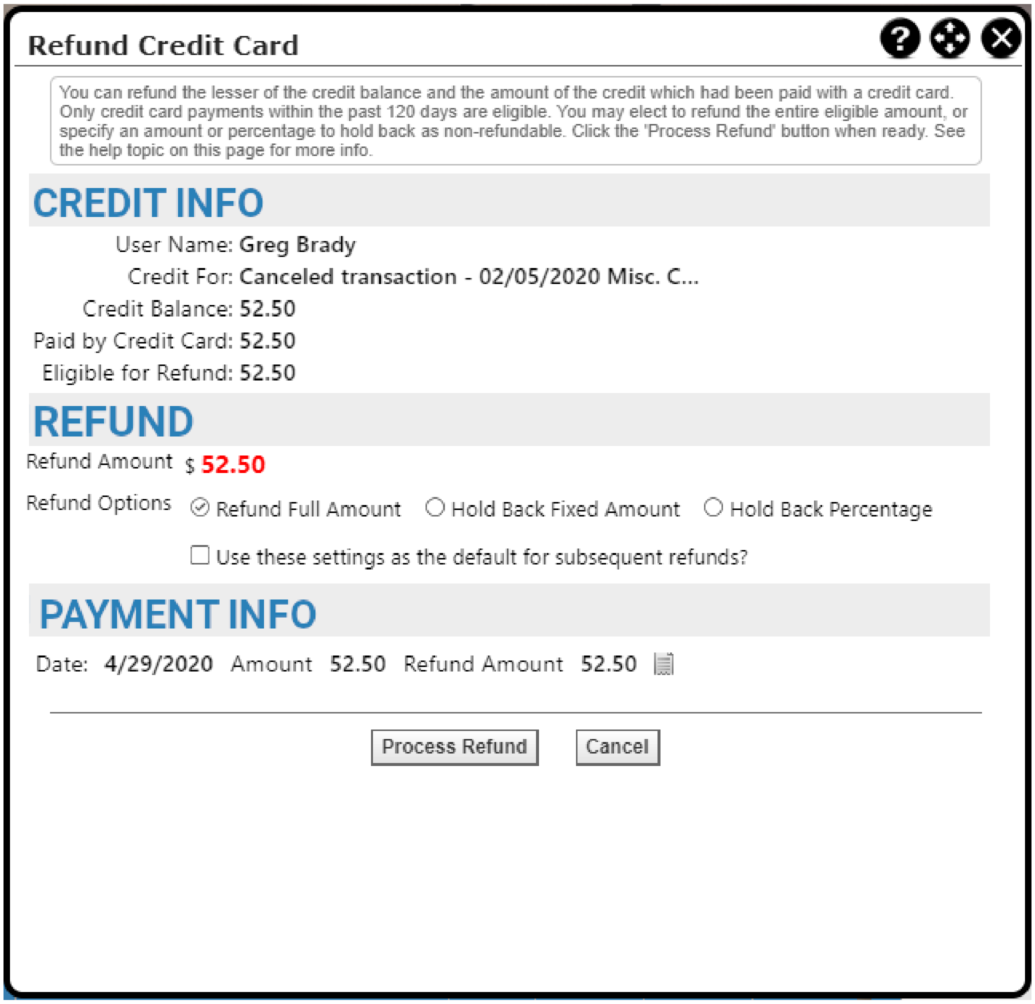
> **Example:** If the user makes a $100 payment to cover a $60 event registration and a $40 donation and the event is canceled, only $60 of the original $100 payment is refunded.

- 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:



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.

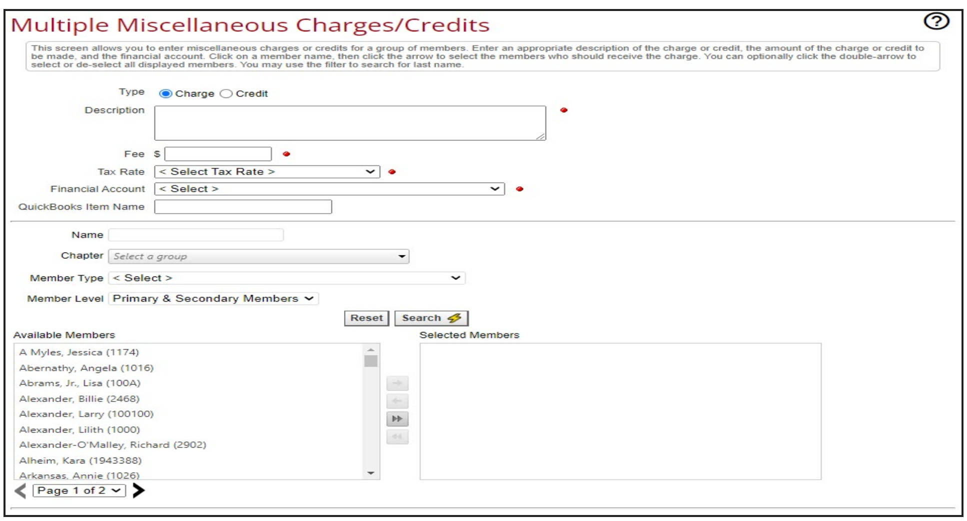
> **Example:** A user has a $100 credit made with two payments: $10, then $90. You elect a fixed hold-back of $20. We do not refund the first payment of $10 and instead count that towards the $20 hold-back. The remaining $10 of the hold-back amount is withheld from the second refund, making the second 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:



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.

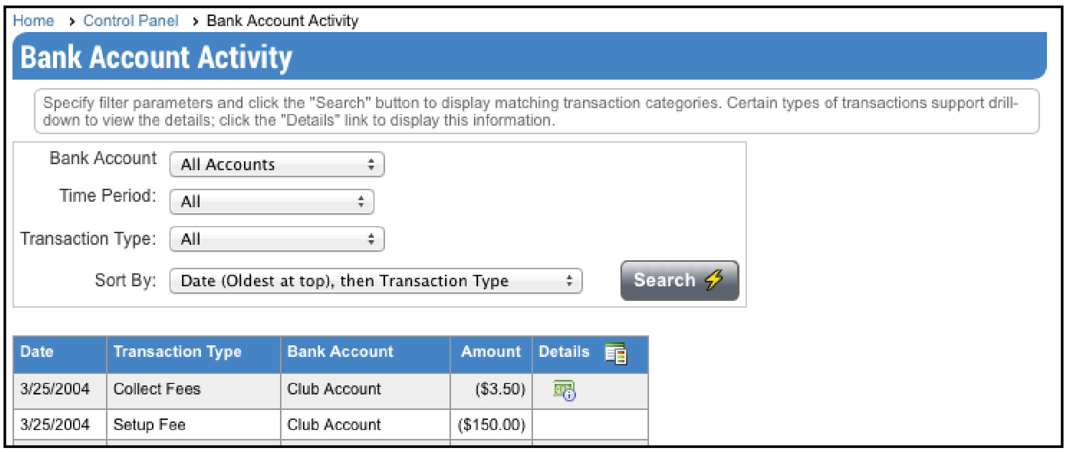
You can select multiple members at once by holding down the Control key. When you click **Save**, the miscellaneous charge or credit will be applied to each checked member. Use the paging controls to switch between pages.

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:



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.

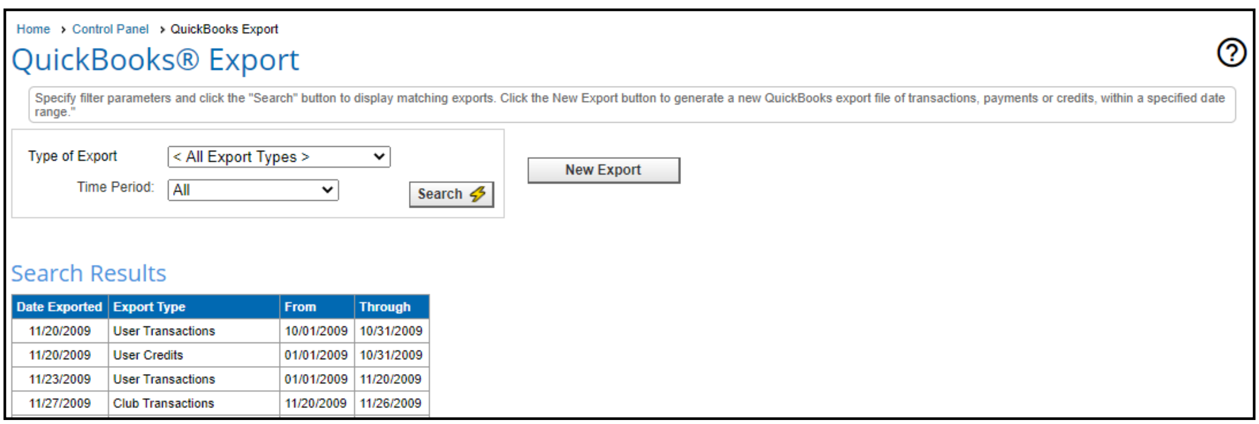
Before you start exporting transactions, credits and payments from your ClubExpress website and importing this data into QuickBooks®, we **strongly** suggest that you experiment with a copy of your main "company" file or with an empty file. A single import of just one month of data could make dozens 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.

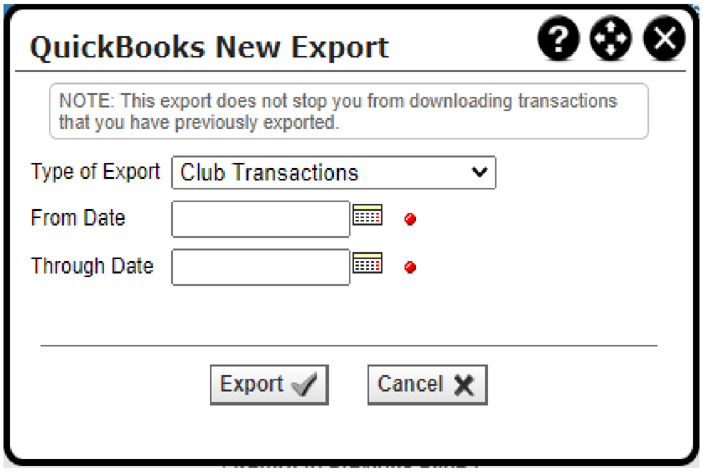
QuickBooks® Desktop for Windows (QBD)

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:



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:



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 Club T-shirt Donation	Income		$40.00 $12.00 $5.00
Accounts Receivable	Current Asset	$57.00	

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.

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.

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

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.

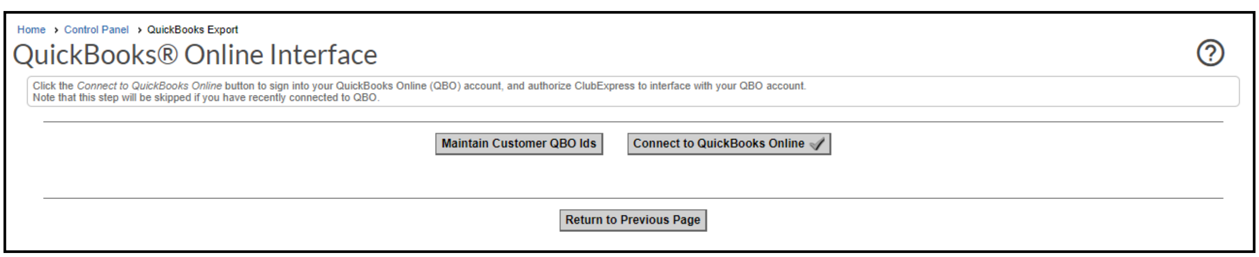
Before you start transferring transactions, credits and payments from your ClubExpress website and importing this data into QuickBooks®, we **strongly** suggest that you experiment with a copy of your main “company” file or with an empty file. A single import of just one month of data could make dozens 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:

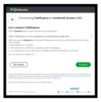


Connecting to QuickBooks® Online

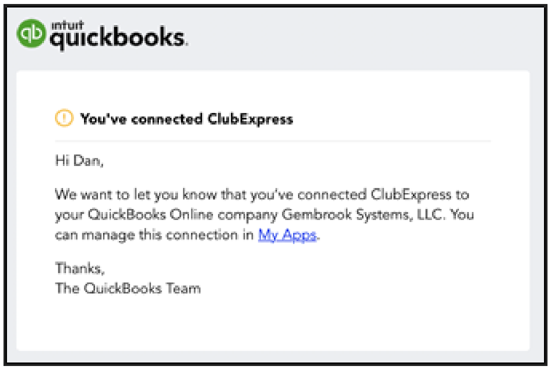
The first step is to log into QuickBooks® Online and give ClubExpress permission to access your account. This required process also tells the system that communications between ClubExpress and QBO are legitimate and approved.

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 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.

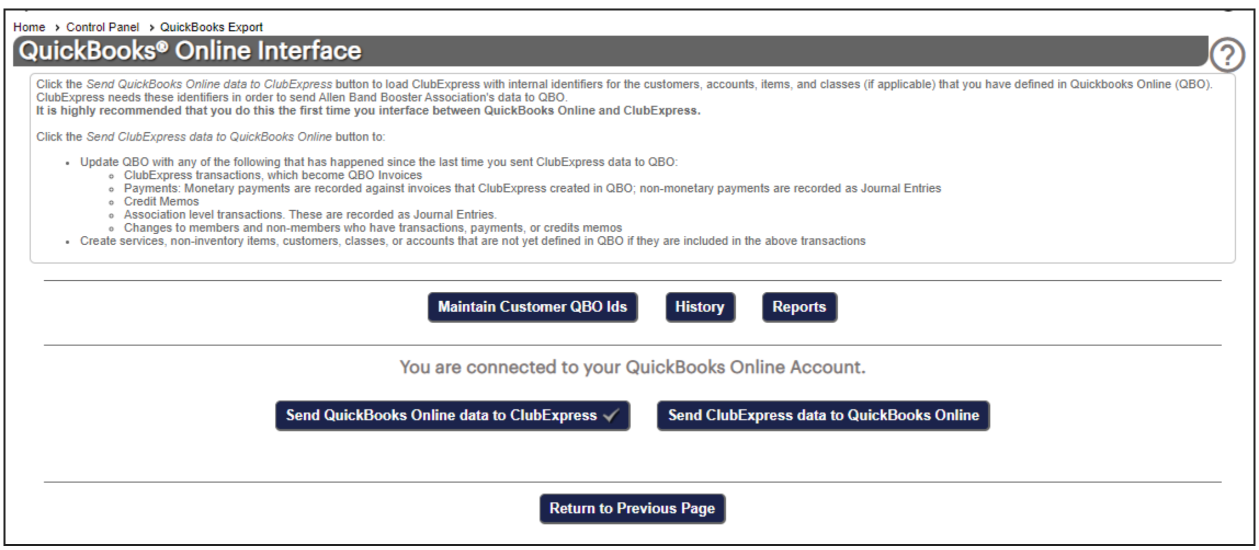
Once you have connected, you will see the following Intuit screen:



You may also receive a confirmation email from Intuit that you have connected to QBO from the ClubExpress “App”.



When you have successfully connected your QBO account with ClubExpress, you will see the following screen:



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.

> **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 Club T-shirt Donation	Income Income Income		$40.00 $12.00 $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	

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

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.

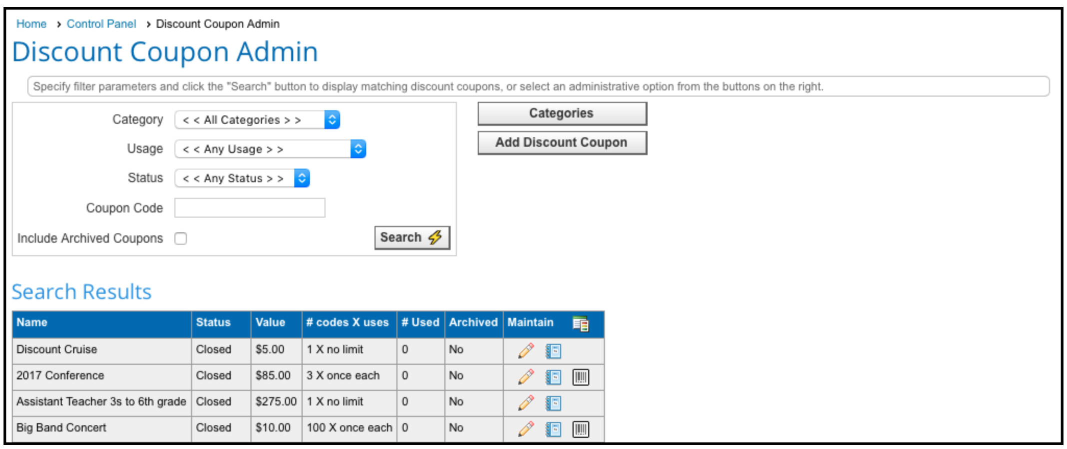
Export Customer Names

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:



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.

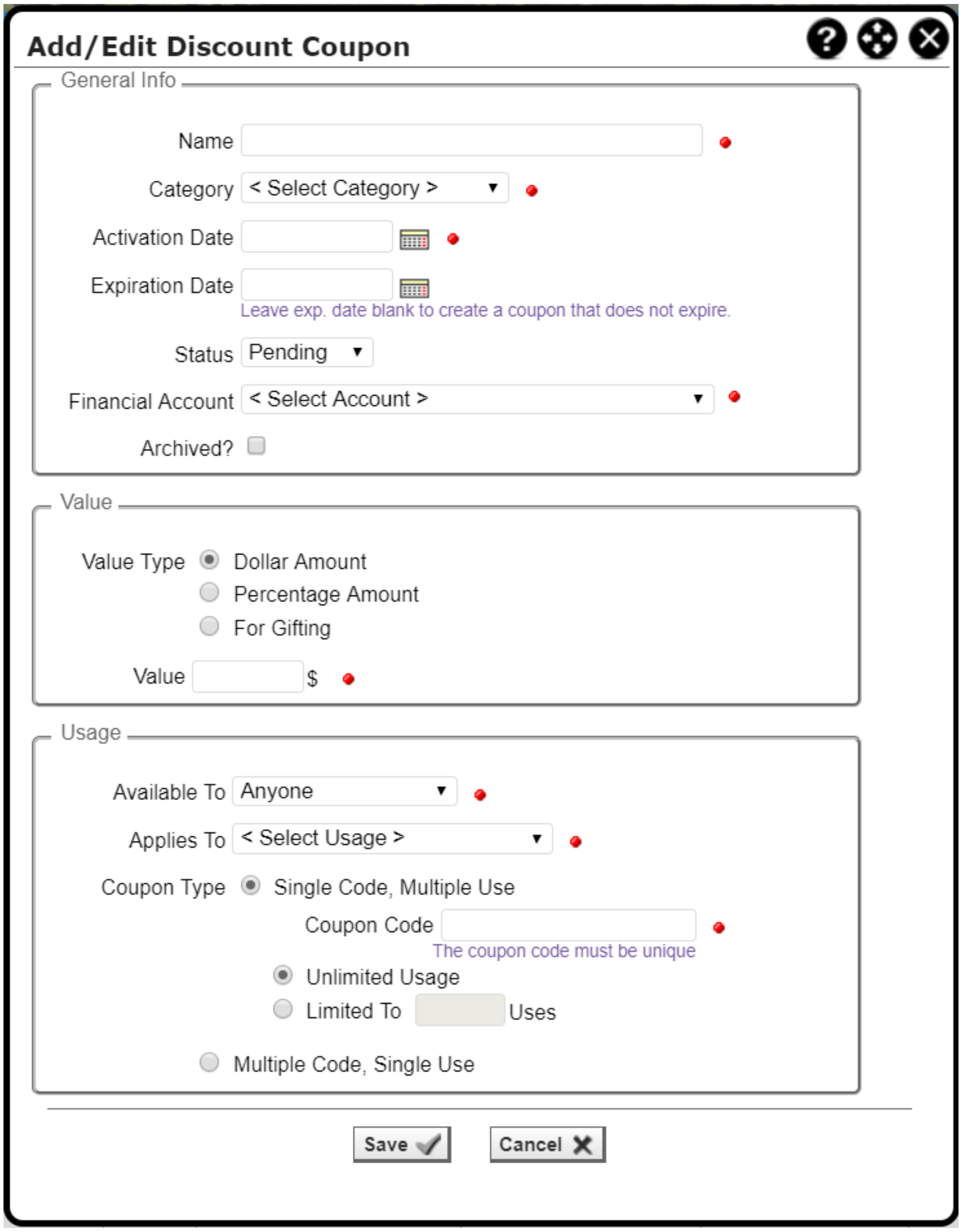
> **Note:** Gift Discount Coupons can only be issued as a dollar amount, not as a percentage.

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:



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:

Icon	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

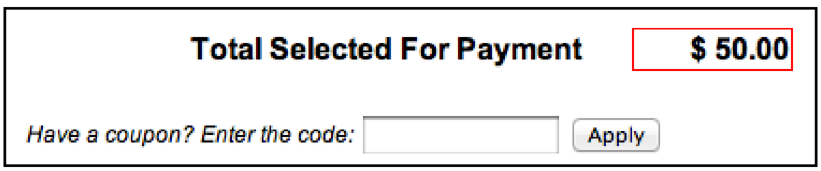
Highlight the table of codes and copy it to the clipboard. You can then paste it into Excel. From there, you can design an actual coupon in Word, InDesign, or a similar program, then use the mail merge features to add the actual coupon code to each coupon. Once they are printed and trimmed, you will 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:

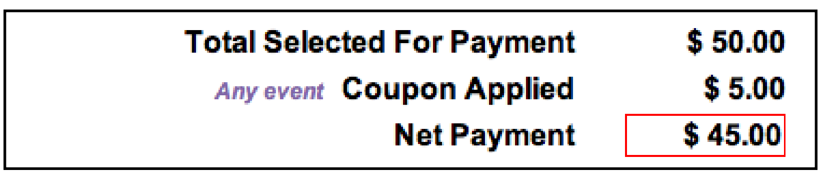
- A published coupon can be closed early.
- A closed coupon can be republished.
- The Expiration date can be changed.
- For a Single Code – Multiple Use coupon, the number of uses can be increased.
- The financial account can be changed.

Coupon Usage

Coupons are applied on the Payments page. If there are published coupons, users will see a field to enter their coupon code:



Once the code has been entered, the screen changes as follows:



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.

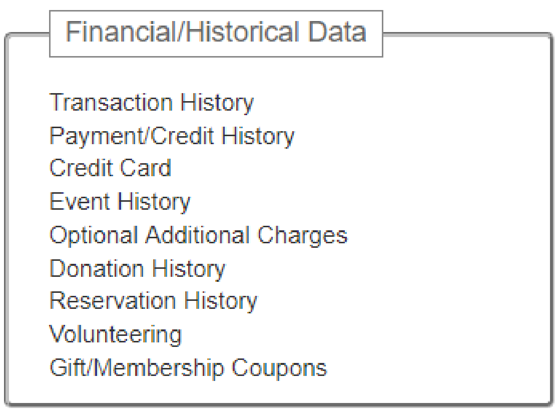
The main search panel allows you to view archived coupons if you need to reset one of them.

Emailing Discount Coupons

Use this screen to send gift codes.

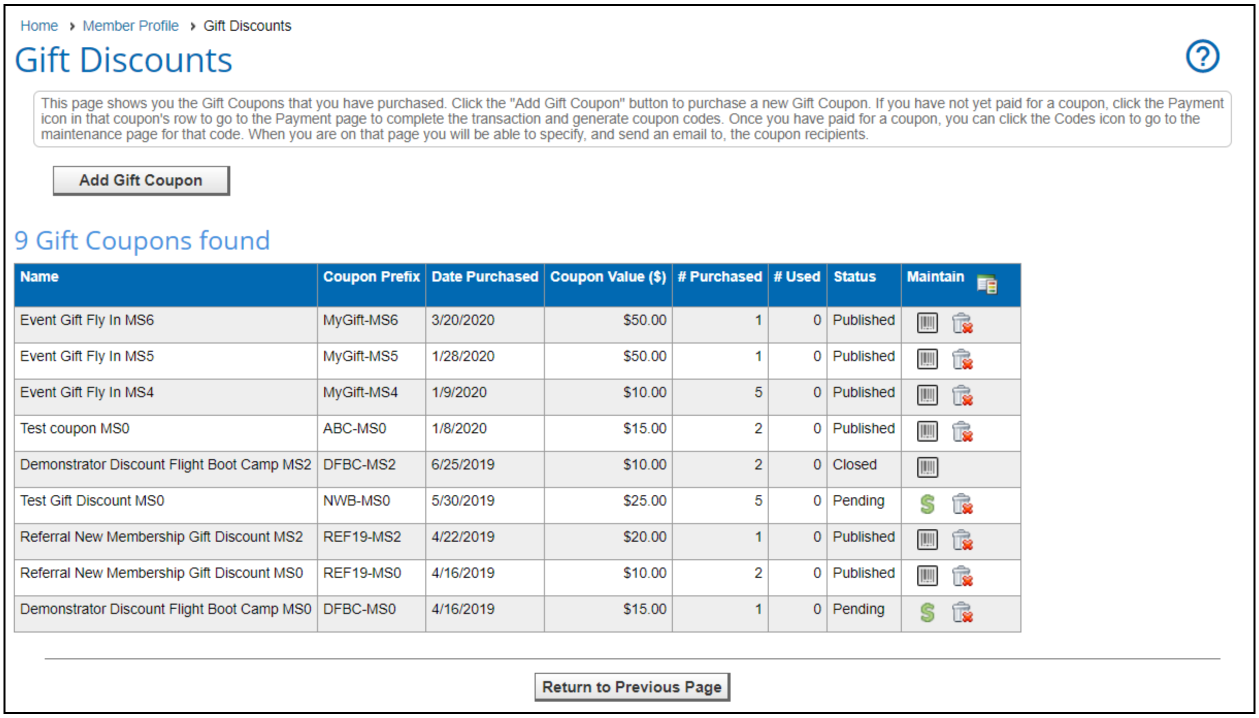
- Specify the email address.
- Type a personal message to the gift recipient.
- Click the Send Email button to send the code or the Cancel button to cancel.

Gift Discount Coupons



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 you have purchased. Click the "Add Gift Coupon" button to purchase a new Gift Coupon. If you have not yet paid for a coupon, click the Payment icon in that coupon's row to go to the Payment page to complete the transaction and generate coupon codes. Once you have paid for a coupon, you can click the Codes icon to go to the maintenance page for that code. When you are on that page you will be able to specify, and send an email to, the coupon recipients.

Add Gift Coupon

9 Gift Coupons found

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	
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	
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	
Referral New Membership Gift Discount MS2	REF19-MS2	4/22/2019	$20.00	1	0	Published	
Referral New Membership Gift Discount MS0	REF19-MS0	4/16/2019	$10.00	2	0	Published	
Demonstrator Discount Flight Boot Camp MS0	DFBC-MS0	4/16/2019	$15.00	1	0	Pending	

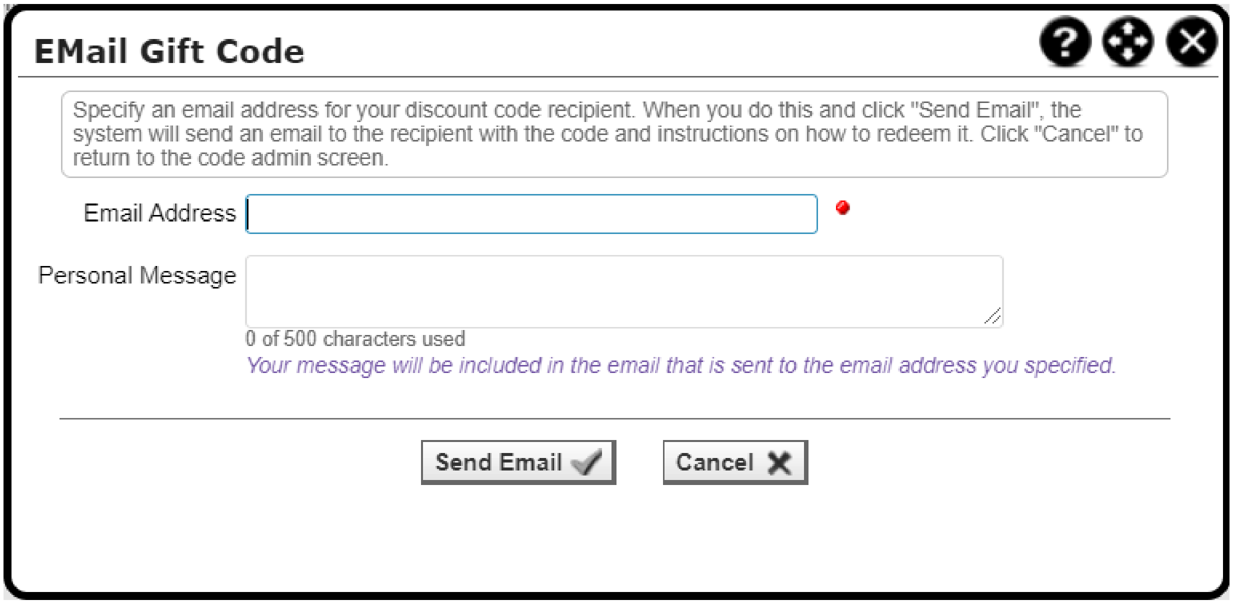
Return to Previous Page

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.

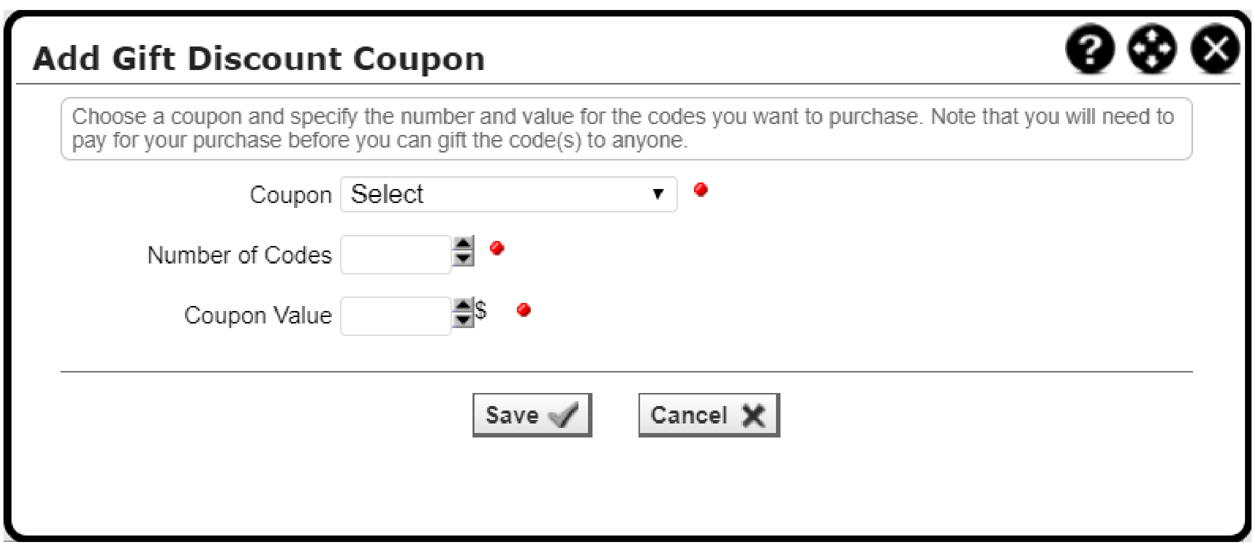
Email Gift Codes



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.

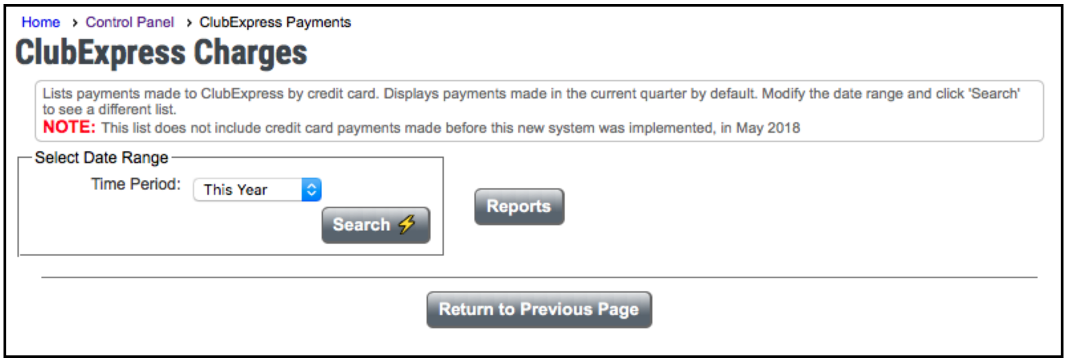
Click the Save button to save your changes or the Cancel button to exit without saving.

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:

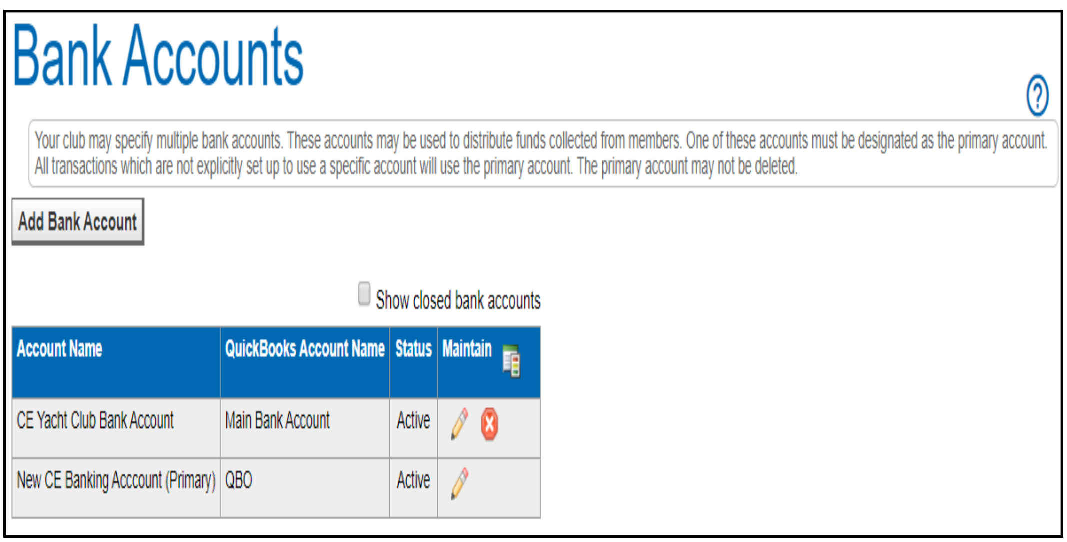


Specify a Time Period from the drop-down list and click the **Search** button to see a list of charges applied to the saved credit card. Note that this feature was added in May, 2018, so only charges posted from May 31st, 2018 onwards will be displayed.

Bank Accounts

Control Panel > Money > Setup

Clicking this choice displays the following screen:



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.

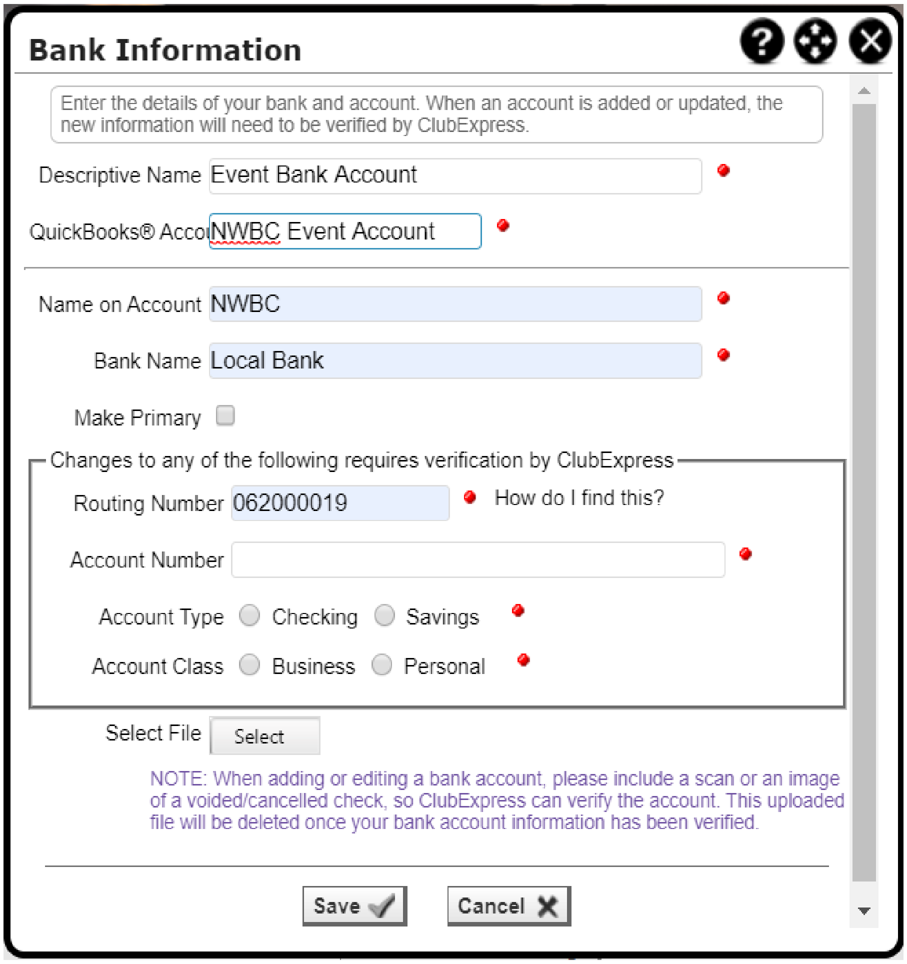
Accounts have various status codes and options in the Maintain column:

- 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.

Icon	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:

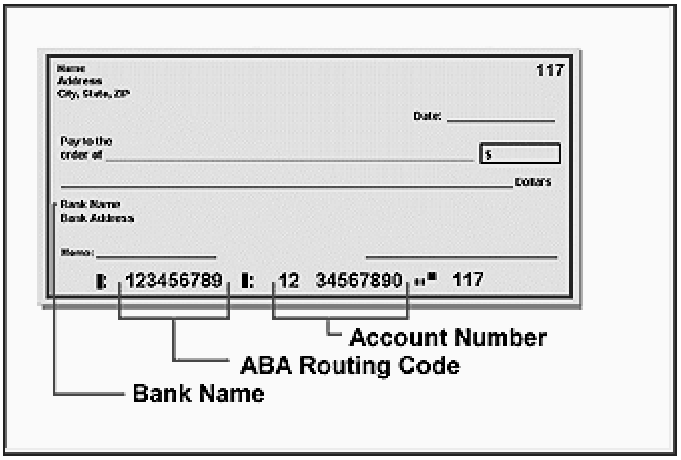


This screen gives us at ClubExpress the information we need to verify your account. The following information is required:

- 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.

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.

Close

Click the **Close** option to close an active account. Closed bank accounts don't appear in drop-down lists. Re-activating a closed bank account generates new PDF uploads (a bank statement or canceled check) that must be verified before the account can be used.

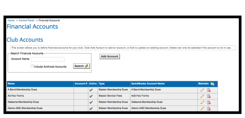
Bank Accounts for Subgroups

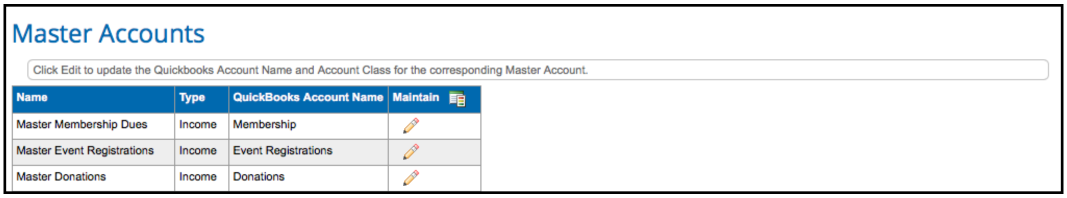
> **Subgroups:** If your club or association has subgroups with their own bank accounts and you want to distribute funds into these accounts, use the above screen to define these bank accounts. Then, the Financial Accounts screen is used to link a bank account to one or more subgroups. See "Financial Accounts" below

Financial Accounts

Control Panel > Money > Setup

When you select this option, a screen similar to the following is displayed:





Master Accounts

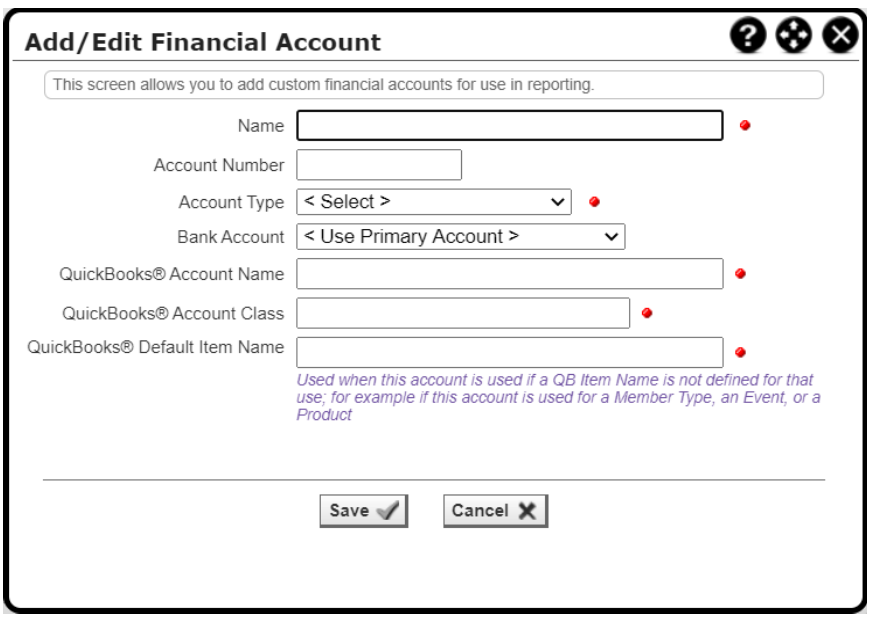
Click Edit to update the Quickbooks Account Name and Account Class for the corresponding Master Account.

Name	Type	QuickBooks Account Name	Maintain
Master Membership Dues	Income	Membership	
Master Event Registrations	Income	Event Registrations	
Master Donations	Income	Donations	

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:



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.

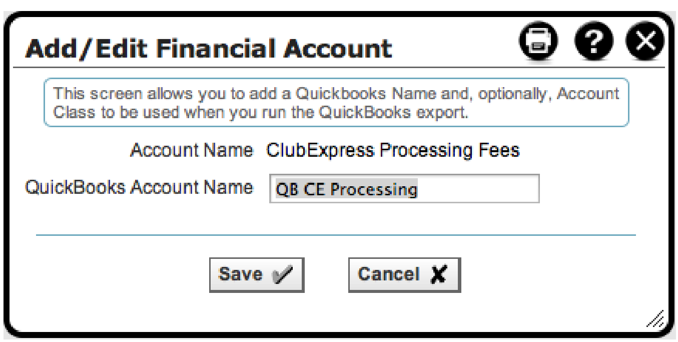
You must specify a QuickBooks® account name for every ClubExpress financial account, even the ones you are not using. Otherwise, the export process will not work.

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:



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

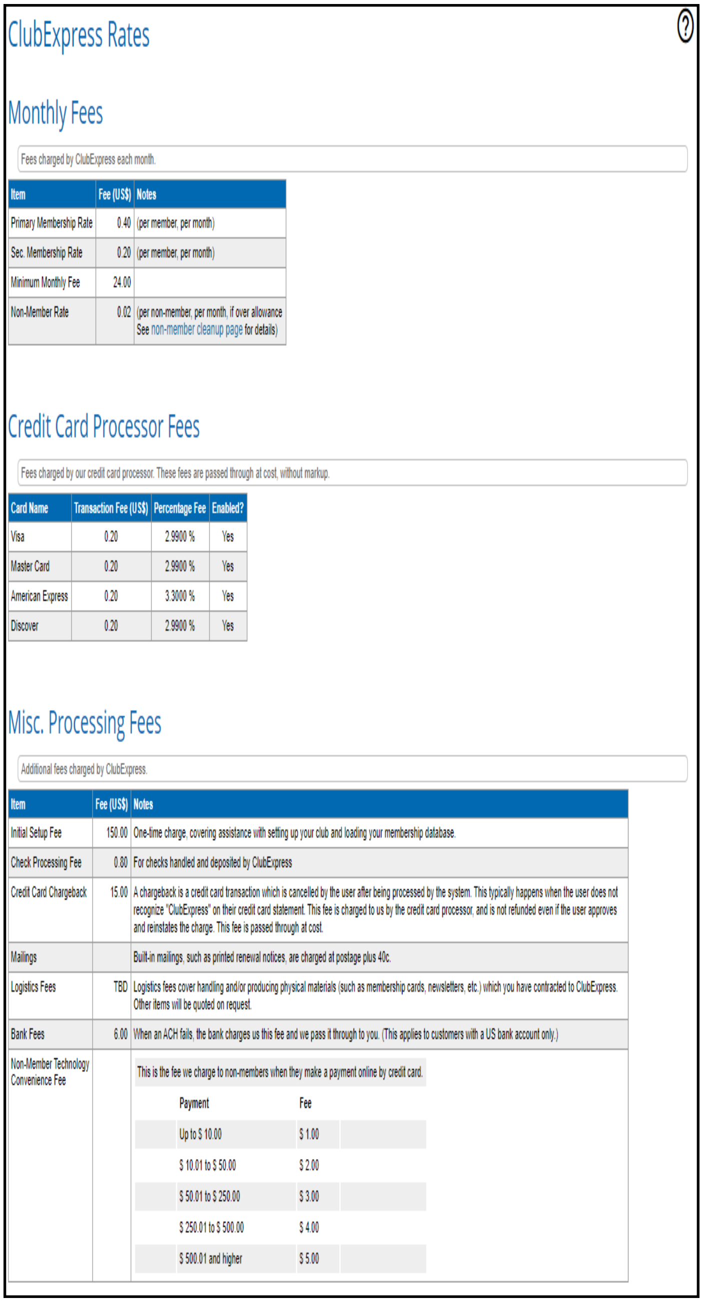
Think of financial accounts as the glue that links different kinds of charges to one or more bank accounts. But they can also be used for reporting and analysis purposes, even if every financial account links to the same bank account.

- 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:



ClubExpress Rates

Monthly Fees

Fees charged by ClubExpress each month.

Item	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 month, if over allowance See non-member cleanup page for details)

Credit Card Processor Fees

Fees charged by our credit card processor. These fees are passed through at cost, without markup.

Card Name	Transaction Fee (US$)	Percentage Fee	Enabled?
Visa	0.20	2.9900 %	Yes
Master Card	0.20	2.9900 %	Yes
American Express	0.20	3.3000 %	Yes
Discover	0.20	2.9900 %	Yes

Misc. Processing Fees

Additional fees charged by ClubExpress.

Item	Fee (US$)	Notes
Initial Setup Fee	150.00	One-time charge, covering assistance with setting up your club and loading your membership database.
Check Processing Fee	0.80	For checks handled and deposited by ClubExpress
Credit Card Chargeback	15.00	A chargeback is a credit card transaction which is cancelled by the user after being processed by the system. This typically happens when the user does not recognize "ClubExpress" on their credit card statement. This fee is charged to us by the credit card processor, and is not refunded even if the user approves and reinstates the charge. This fee is passed through at cost.
Mailings		Built-in mailings, such as printed renewal notices, are charged at postage plus 40c.
Logistics Fees	TBD	Logistics fees cover handling and/or producing physical materials (such as membership cards, newsletters, etc.) which you have contracted to ClubExpress. Other items will be quoted on request.
Bank Fees	6.00	When an ACH fails, the bank charges us this fee and we pass it through to you. (This applies to customers with a US bank account only.)
Non-Member Technology Convenience Fee		This is the fee we charge to non-members when they make a payment online by credit card.

Payment	Fee
Up to $ 10.00	$ 1.00
$ 10.01 to $ 50.00	$ 2.00
$ 50.01 to $ 250.00	$ 3.00
$ 250.01 to $ 500.00	$ 4.00
$ 500.01 and higher	$ 5.00

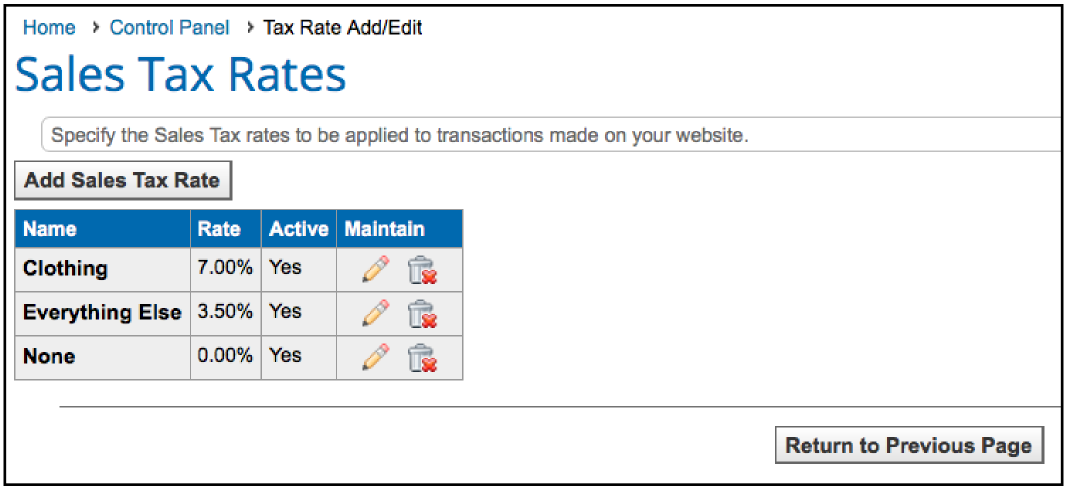
This is a read-only screen which lists the various rates charged by ClubExpress per member, family member, check processed, etc. It also shows the credit card fees charged to us which we pass through to you, and whether selected credit card types are enabled or disabled.

> **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.

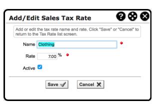
Sales Tax Rates

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:



Each rate has a name, percentage and status. Click **Add Sales Tax Rate** to see the following screen:



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, however 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 per-transaction 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

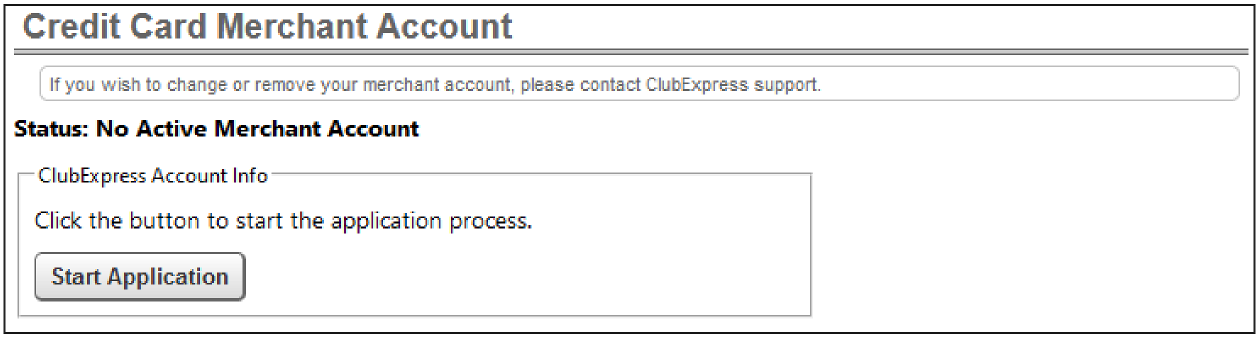
ClubExpress Merchant Account Processing Fees

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

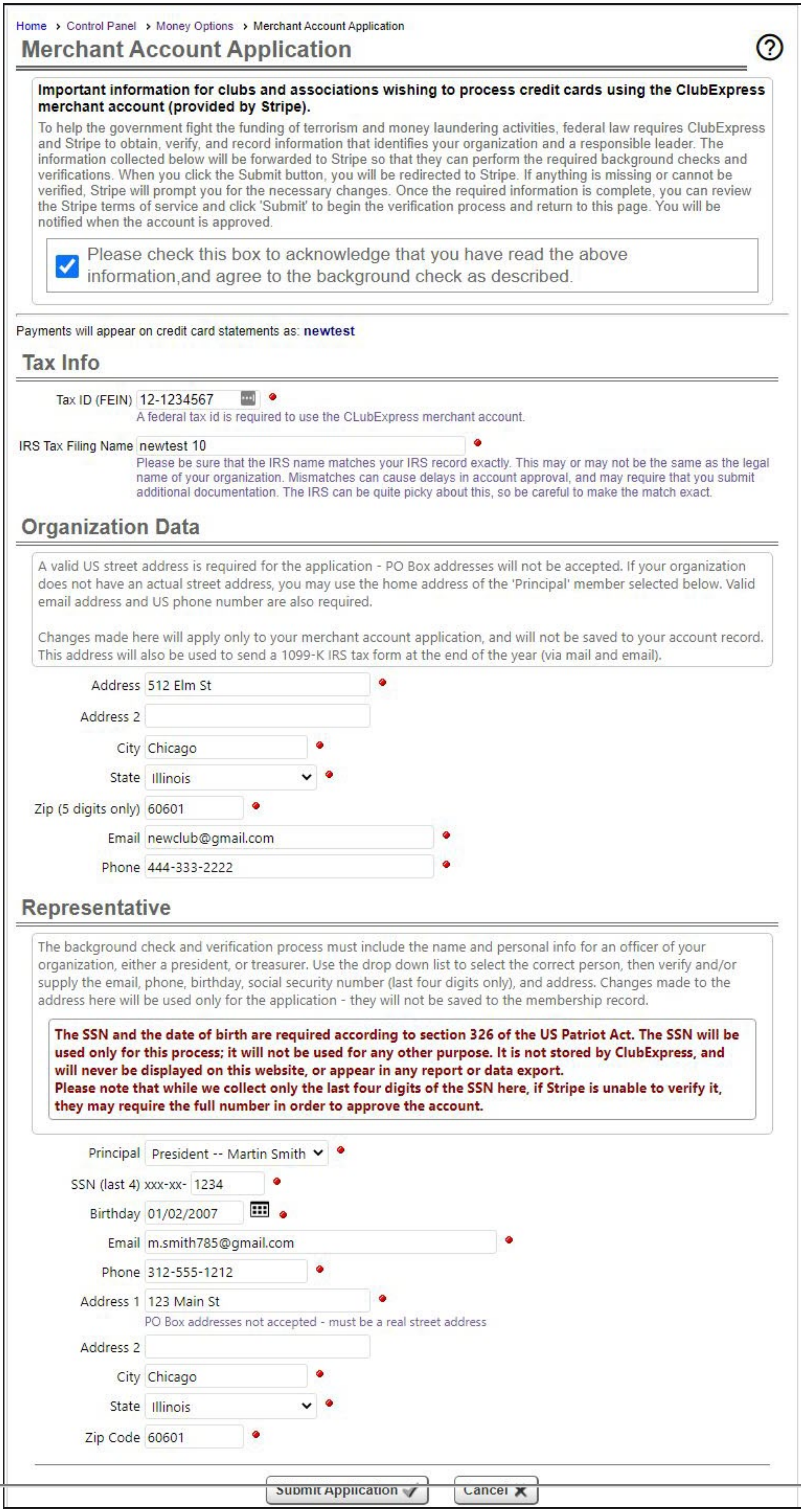
How to Apply

Navigate to Control Panel > Money > Setup > Money Options to begin your merchant account application. Select Start Application to navigate to the application screen.



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.



Home › Control Panel › Money Options › Merchant Account Application

Merchant Account Application

Important information for clubs and associations wishing to process credit cards using the ClubExpress merchant account (provided by Stripe).

To help the government fight the funding of terrorism and money laundering activities, federal law requires ClubExpress and Stripe to obtain, verify, and record information that identifies your organization and a responsible leader. The information collected below will be forwarded to Stripe so that they can perform the required background checks and verifications. When you click the Submit button, you will be redirected to Stripe. If anything is missing or cannot be verified, Stripe will prompt you for the necessary changes. Once the required information is complete, you can review the Stripe terms of service and click 'Submit' to begin the verification process and return to this page. You will be notified when the account is approved.

☑ Please check this box to acknowledge that you have read the above information,and agree to the background check as described.

Payments will appear on credit card statements as: **newtest**

Tax Info

Tax ID (FEIN) 12-1234567
A federal tax id is required to use the CLubExpress merchant account.

IRS Tax Filing Name newtest 10
Please be sure that the IRS name matches your IRS record exactly. This may or may not be the same as the legal name of your organization. Mismatches can cause delays in account approval, and may require that you submit additional documentation. The IRS can be quite picky about this, so be careful to make the match exact.

Organization Data

A valid US street address is required for the application - PO Box addresses will not be accepted. If your organization does not have an actual street address, you may use the home address of the 'Principal' member selected below. Valid email address and US phone number are also required.

Changes made here will apply only to your merchant account application, and will not be saved to your account record. This address will also be used to send a 1099-K IRS tax form at the end of the year (via mail and email).

Address 512 Elm St
Address 2
City Chicago
State Illinois
Zip (5 digits only) 60601
Email newclub@gmail.com
Phone 444-333-2222

Representative

The background check and verification process must include the name and personal info for an officer of your organization, either a president, or treasurer. Use the drop down list to select the correct person, then verify and/or supply the email, phone, birthday, social security number (last four digits only), and address. Changes made to the address here will be used only for the application - they will not be saved to the membership record.

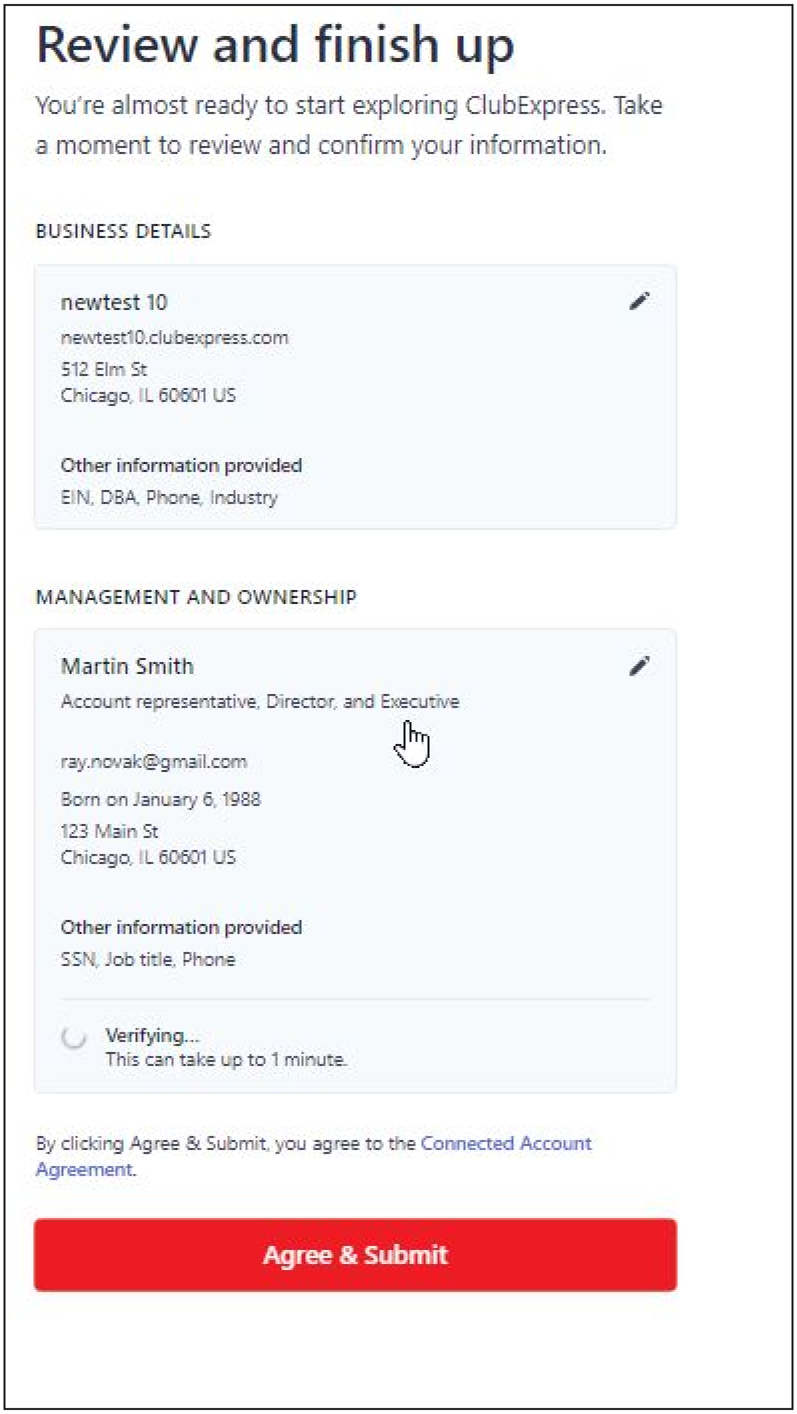
The SSN and the date of birth are required according to section 326 of the US Patriot Act. The SSN will be used only for this process; it will not be used for any other purpose. It is not stored by ClubExpress, and will never be displayed on this website, or appear in any report or data export.
Please note that while we collect only the last four digits of the SSN here, if Stripe is unable to verify it, they may require the full number in order to approve the account.

Principal President -- Martin Smith
SSN (last 4) xxx-xx- 1234
Birthday 01/02/2007
Email m.smith785@gmail.com
Phone 312-555-1212
Address 1 123 Main St
PO Box addresses not accepted - must be a real street address
Address 2
City Chicago
State Illinois
Zip Code 60601

Submit Application ✓ Cancel ✗

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.



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 *(we do not currently allow Apple or Google Pay on ClubExpress sites)*	2.9% + $0.30
International Cards	+1%

Stripe Processing Fees

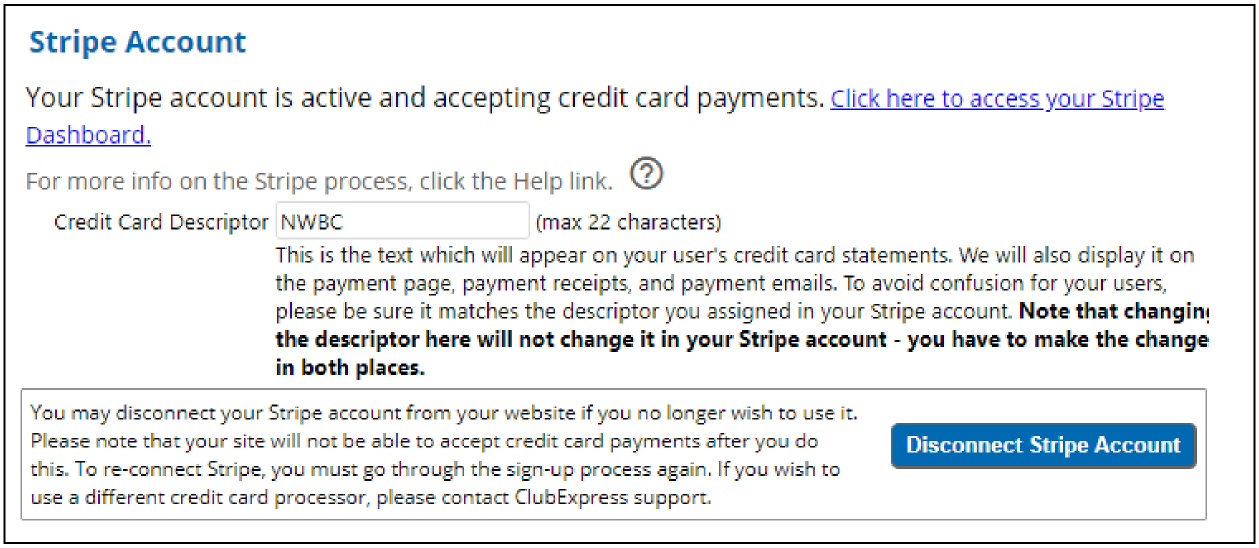
How to Set Up Stripe

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.

- 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.

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.

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”.

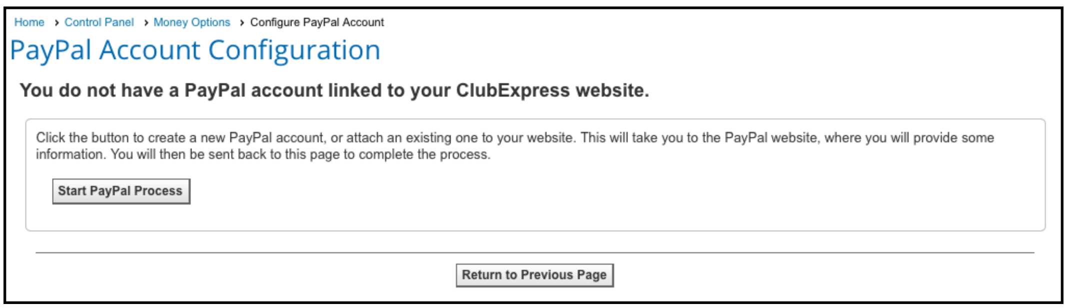
> **Administrators:** PayPal is not available as a payment method for administrators to use to apply payments on behalf of a member. Only users can choose to make a payment using their personal PayPal account.

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.

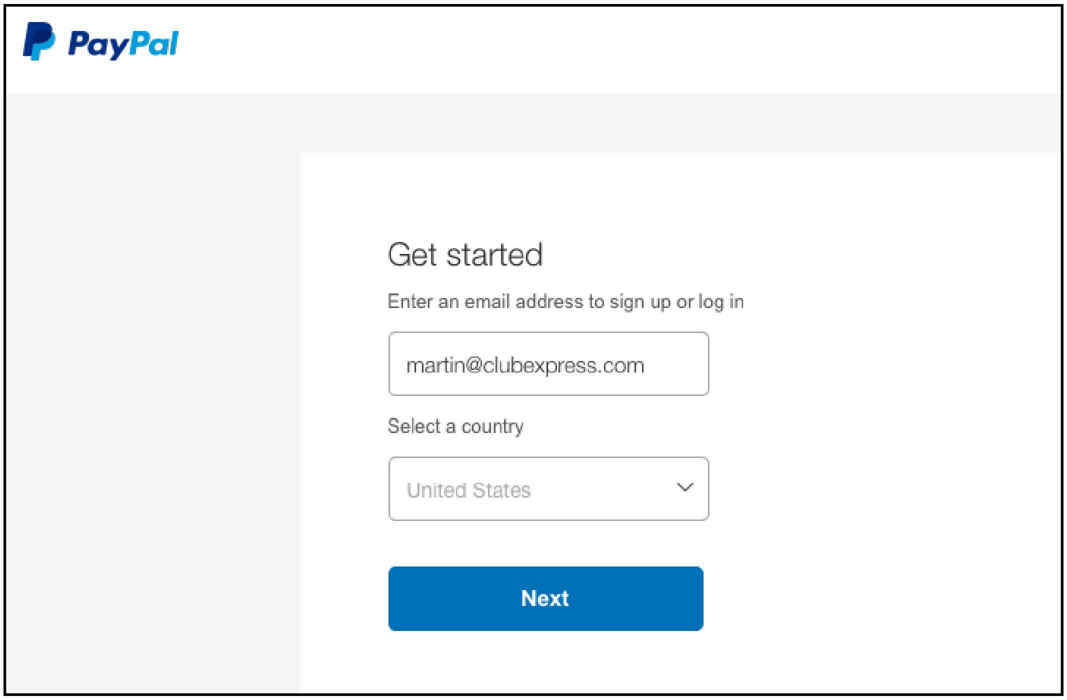
How to Set Up PayPal

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:



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.

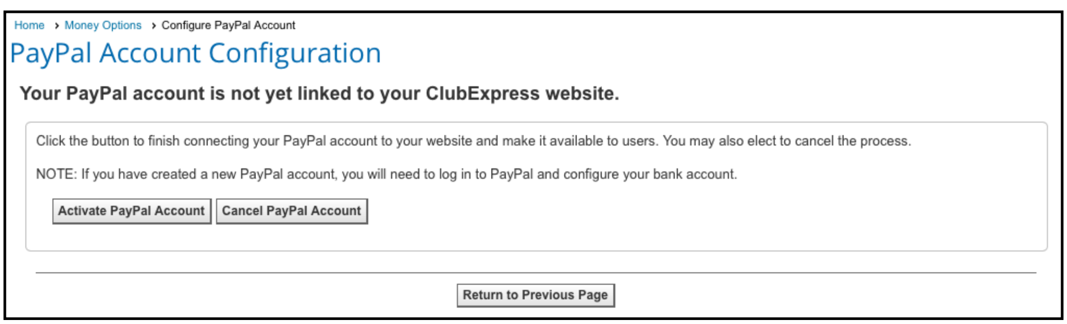


Enter the **email address** linked to the PayPal account and your country. Click **Next** then enter your password on the next screen.

You will next see a screen asking if you want to connect your website to your PayPal account. Click **Agree and connect**.

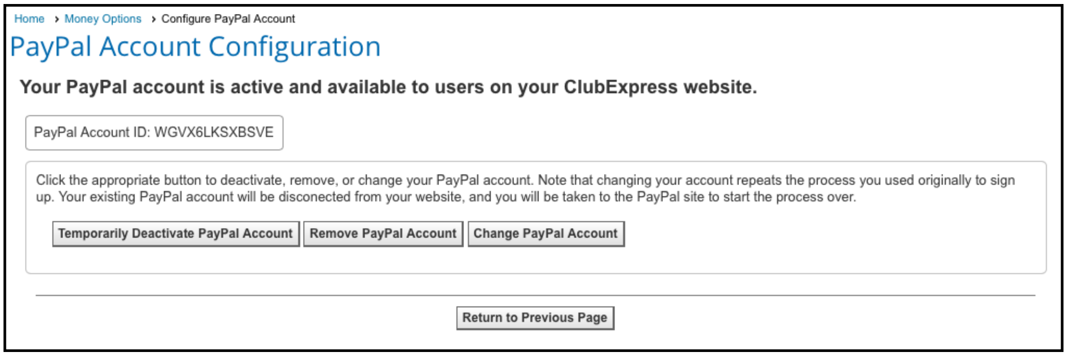
If everything is in order, the next screen will confirm that you've successfully authorized your club's website on ClubExpress to use that PayPal account. Click the **Go back...** button to return to your ClubExpress website.

The PayPal Account Confirmation screen will now look as follows:



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:



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…**

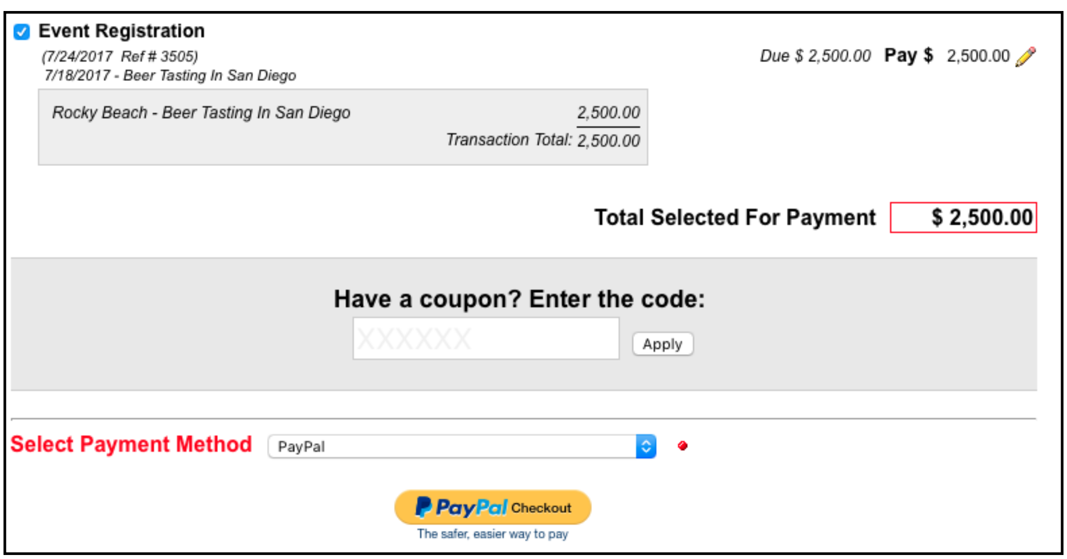
Click the **Remove PayPal Account** to stop accepting PayPal and remove the configuration completely. You will be prompted to confirm this operation. Once this is done, you can easily reactivate the previously-configured PayPal Account, or restart the linking process to configure a new PayPal Account.

Click the **Change PayPal Account** to start using a different account. This restarts the linking process by taking you back to the PayPal site.

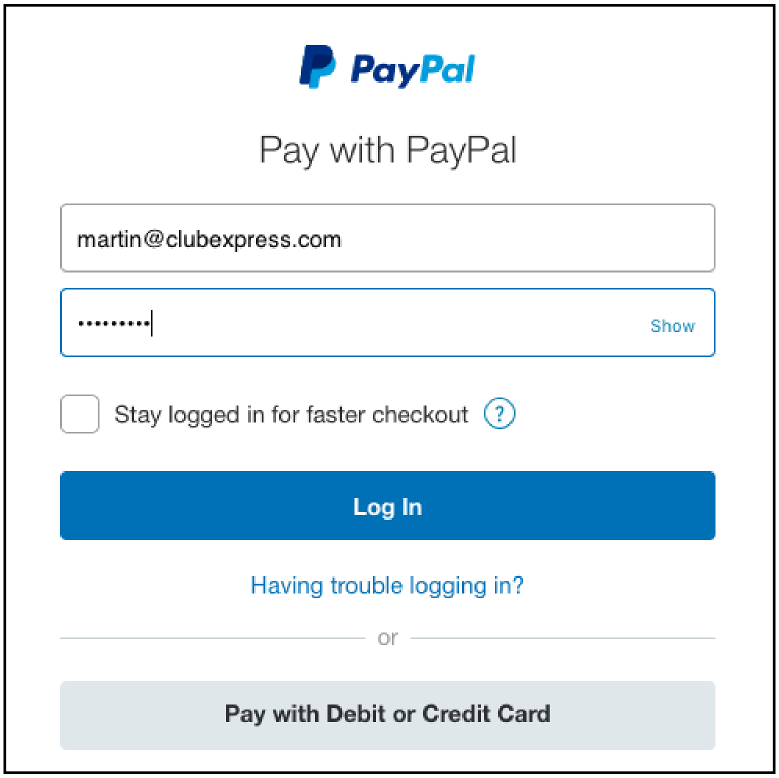
How to Use PayPal

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.

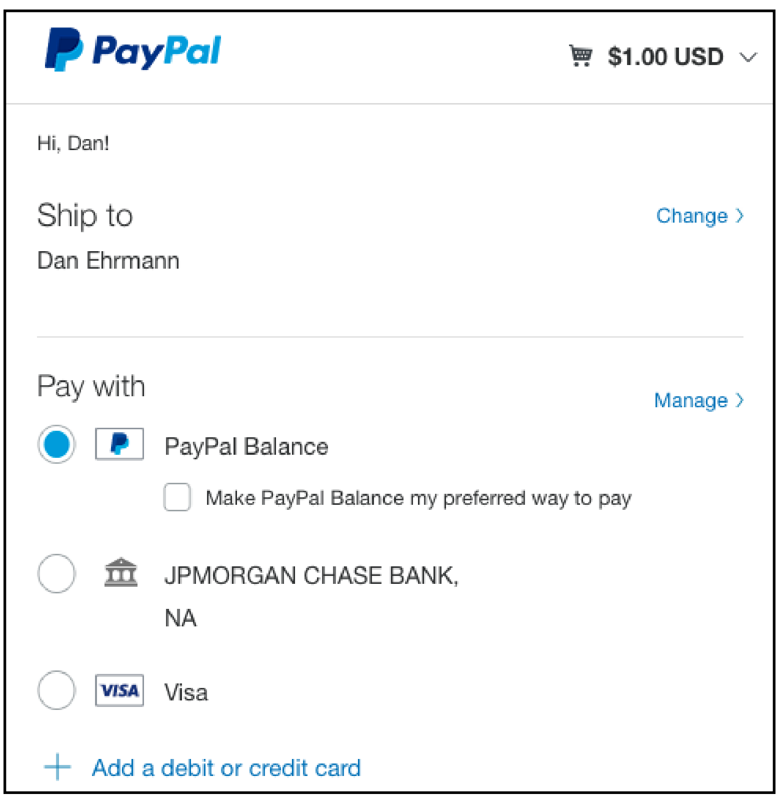
When PayPal has been enabled, users will see PayPal as an available option on the Pending Payment page.



Clicking the **PayPal Checkout** button displays a popup form to login to your PayPal account:



Once you have logged in, you are taken to a page where you can pick the source of funds:



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.

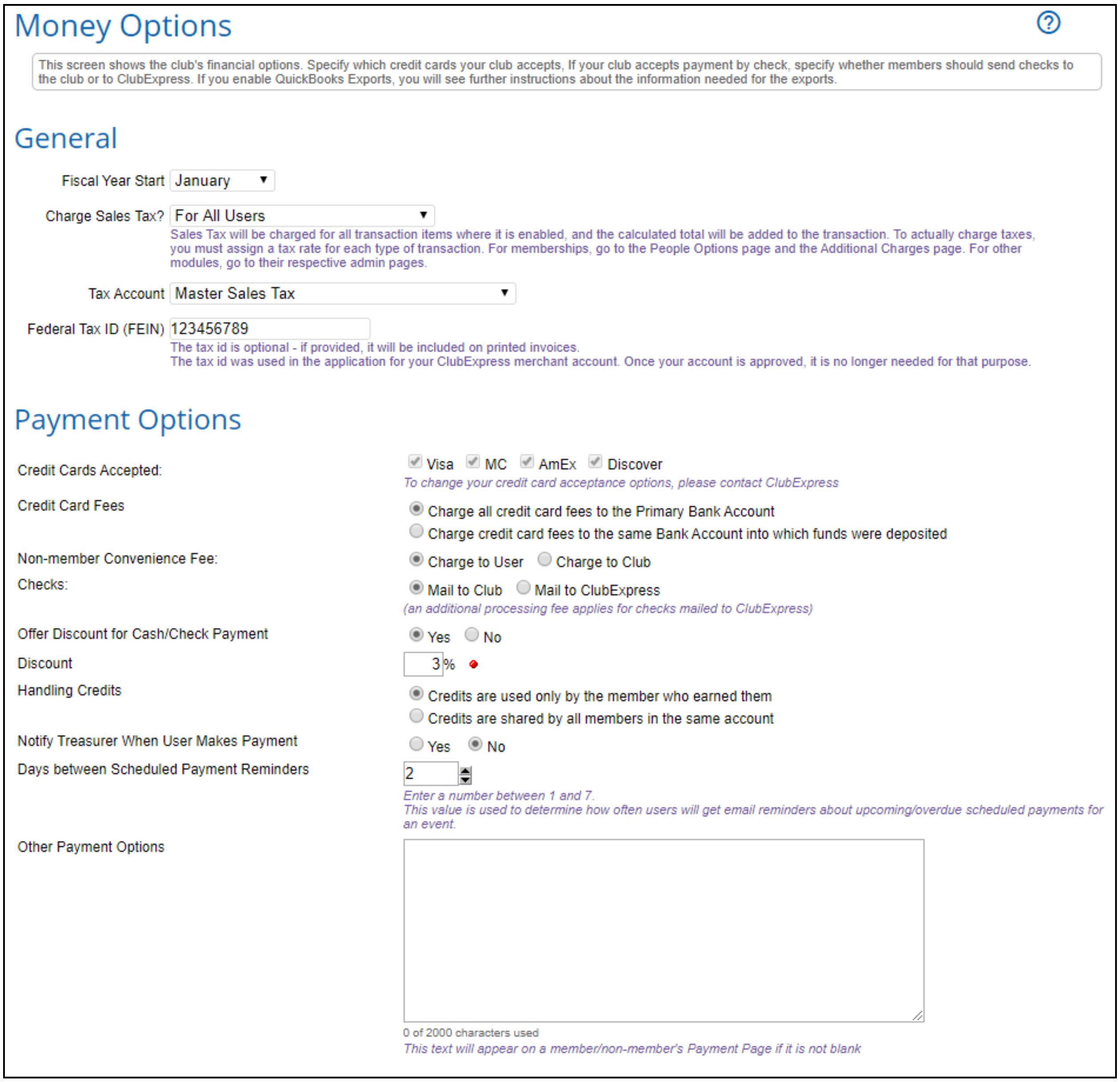
The funds will be transferred and the dialog will close. You will be returned to your ClubExpress website.

PayPal will send you a receipt to show that the funds have arrived in your PayPal account.

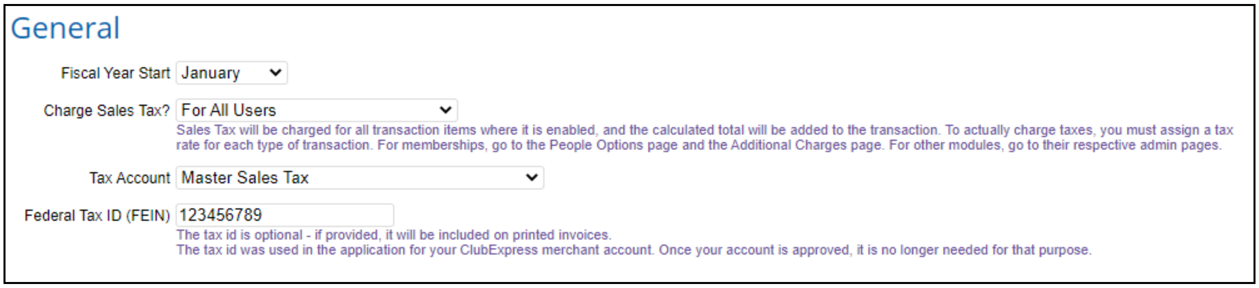
Money Options

Control Panel > Money > Setup

When you select this option, you will see the following screens. Click on the screen sections below to learn more.



General



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 cash-management bank account. The funds are then remitted to you at the same time as funds collected via credit card payments. (If the check does not include “ClubExpress” as a Payable To name, we process it but then hold it until the end of the month when we send all such checks to you for deposit.)

Note that there is a small additional fee for this service.

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.

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

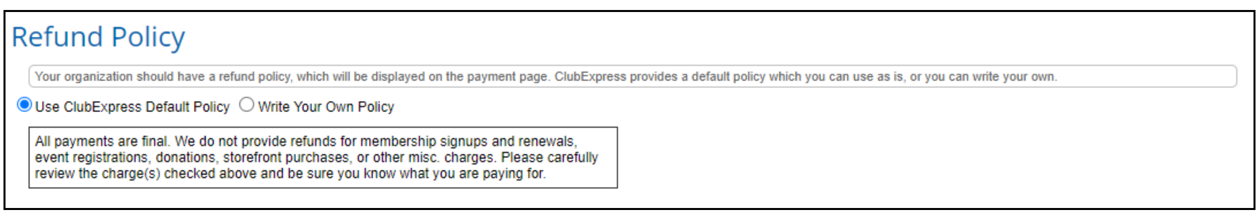
Select "Yes" to send automatic reminder emails for unpaid transactions to both members and non-members. When you select "Yes" you'll be prompted to determine when the reminders start and how many days between each reminder.

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.

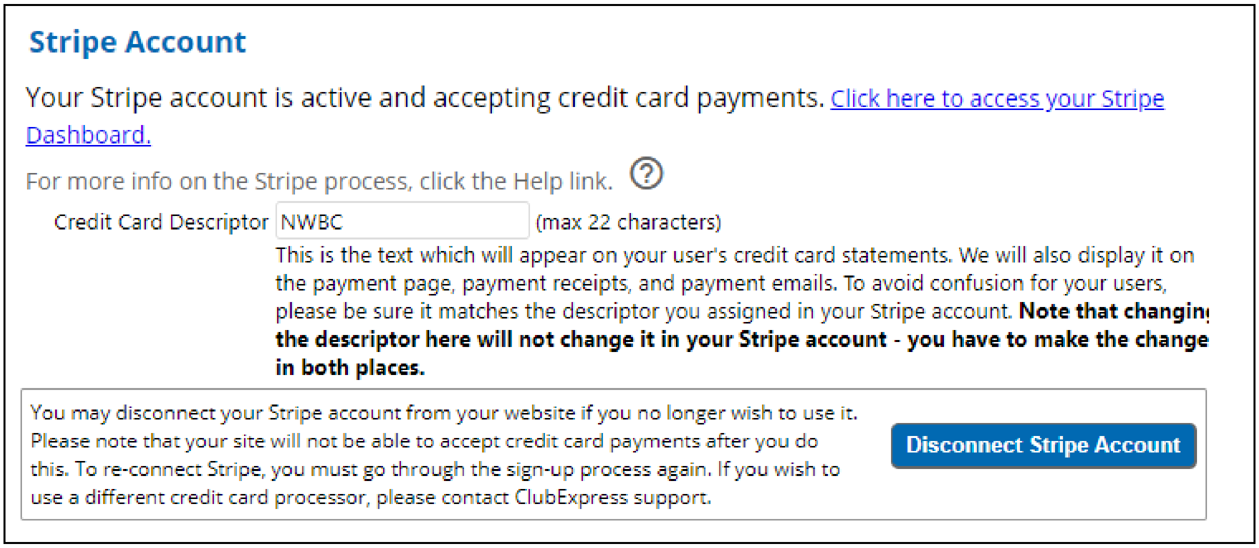
> **Note:** If this section is left blank, no instructions will be displayed.

Refund Policy



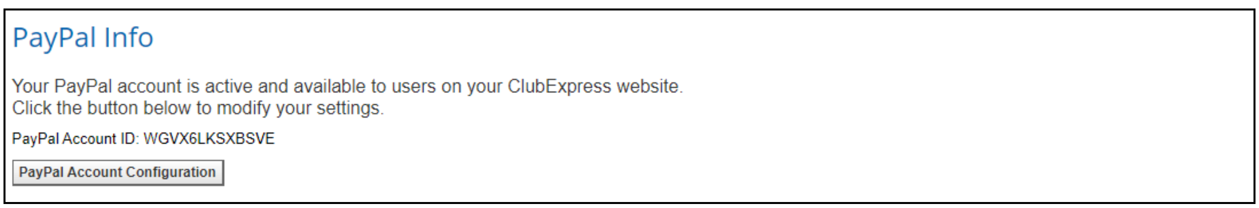
ClubExpress allows you to specify your own refund policy, which will appear on the payment page. A default refund policy is provided. When you click **Write Your Own Policy**, a text box is displayed to enter the desired text. You can also click the **Copy Default** button to copy the default refund policy as a starting point.

Stripe



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

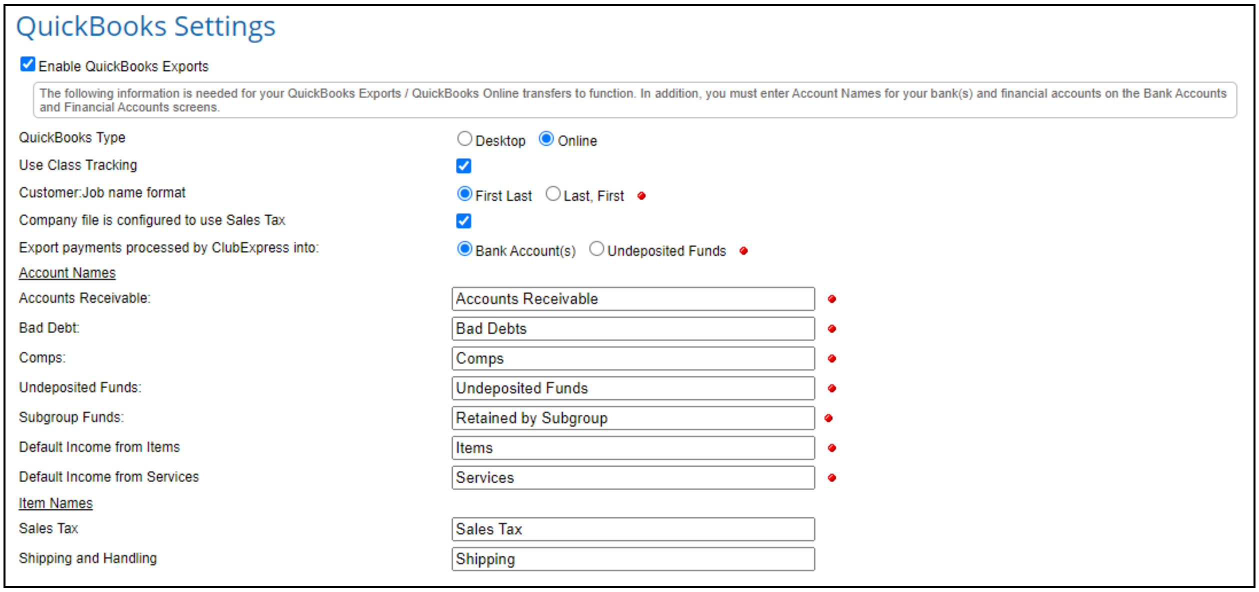


ClubExpress supports PayPal as a payment method. Members and non-members with a PayPal account can pay for their memberships, event registrations, donations, etc. using their PayPal account and the funds will flow into your club’s PayPal account. You can then move them into a regular bank account.

> **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:** 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.

Currency

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

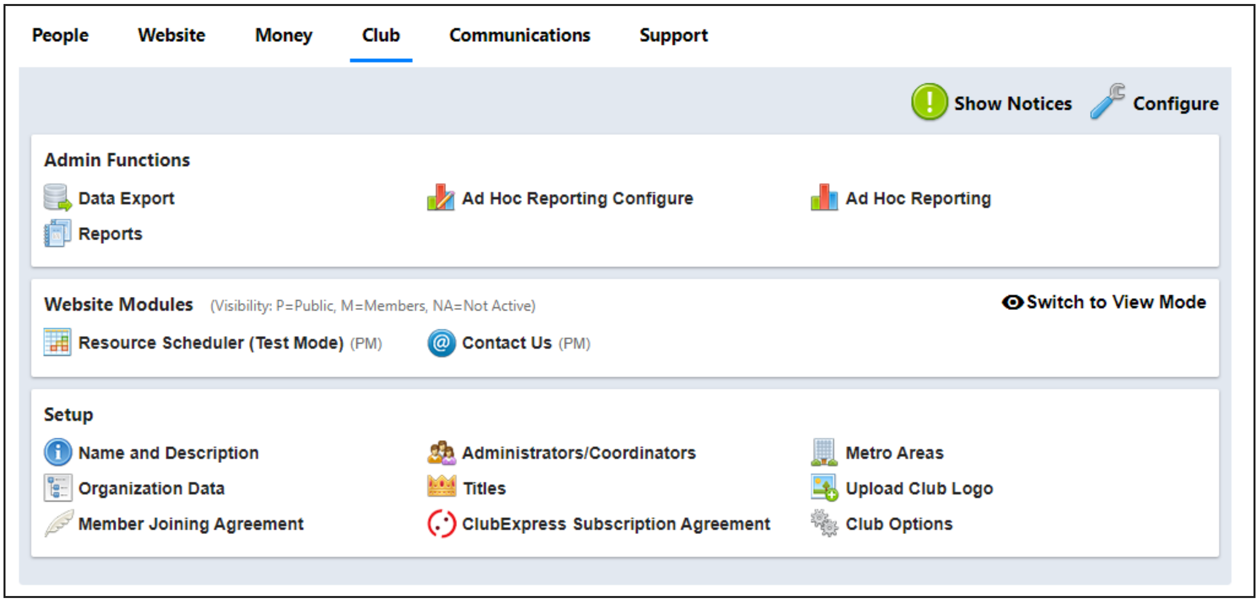
If available, click the **Exports** button to display a dialog listing available exports. Select one and click the Export button to generate an unformatted CSV file with the desired data. This file can be opened directly in Excel, Access, or a similar spreadsheet or database program for further manipulation.

Report Type	Description
Member Invoice	Print invoices of pending payments.
Transactions / Payments by Account	Financial reports organized by financial account.
Member / User Transactions	Financial reports showing transactions (including memberships, event registrations, donations, storefront purchases, misc. charges, etc.)
ClubExpress Trans-	Financial reports showing club-level fees and charges.

Report Type	Description
actions	
User Payments / Credits	Financial reports showing payments by credit card, check, cash, etc.; and reports of credits.

Money Tab Report Options

Club



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?

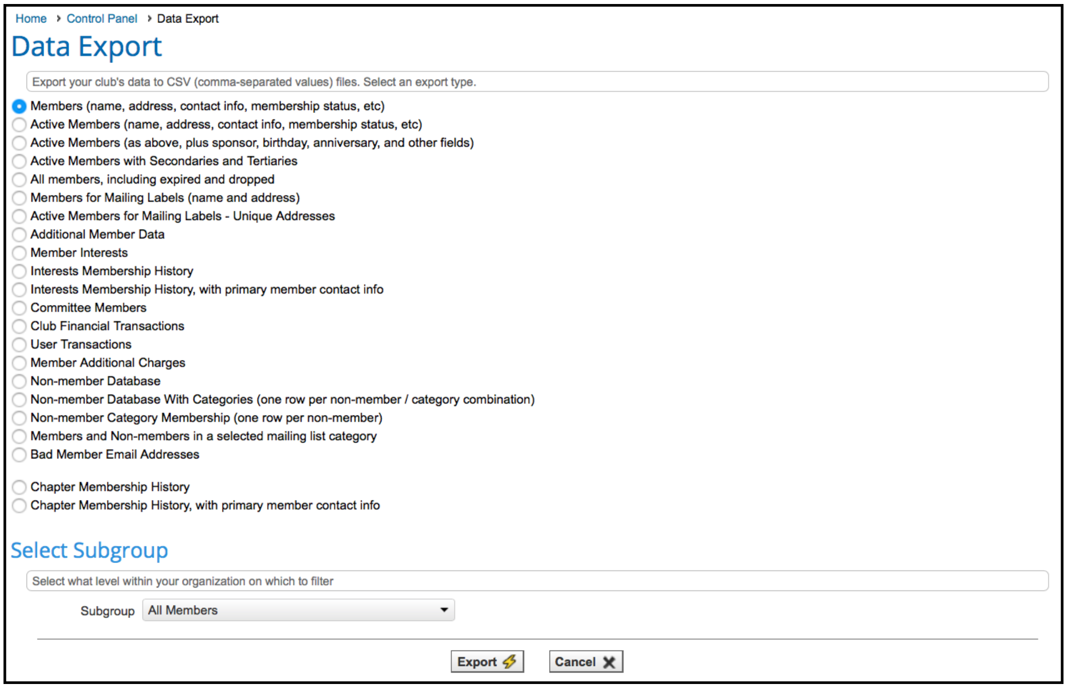
- For help with modules in the Club section, see " ClubExpress Modules " on page 588
- Get help exporting data to CSV files for importing into a local spreadsheet or database; see "Data Export" on page 499
- Update the basic information about your club or association; see "Name & Description" on page 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

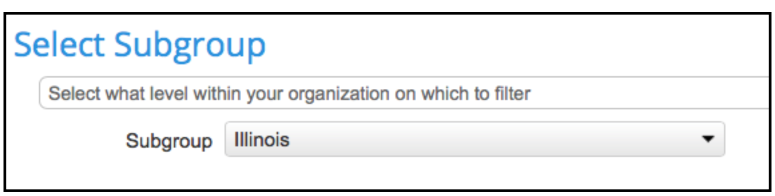
Control Panel > Club > Admin Functions

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:

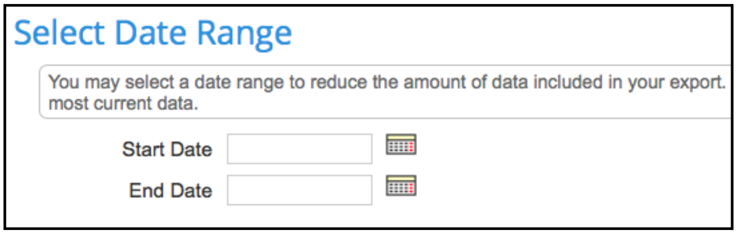


Select an option from the list and click the **Export** button. The results will either download automatically or you will be prompted to save them to a local file, depending on your web browser. Data are saved in CSV format (Comma Separated Values), with one record per row, commas between fields, and 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.



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:

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.

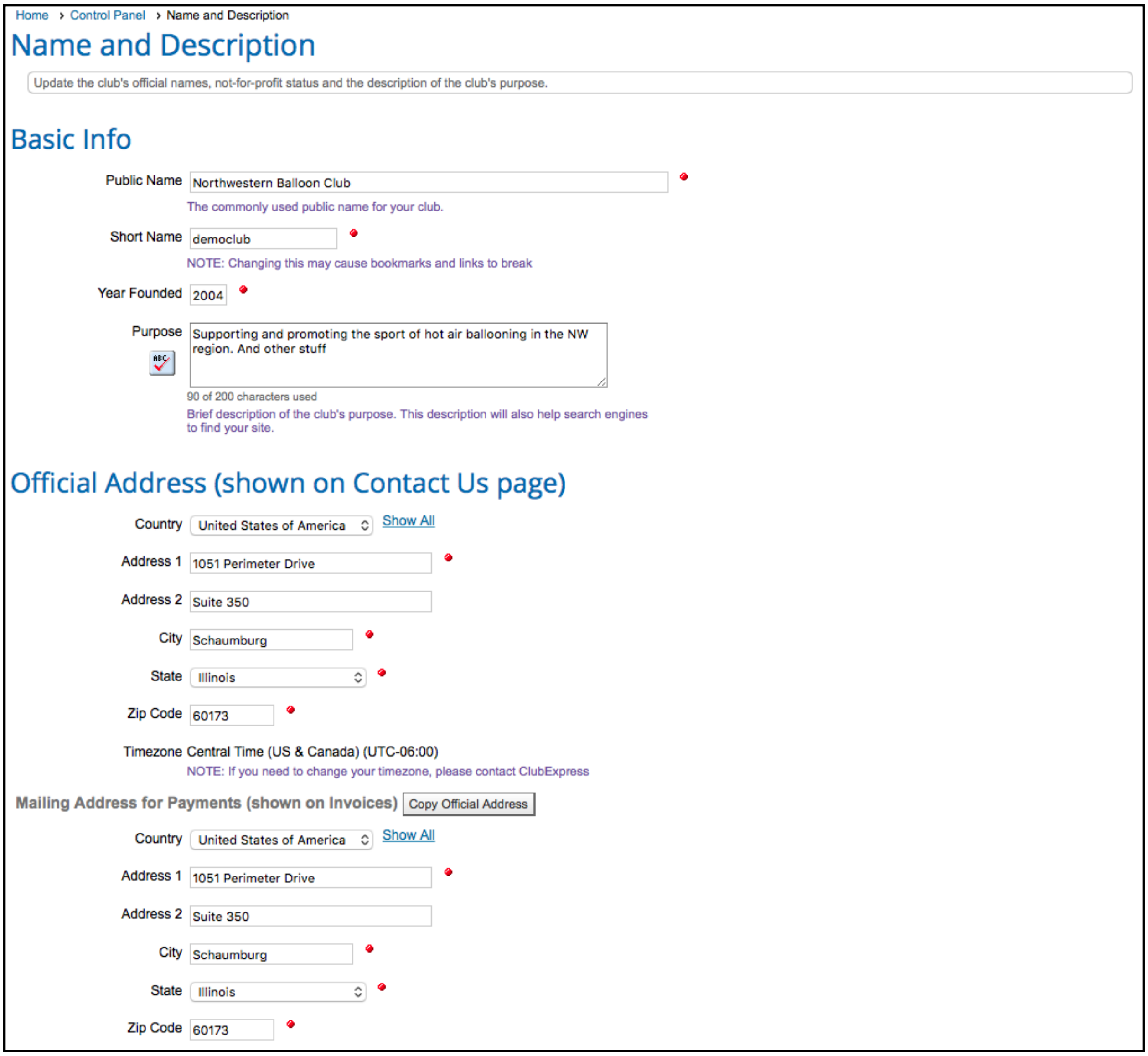
When data is exported outside our platform, it moves outside our control and becomes the responsibility of your club or association. It is important to protect this offline data as carefully as we protect your online data.

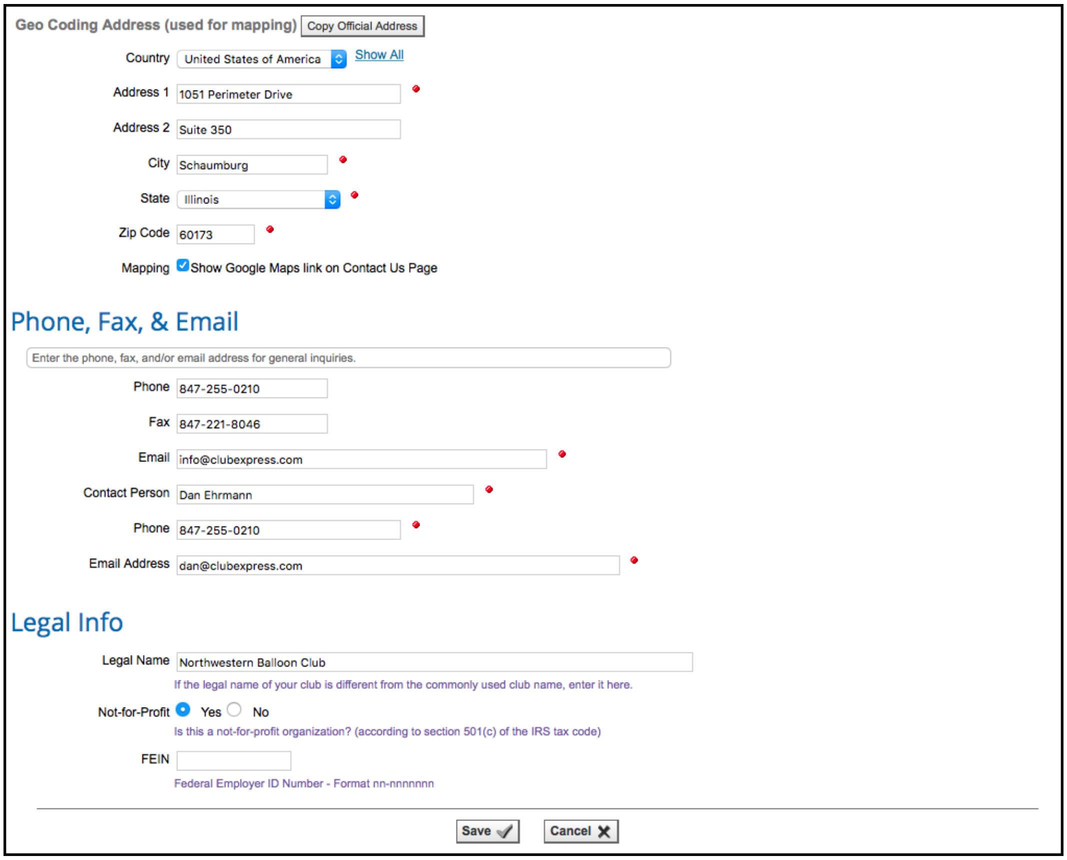
And when members or non-members exercise their right to “be forgotten”, and you approve this request, a person’s data must also be deleted or anonymized from any offline records you may have created through data exports, for backup or analysis purposes.

Name & Description

Control Panel > Club > Setup

Click **Name & Description** to display the following screen:





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.

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.

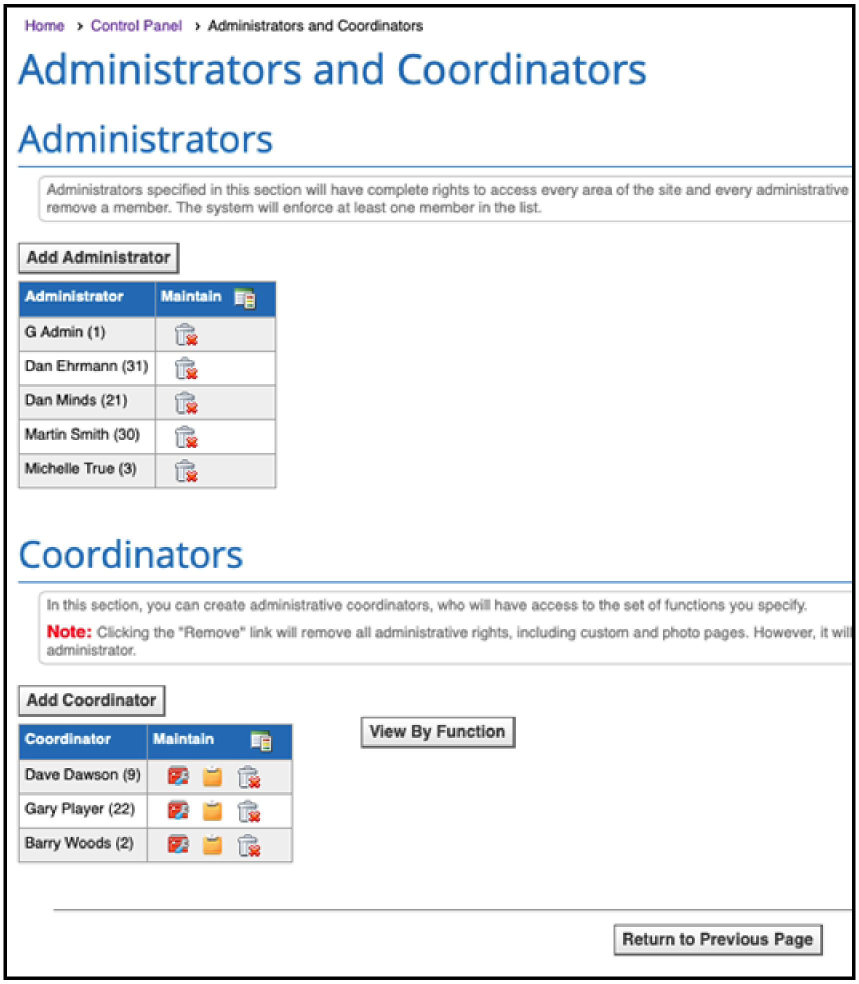
Administrators/Coordinators

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:

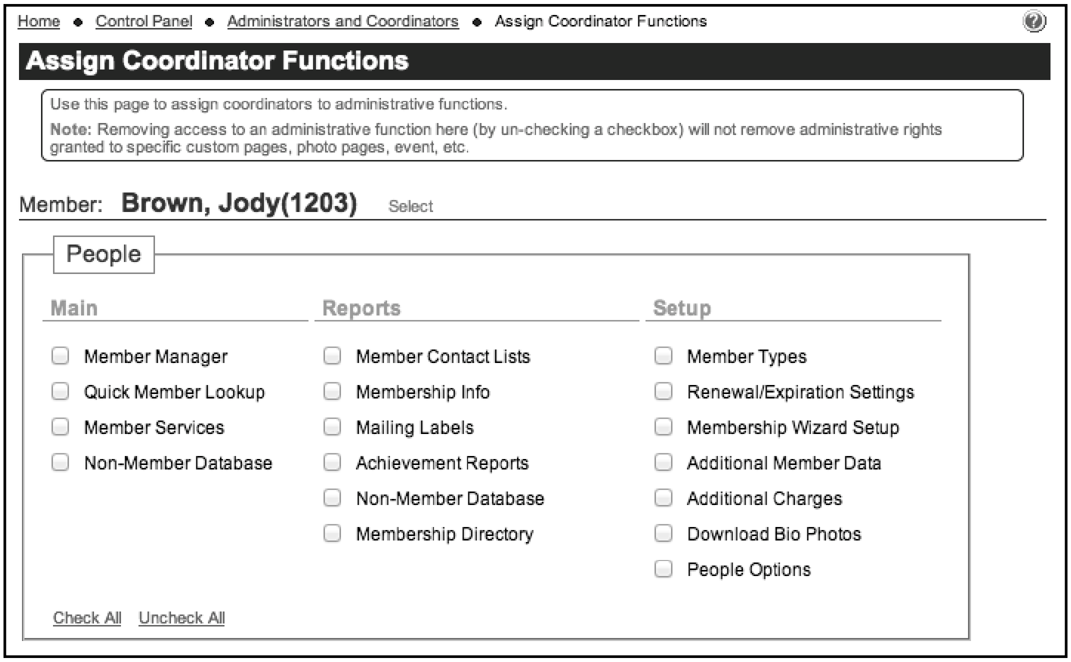


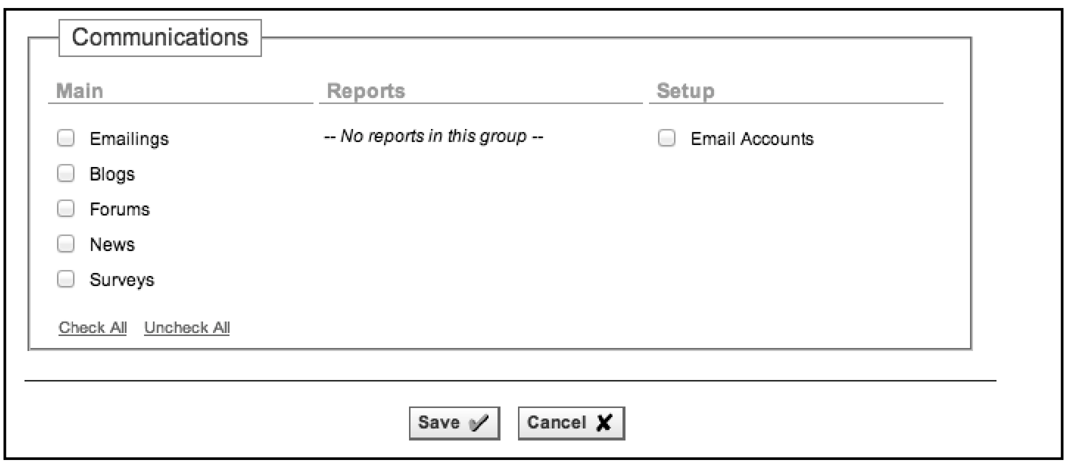
The top part of the screen allows you to define administrators. Click **Add Administrator** to specify that a member should be treated as an administrator. The standard Select Member dialog will be displayed to allow you to select a member. Only Active members are shown in the list.

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:





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.

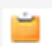
Three options on this screen deserve special mention because they do not appear on the full administrator Control Panel:

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.

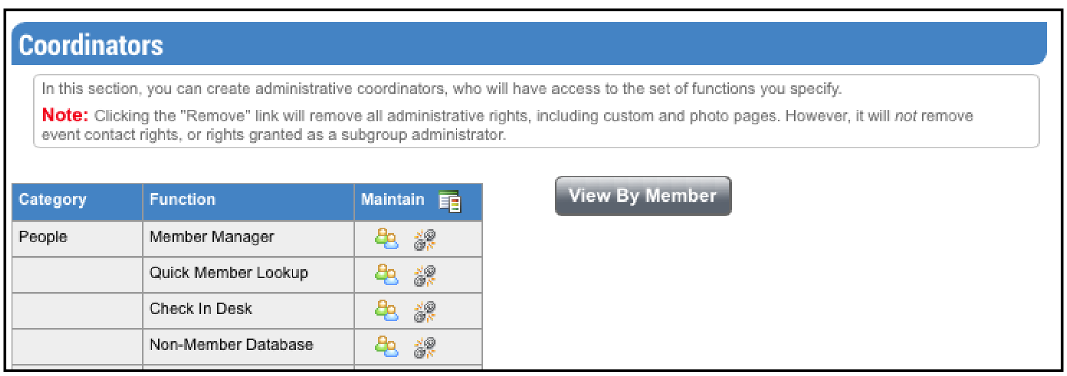
The following options are available in the Maintain column:

Icon	Description
 (Func-tions)	Clicking the Functions icon displays the same screen in edit mode.
 (Copy)	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:



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.

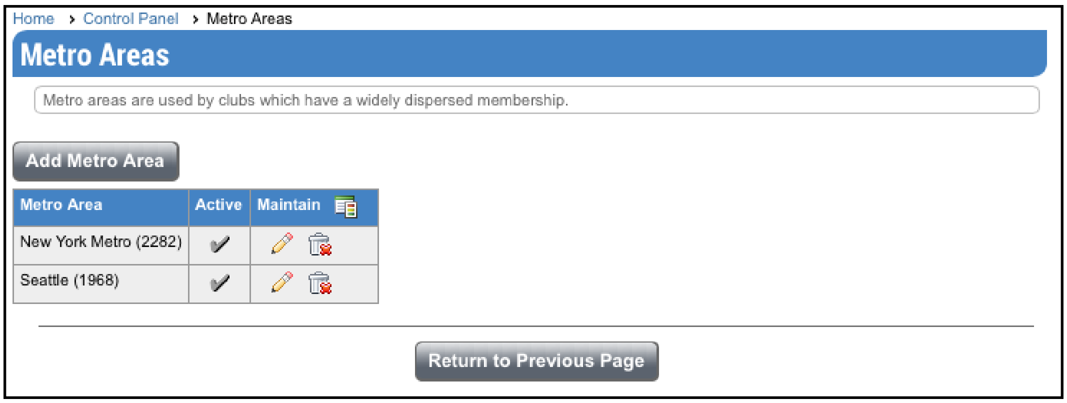
Click Save to save your changes, or Cancel to close the window without saving.

Note: Copying coordinator functions to another member will also copy their Favorites.

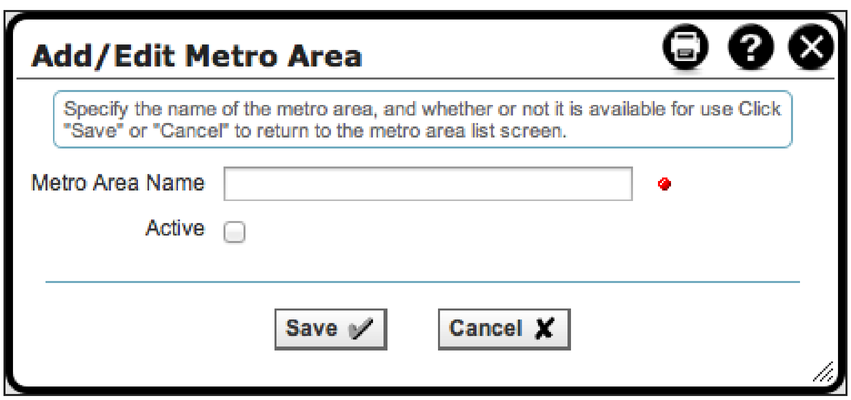
Metro Areas

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:



This screen lists the metro areas defined. Click **Add Metro Area** to define a new area. You will see the following screen:



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.

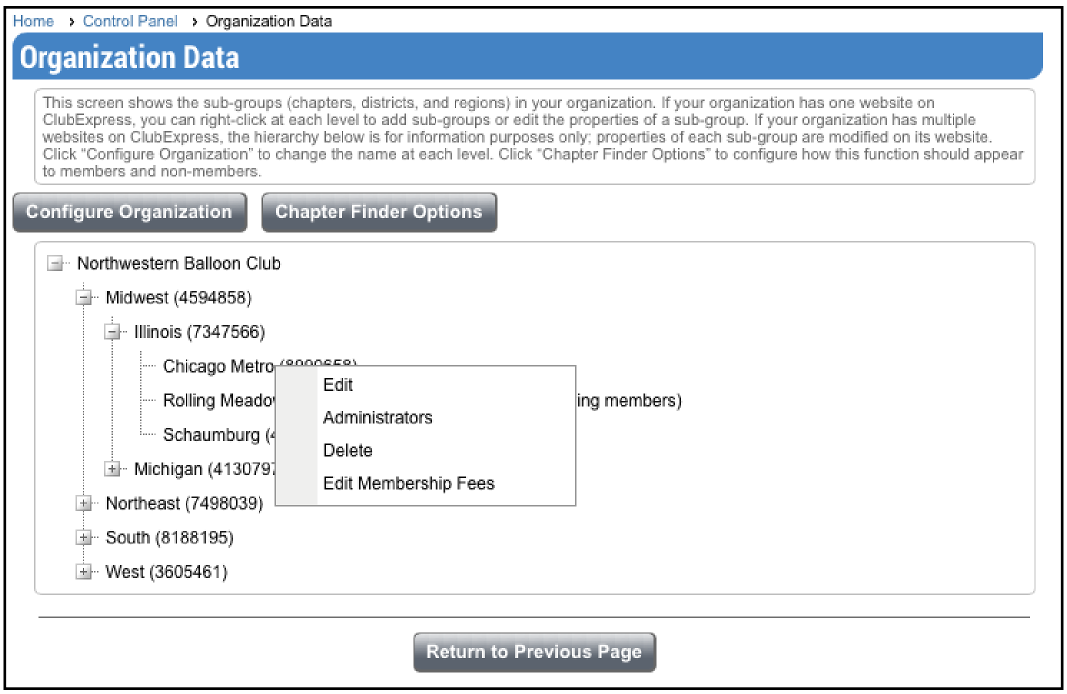
Organization Data

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:



> **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.

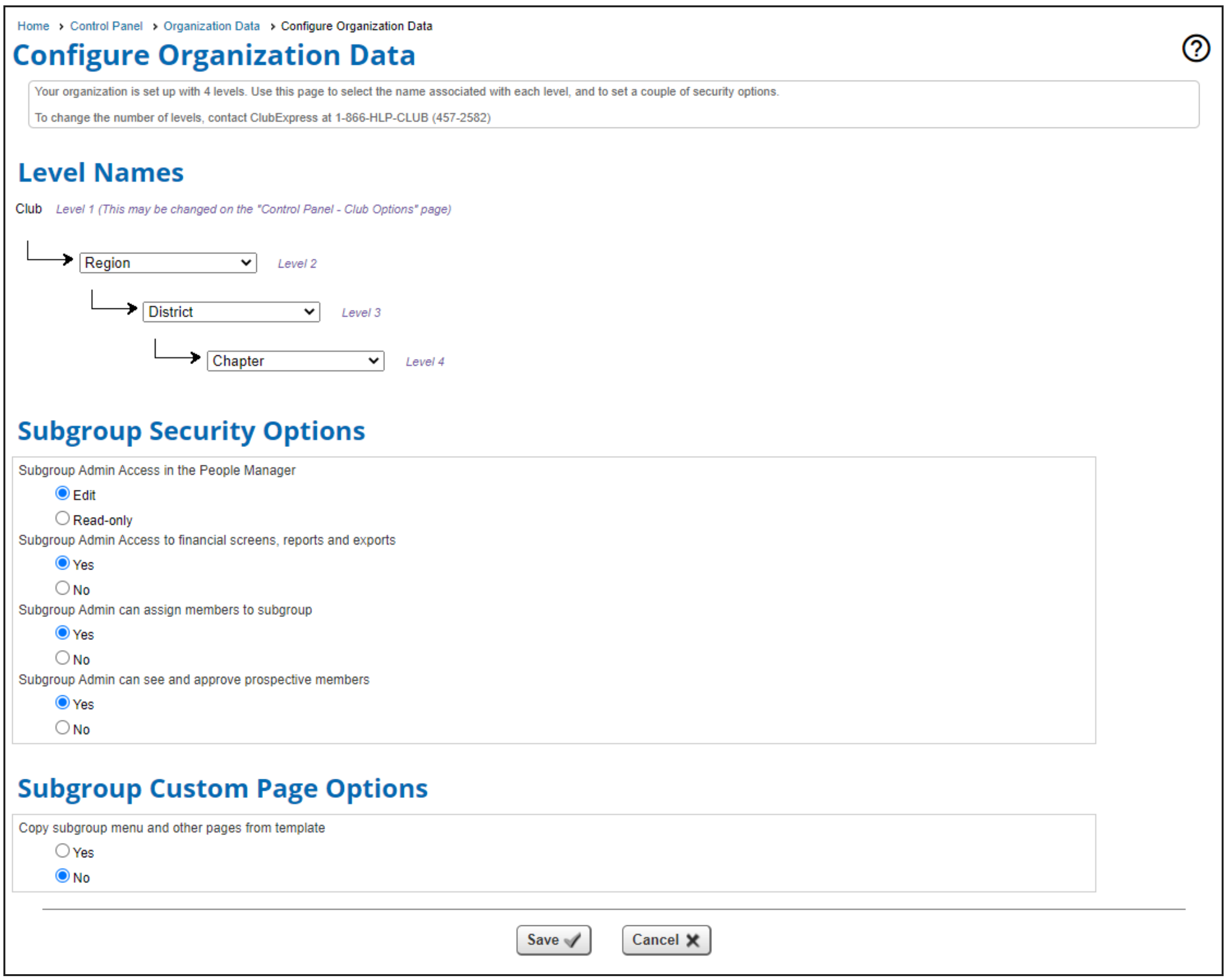
The ID numbers after each subgroup name can be used to create custom event calendars.

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:



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 sub-group.

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~~

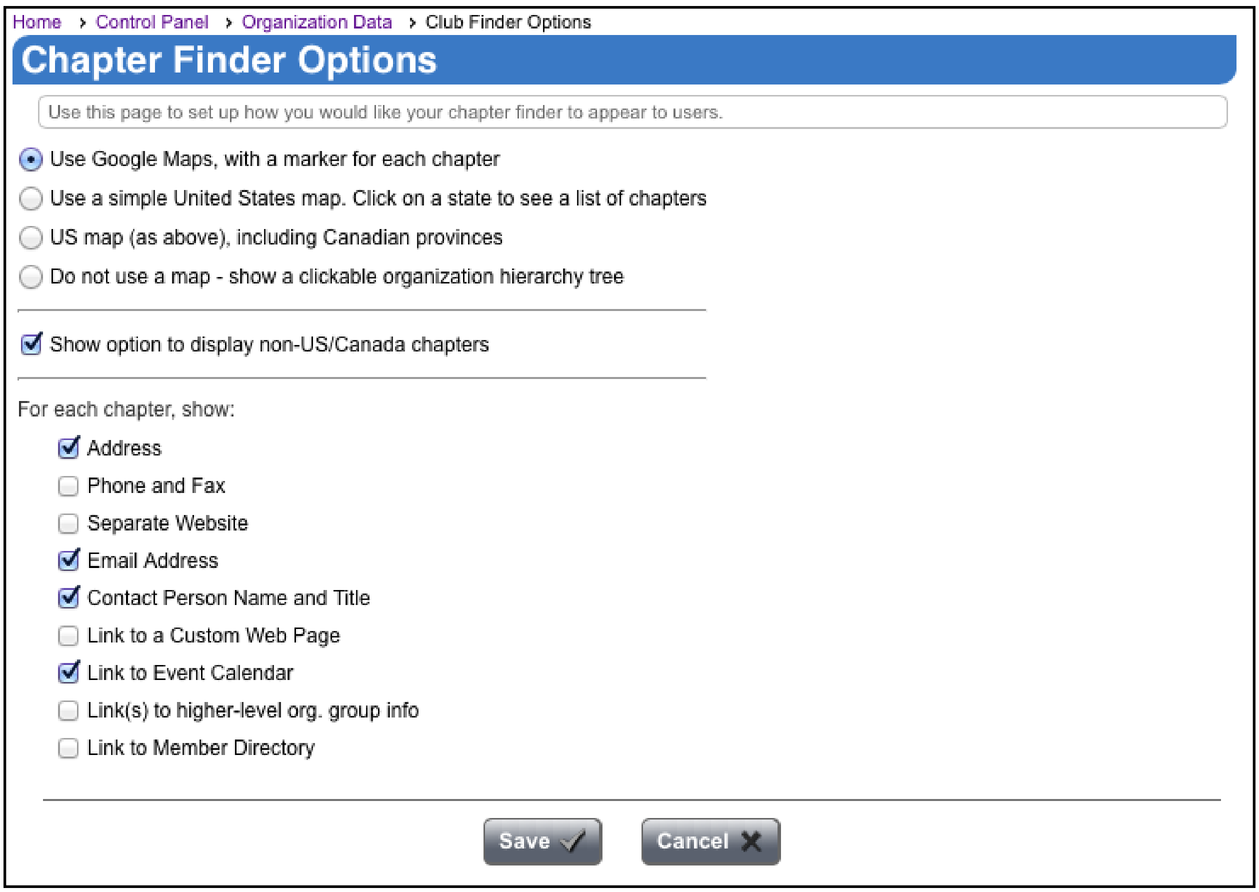
~~external_website~~

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

Chapter Finder Options

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:

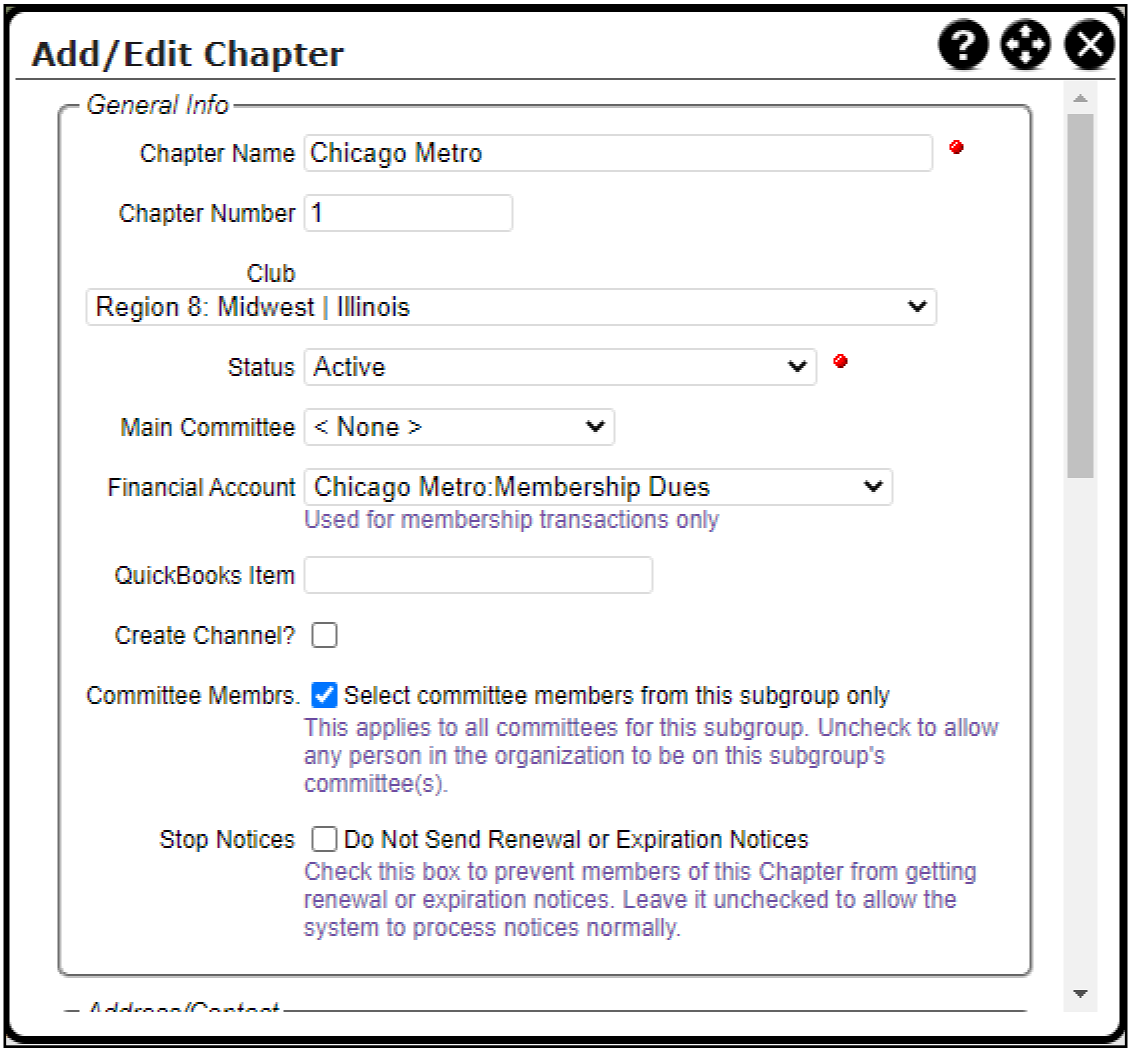
- Address of the chapter meeting or where correspondence should be sent;
- Phone and fax (blank fields will not be displayed);
- Separate website
- Email address
- Contact person name and title
- Link to a custom web page on the main website (some clubs and associations give each chapter, district and 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:



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:

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.

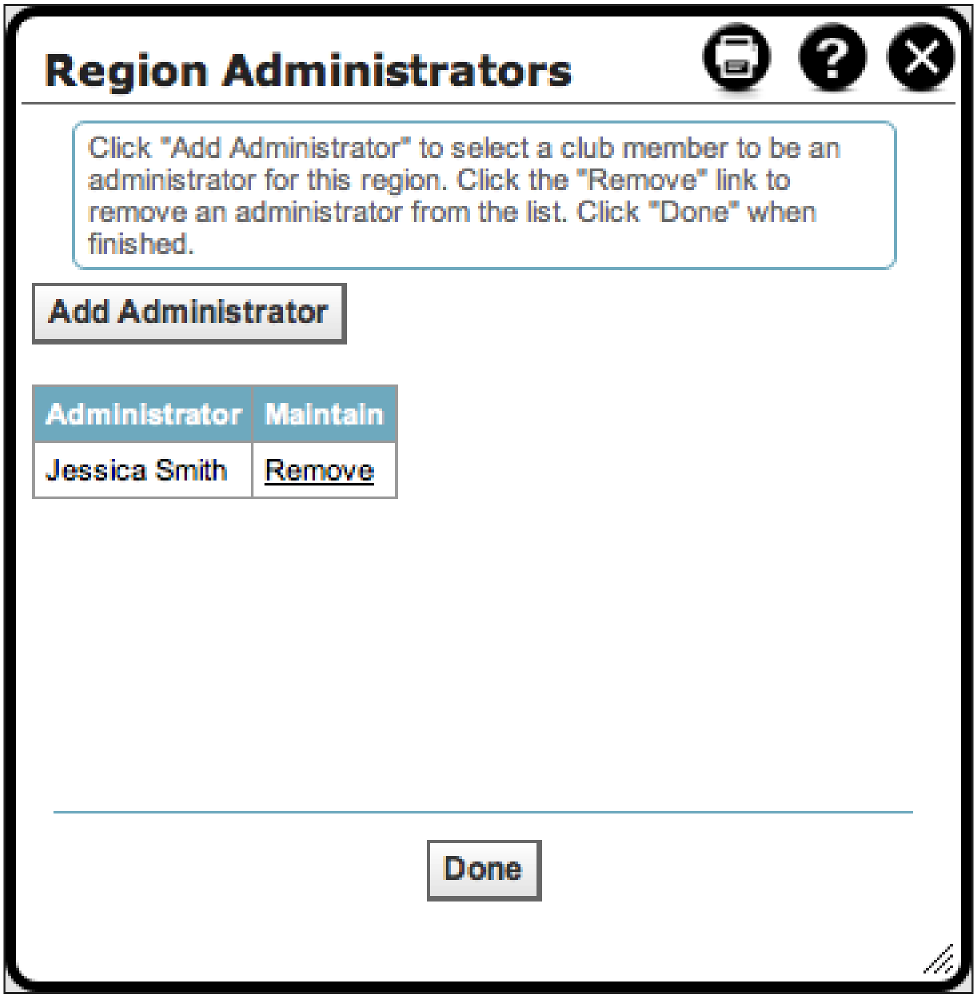
If geocoding has been enabled, you will also see **Latitude** and **Longitude** fields in the address panel for the lowest level of subgroup, allowing you to enter or update the location of each chapter in the Chapter Finder module. The system will update these geocodes automatically based on the address (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:



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.

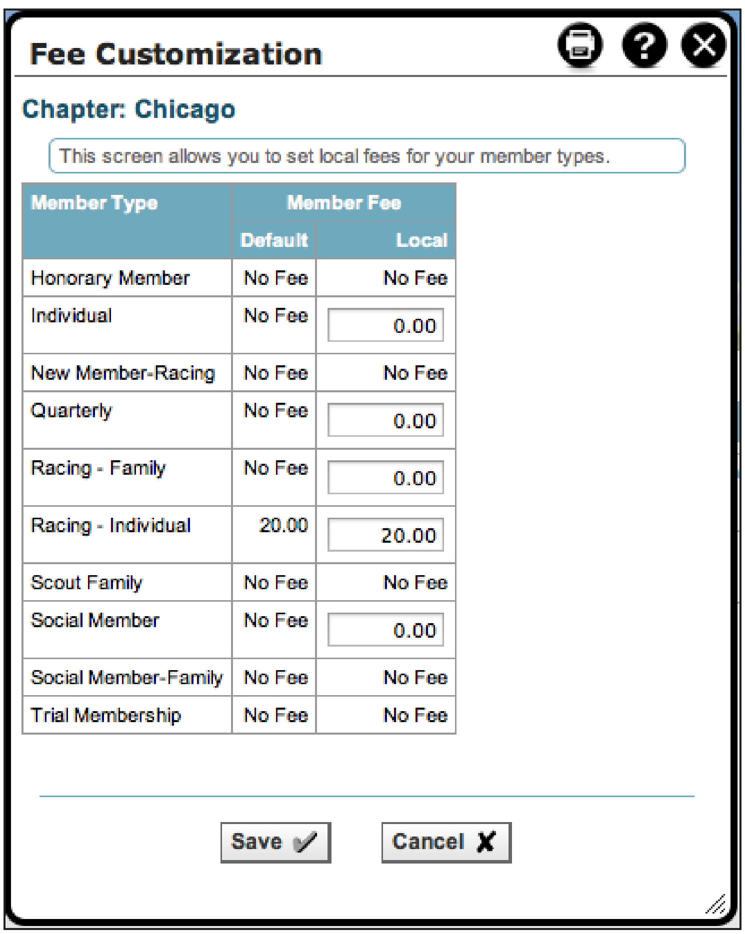
> **Example:** You cannot delete a district until the chapters within that district have been assigned to other districts. It also cannot have any members or administrators.

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:



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.

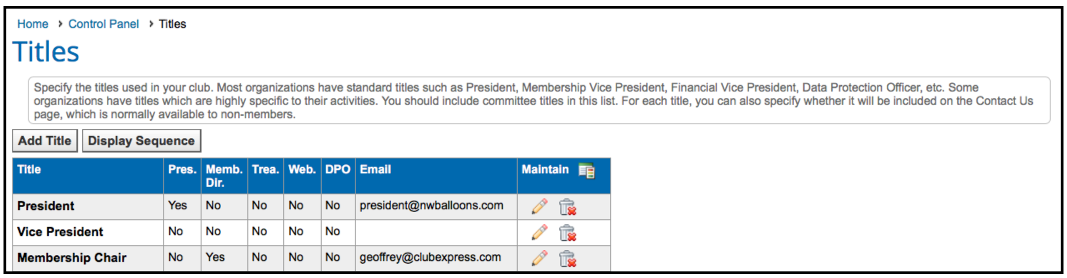
Click **Save** to save your changes and return to the Chapter hierarchy, or **Cancel** to return without saving.

Organization Titles

Control Panel > Club > Setup

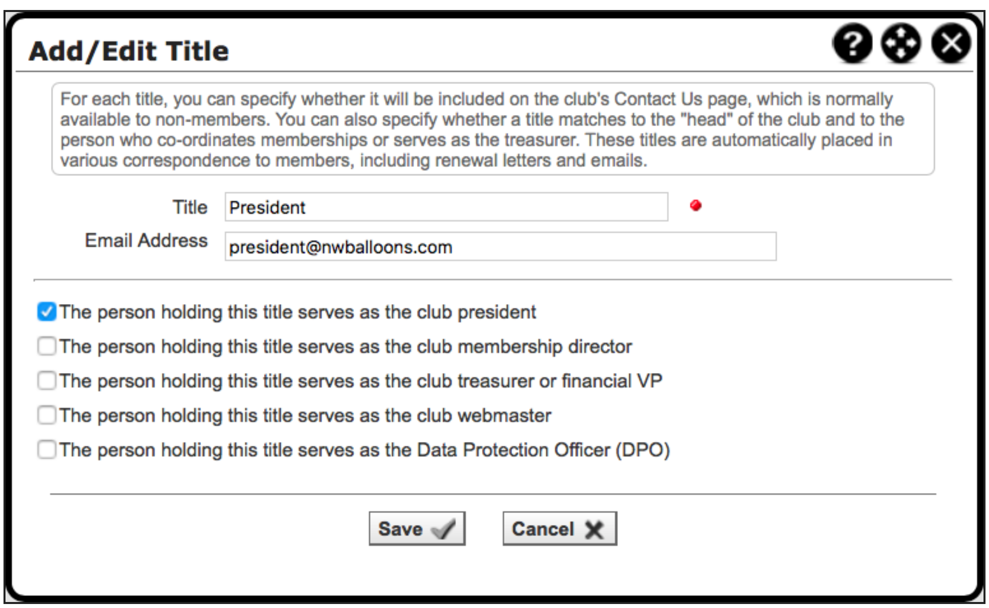
Every club and association has official titles defined in its constitution or bylaws, or used in committees. Some positions are members of the Board of Directors while others fill specific roles in your organization, for example, in judging at events or in producing the newsletter. Every title should 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:



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:



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.

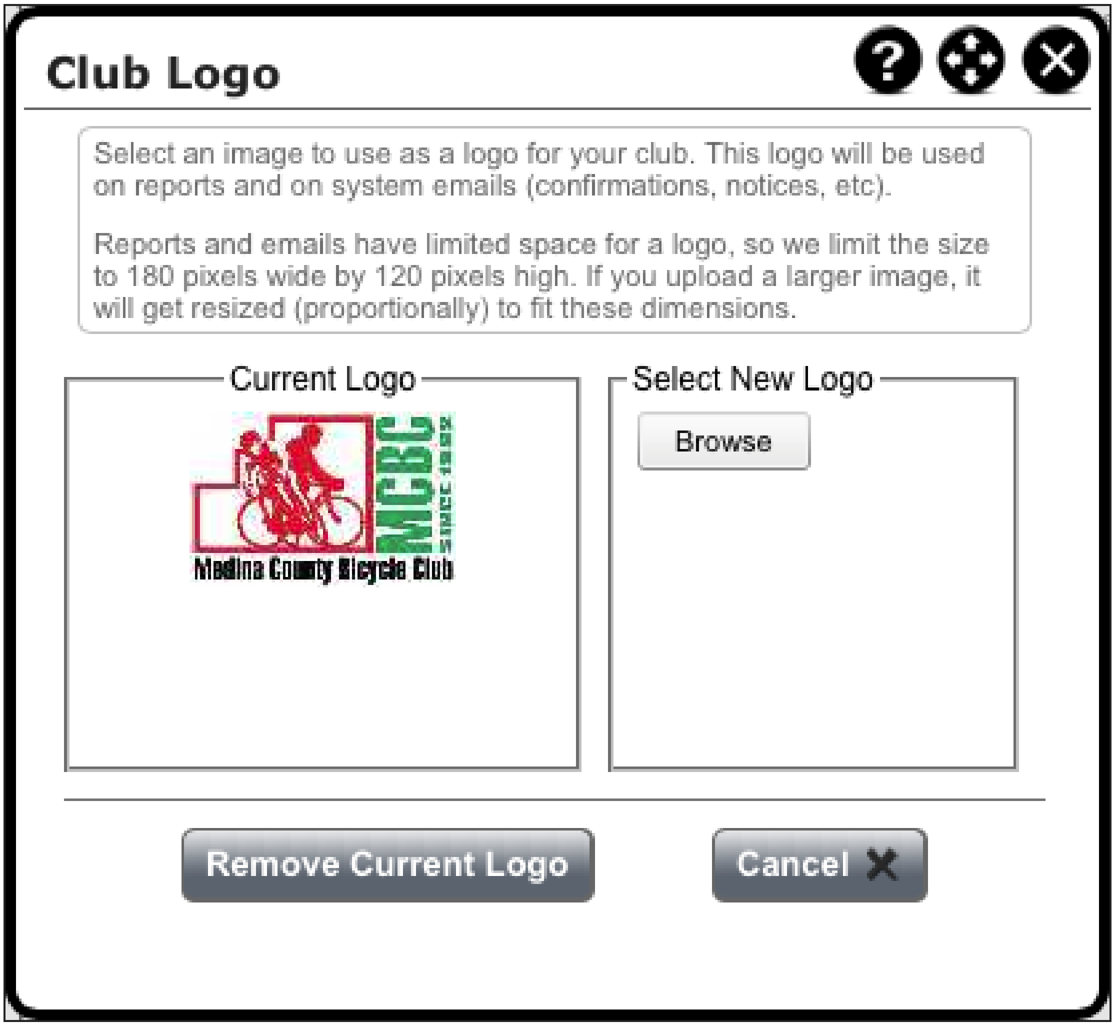
Upload Your Club Logo

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.

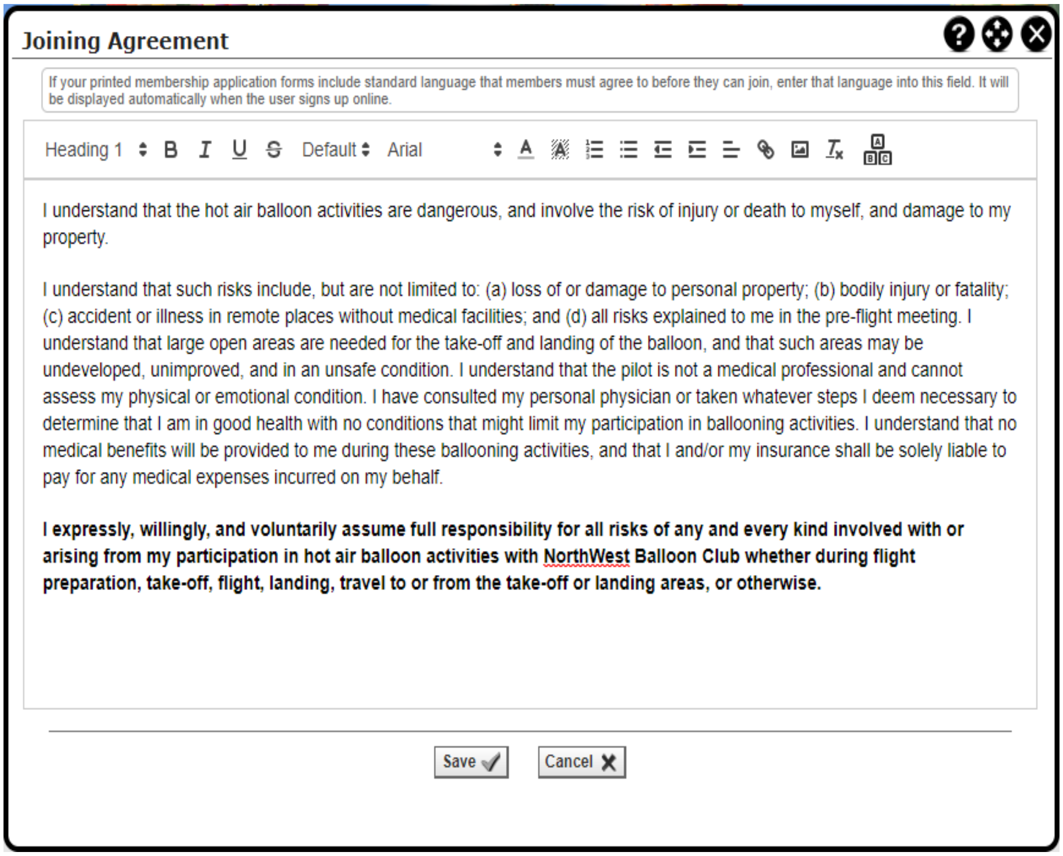
If you don't want to use the new logo, you can also click the **Remove** link. Or click **Remove Current Logo** to do just that.

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:



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.

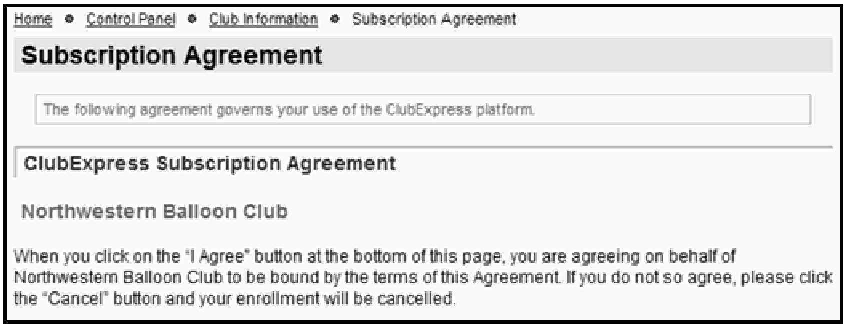
Related Tasks

Reference Materials

ClubExpress Subscription Agreement

Control Panel > Club > Setup

Click **Subscription Agreement** to display the following screen:

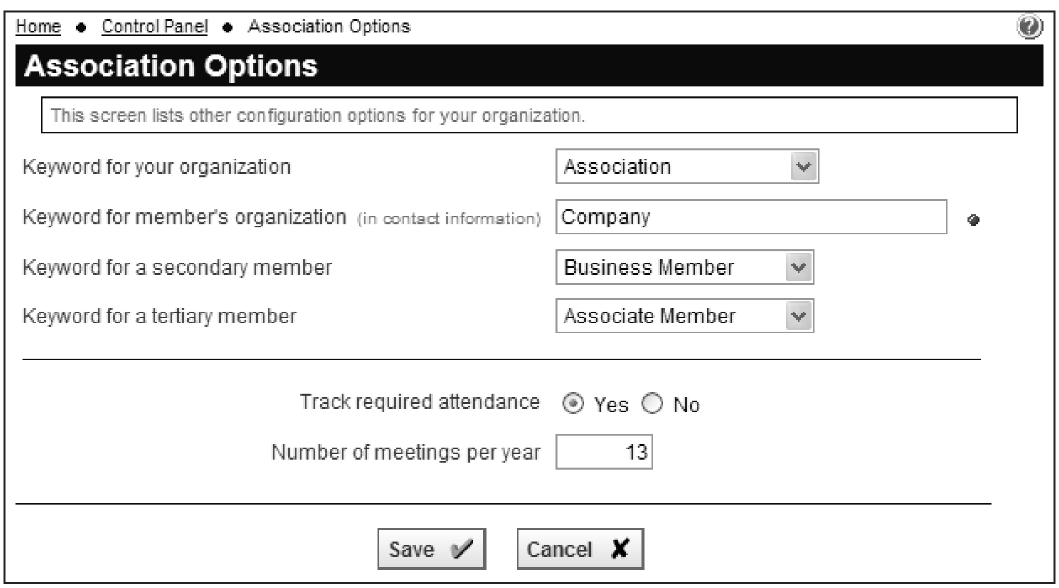


This screen displays the Subscription Agreement governing your use of the ClubExpress platform. This includes information related to licensing, fees and banking information, data rights, and terms related to the content on your website.

Club Options

Control Panel > Club > Setup

Selecting this option displays the following screen:



This screen has the following options:

- Specify the keyword for your organization: club (default), association, society, chamber, fraternity, institute, etc.
- Specify the keyword to use for a member's organization or company on their Contact Information screen.
- Specify the keyword to use for secondary members (if defined): family, associate, business, etc.
- Specify the keyword to use for tertiary members (if defined): child, coworker, etc.
- Does your club or association track required attendance? Many community service clubs such as Rotary, Lions, and Exchange require members to attend a minimum number of meetings each year.
- If so, specify how many meetings a member must attend each year. In the event calendar module, you can optionally track attendance for each event and also define whether that event is eligible for meeting attendance credit.

Click **Save** or **Cancel** to return to the Control Panel.

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.

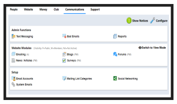
Exports

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 Hierarchy data	View and print reports showing the organization hierarchy for a multi-tier club.	N/A

Club Tab Reports

Communications



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 non-members.

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

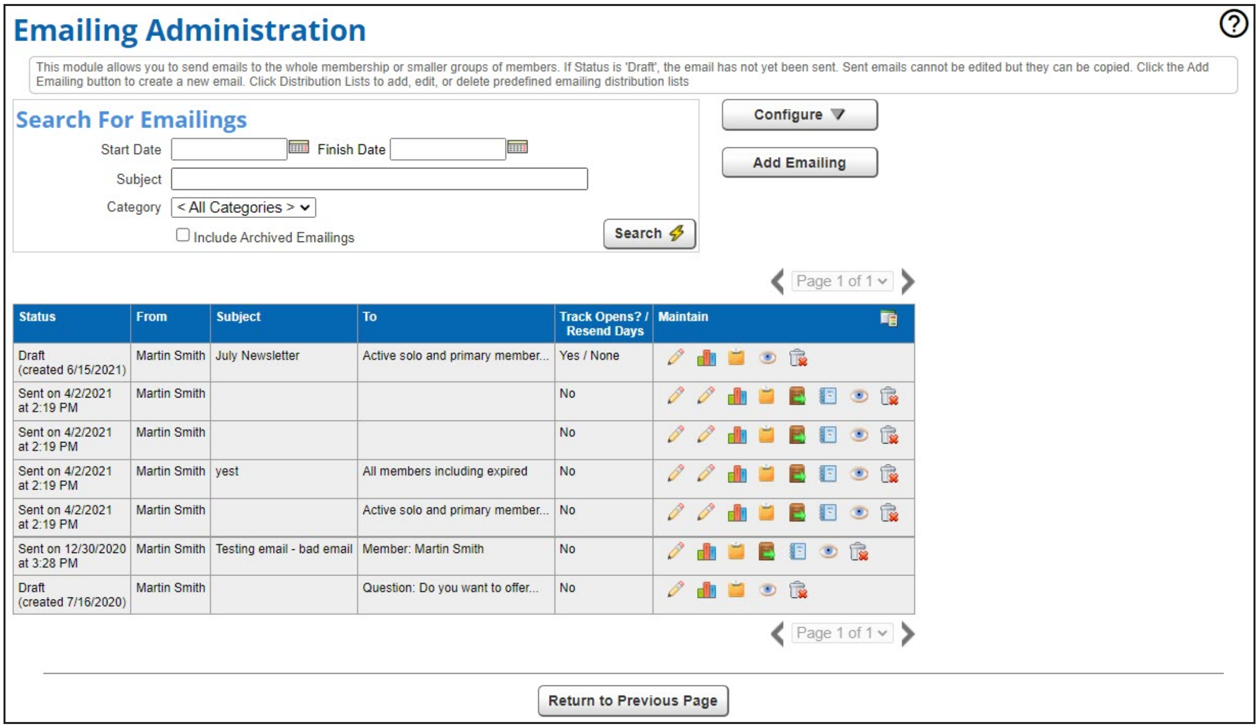
Emailings

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:



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>

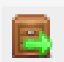
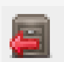
You can filter by date range, subject (anywhere in the field), category and optionally include archived emails. Click **Search** to show a list of matching emails.

> **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:

Icon	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.

Icon	Description
 (Results)	Select **Results** to display the results of the email, including number attempted, number delivered, and various failure statistics.
 (Copy)	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 available 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) /  (Unarchive)	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 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:

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.

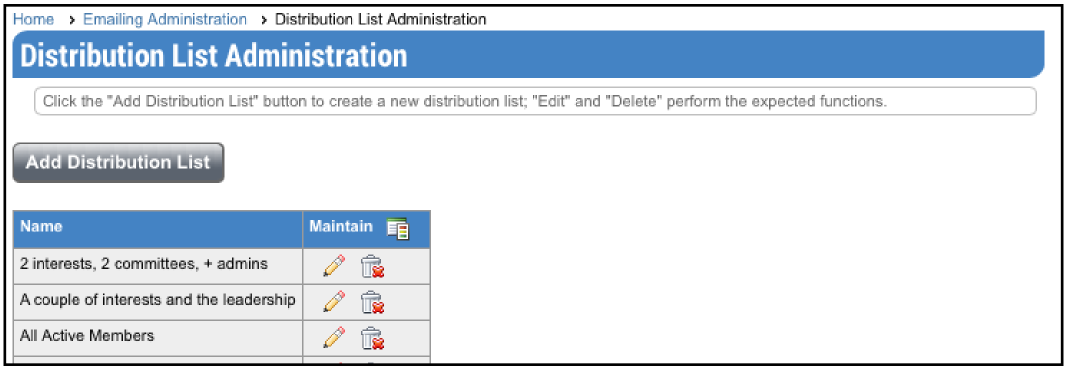
Note that distribution lists with multiple options act using “OR” conditions; each option is additive to the list.

> **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.

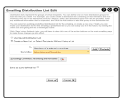
You can also exclude members or groups from your emailing list.

> **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:



Click the **Add Distribution List** button to create a new list. You will see a screen similar to the following:



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.

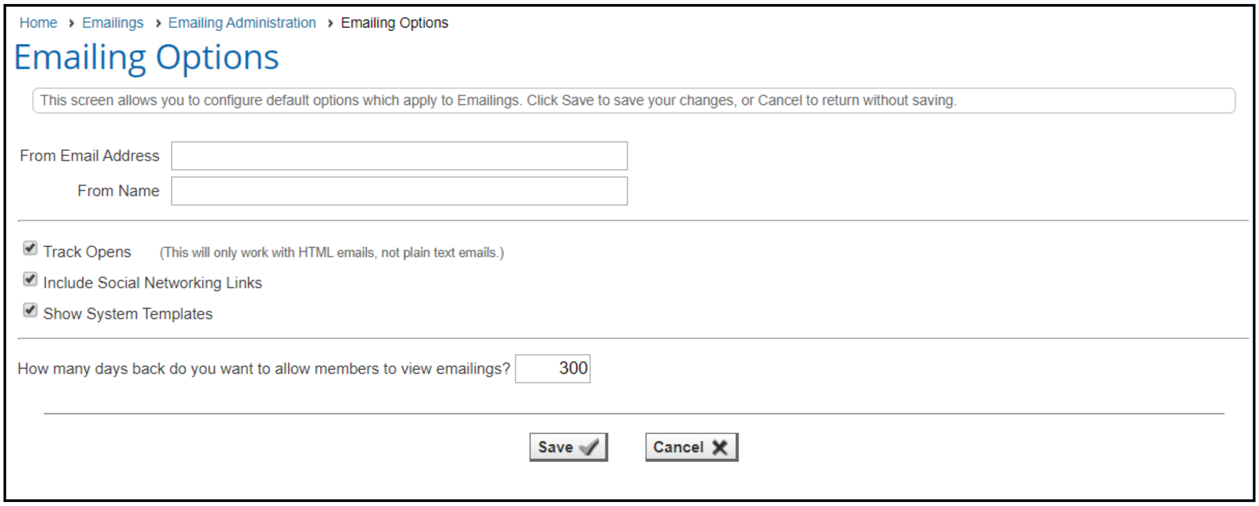
On the Distribution Lists main screen, click the **Edit** icon to modify an existing distribution list, or the **Delete** icon to remove a list.

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:



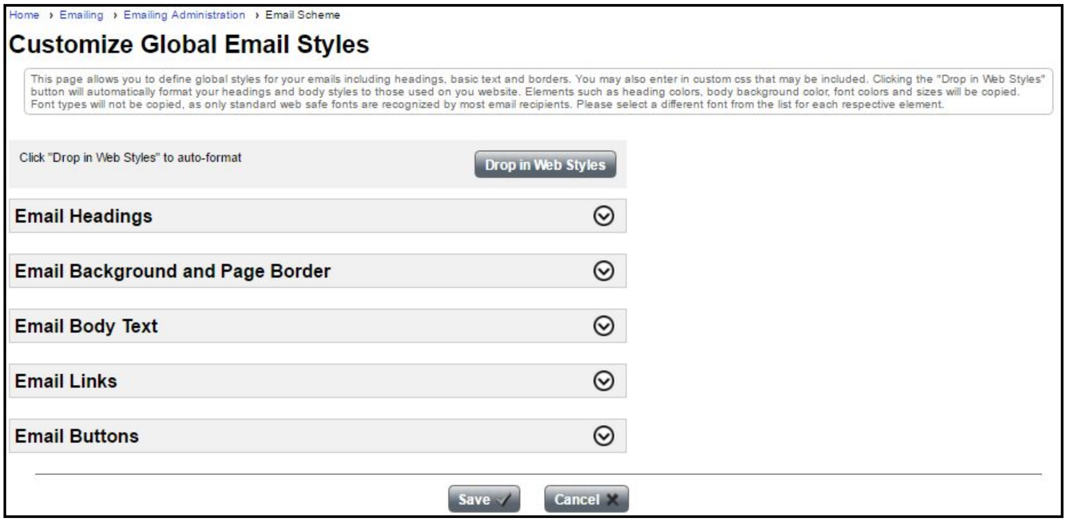
On this screen, you can specify the default email address and name to be used as the "Sender". You can also specify whether you want to track who opens the email, whether to include a panel in each email showing links to the club's social networking feeds, and whether system templates should be shown 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:



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.

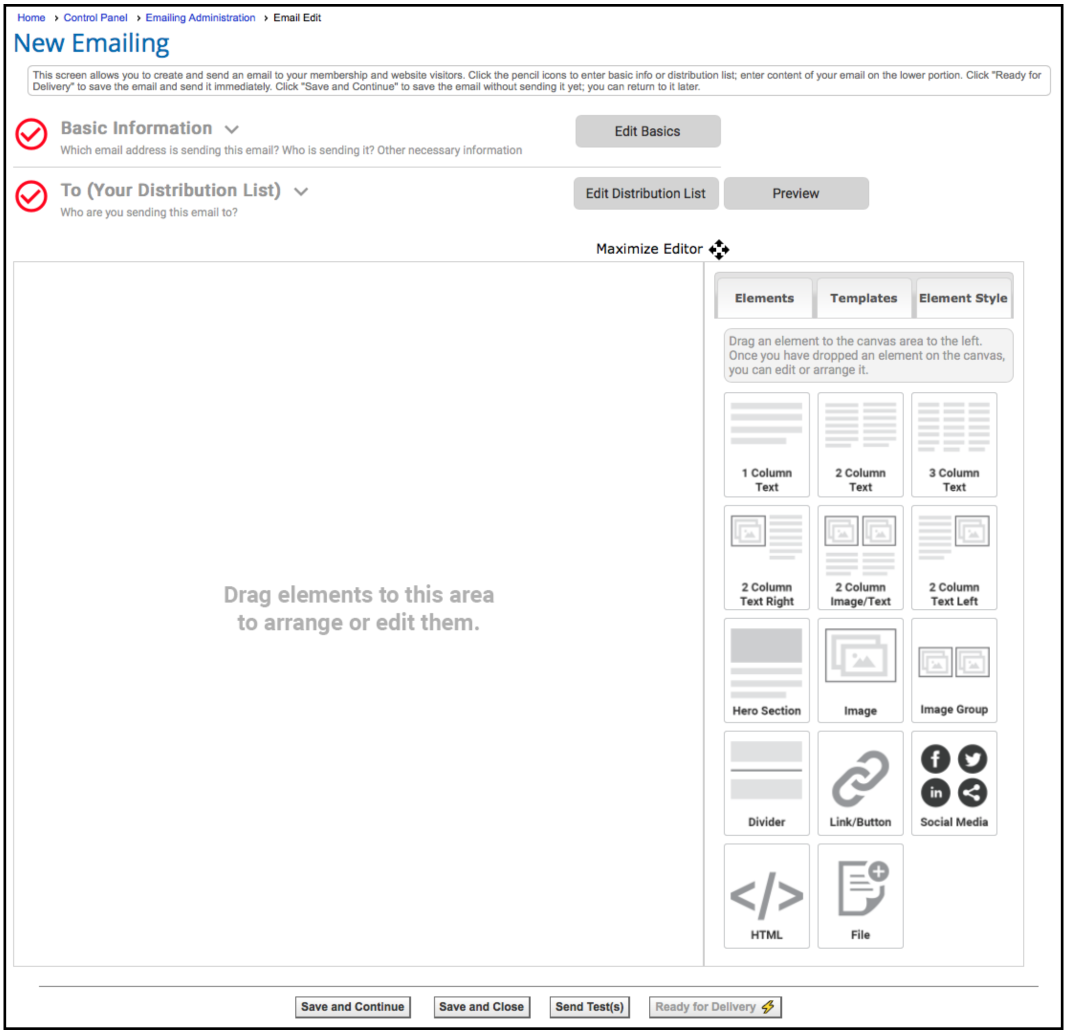
> **Note:** This option is for experienced web developers only. ClubExpress cannot debug or customize Custom CSS entries. Also, very elaborate CSS may be ignored by many popular email programs.

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

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:



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.

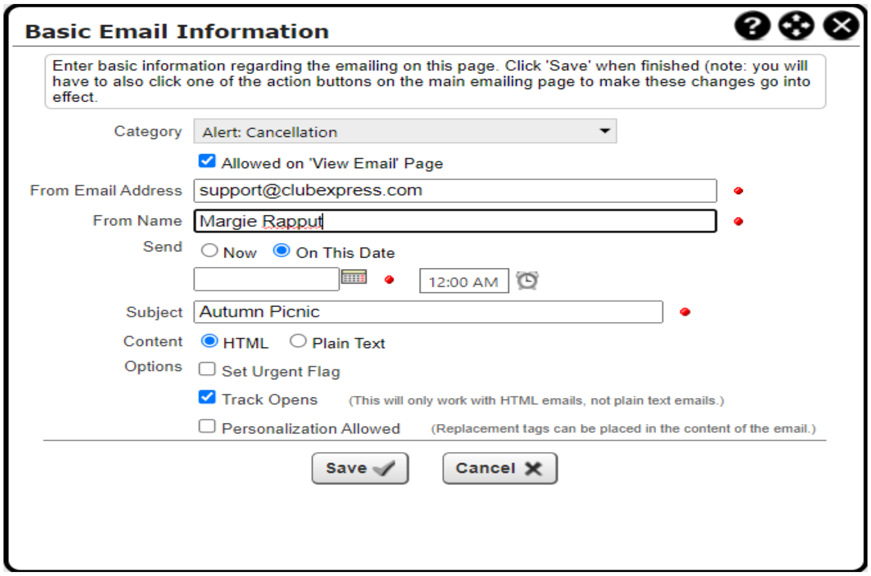
On the right, you will initially see a list of elements that can be dragged into the Builder panel. Two other tabs allow you to select a predefined template or to modify styles for the currently selected element.

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:



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.

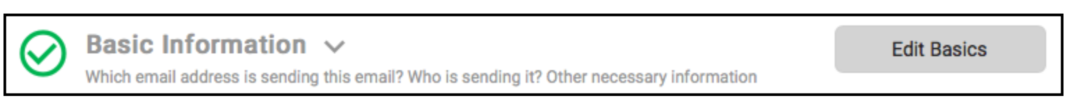
> **Note:** When sending an email at a future time, the time the email will be sent at the selected time in your club's local time zone (specified in Control Panel > Club Tab > Setup > Name and Description).

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.)

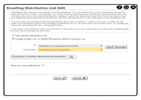
When you are done, click **Save** to save your changes, or **Cancel** to close the dialog without saving. When you click Save, the screen will look like the following:



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.

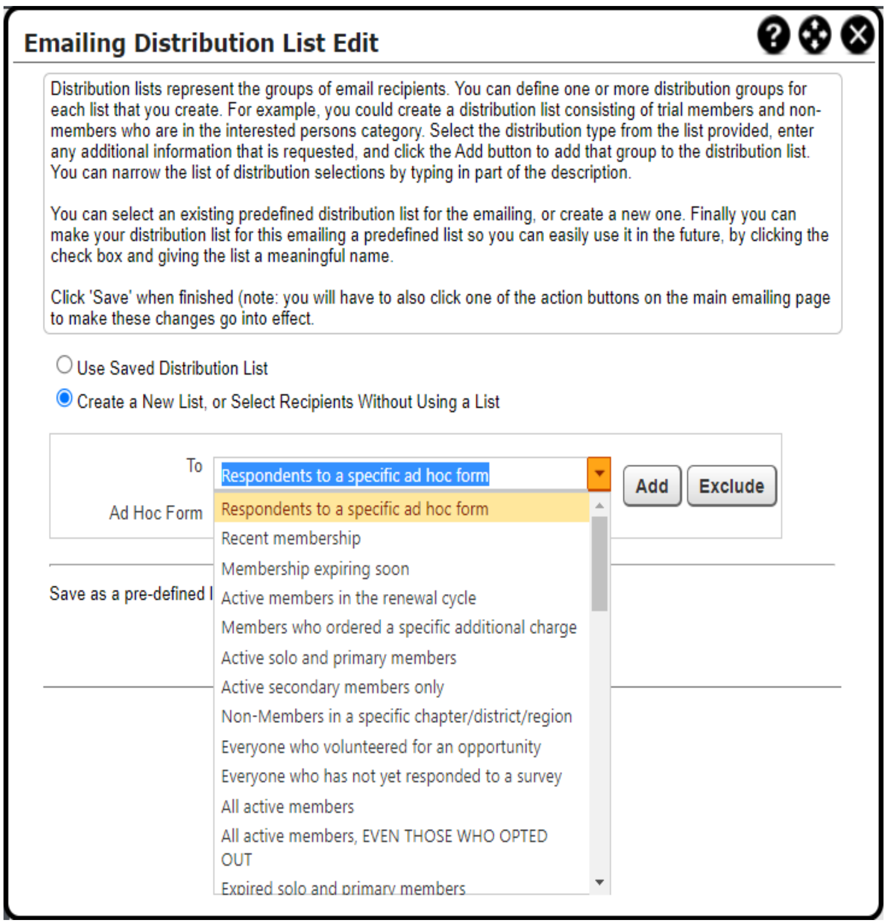
Edit Distribution List

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:



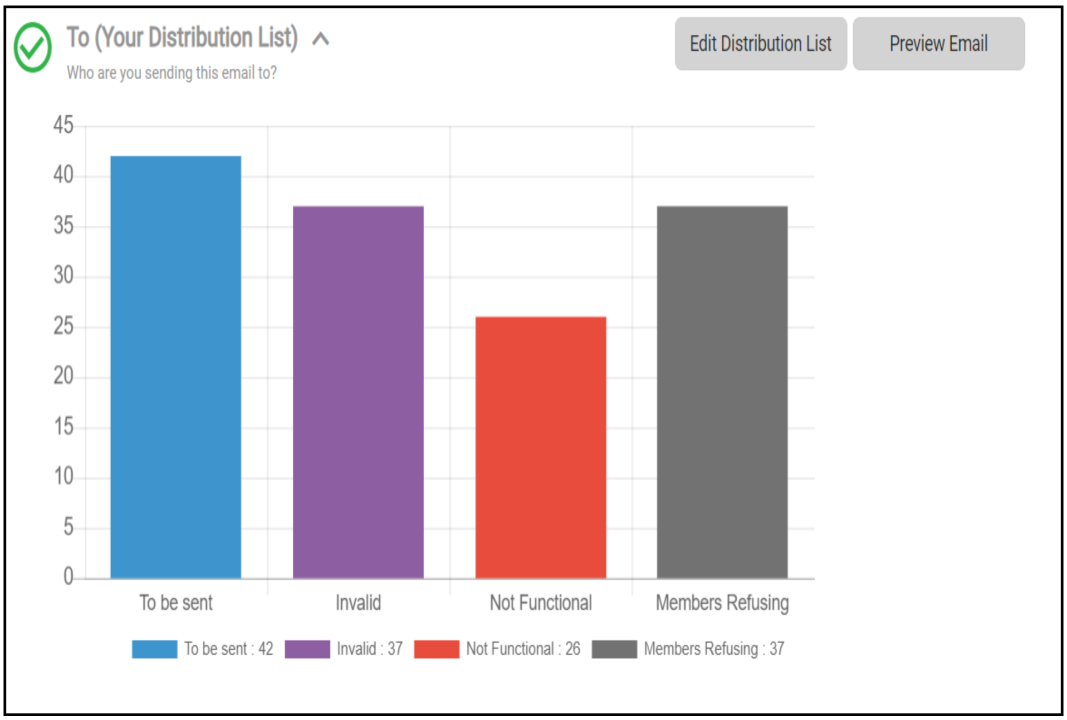
Start by clicking the drop-down to select one of the available options. Some options will then prompt for additional information. To find a list easily, begin typing in the To drop down menu to narrow down the list of distribution lists.

> **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:

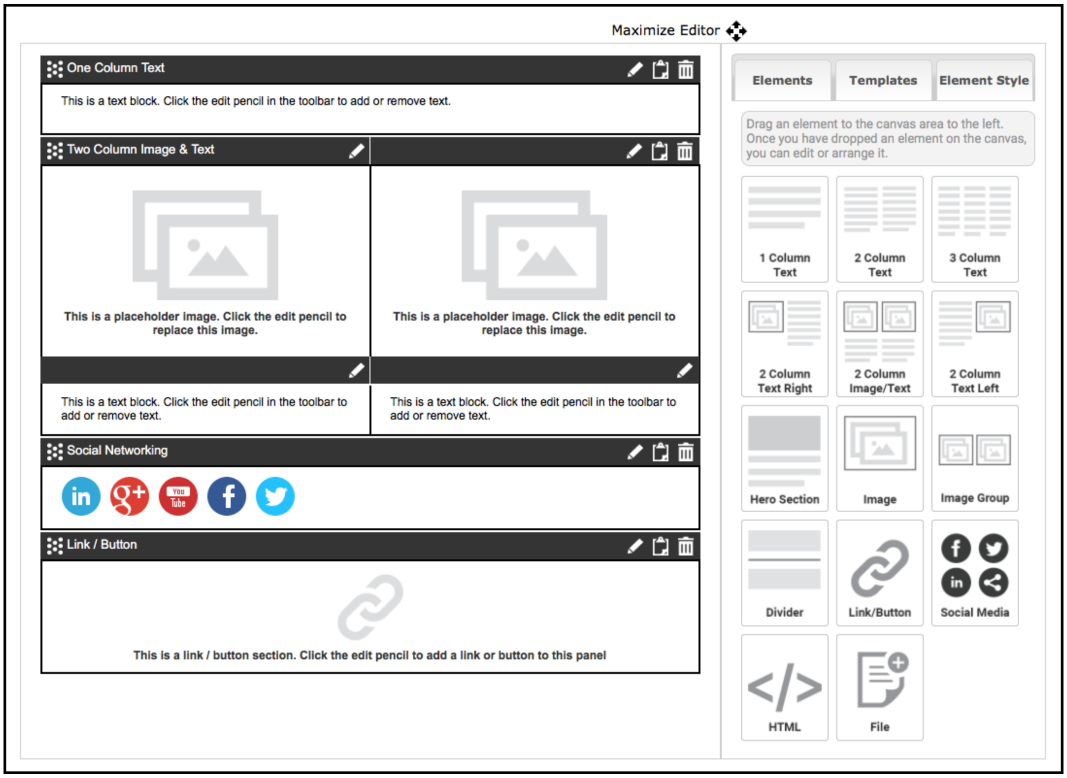
- 1 Column Text
- 2 Columns Text
- 3 Columns Text
- 2 Columns Text Right of Image
- 2 Columns Image above Text
- 2 Columns Text Left of Image
- "Hero" Section (photo above text)
- Image
- Image Group (2 images side by side)
- Divider
- Link or Button
- Social Media Links
- HTML
- File Attachment

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.



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.

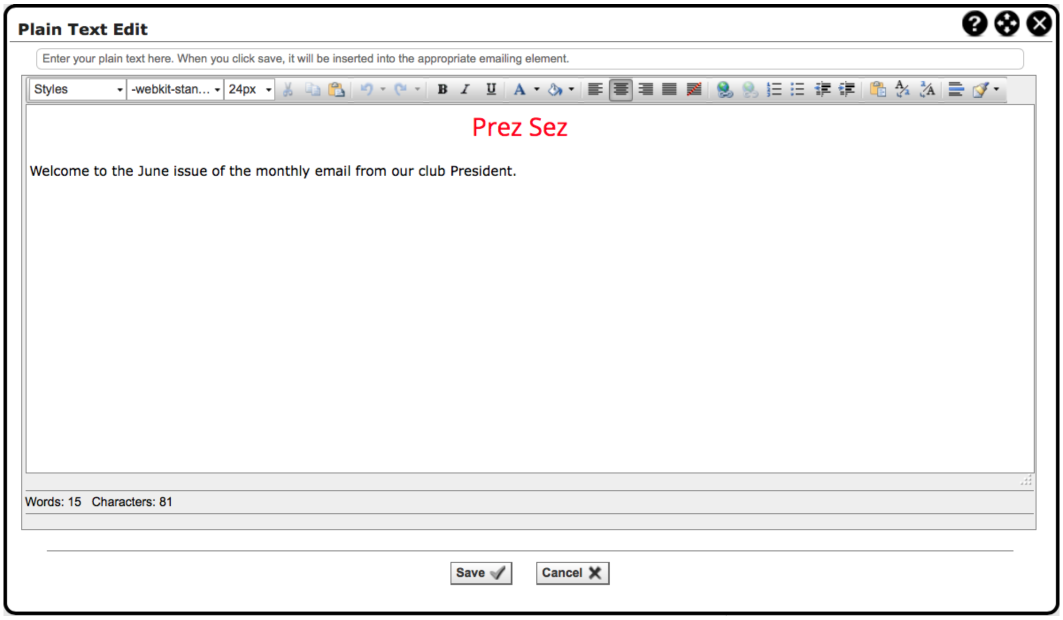
To edit an element, click the pencil icon on the right side of the title bar. The various options you will see are described below.

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

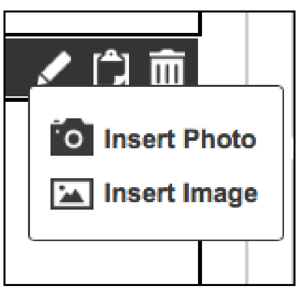
When you edit a text block, you will see a simplified version of our advanced Content Editor, as shown below:



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:

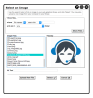


Within ClubExpress, images can come from two locations: photos (which are stored internally in multiple resolutions), and images (website graphics that are stored internally in a single resolution.)

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.

Selecting Insert Image displays the following dialog:

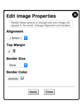


This is a standard dialog that allows you to search for an image previously uploaded, based on filename, title, and/or folder. You can also upload a new image by clicking the **Upload New File** button.

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.

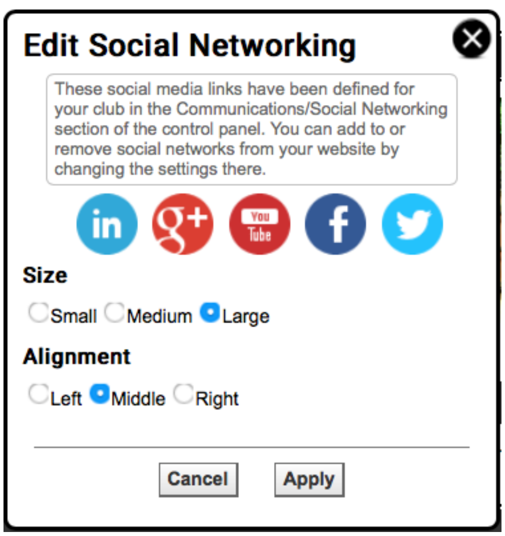
Editing Links

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.

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

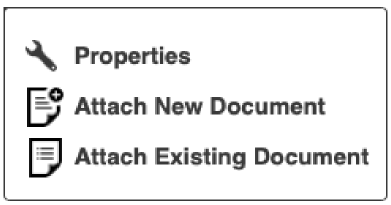
When you drag in an HTML section and click the Edit icon, you will see the full content editor with almost all of its options. (Only options not supported in emails have been removed.) You also have the ability to switch into HTML mode to build something as complex as you want.

> **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

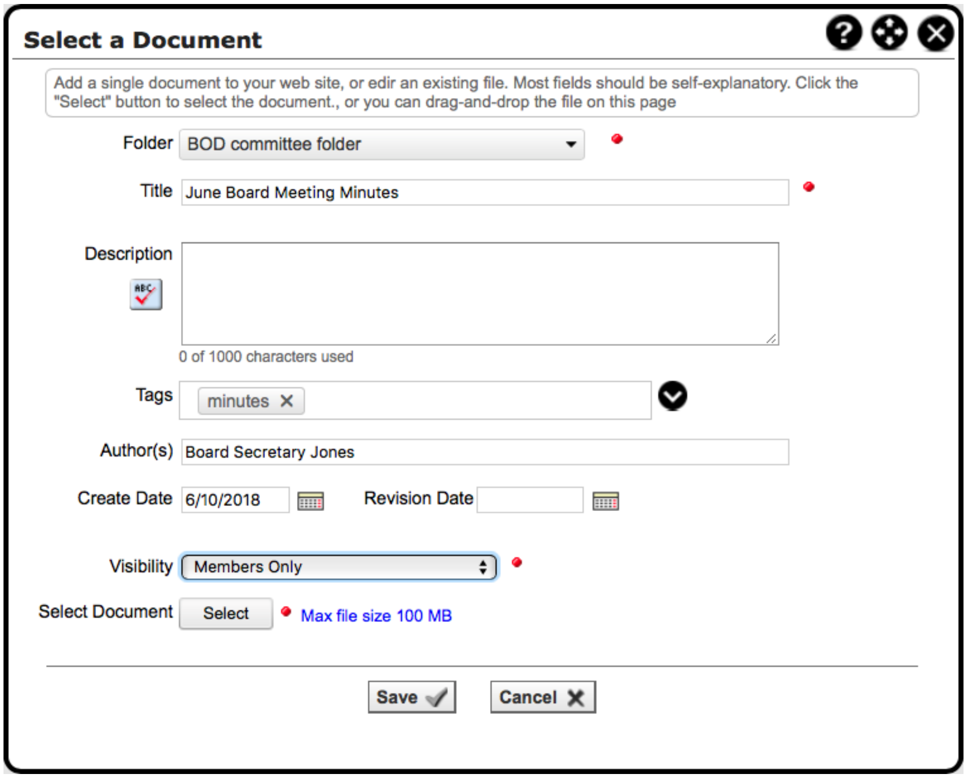
Use the File element to add an attachment to your email.

When you click the edit icon for a File element, you will see the following popup menu:



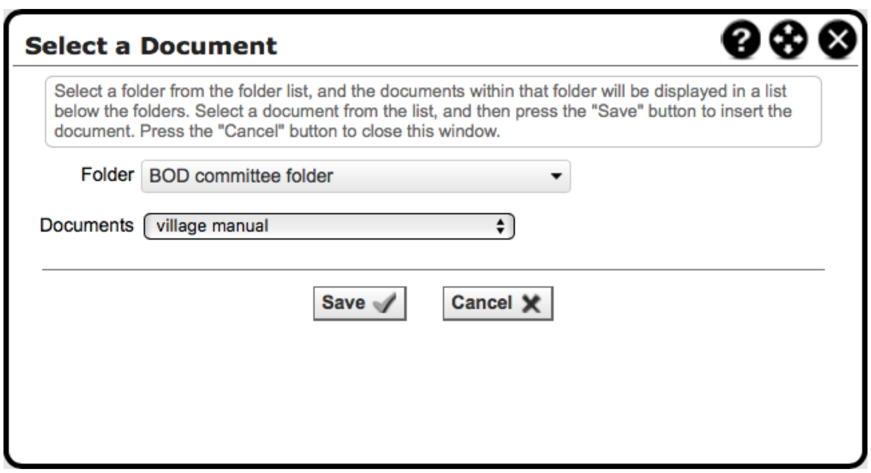
Note: Properties is only visible once a document has been attached.

When you select Attach New Document, you will see the following dialog from the Document Library module:



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.

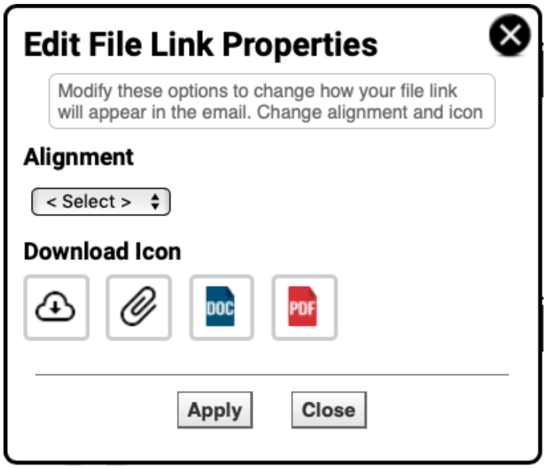
When you select Attach Existing Document, you will see the following dialog:



Select 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.

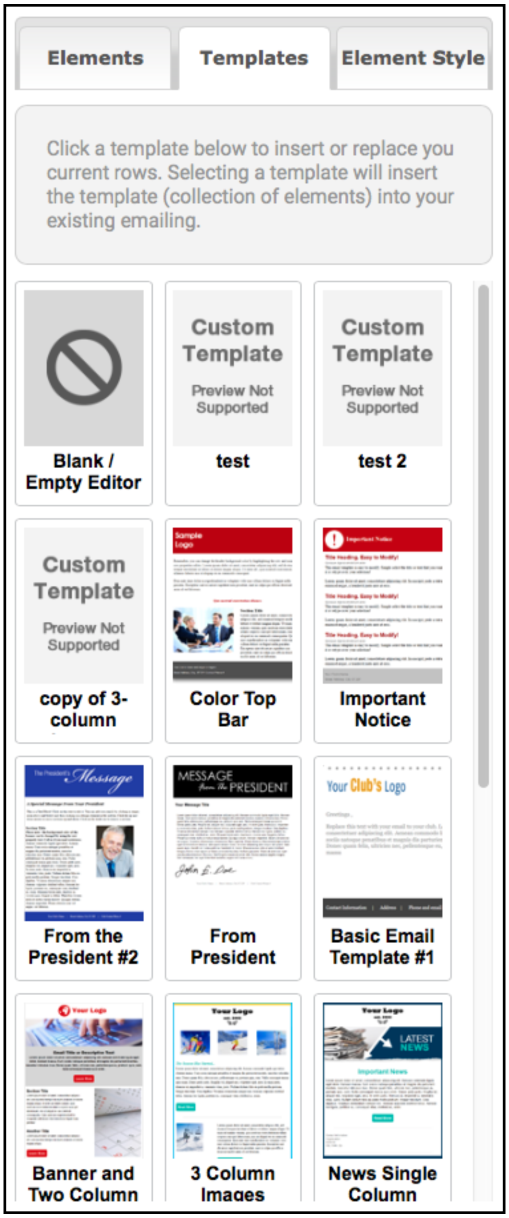
Once a document is attached, select **Properties** to see the following dialog:



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.



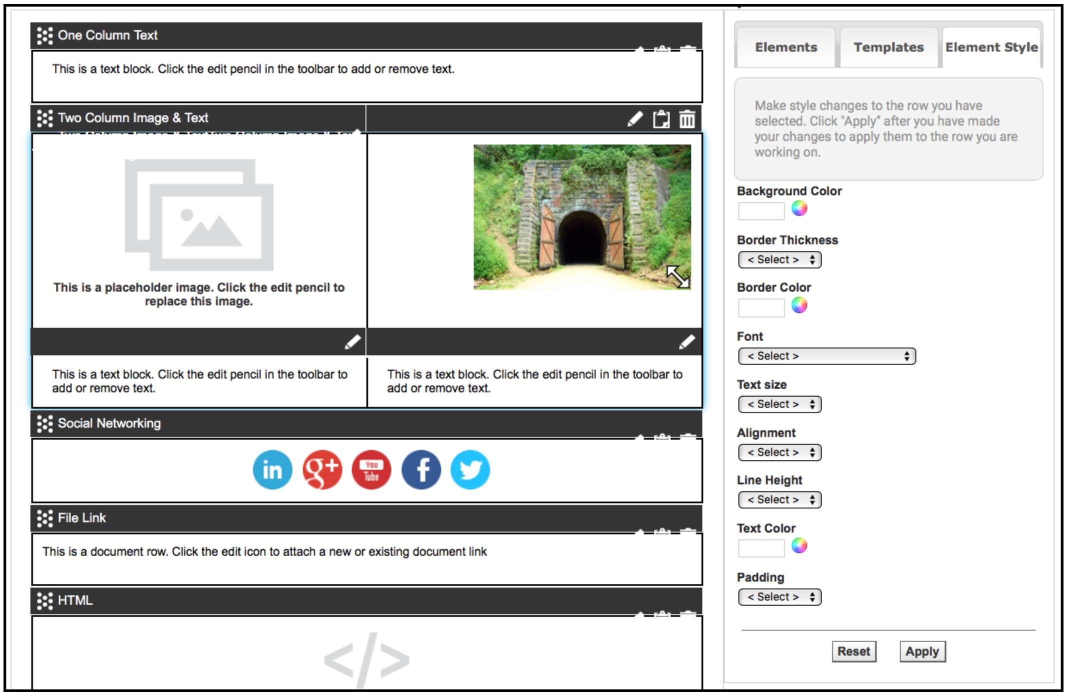
A template is simply a collection of one or more predefined elements. When you drag a template onto the canvas, these elements will be inserted at the drop position, alongside the elements that were already there.

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

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.)

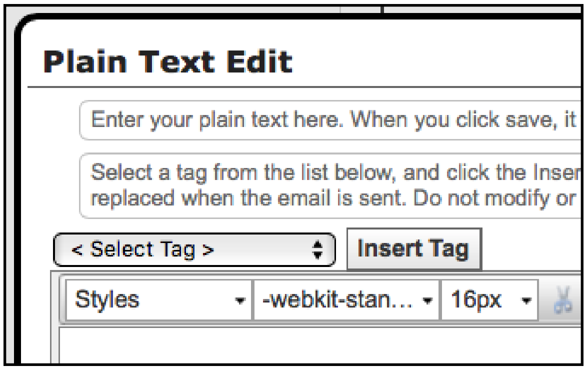
Change style as necessary and click **Apply** at the bottom of the panel to apply your changes, or **Reset** to reset styles back to their defaults.

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.



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

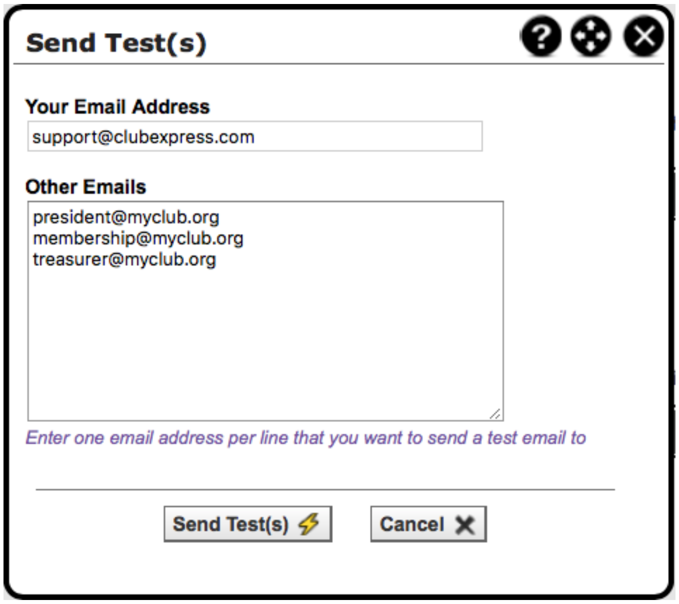
Click **Save and Continue** to save your work but stay in the editing environment to continue making changes.

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:

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:



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!

Notes

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.

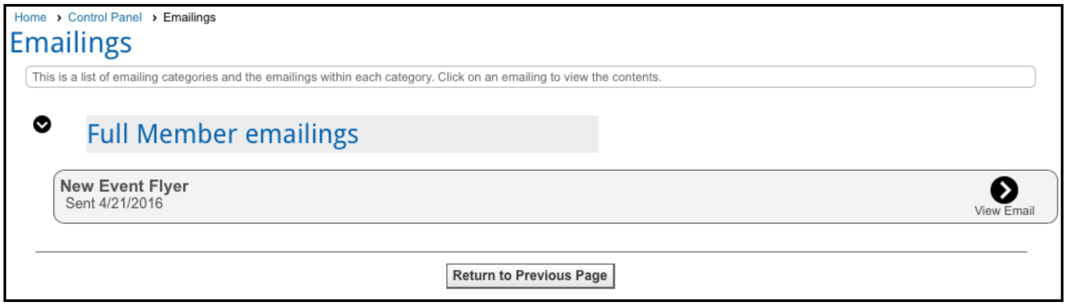
The design elements inserted via the row builder will display approximately 600px wide on desktop email clients. This width is standard and designed to fit well within most left/right pane email viewers.

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:



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

Related Tasks

Reference Materials

Text Messaging

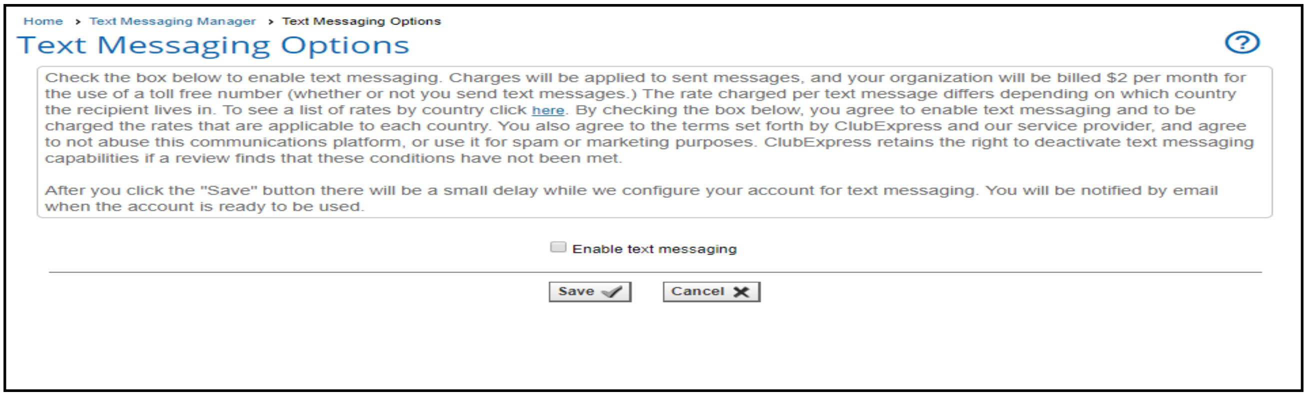
Control Panel > Communications > Admin Functions

ClubExpress provides powerful tools that allow administrators to communicate with members and non-members via text message.

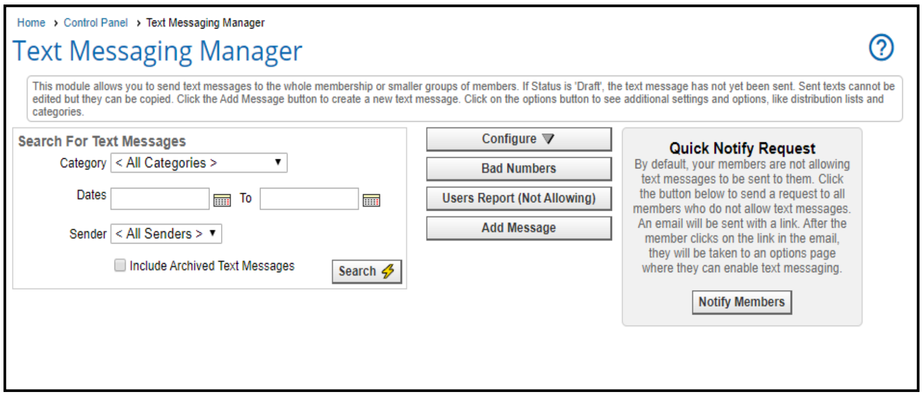
Clicking this option for the first time brings you to a new page to enable text messaging, and to accept the associated fees. Charges will be applied to sent messages, and your organization will be billed $2 per month for the use of a toll free number (whether or not you send text messages). You can 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.

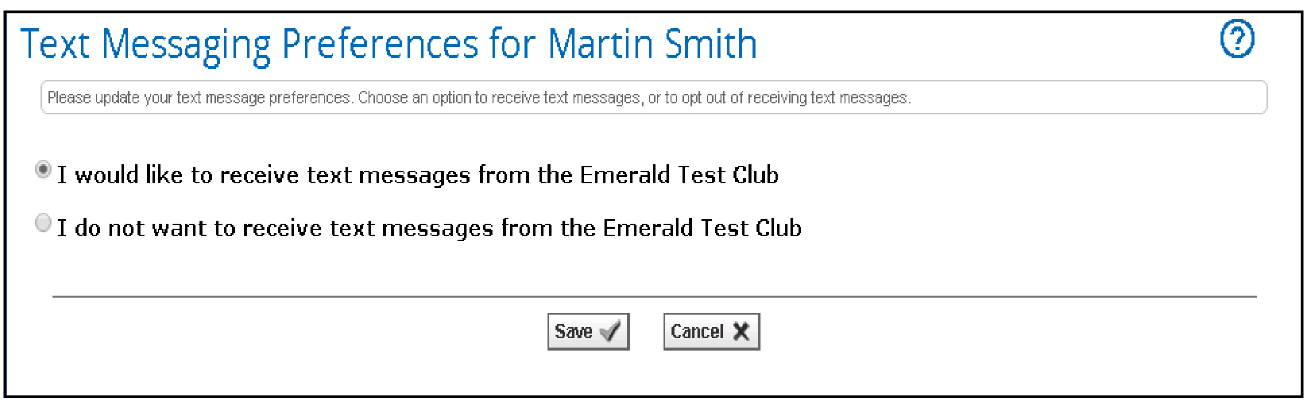


Once the module is enabled (even before you have been assigned a number), the Text Messaging Manager is available:

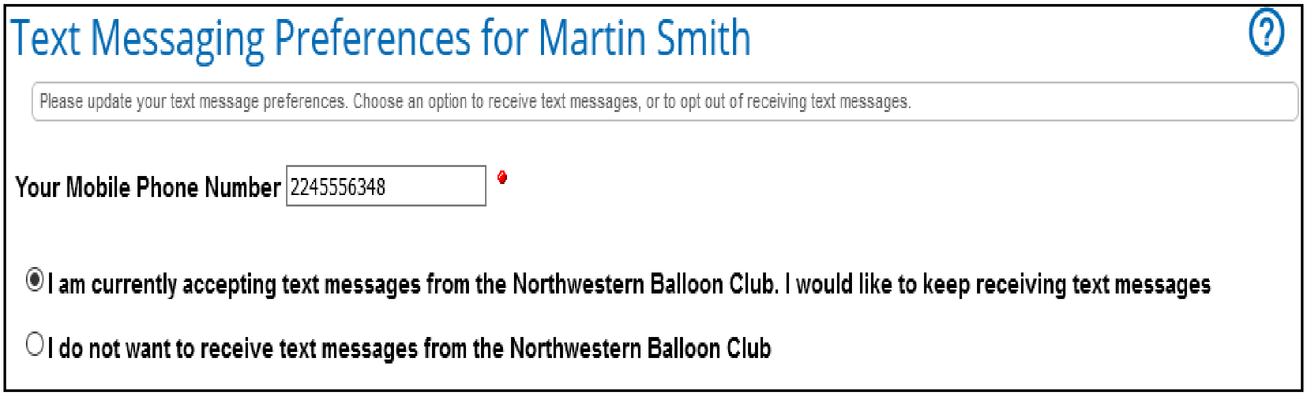


Members and non-members must opt-in to receive text messages by visiting their member profile, under **Contact Info**. Non-members must opt-in when they click the **Add Me To Your Mailing List** link. Administrators cannot check this box on behalf of members or non-members. Administrators can send a **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.**



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:

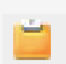
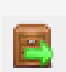
- Draft (created on <date>) – not yet sent
- Sent (<date>)

> **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.
 (Copy)	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.

Icon	Description
 (Unarchive)	
 (Res-ults)	Select **Results** to display the results of the text message, including the number of messages 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)	**Share** this text message on your club's social networks, including Facebook and Twitter. **Note:** Facebook requires a link in order to post. If there is not a link within your text message, you will receive an error.
 (Delete)	Use the **Delete** option to completely remove a text message from the list if it has not been sent. **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.

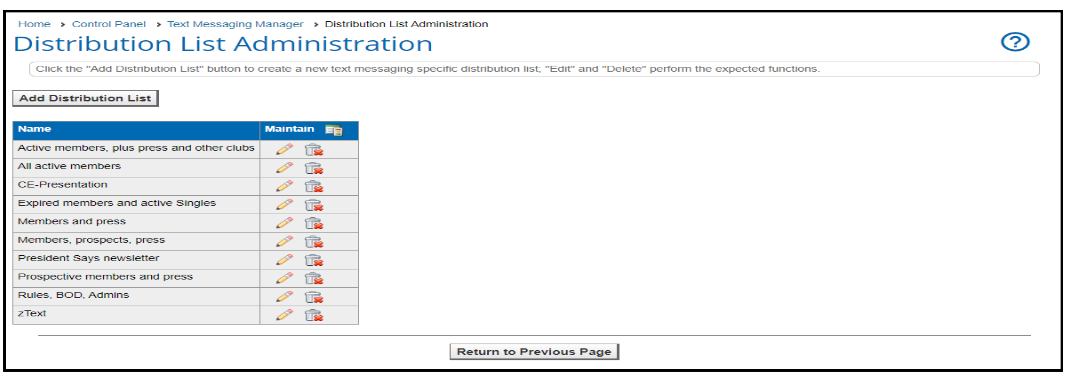
Saved Distribution Lists

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.

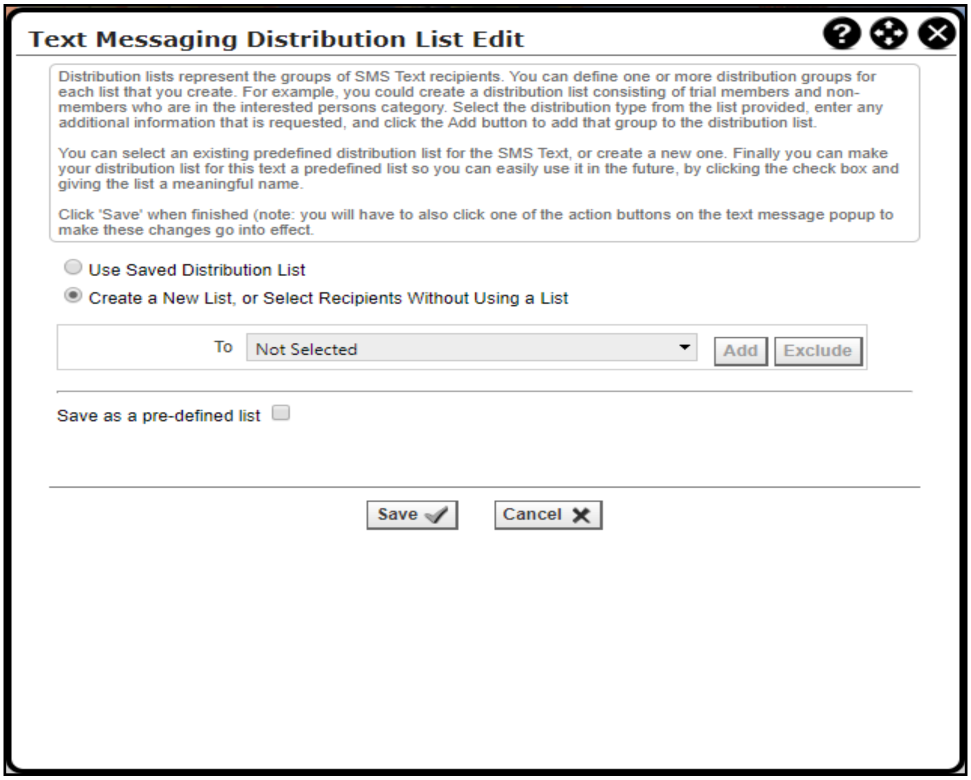
Note that distribution lists with multiple options act using "OR" conditions; each option is additive to the list.

> **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:



Click the **Add Distribution List** button to create a new list. You will see a screen similar to the following:



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.

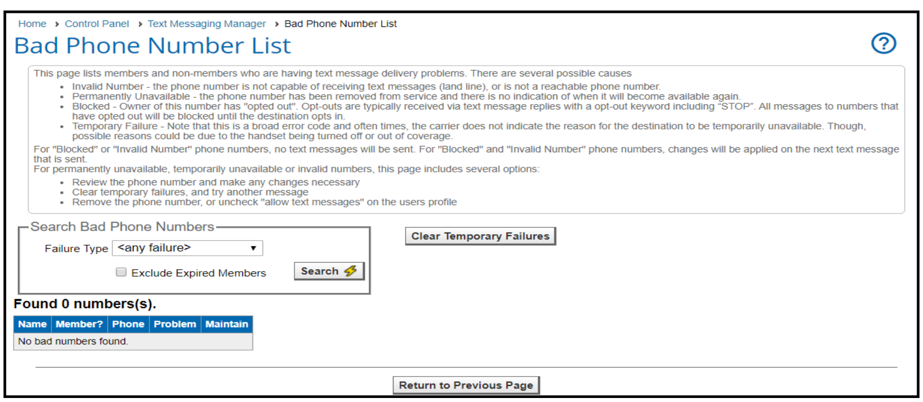
Enable double length text messages allows you to send text messages with a total of 286 characters (including the Message Prefix). Standard text messages are a total of 160 characters (including the Message Prefix).

> **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



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:

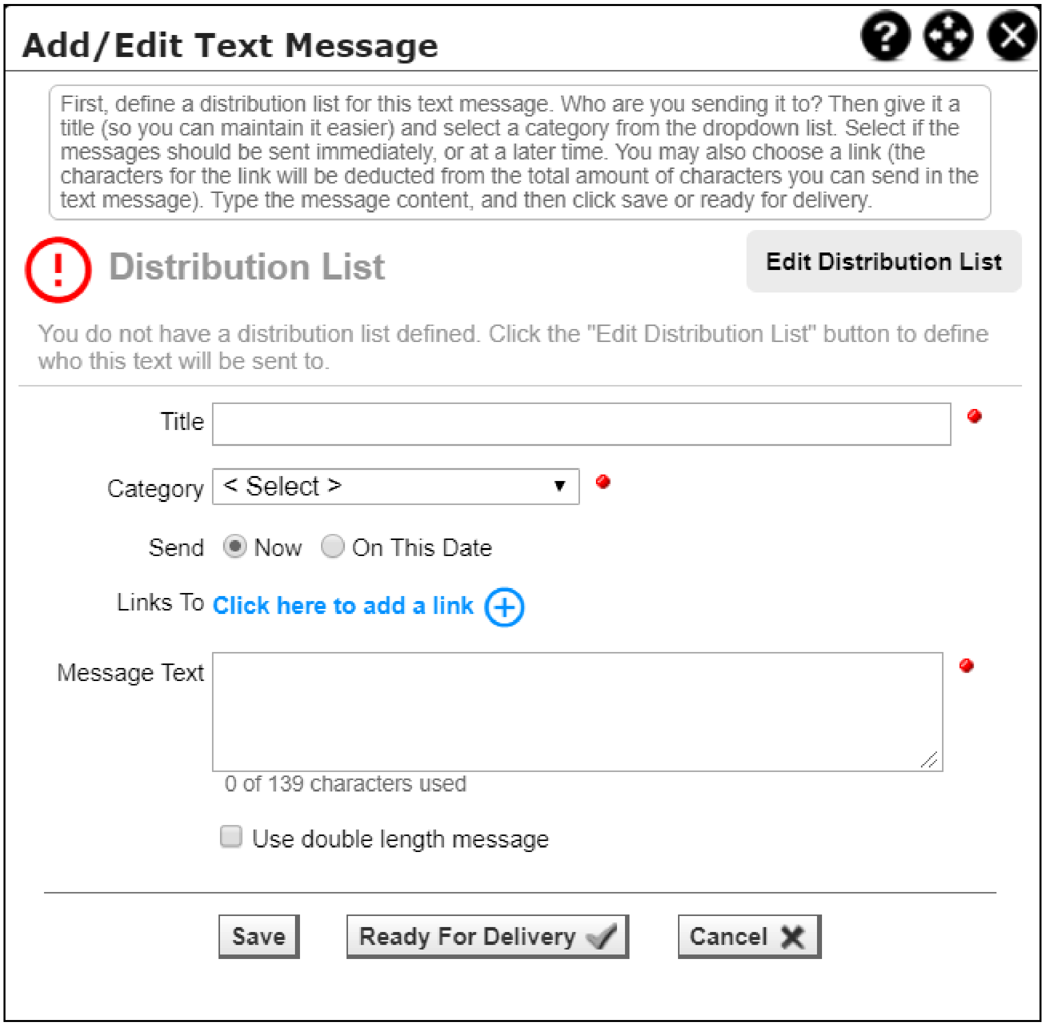
- Review the phone number and make the necessary changes
- Clear temporary failures and try another message
- Remove the phone number, or uncheck "allow text messages" on the user's profile.

Users Report (Not Allowing)

Click this button to run a report showing all site users who have not opted in to receive text messages.

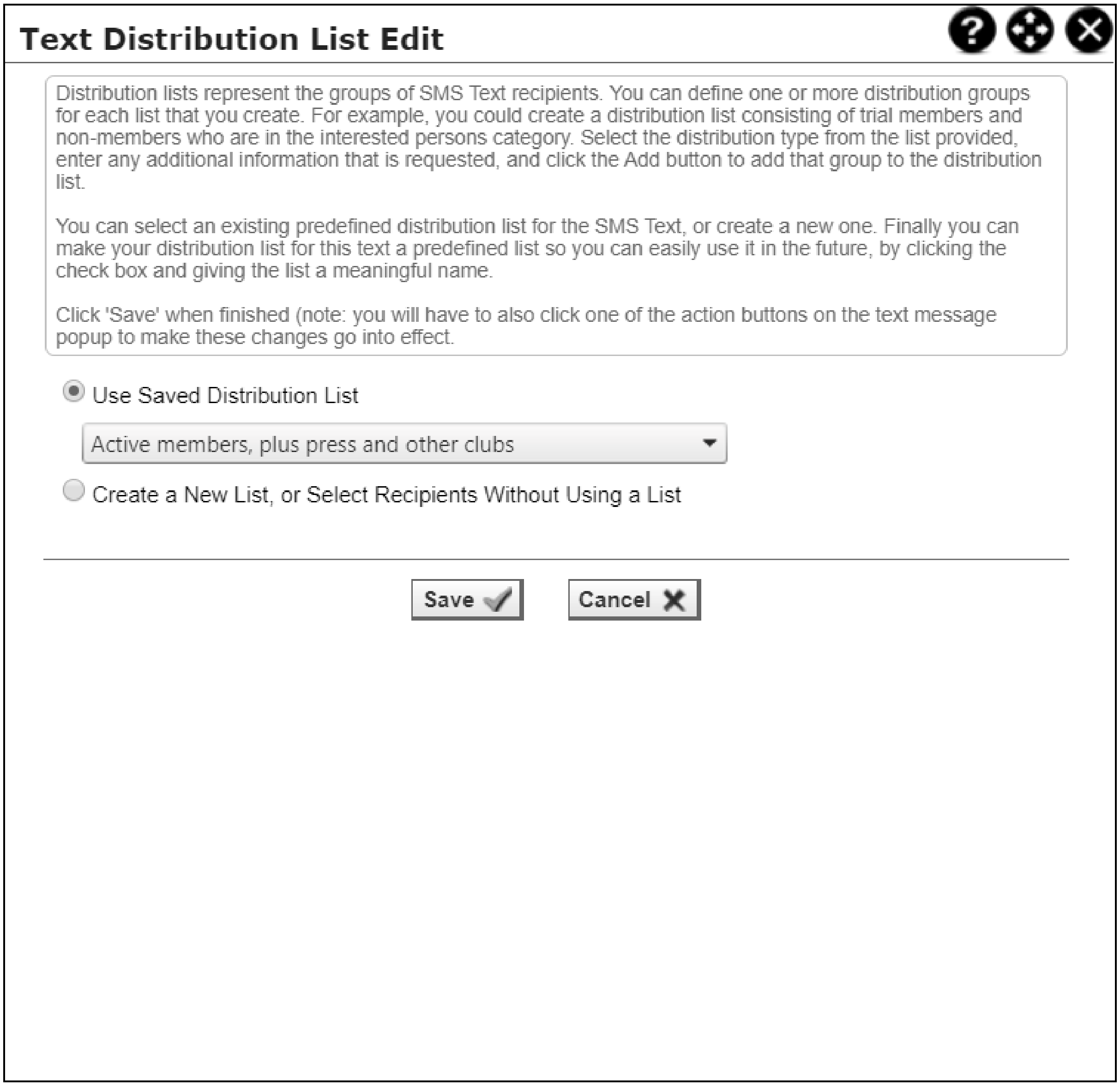
Add Message

Clicking Add Message will display the following screen:



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.



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.

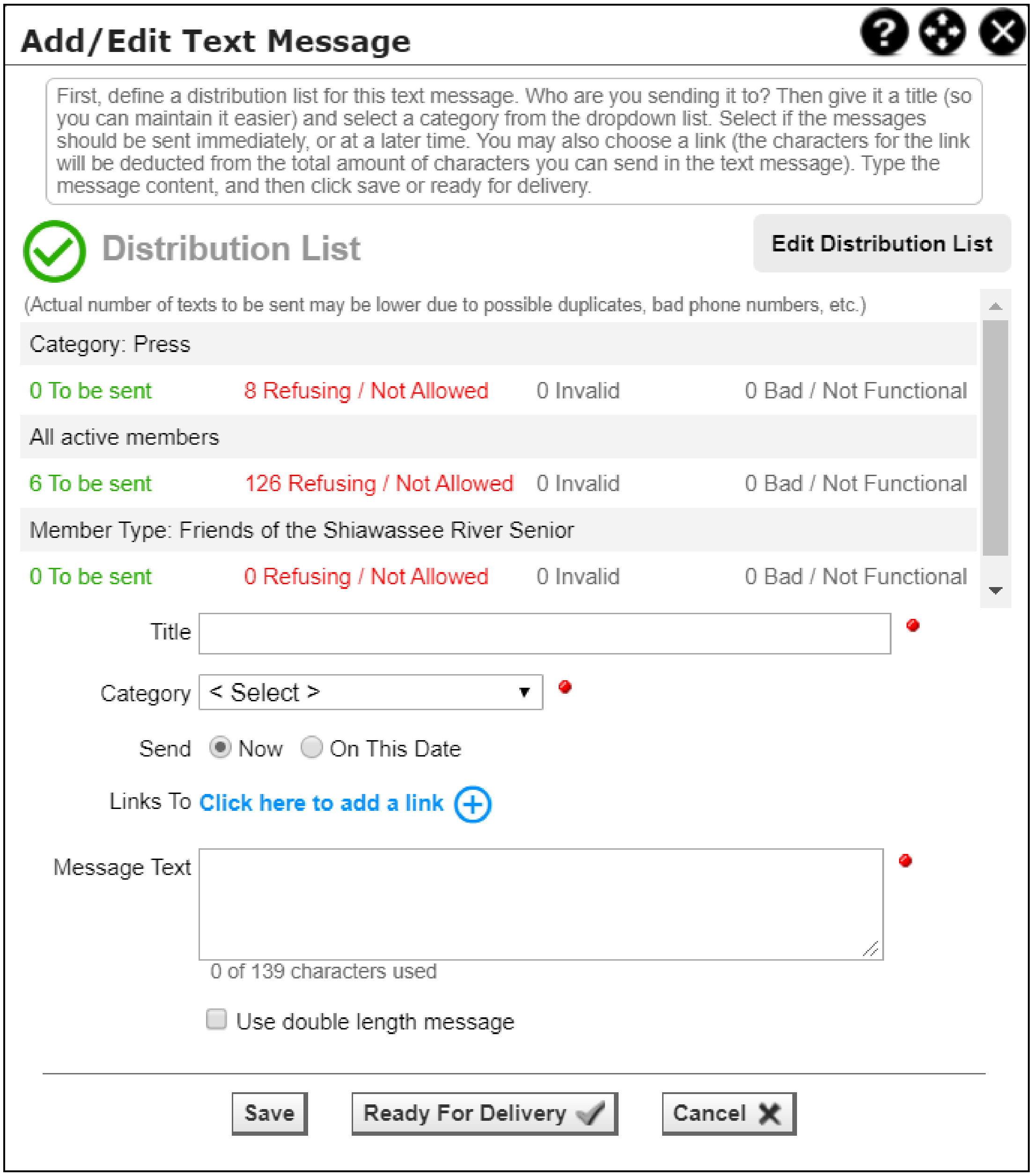
Click the **Create a New List…** radio button to create a new list. Start by clicking the drop-down to select one of the available options. Some options will then prompt for additional information.

> **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:



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 pre-configured 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.

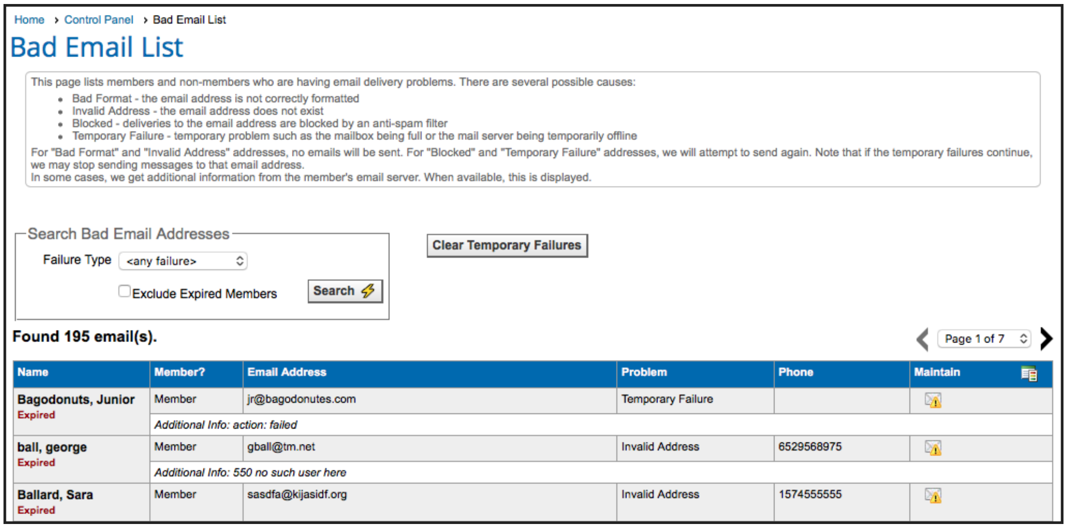
Sending a Text Message

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:

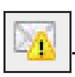


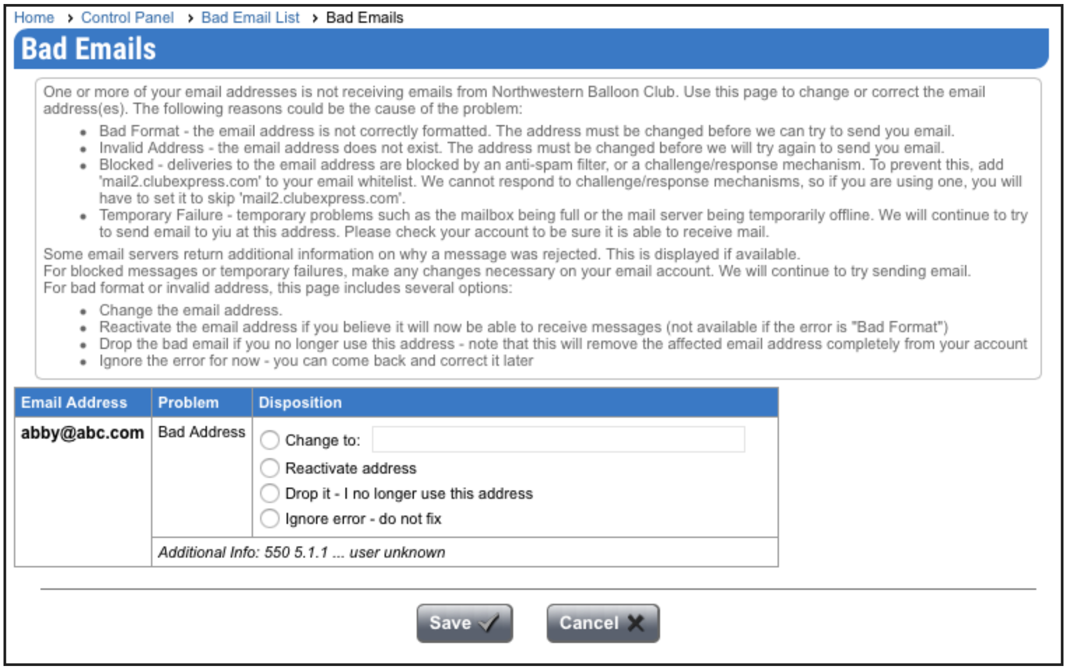
This screen lists members and non-members who have had email delivery problems. Four possible causes may be listed and you can filter by each type:

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 non-member, 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:



For each bad email address, the following options are available:

1. Change the email address to the value entered.
2. 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

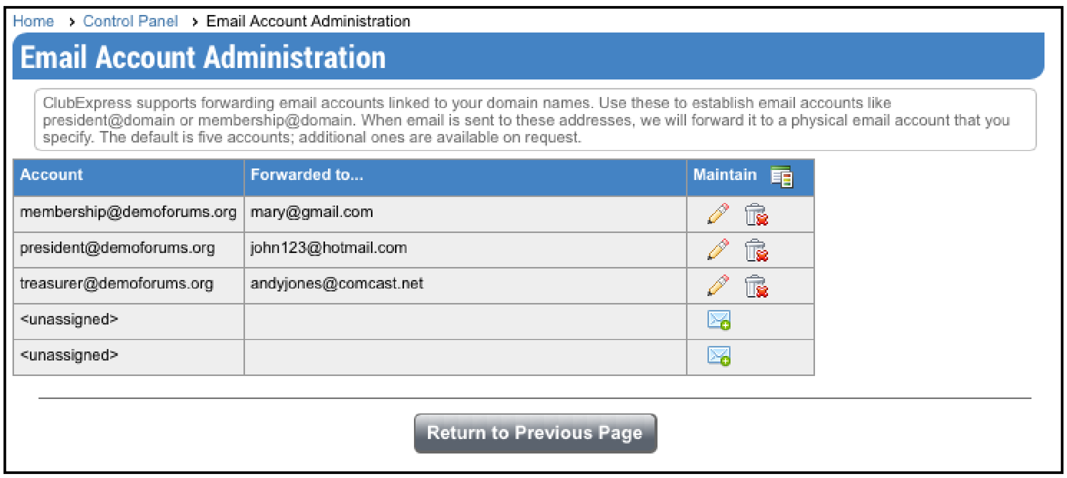
> forwarded, these email are generally blocked by the receiving servers. You should use a personal or business email address in these cases.

ClubExpress supports club-level email forwarding accounts such as:

- president@myclub.org
- info@myclub.org

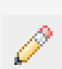
If we are not handling email for you, you will see a message on this page indicating that forwarding email accounts cannot be created.

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:



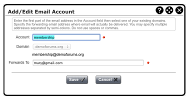
You will see a grid with the number of rows equal to the number of available email accounts.

The following options are available in the Maintain column:

Icon	Description
 (Assign)	The **Assign** option allows you to define a club-level email account and assign it to a member'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:



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.)

Related Tasks

Reference Materials

Concept Information

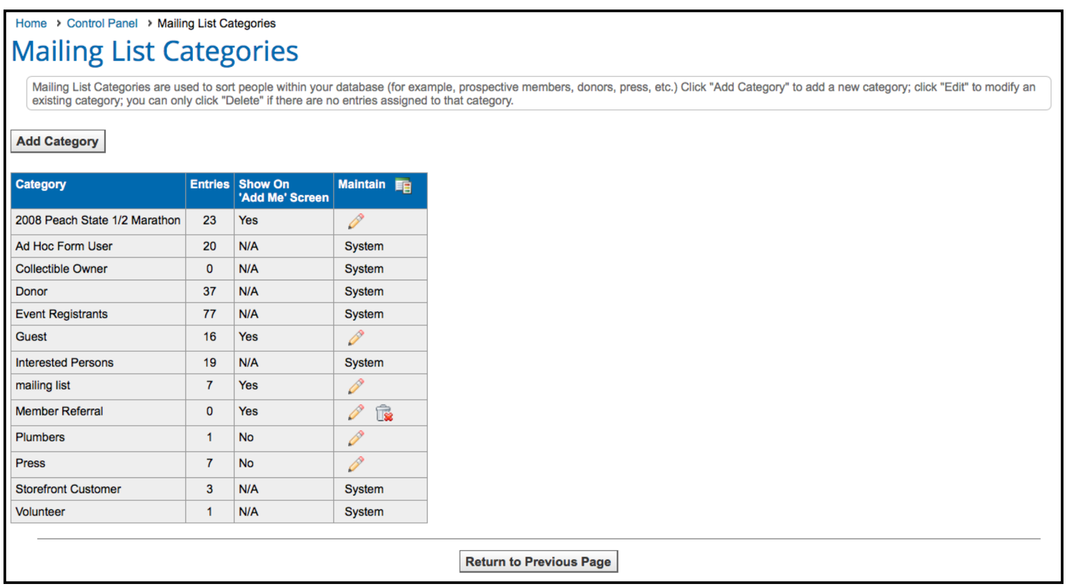
Mailing List Categories

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 › Mailing List Categories

Mailing List Categories

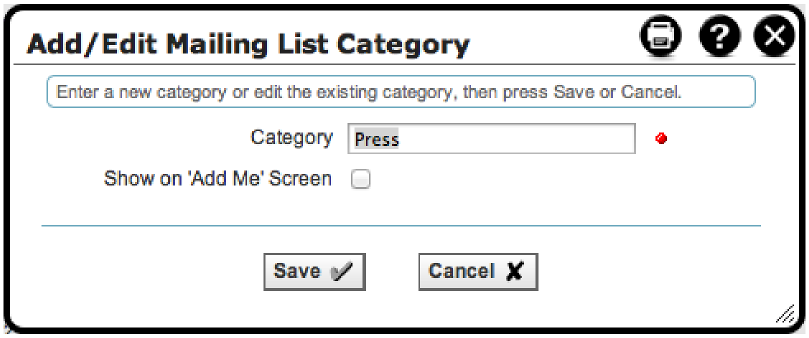
Mailing List Categories are used to sort people within your database (for example, prospective members, donors, press, etc.) Click "Add Category" to add a new category; click "Edit" to modify an existing category; you can only click "Delete" if there are no entries assigned to that category.

Add Category

Category	Entries	Show On 'Add Me' Screen	Maintain
2008 Peach State 1/2 Marathon	23	Yes	
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	
Interested Persons	19	N/A	System
mailing list	7	Yes	
Member Referral	0	Yes	
Plumbers	1	No	
Press	7	No	
Storefront Customer	3	N/A	System
Volunteer	1	N/A	System

Return to Previous Page

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:



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.

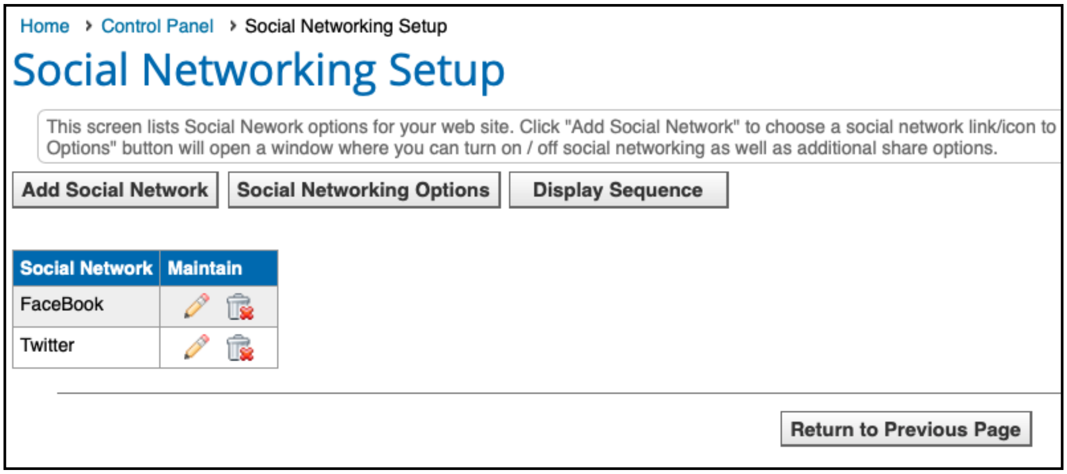
Some categories are maintained by the system and cannot be modified. These are flagged with a “System” tag.

- 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

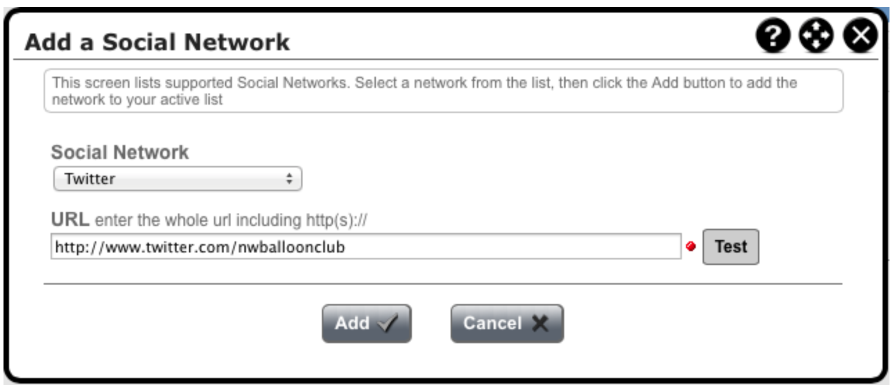
Control Panel > Communications > Setup

When you select **Social Networking**, you will see a screen similar to the following:



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:



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.

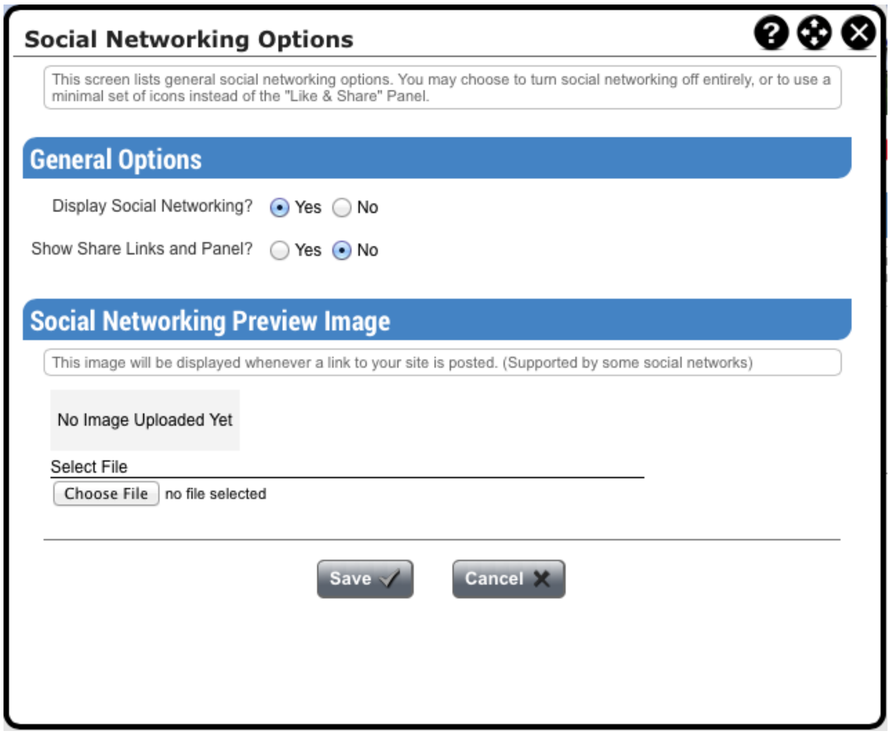
Back on the main setup screen, click the **Edit** (pencil) icon to modify a social network definition, or the **Delete** (trashcan) icon to remove a definition.

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.

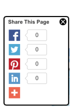
Social Networking Options

When you click this button, the following screen appears:



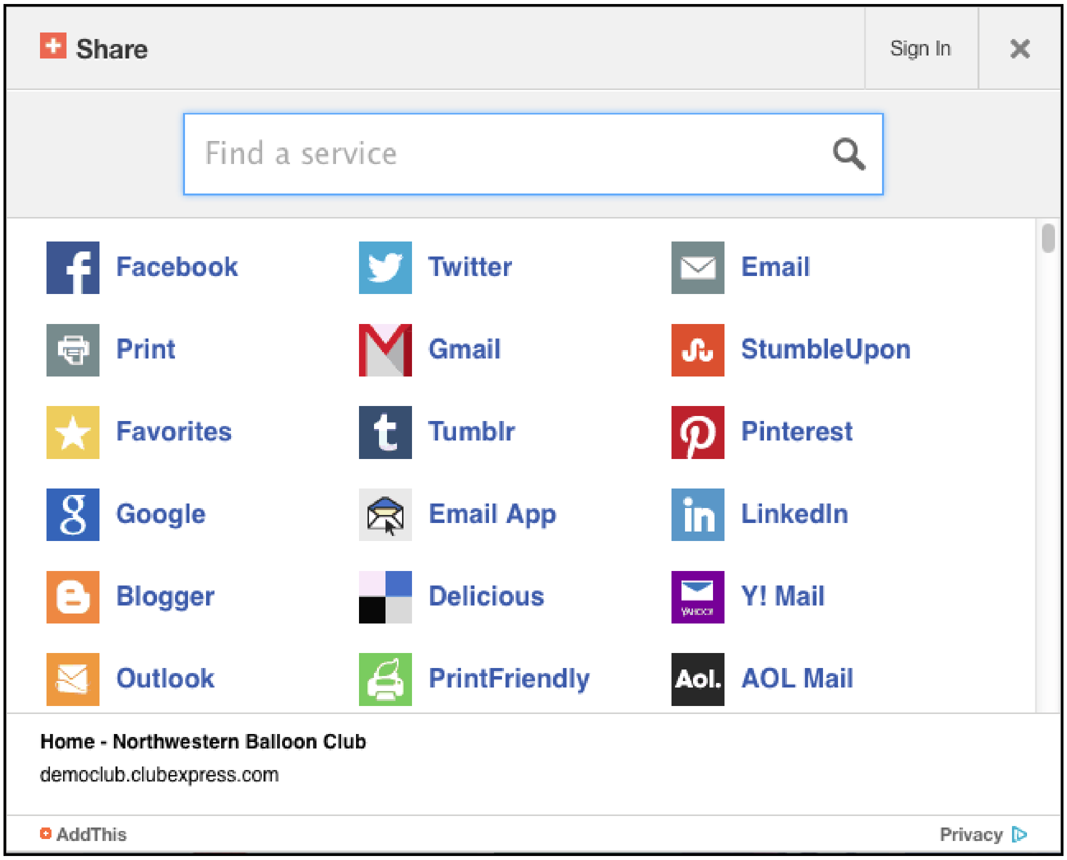
Display Social Networking allows you to turn the social networking panel on or off.

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.

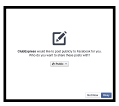
In order to post to social media, you need to explicitly authorize “ClubExpress.com” to be allowed to post to your page or feed via that network’s API (Application Programming Interface.) For Facebook, this only needs to be done once. For Twitter, it needs to be done in each session (by Twitter policy.)

> **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:

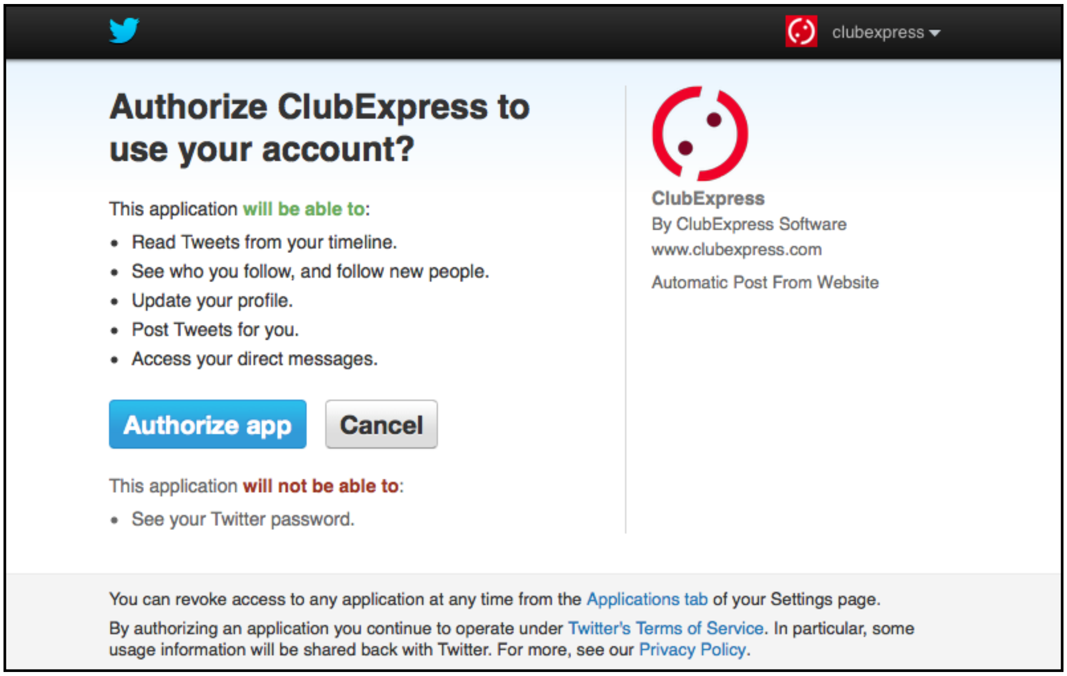


You will usually want the post to be public, but you can click the **Public** drop-down to limit the scope of your post. Click **Okay** to complete the authorization or **Not Now** to cancel the process.

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.

Twitter

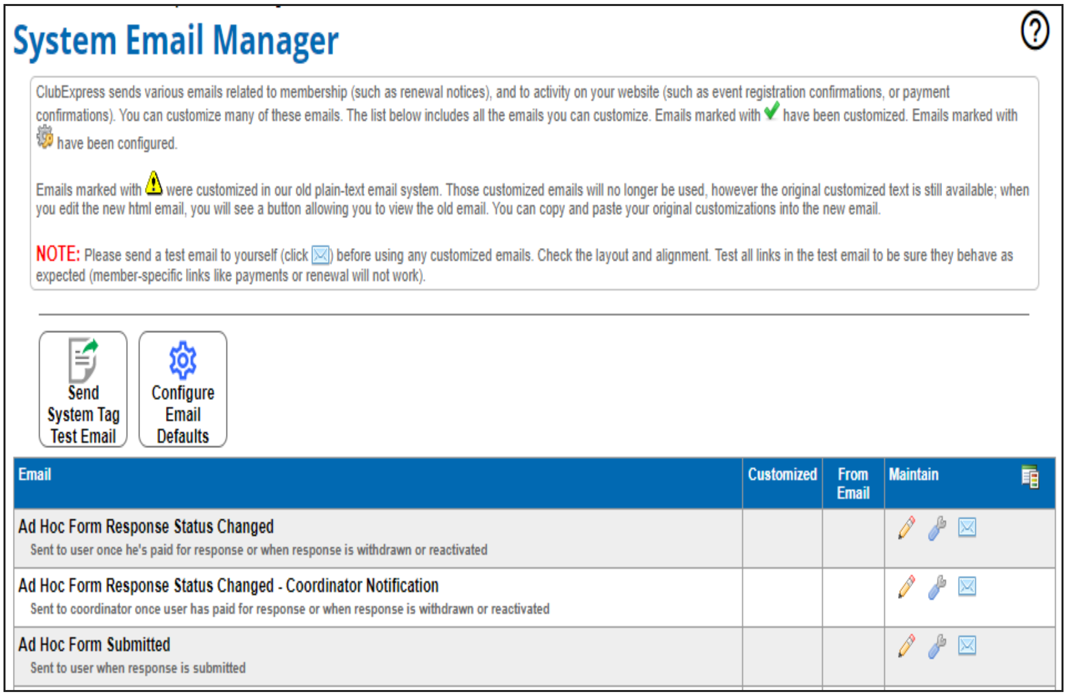
When you try to post to Twitter the first time in each session, you will see the following popup browser window:



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



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:

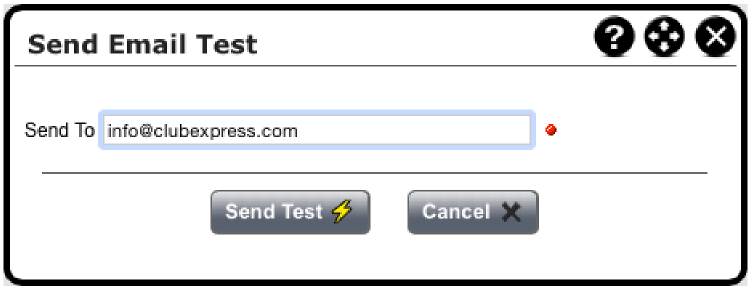
- Emails to users - mailer@mail2.clubexpress.com, with the From address specified based on the email being sent (for example, a survey confirmation email will come from the survey coordinator)
- Emails to admins - support@clubexpress.com.

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.

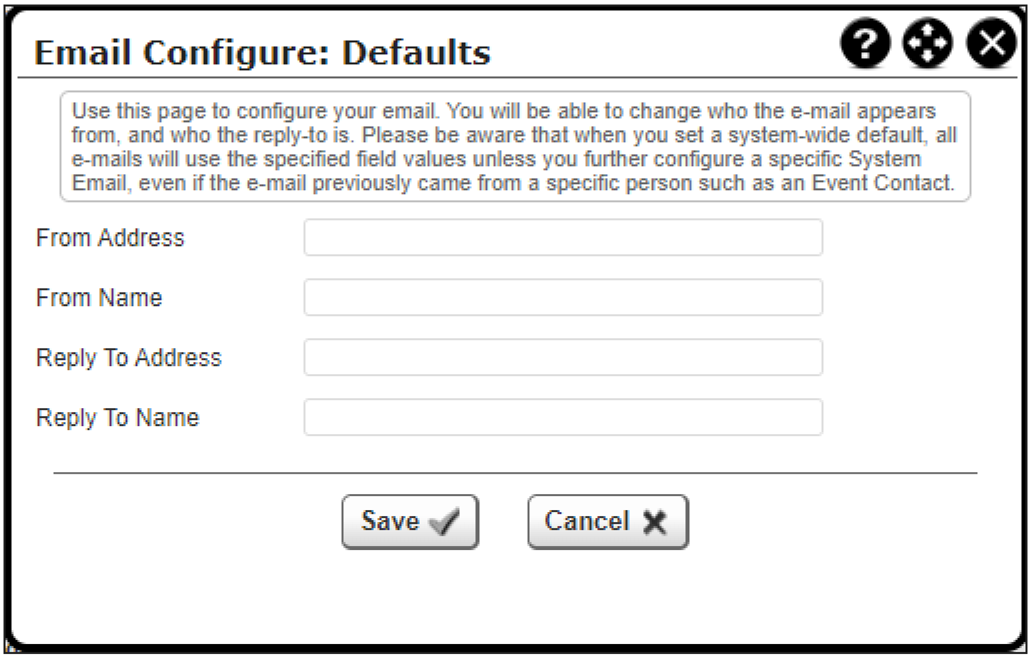
> **Note:** The built-in Payment Confirmation email cannot be customized; some content in this email is required and cannot be edited or removed.

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 for each member (using your own personal data for the membership info).



Configure Email Defaults



Select this option to configure the default From and Reply names and email addresses. These are system-wide 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:

Icon	Description
 (Edit)	**Edit** this email. You will see the screen described below.

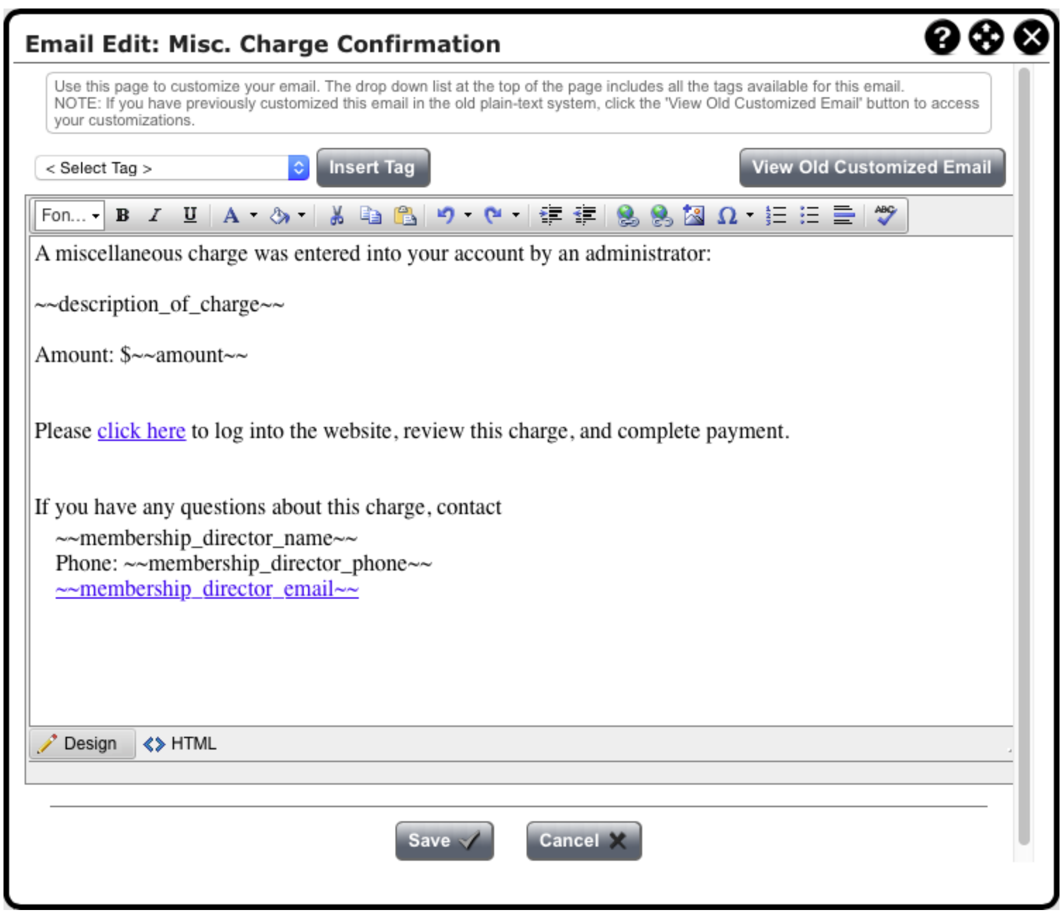
Icon	Description
(Send Test Email)	Send a test version of this email so that you can see how it looks. As above, you will be prompted for the destination email address.
(Results)	This icon will only appear if you have enabled Tracking.
(Configure)	Configure the specific defaults for the email, including the subject line and whether or not "opens" are tracked for that email.
(Remove Customized 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:



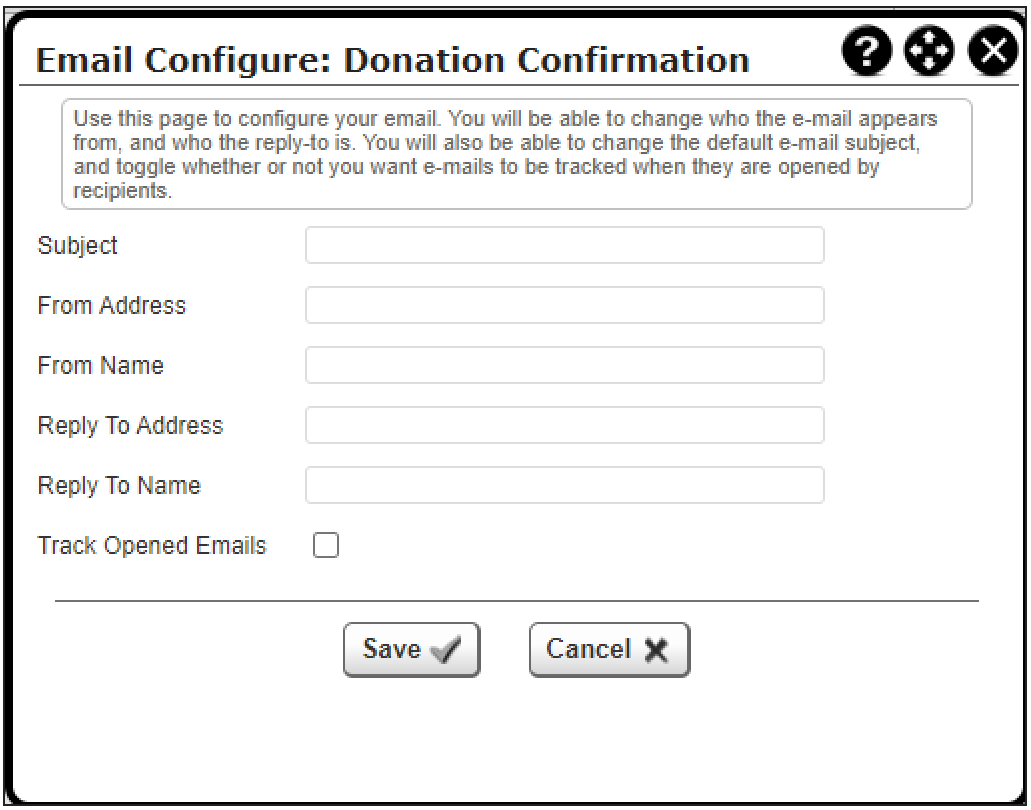
Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

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



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 Support Team to provide us with the details.

Understanding ~~tags~~

Each of these system emails includes a number of replaceable ~~tags~~, 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.

[1]Note 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.

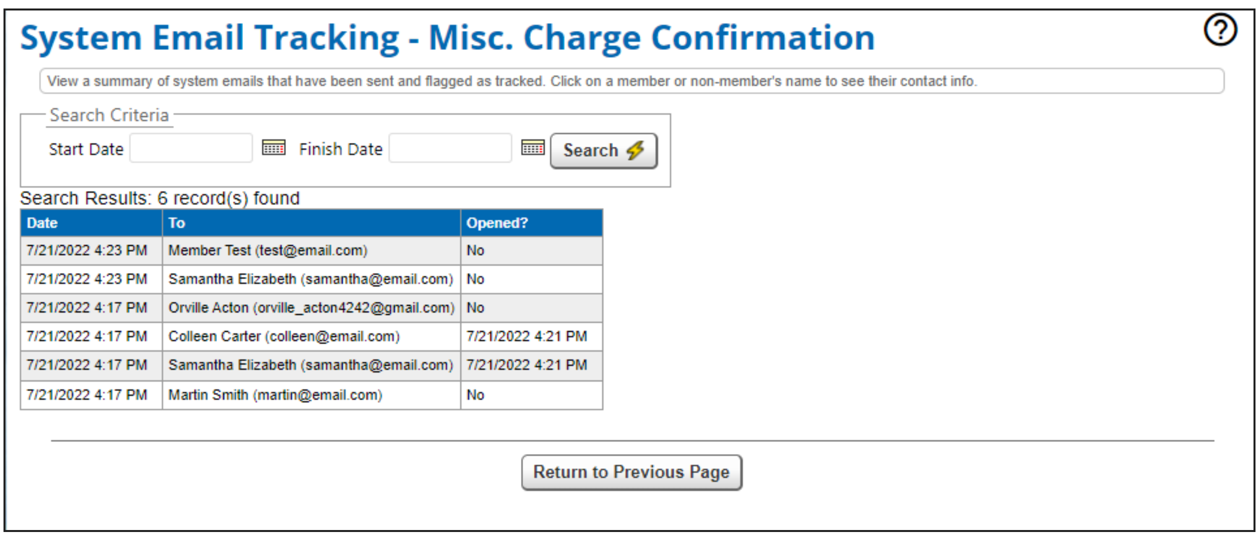
> **Note:** The "Contact" tag (contact_name and contact_email) correspond to the contact designated for the item, for example the contact in an event-related email would be the event coordinator.

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.



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 Problems	Members without Email	Members without an email address, including phone number and address, sorted by last name	Members status, type, level
Member Email Problems	Members Refusing Email	Members refusing blast emails, including email address, phone number and city and state, sorted by last name	Members status, type, level
Member Email Problems	Members with Bad Emails; see "Bad Emails" on page 567	Members with bad email addresses, including email address, status and phone number, sorted by last name	Members status, type, level
Member Email Problems	Non-Members with Bad Emails	Non-members with bad email addresses, including email address, status and phone number, 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.

ClubExpress Modules

Ad Hoc Forms

Custom forms on the website to collect information from members and/or non-members
Read More

Benefits

The benefits of joining the organization
Read More

Blogs

Publish periodic articles of interest or opinion pieces
Read More

Business Directory

An online directory of member businesses
Read More

Chapter Finder

Locate chapters, districts or regions of the organization
Read More

Check-in Desk

Keep track of visits to a facility
Read More

Collectibles

Maintain and track member collections
Read More

Committees

Organize committees and committee members
Read More

Contact Us

Ways for your members and website visitors to contact your club
Read More

Discussion Forums

Online discussions on a variety of topics
Read More

Document Library

Organize documents into folders for website visitors to download
Read More

Donations

Funds into which members and non-members can donate
Read More

Events

Online club calendar
Read More

FAQ/Tech Library

Questions and answers organized into topics
Read More

Gift Memberships

Allow members and non-members to purchase a membership for someone else
Read More

Interests

List various special interests, programs or affiliations that the organization sponsors
Read More

Member Directory

Locate and contact other members
Read More

Member Signup/Renewal

Configure the wizard used for joining your club
Read More

News/Articles

Communicate announcements or create a library of articles
Read More

Photo Albums

Albums of photos uploaded by administrators or members
Read More

Storefront

Sell club merchandise though your website
Read More

Surveys

Create surveys and polls on your website
Read More

Volunteering

Post volunteering opportunities for signup
Read More

Ad Hoc Forms

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.

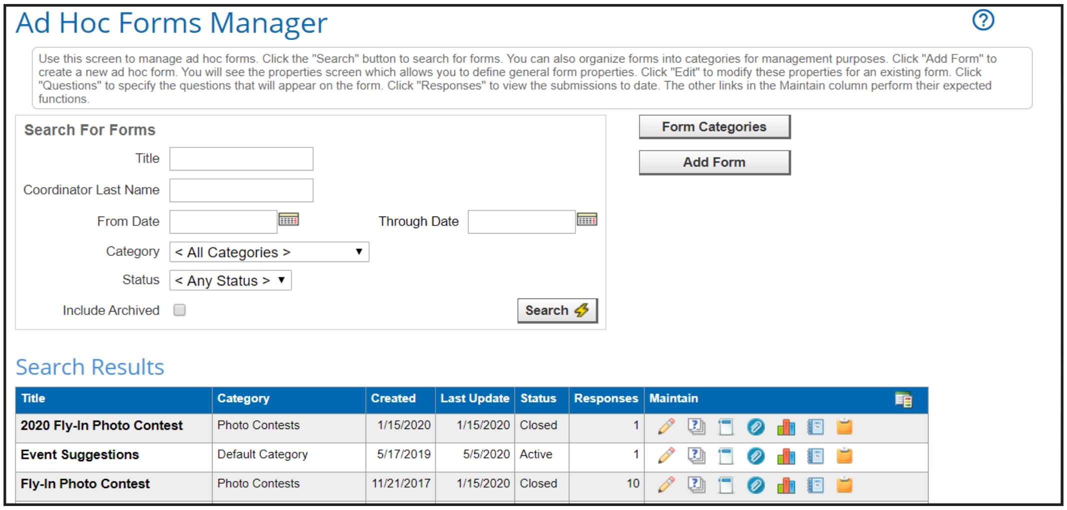
> **Example:** If your association has an annual conference you will likelyyhave a section of the website that describes this conference. On one of these pages, you might place text such as the following:
> Interested in presenting at this year's conference.
> **Click** here **to submit your abstract 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:



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:

Icon	Description
 (Edit)	**Edit** properties for this form.

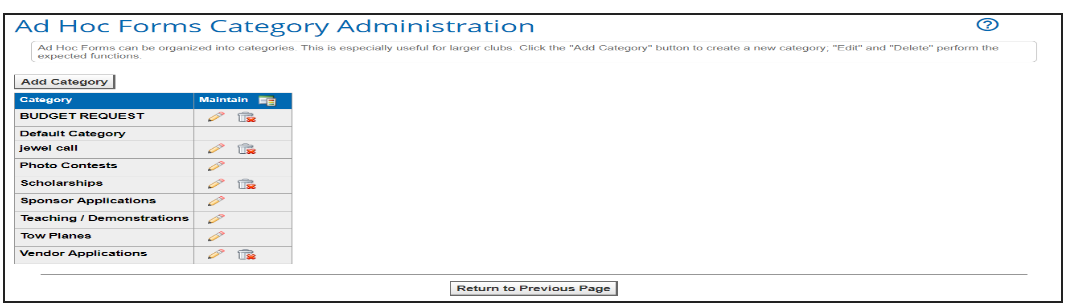
Icon	Description
(Questions)	Update the list of **Questions** that will appear on this form.
(Preamble)	Edit the **Preamble** text that will appear at the top of the form.
(Respond)	**Respond** to this form. This option only appears for forms that are in Test mode and allows you to test the form you 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 dia-log.
(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.
(Copy)	**Copy** this ad hoc form. You will be prompted to enter a new name and other prop-erties. 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:



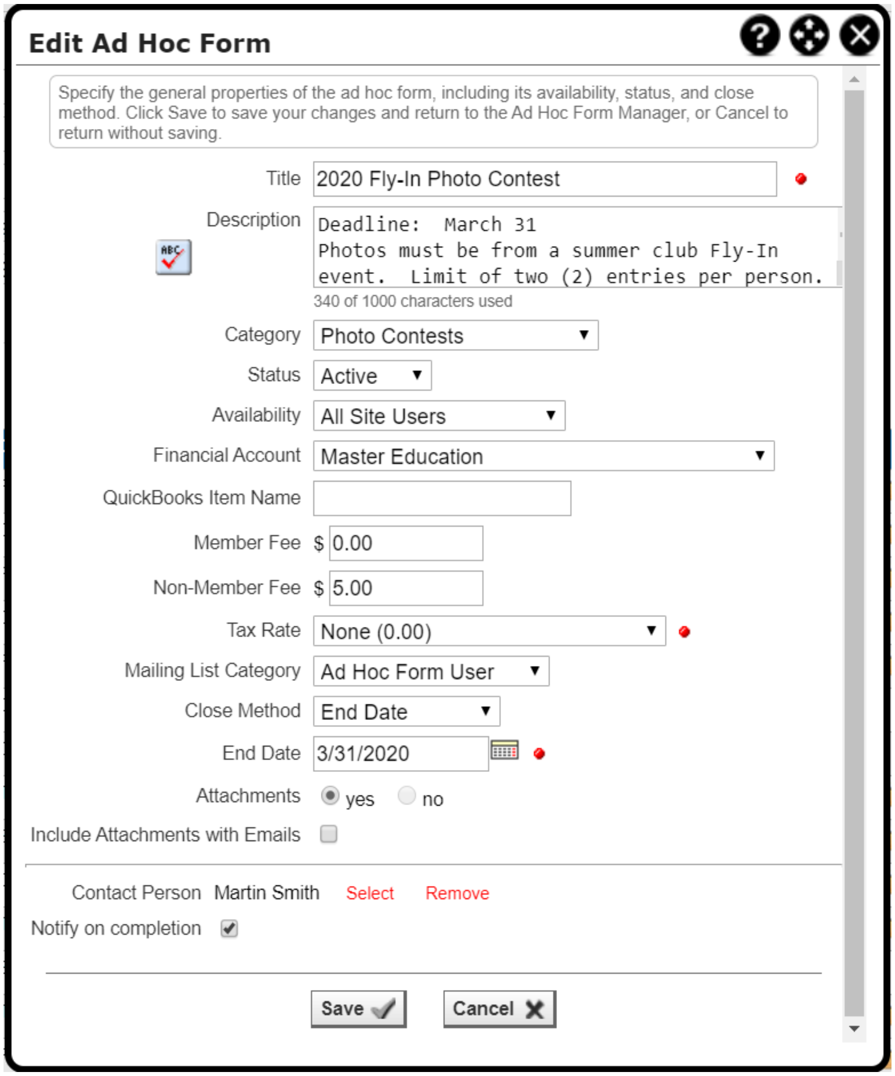
Click **Add Category** to create a new category. Click the **Edit** icon to edit the text of an existing category. If a category is not being used, you will also see a standard **Delete** icon.

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:



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.

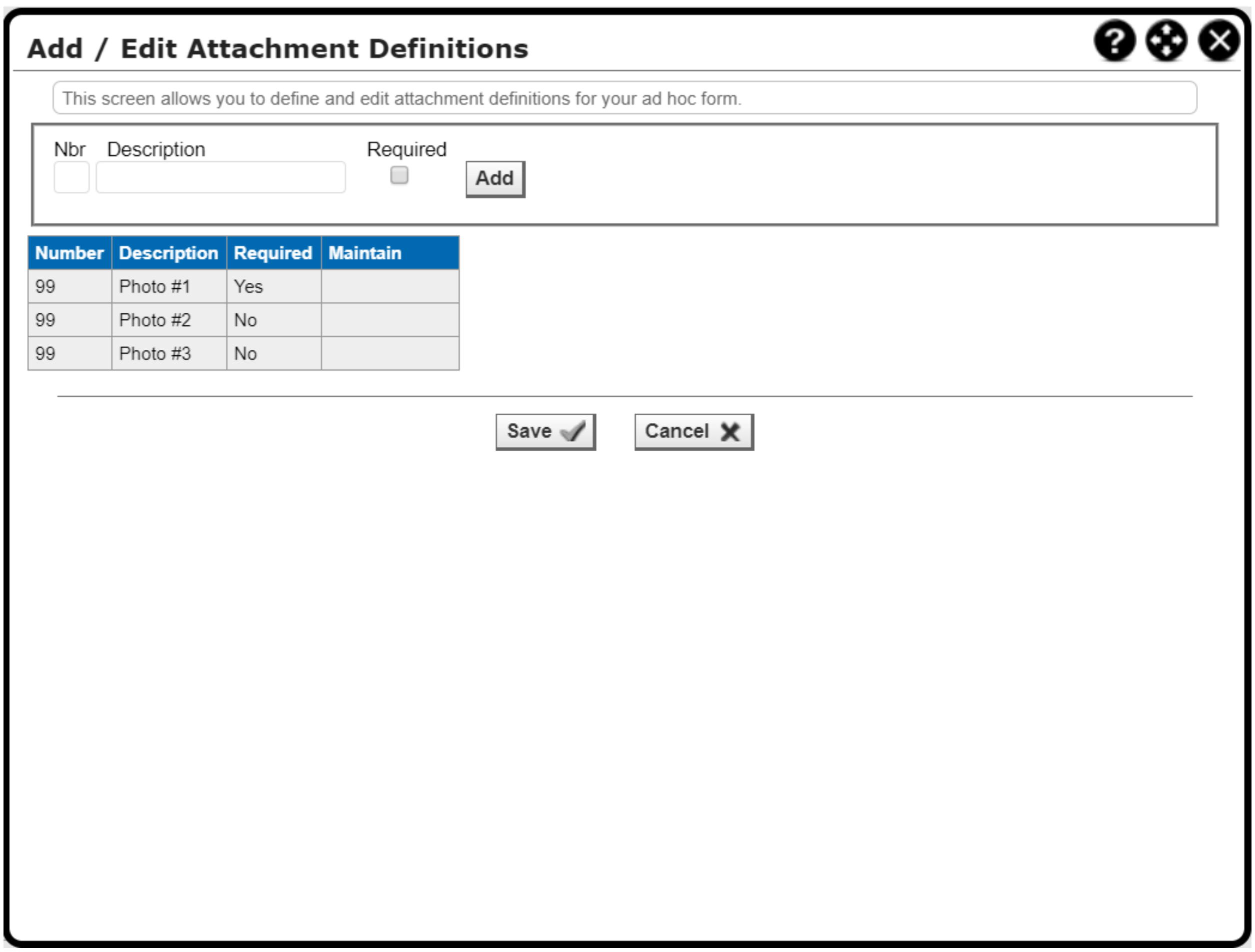
> **Note:** When you add questions with a correct answer configured but enabled the "Other" option, and the user enters their response, the answer will be incorrect.

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:



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.

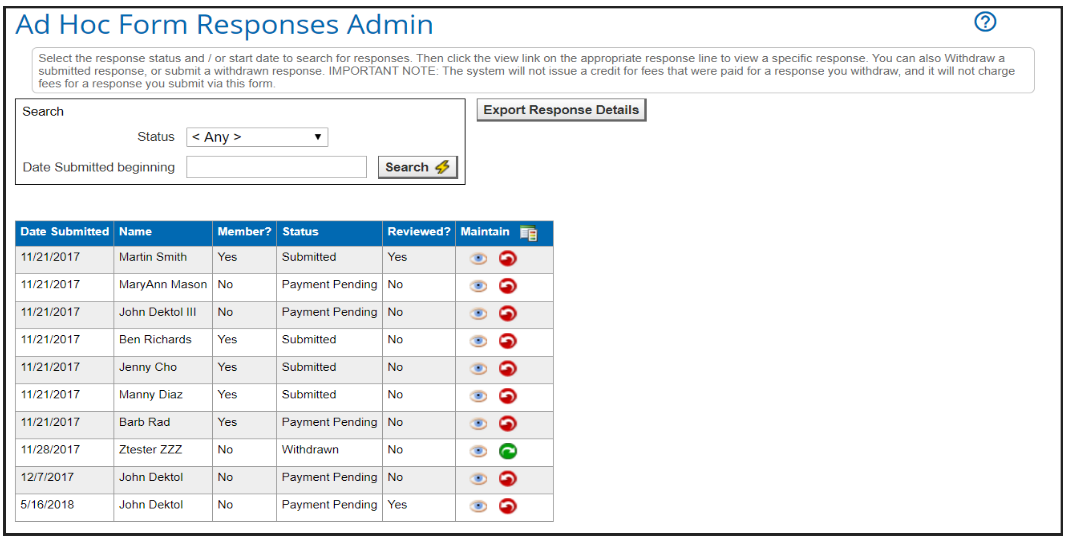
In the grid, click the **Edit** icon to move that attachment definition back to the top for editing, or the **Delete** icon to remove it. These icons do not appear if the ad hoc form has been published and responses have already been submitted.

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

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

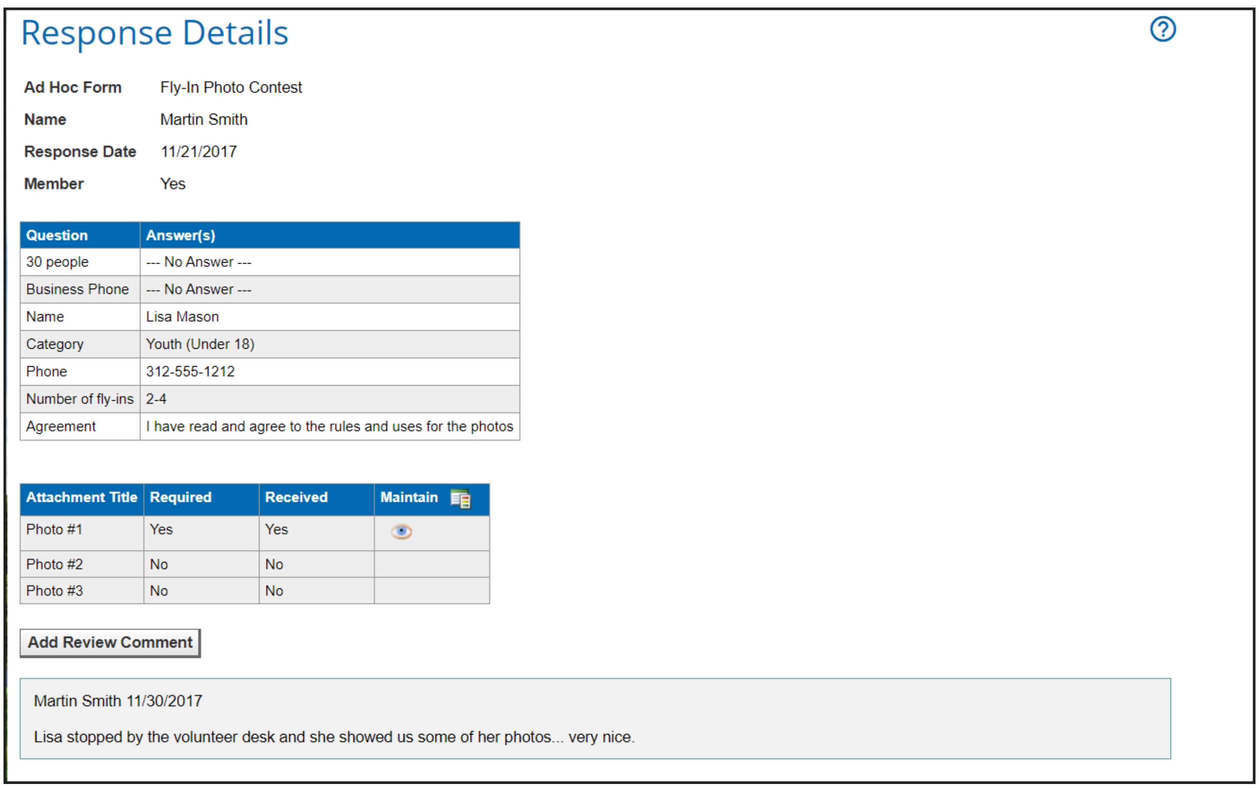
Icon	Description
(View)	**View** this ad hoc form submission.
(With-draw)	**Withdraw** this submission at the request of the submitter. You will be prompted to confirm this step.
(Reactiv-ate)	**Reactivate** this withdrawn submission at the request of the submitter.

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


Response Details

Ad Hoc Form	Fly-In Photo Contest
Name	Martin Smith
Response Date	11/21/2017
Member	Yes

Question	Answer(s)
30 people	--- No Answer ---
Business Phone	--- No Answer ---
Name	Lisa Mason
Category	Youth (Under 18)
Phone	312-555-1212
Number of fly-ins	2-4
Agreement	I have read and agree to the rules and uses for the photos

Attachment Title	Required	Received	Maintain
Photo #1	Yes	Yes	
Photo #2	No	No	
Photo #3	No	No	

Add Review Comment

Martin Smith 11/30/2017

Lisa stopped by the volunteer desk and she showed us some of her photos... very nice.

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.

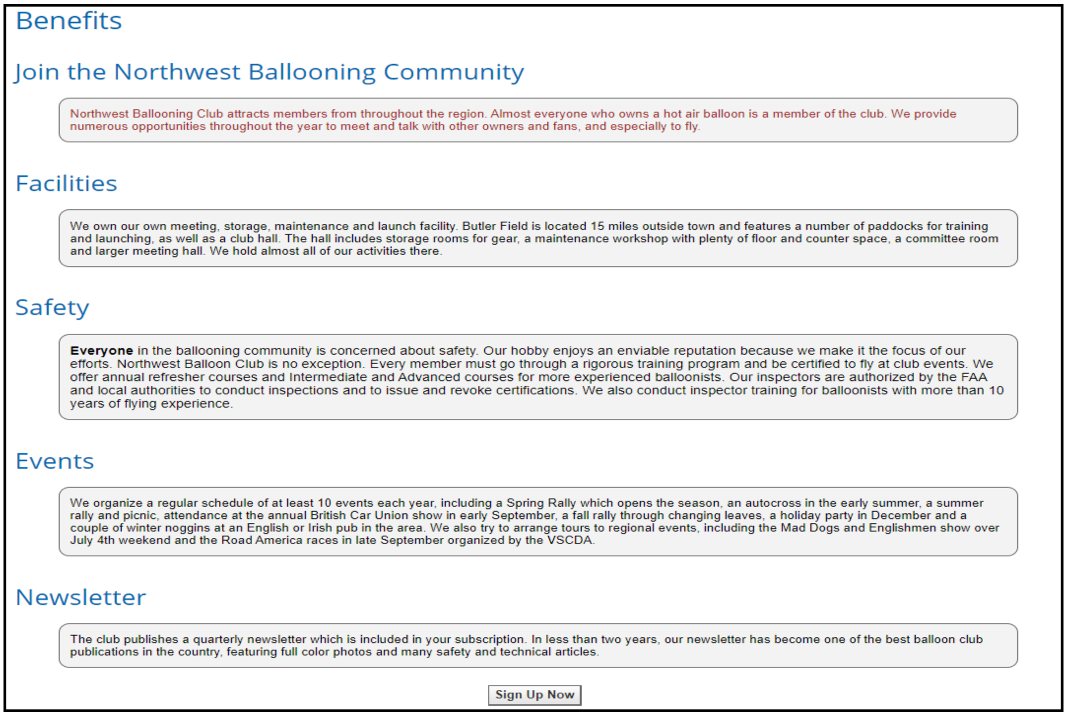
Click the **Add Review Comment** button to add a comment to the submission. You will see a standard popup form with a text box. Comments are shown below the button and each comment is tagged with the commenter's name and the date/time when the comment was made.

Click **Return to Previous Page** to return to the list of submissions.

Benefits

Benefits

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.



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.

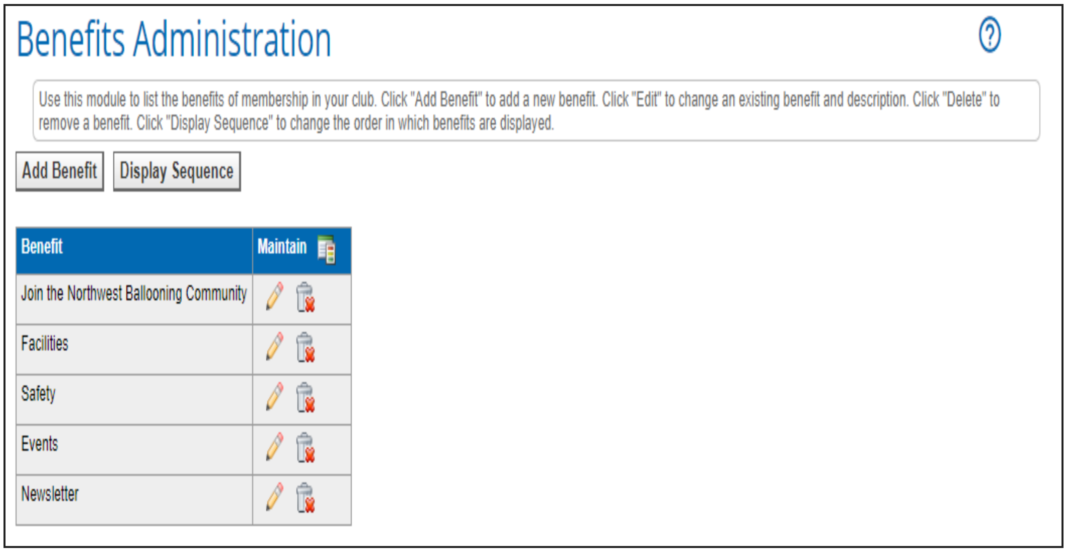
Benefits Manager

Control Panel > Club > Website Modules > Benefits

There are two ways to edit Benefits:

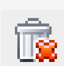
1. Administrators and Function Coordinators can select the module in the Control Panel (Club tab) to access the admin side of the function.
2. When viewing the Benefits panel, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed showing the list of existing benefit headings:



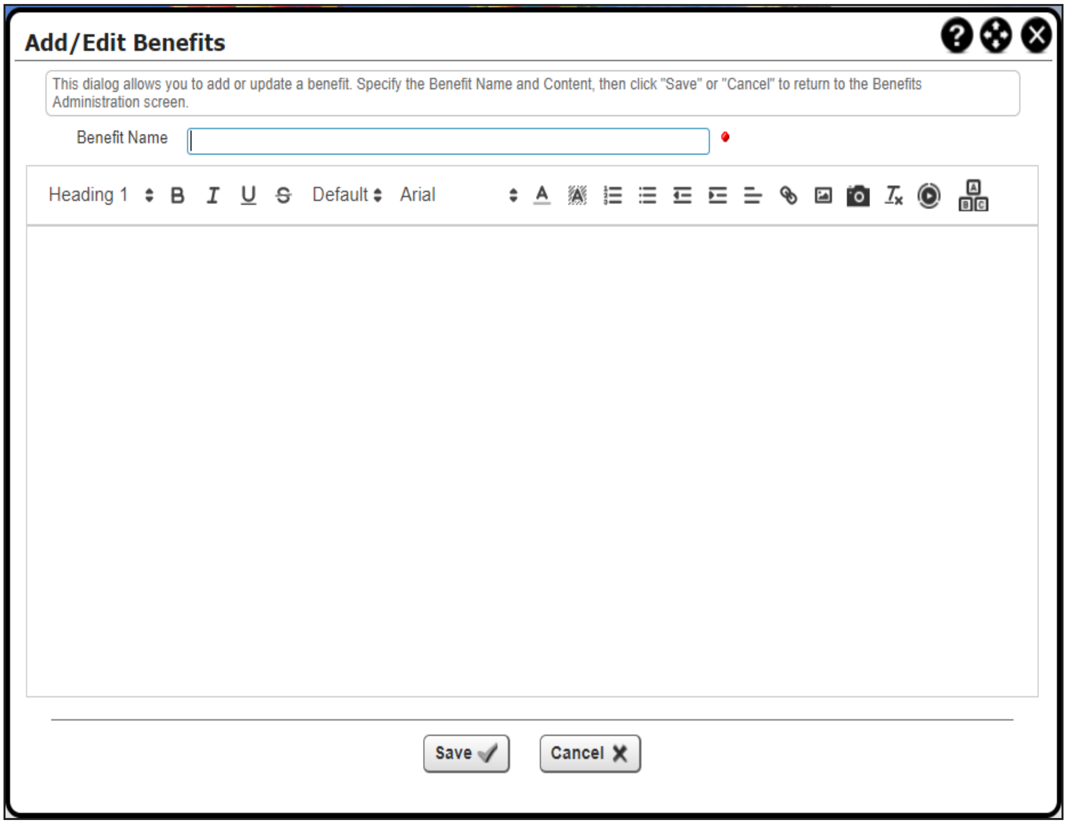
Maintain Options

The following options can be found in the Maintain column:

Icon	Description
 (Edit)	**Edit** this benefit.
 (Delete)	**Delete** this benefit.

Maintain Options

To add a benefit, click **Add Benefit**. The following popup window is displayed:



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

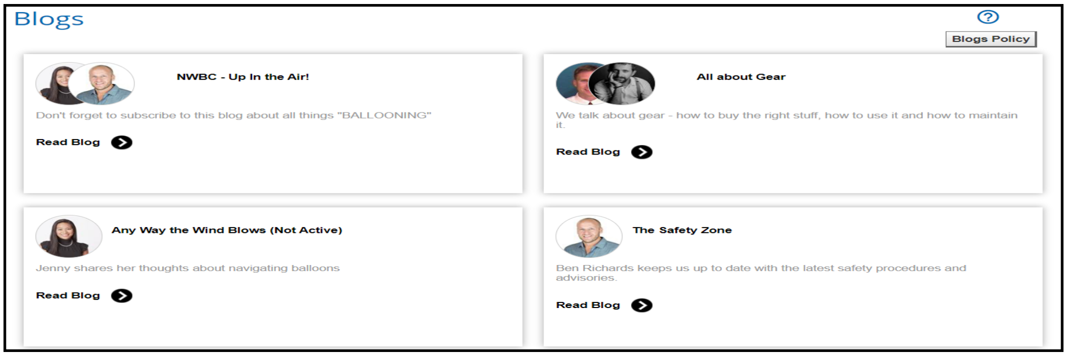
Select **Control Panel – Website – Setup – Website Options.** Change "Show member sign-up link in Benefits" to **Yes**, then specify the text to appear on the link button.

To disable the button, just go to the same screen and change the option to **No**.

Blogs

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.

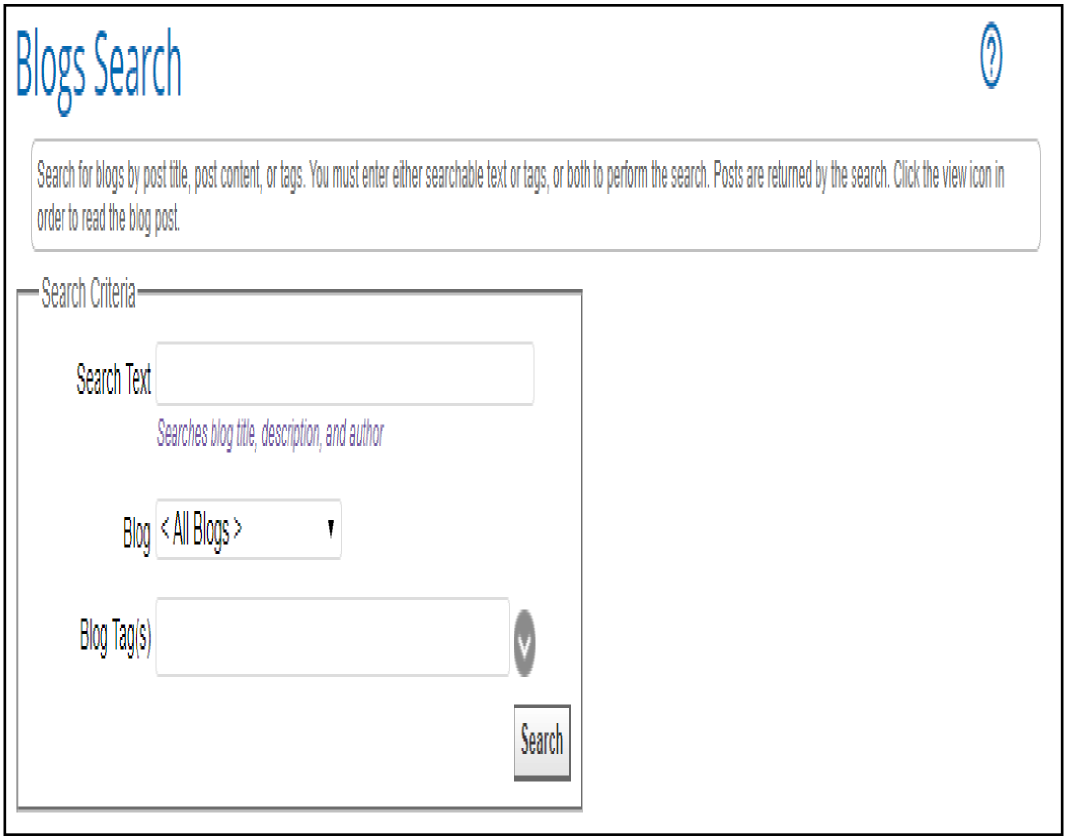
In the ClubExpress model, an administrator or Blogs module coordinator creates a blog and then hands it over to a blog author or authors to manage.

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:



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.

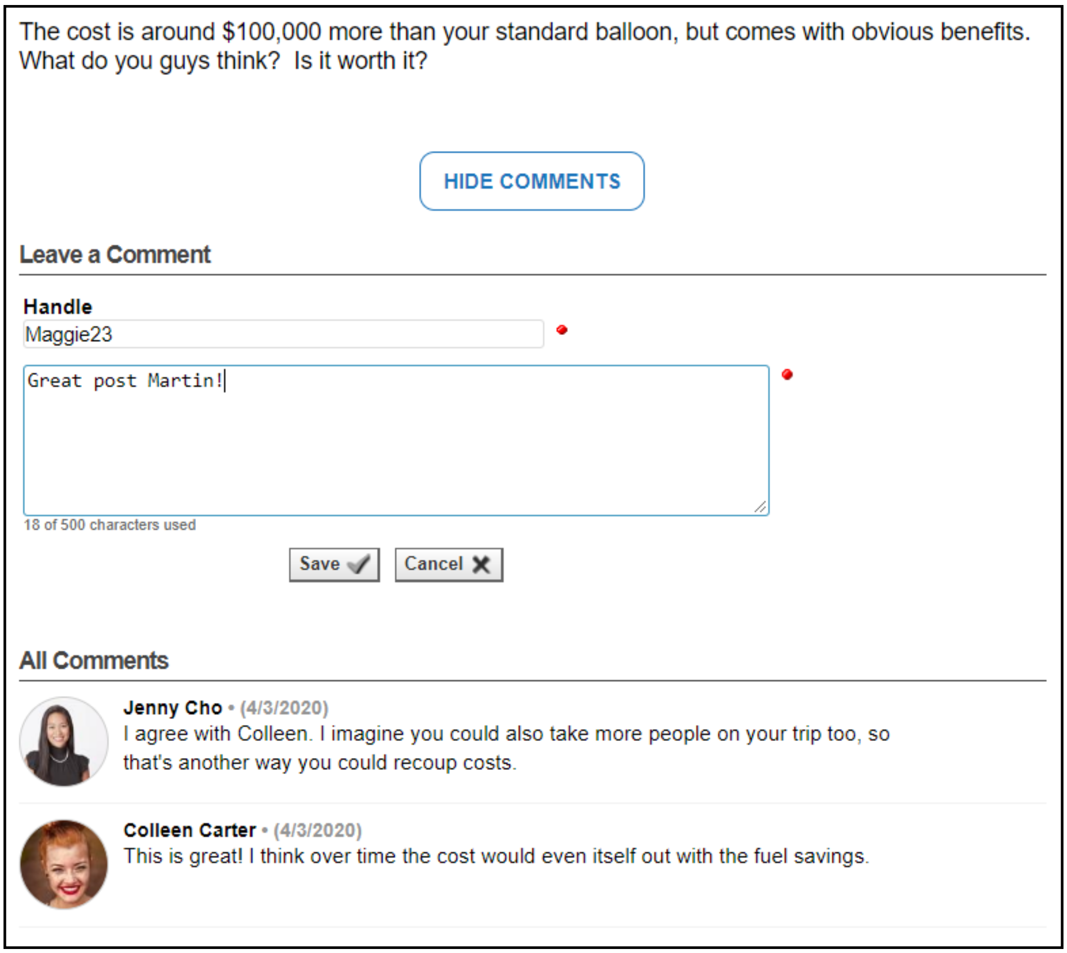
Members

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:



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.

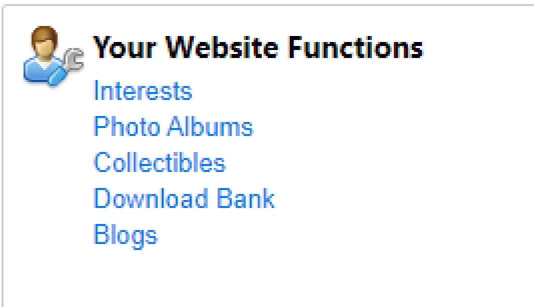
Manage Blog Authors

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.

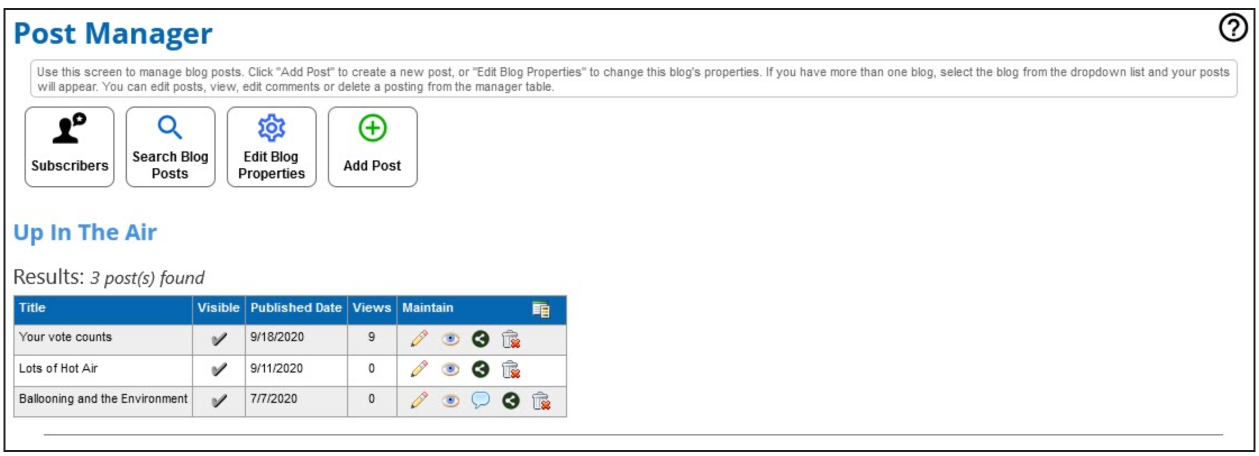
The blog's authors will see it in their blogs list, even if the initial status is Draft or Offline. Authors can modify the title, description, visibility, status and whether comments are allowed.

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.



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.

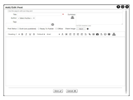
Buttons are available to view a list of subscribers, search blog posts, edit the properties of the blog and add a post.

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:

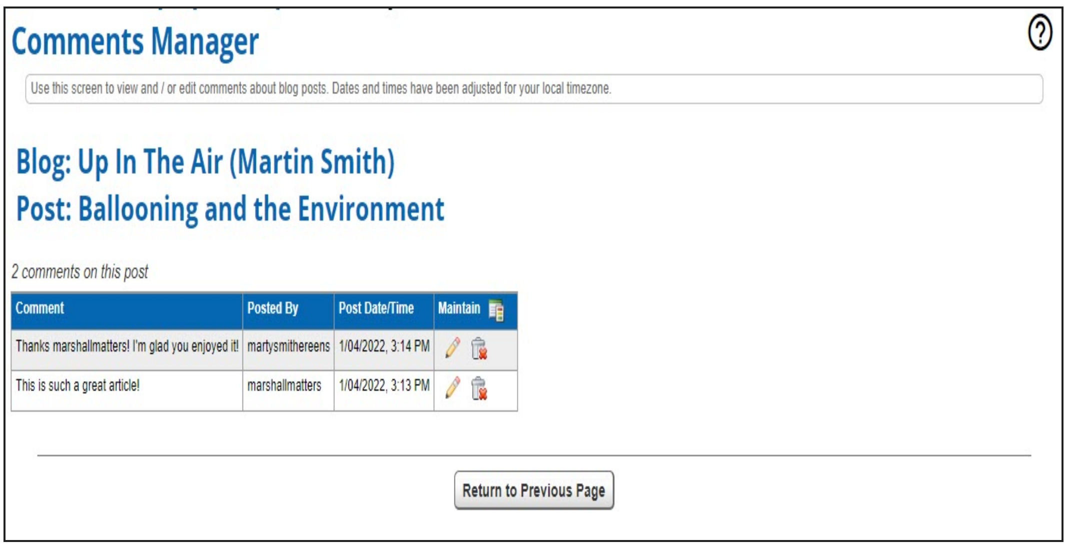
Icon	Description
(Edit)	**Edit** this blog entry.

Icon	Description
(View)	**View** this blog post.
(Comments)	View and edit **Comments** posted on this blog entry. This icon will only display if comments 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 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:

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

Reference Materials

Related Tasks

Blogs Manager for Admins

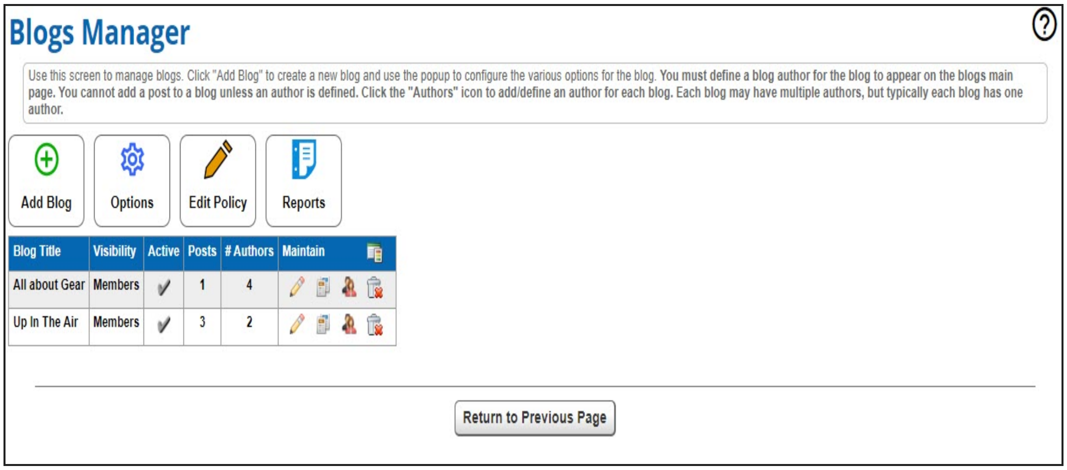
Control Panel > Communications > Website Modules > Blogs

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

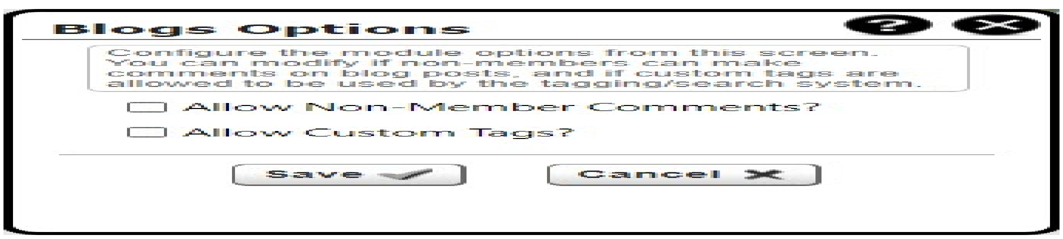
2. When viewing any screen in the Blogs function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.



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.



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

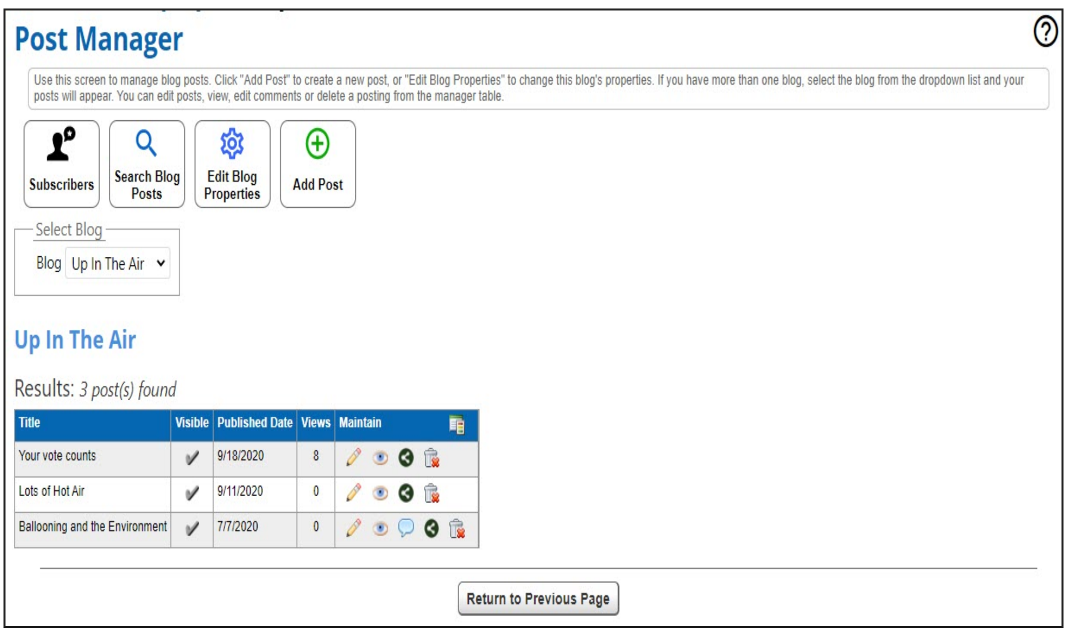
The following options can be found in the Maintain column:

Icon	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:



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.

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.

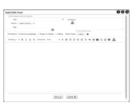
Select **Subscribers** to view a list of subscribers, with member and non-member subscribers listed separately and the ability to remove each subscriber individually.

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

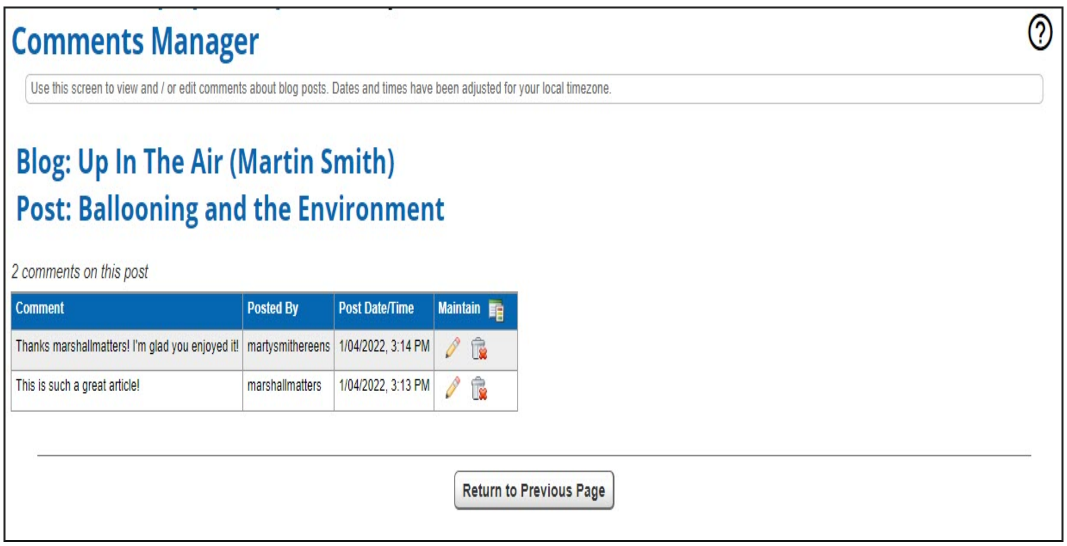
The following options can be found in the Maintain column:

Icon	Description
(Edit)	**Edit** this blog entry.
(View)	**View** this blog post.
(Comments)	View and edit **Comments** posted on this blog entry. This icon will only display if comments 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

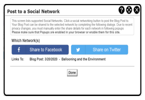
Click the **Comments** icon to view and edit comments. You will see a screen similar to the following:



Comments 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:



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.

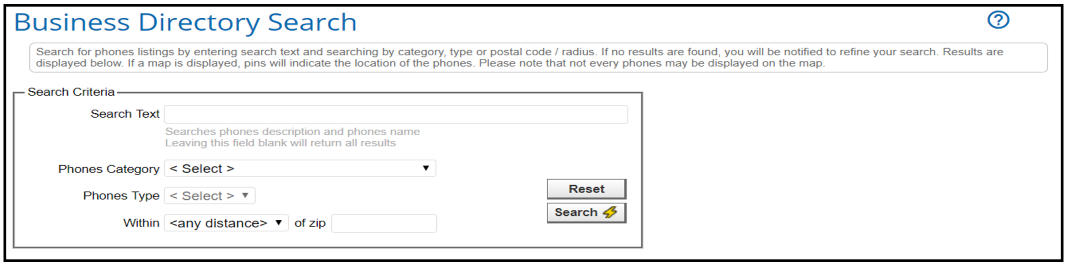
Enter whatever text you need to communicate the details to your audience, then click the **Share** button to post this blog entry to your club's social network(s), or **Cancel** to close the dialog without posting.

> **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

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:



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.

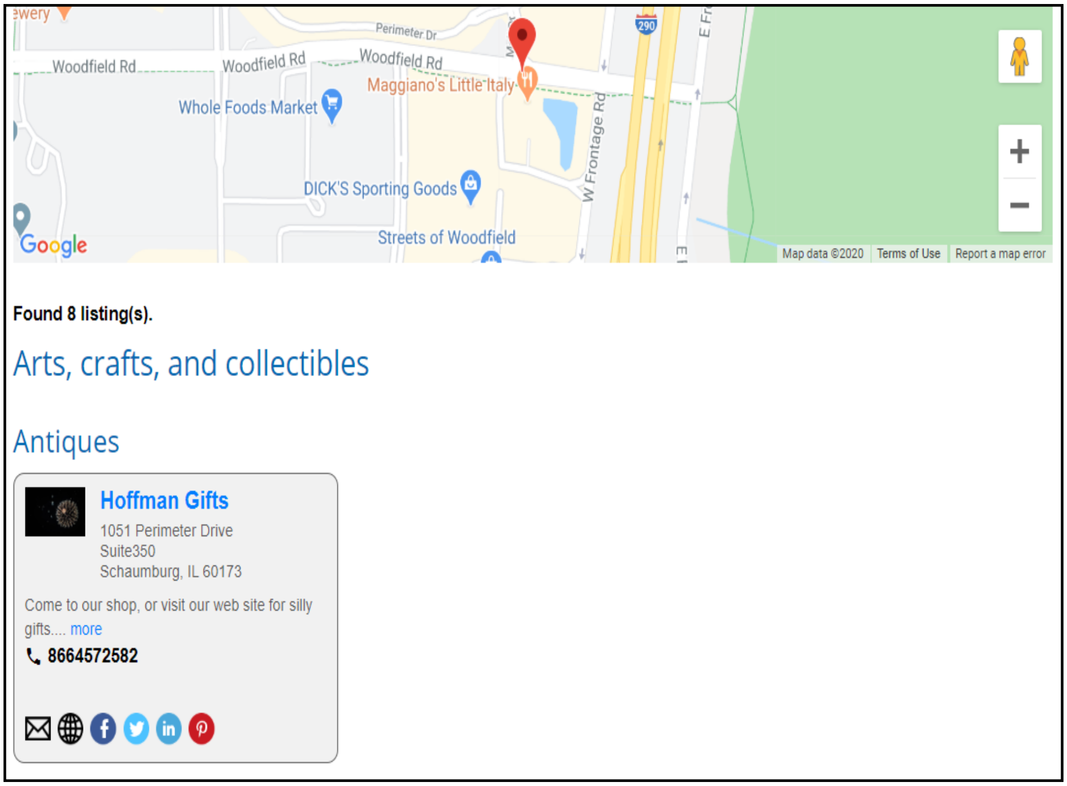
Searching the Business Directory

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”.



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.

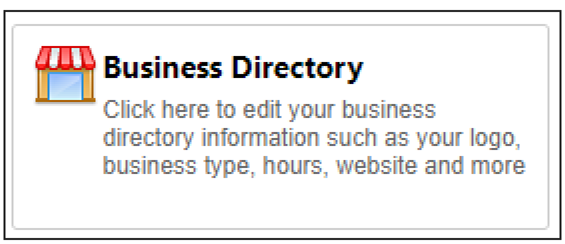
The Business Directory includes primary and secondary members within the membership. This option allows a business with multiple locations to list each location separately. Businesses can also hide themselves completely if they don't want to be included in the directory.

There are two ways for members to update the information in the Business Directory:

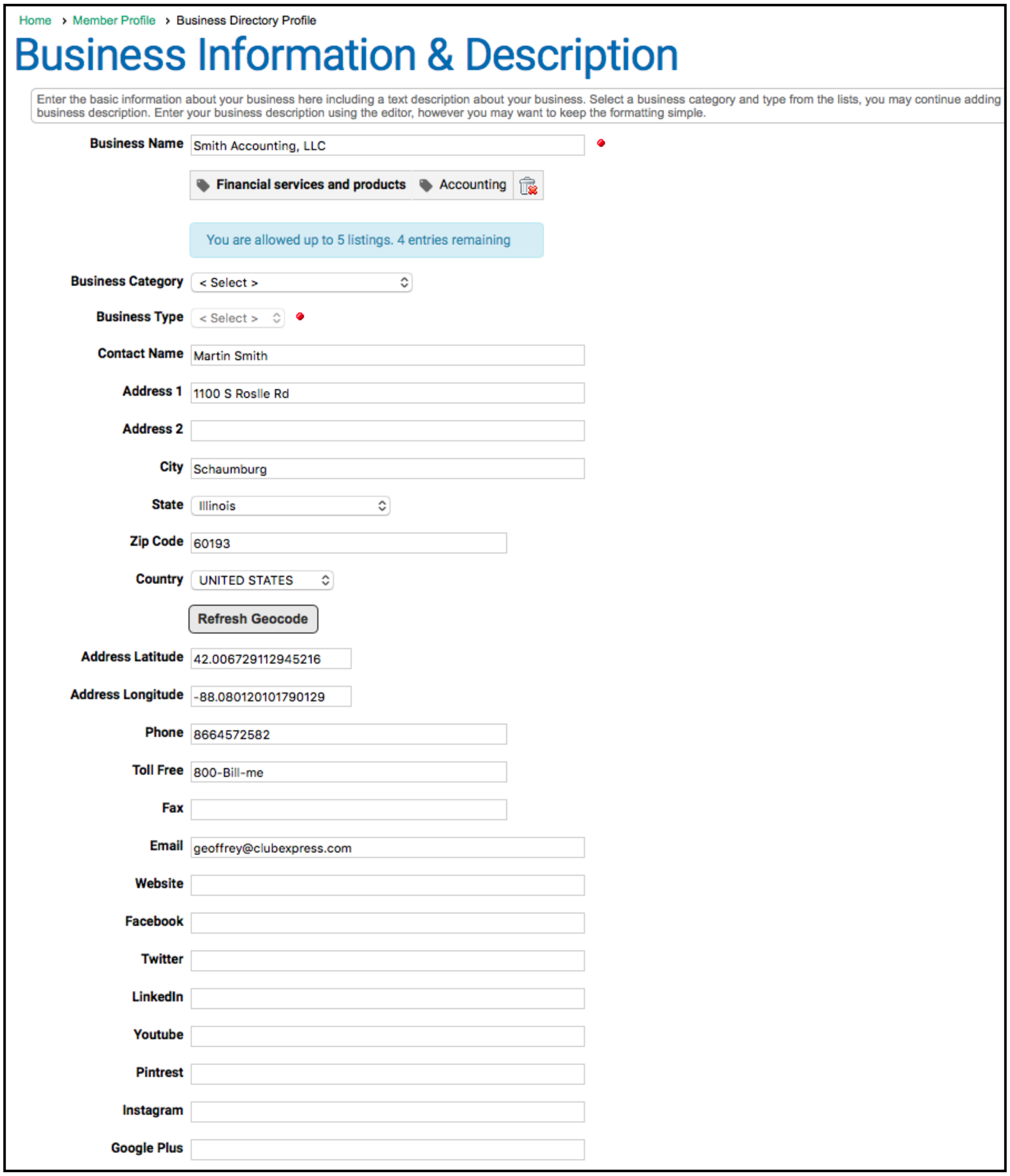
- From their Profile screen
- From the Detail screen within the directory itself

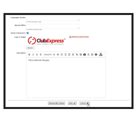
Member Profile

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:



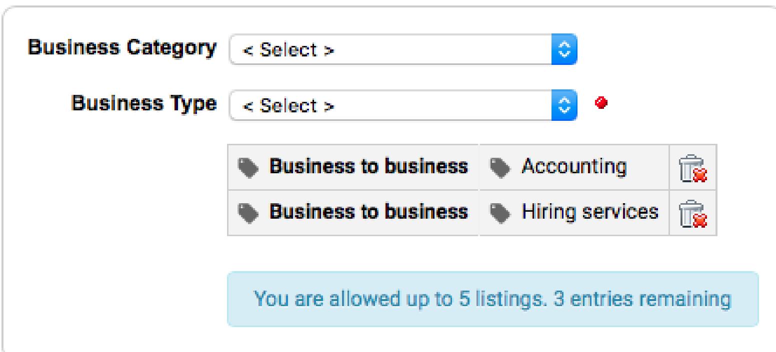


When this screen is first accessed, the system will copy over the member's personal contact information. But everything can be changed to show different information.

> **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.



- 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.

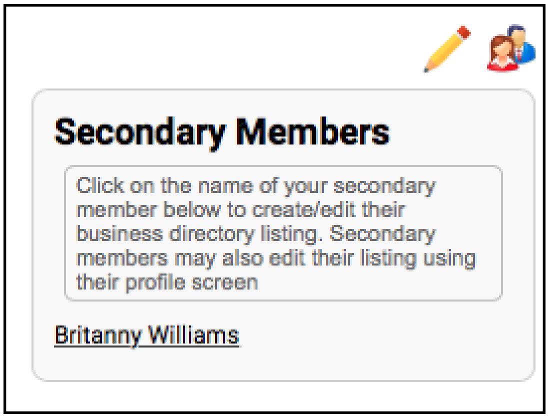
Removing Your Directory Listing

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.



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

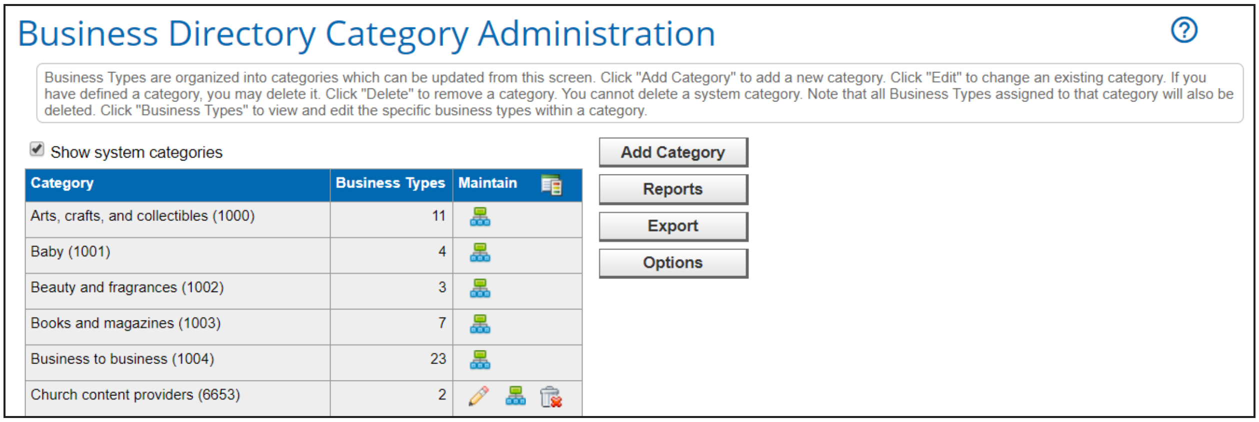
Control Panel > People > Website Modules > Business Directory

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:



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:

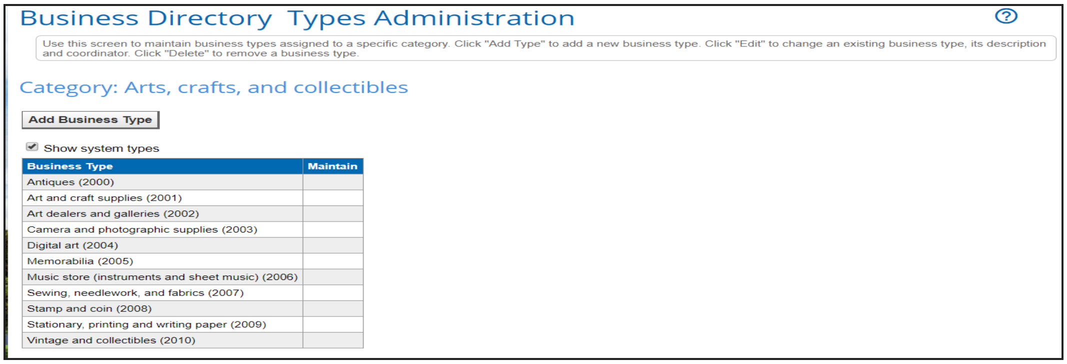
Icon	Description
(Business Types)	Display the list of business types within a category.
(Delete)	**Delete** this category. This option only appears for user-defined categories and then only if there are no business types under the category. You will be prompted to confirm this action.

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:



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.

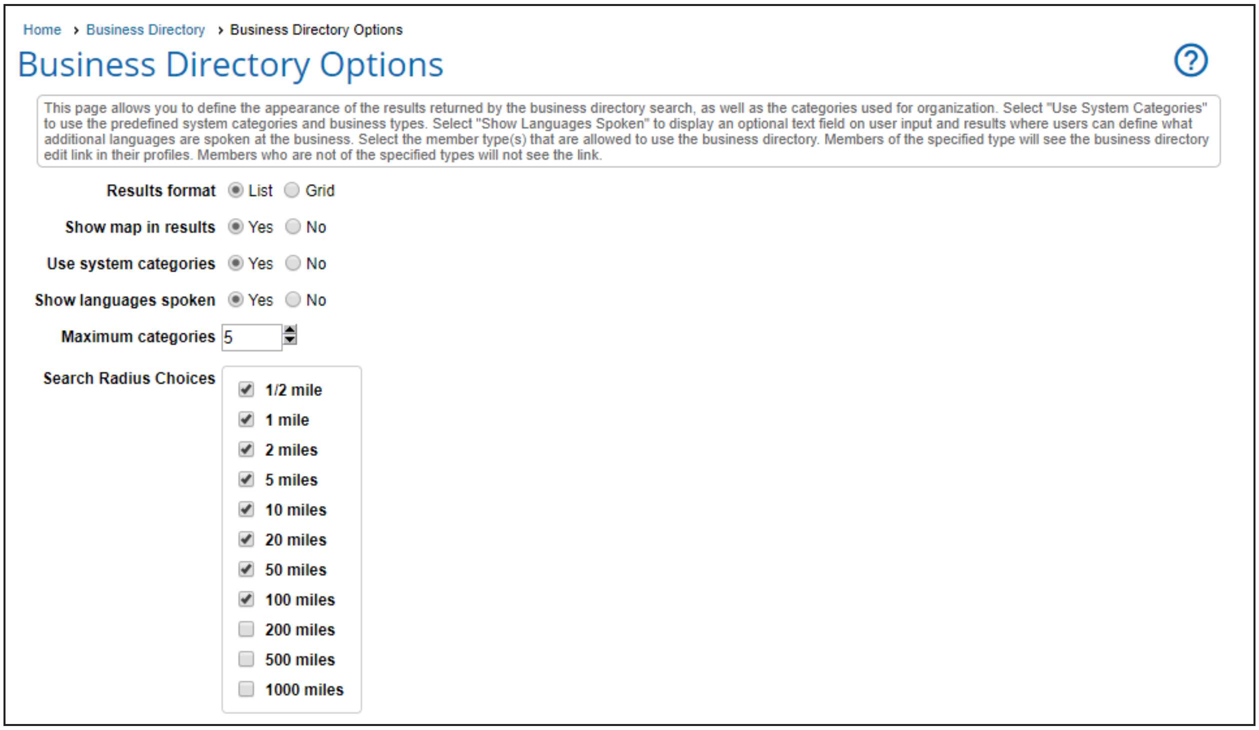
Select a report and click **Next**. Then select a report title and output format and click **Run Report** to display your report.

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:



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

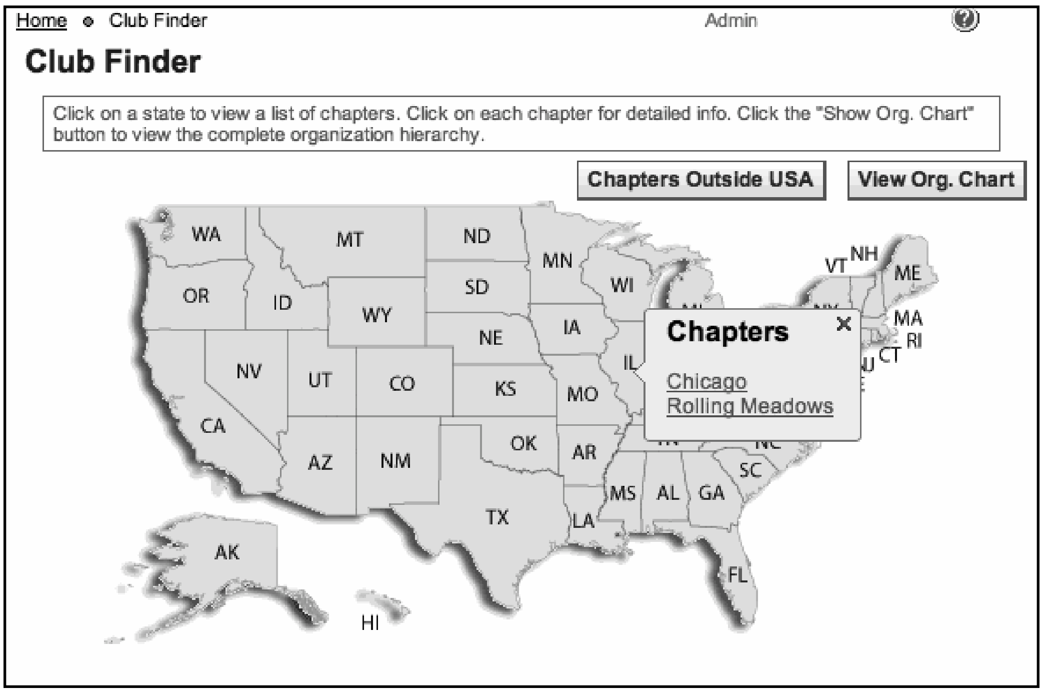
> **Example:** The following link shows all restaurants within a 1-mile radius of 60173.
> …content.aspx?page_id=154&club_id=522353&cat=2129&zip=60173&radius=1

Chapter Finder

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

US Map
US/Canada Map

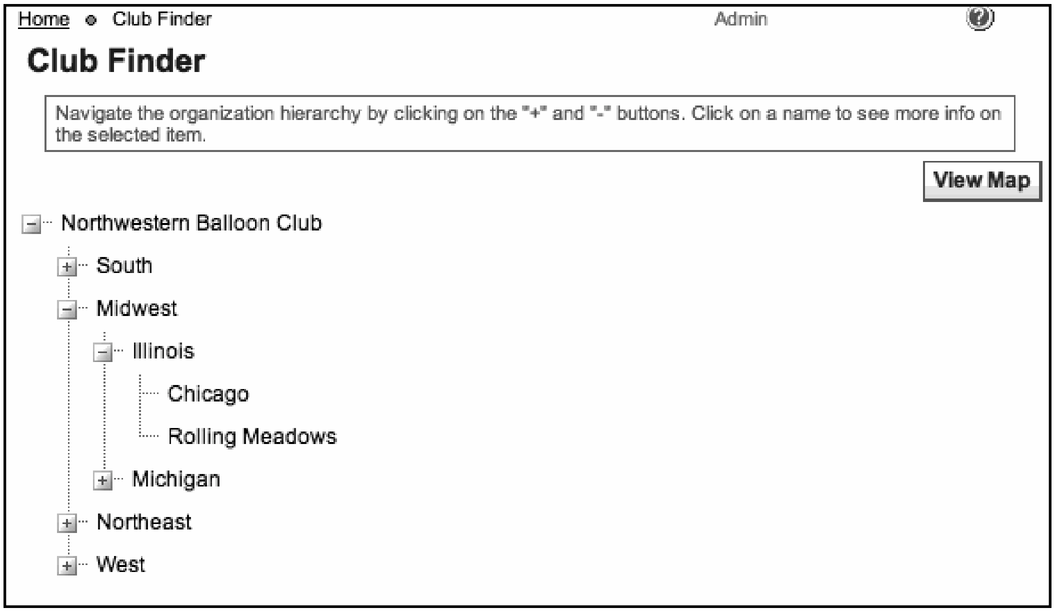


Click a state or Canadian province to see a list of chapters in that state or province. When you click a chapter name, you'll see contact details for that chapter.

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



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.

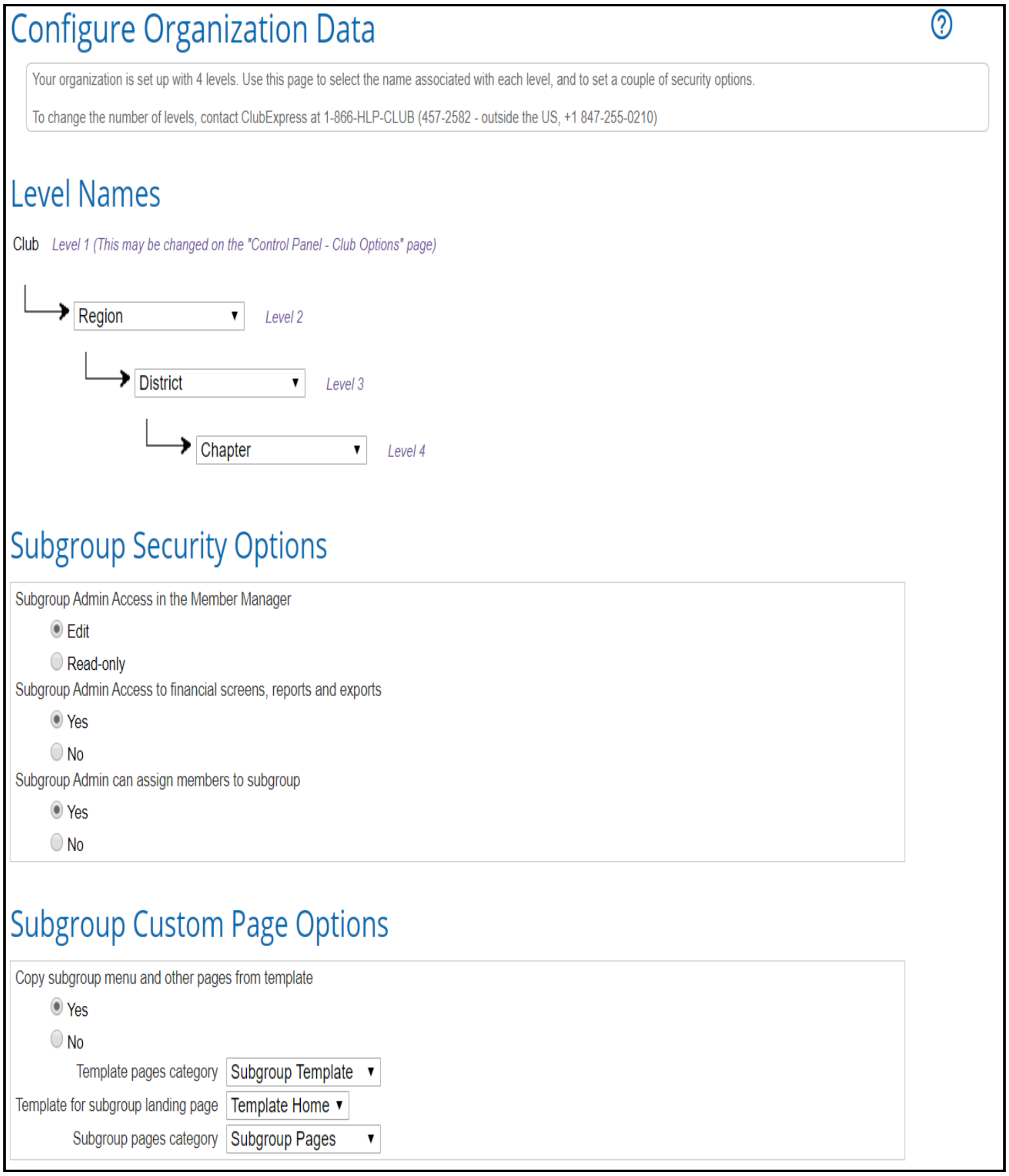
Configure Chapters, Districts and Regions

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:



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 sub-group.

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~~

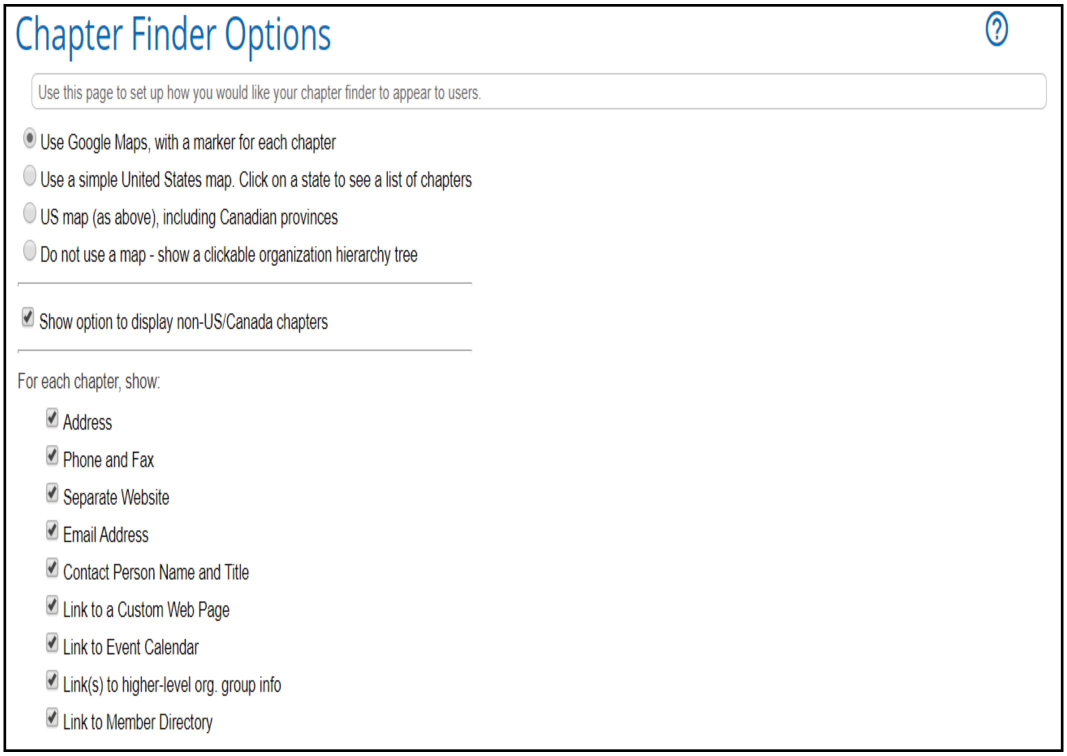
~~contact_email~~

~~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:



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.)

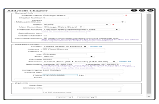
- Link(s) to a higher-level subgroup (for example, the district or region that the current chapter belongs to.)
- Link to the Member Directory (for the chapter's primary contact person.)

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:



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:

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.

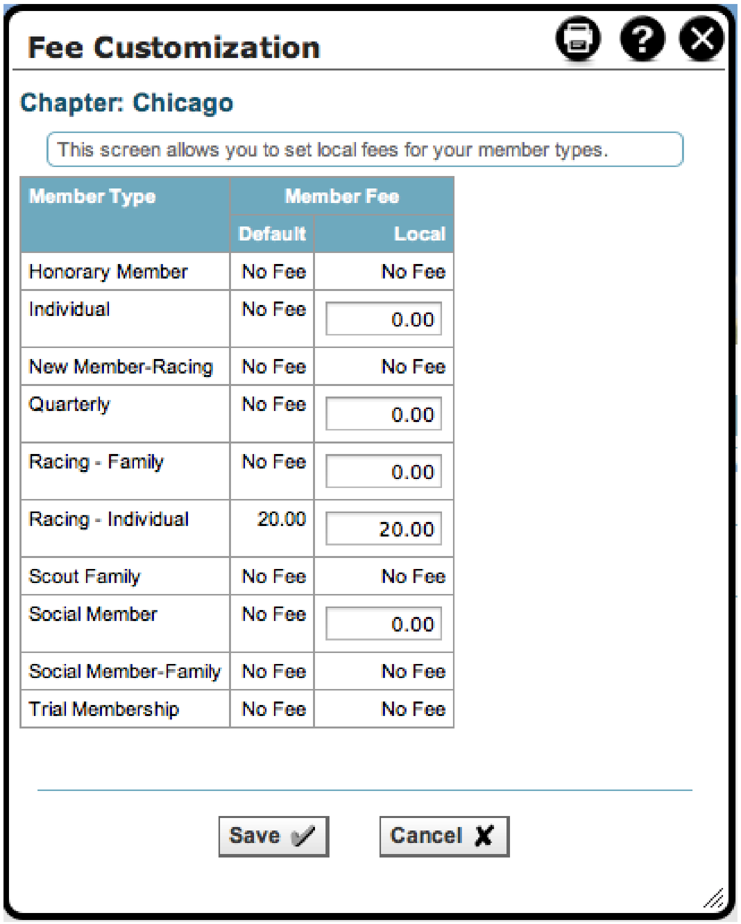
> **Example:** You cannot delete a district until the chapters within that district have been assigned to other districts. It also cannot have any members or administrators.

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:



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

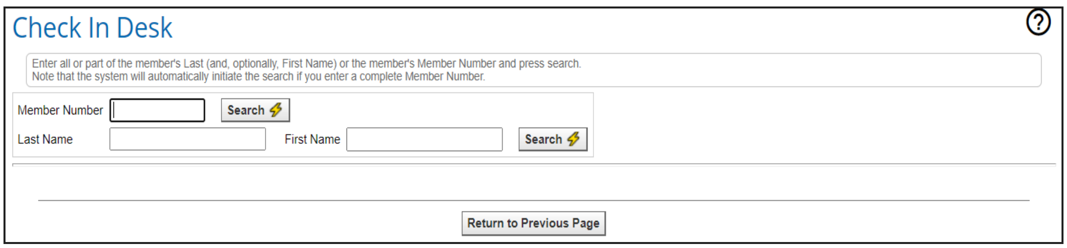
This function is designed for clubs and associations with a Check-in Desk at a clubhouse or facility. Coordinators can use it to check the membership status of people entering the facility. Members can optionally check themselves in if allowed by administrators, and if the module is placed on a menu.

> **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:



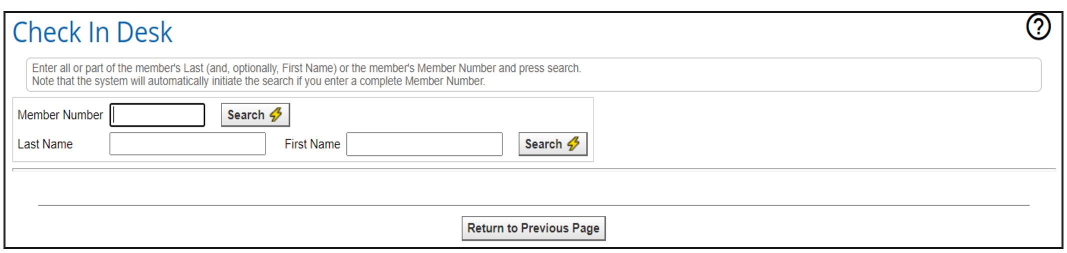
> **Note:** If you are redirected to the Home Page your organization does not allow members to check in themselves. Please contact an administrator in your organization for questions.

Enter a Member Number, Last Name, or First Name and click the **Search** button. The screen will refresh to show matching members.

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:



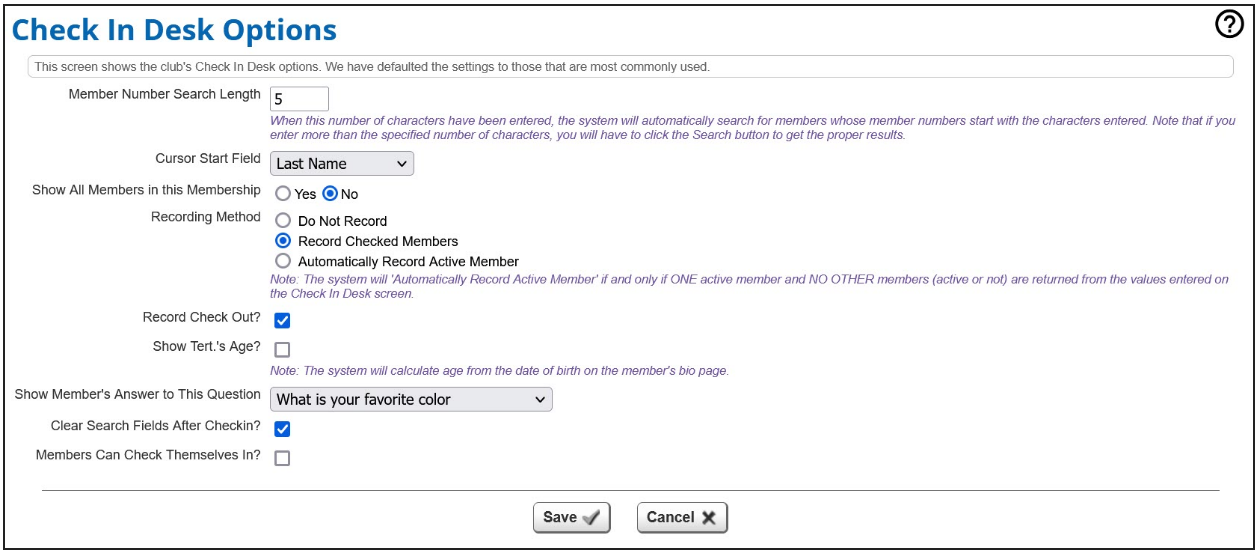
Enter a Member Number, Last Name, or First Name and click the **Search** button. The screen will refresh to show matching members.

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.



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.)

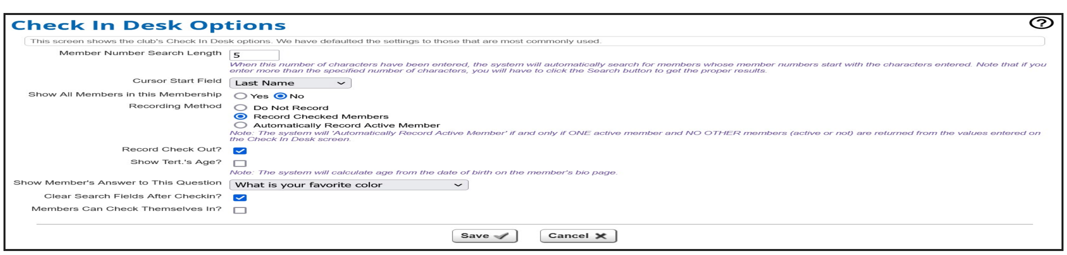
Scanning a Digital Card

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 allows you to review check-ins that have been recorded in the database. You can search by date range and last name (starts with.)

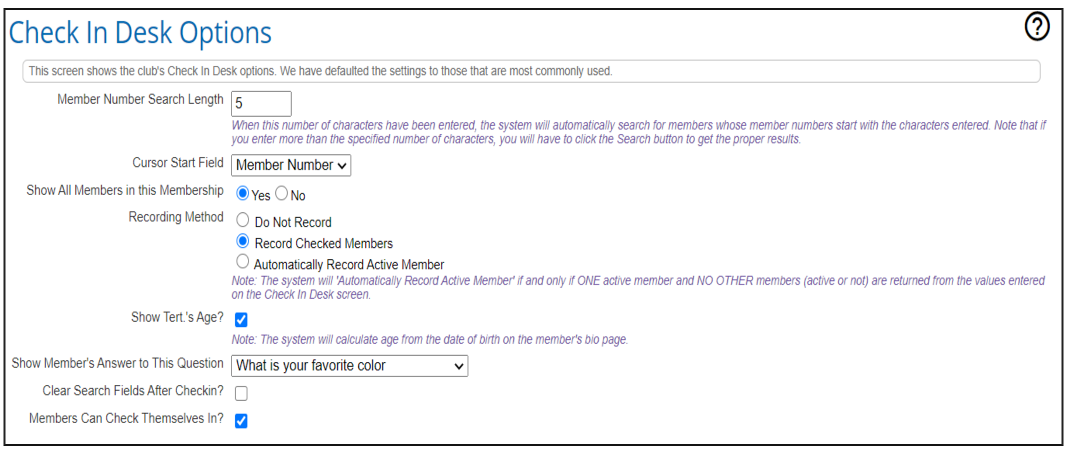
Click the **Reports** button to run reports of recorded check-ins.

Reports

Report	Description	Filter Options
Check Ins by Date	Check-ins sorted by most recent check-in, including member name, number, check-in date and time	Member Options, type, level, date
Check Ins by Name	Check-ins sorted alphabetically by last name, including member number, check-in date and time	Member Options, type, level, date
Check Ins by Member Counts	Number of check-ins by member, sorted by member last name	Member Options, 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

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.

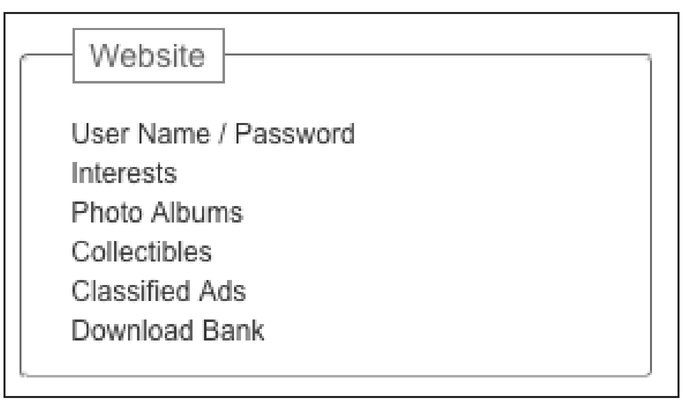
> **Example:** A car may change ownership over the years and be modified along the way, including a new engine or paint scheme. There is nothing inherent in the system that stops this car being listed multiple times under the same or different owners. Searching for this car using its reference number 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”.

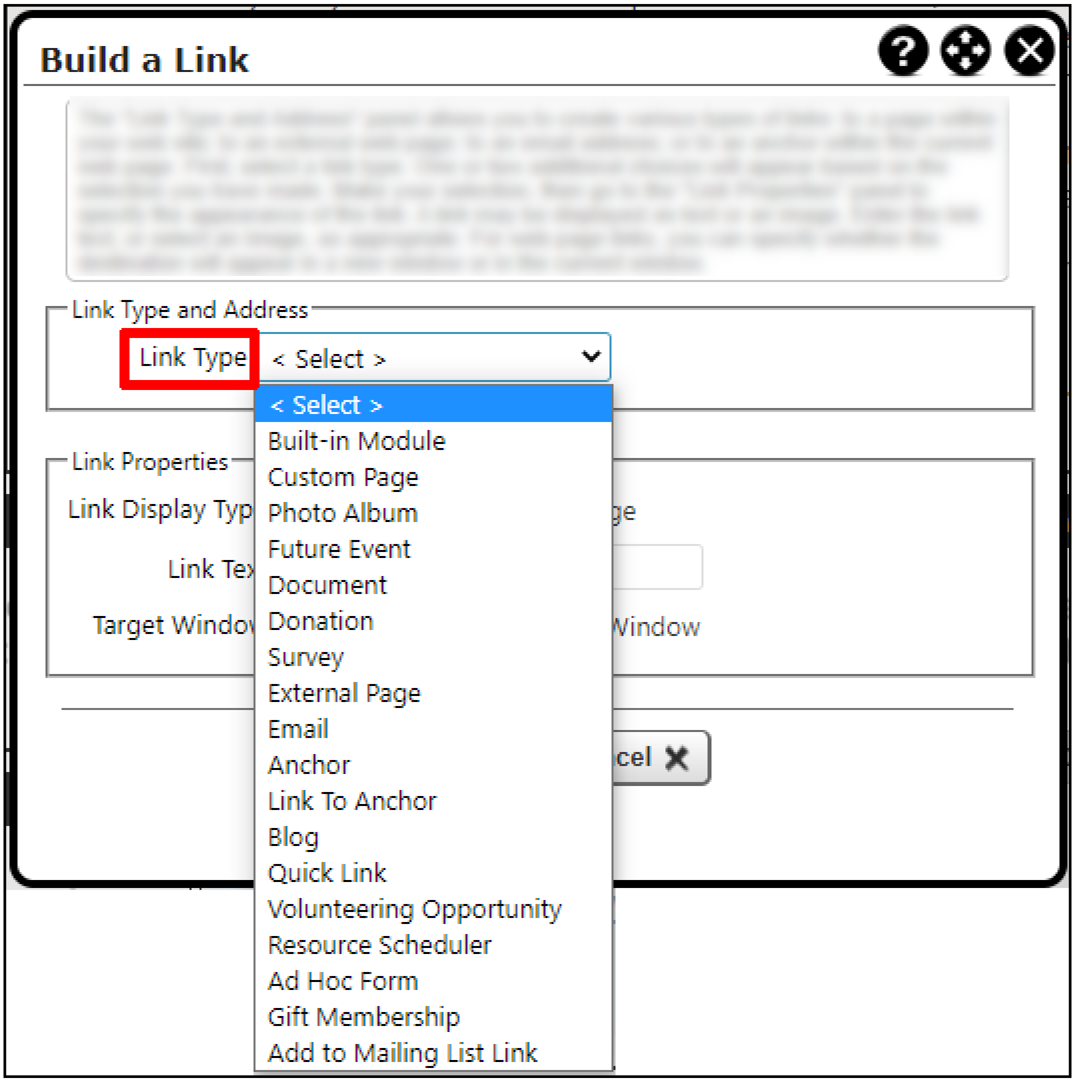
Collectibles in the Member Profile

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.



Search Collectibles (User)

When you first display the user side of the Collectibles module, you will see the following screen.



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.

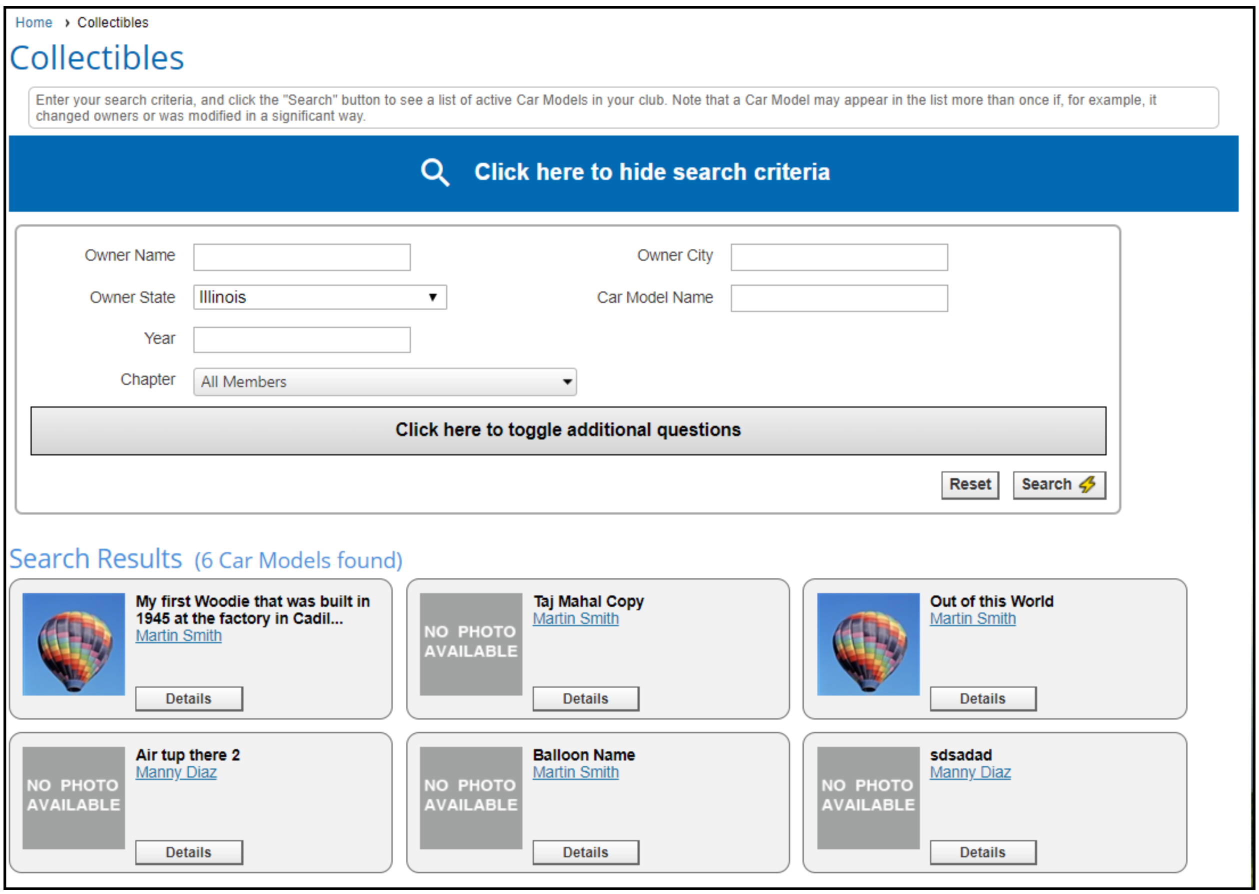
Enter or select the relevant search criteria and click the **Search** button.

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:

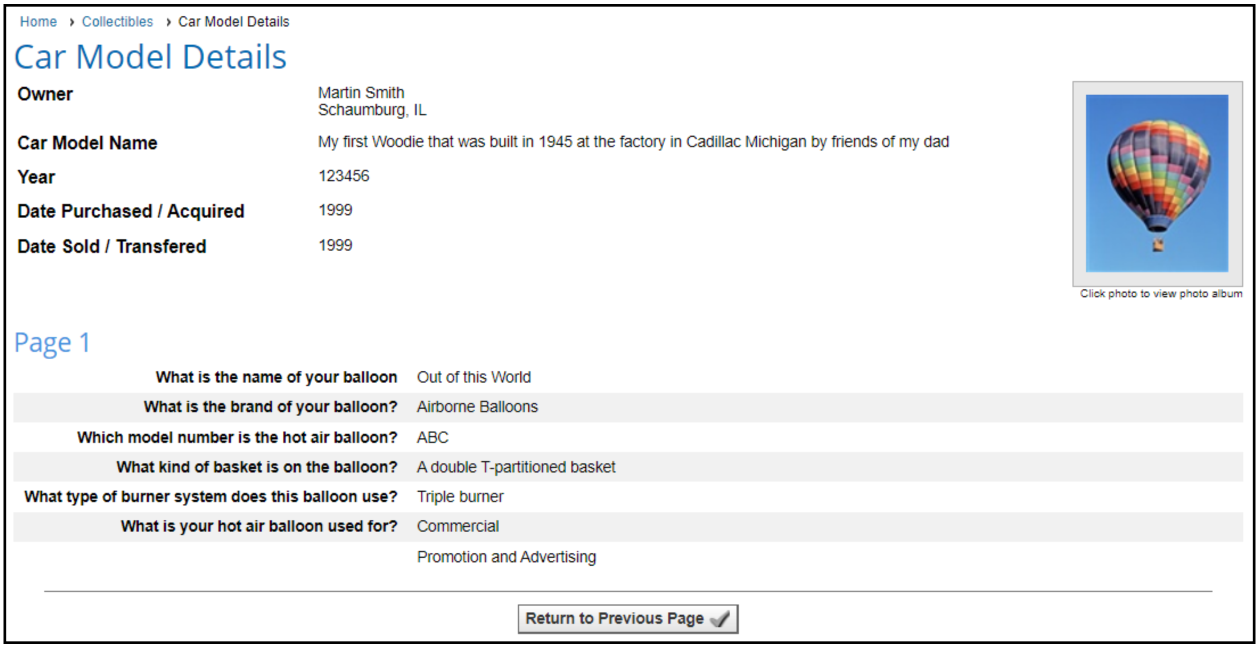


Matching items are shown below the search panel (which actually collapses when a search is performed.) 20 results are shown; if there are more than 20, the standard ClubExpress page controls will also be displayed to navigate forward and backward through the list.

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:

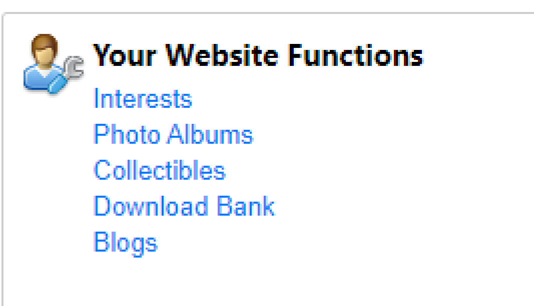


Items can be organized into pages, with any number of pages and questions per page. The fixed properties and photo are shown at the top, then each page and its questions and answers in turn.

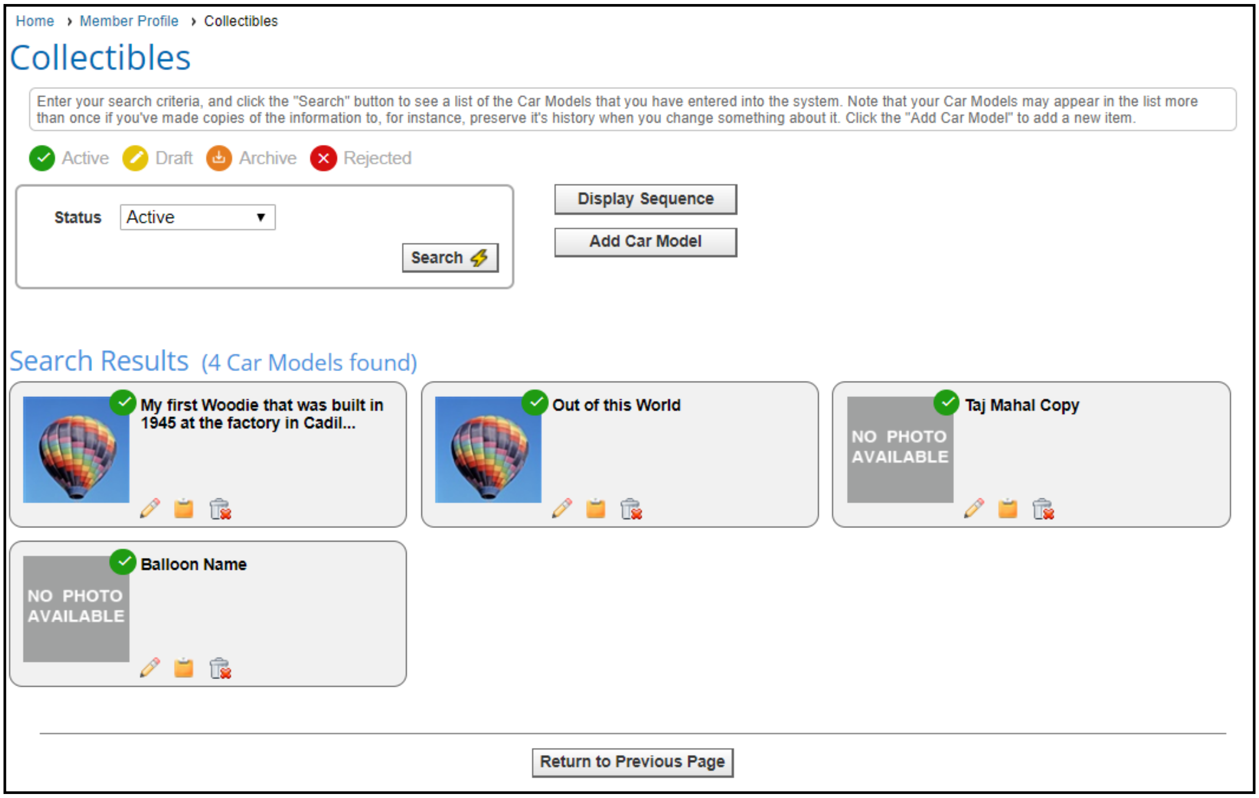
Click **Return to Previous Page** to return to the search and results screen.

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:



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

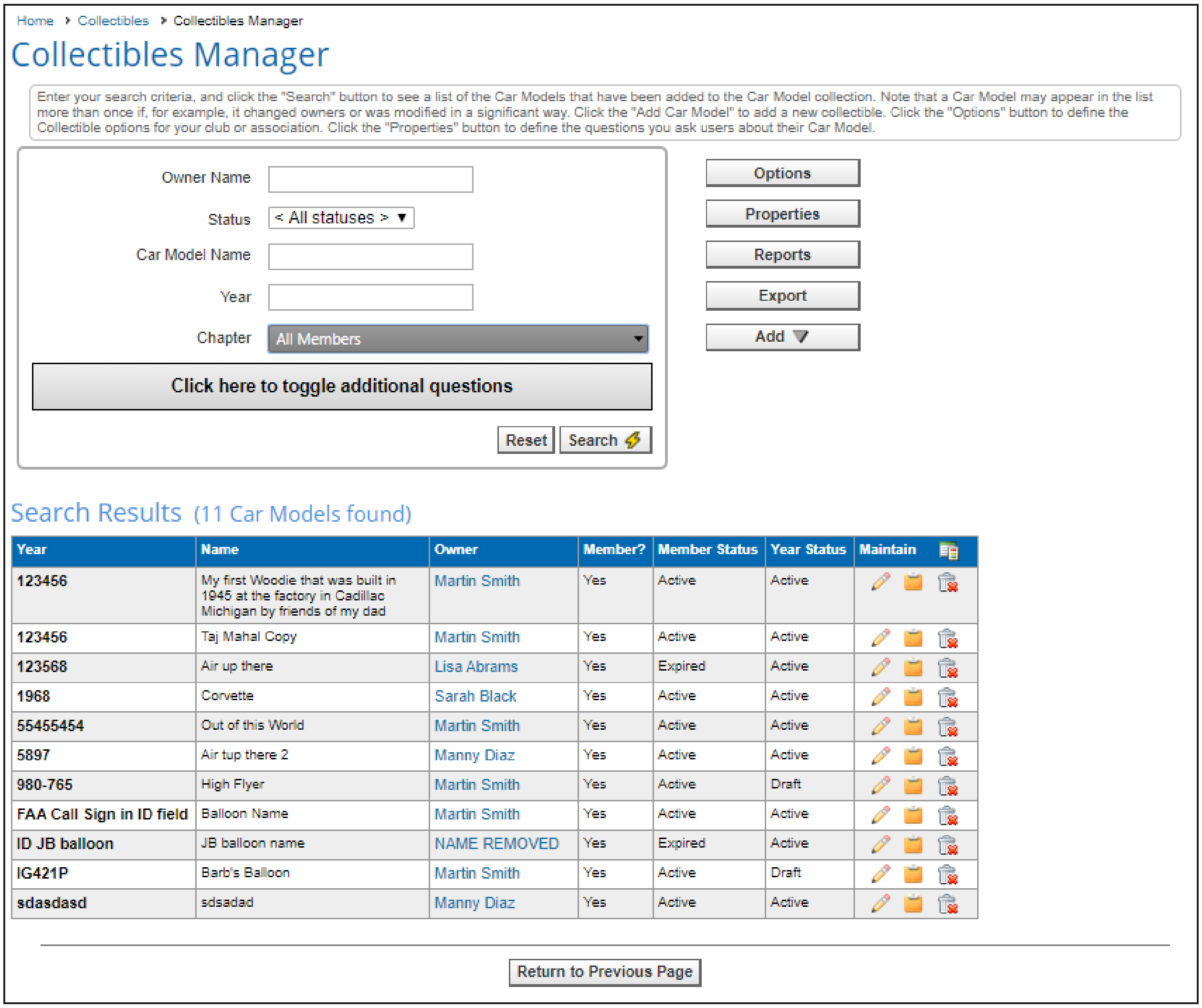
There are two ways to manage collectibles

1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

2. 

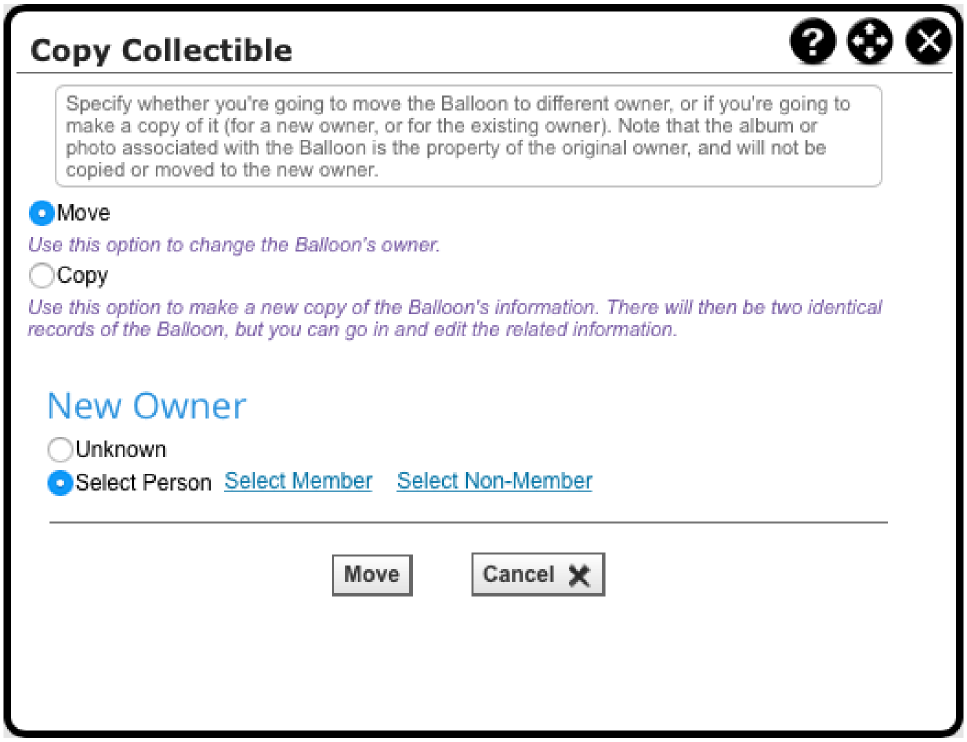
When viewing any screen in the Collectibles function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following Collectibles Manager screen is displayed:



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.

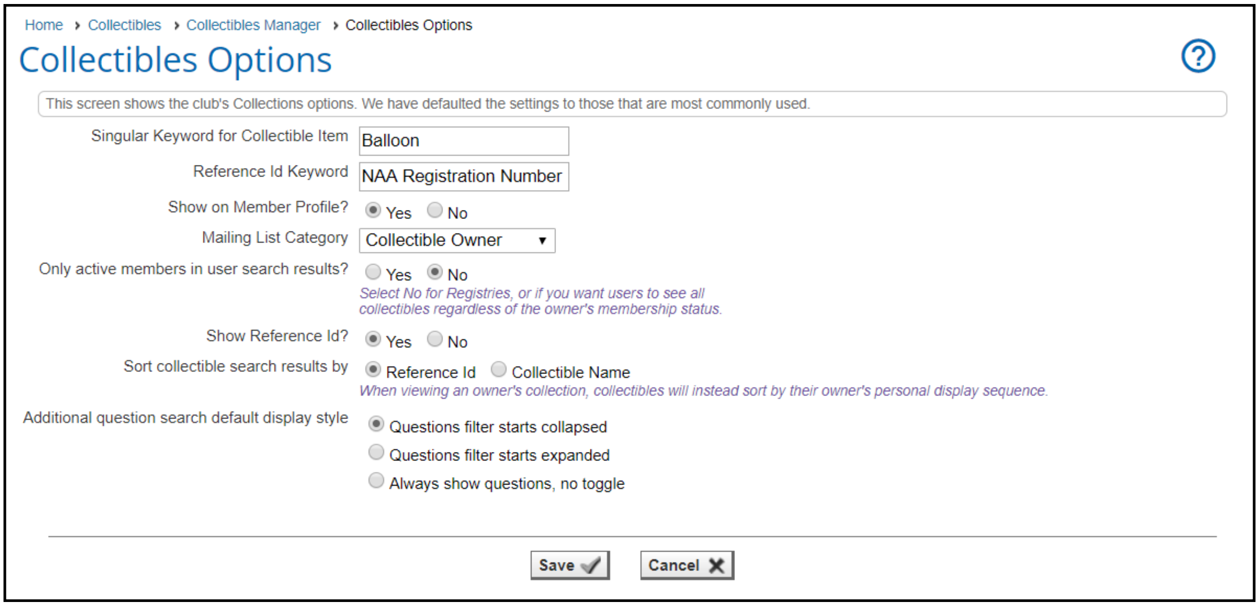
Select the **Copy** option to copy a collectible item to an Unknown user, to the same person (member or non-member), or to a new person.

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:



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 Number	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

Maintain Options

The following options are available in the Maintain column for collectibles:

Icon	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.

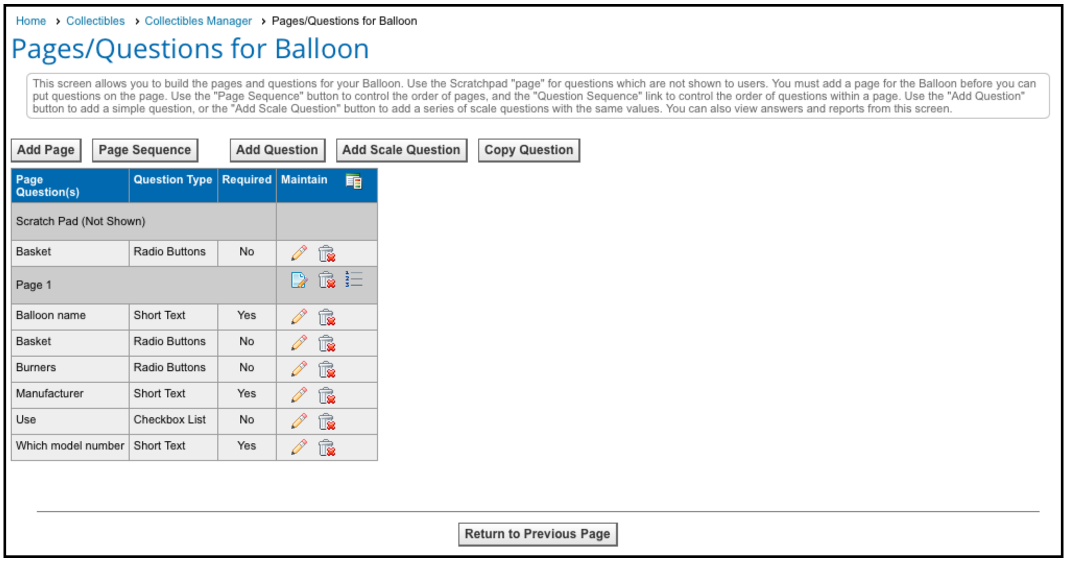
Maintain Options

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:

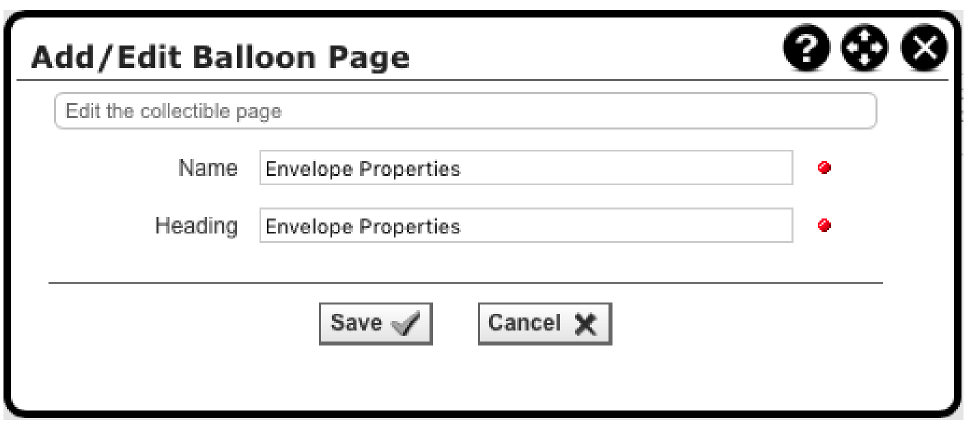


This screen allows you to define the pages and questions used to define and describe collectible items.

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.



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:

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

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.

Type	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) • Email Address • Web Address (URL) • US Phone Number	Required: yes/no Allow comments: yes/no

Type	Display Format	Additional Values	Options
		• US Zip Code • Canada Post Code • Australian Post Code • UK Post Code • Custom – Enter a Regular Expression and test the expression Regular Expressions 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, maximum 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, maximum 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

Type	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 selections that can be made. Allow other: yes/no Allow comments: yes/no
Radio Buttons	Vertical list of radio buttons; only one can be selected	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election) **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. **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.	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
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; anything 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 buttons representing the "strength" of the respondent'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 minimum of two (2) items must be specified.	Required: yes/no Store numbers: yes/no (If no is specified, values 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.

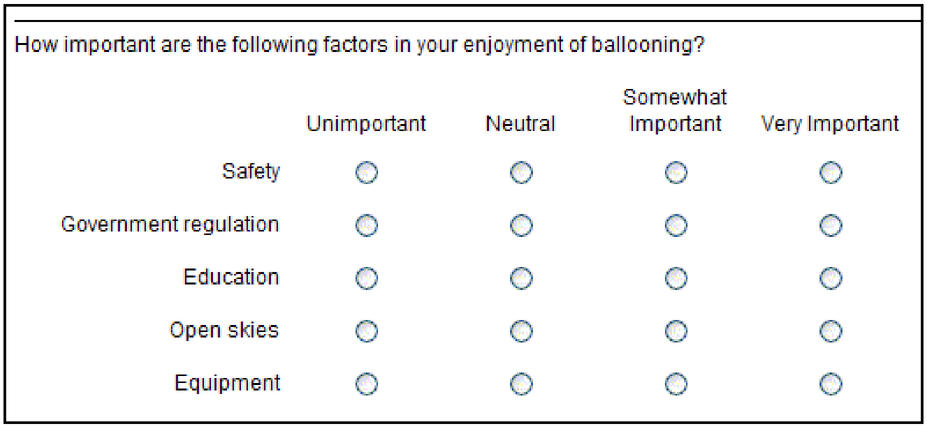
For more information about regular expressions, see the following websites:

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

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

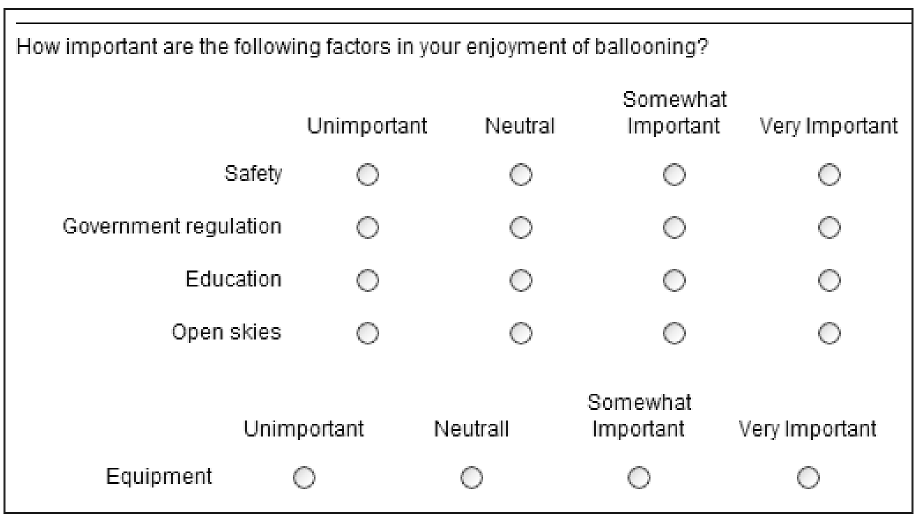
Scale Questions

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:



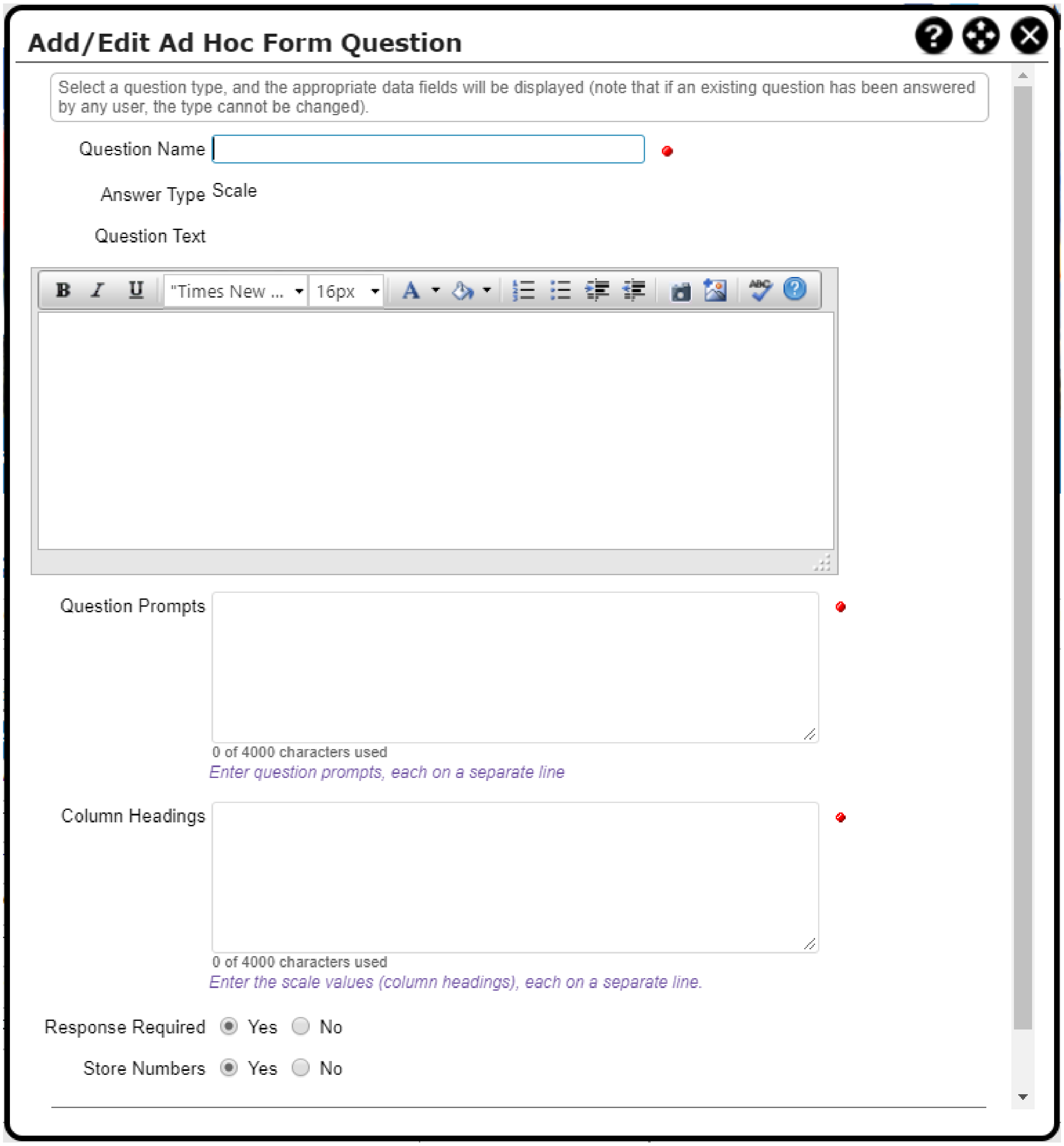
ClubExpress includes special functionality to display scale questions. If there's a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different 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.



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:



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.

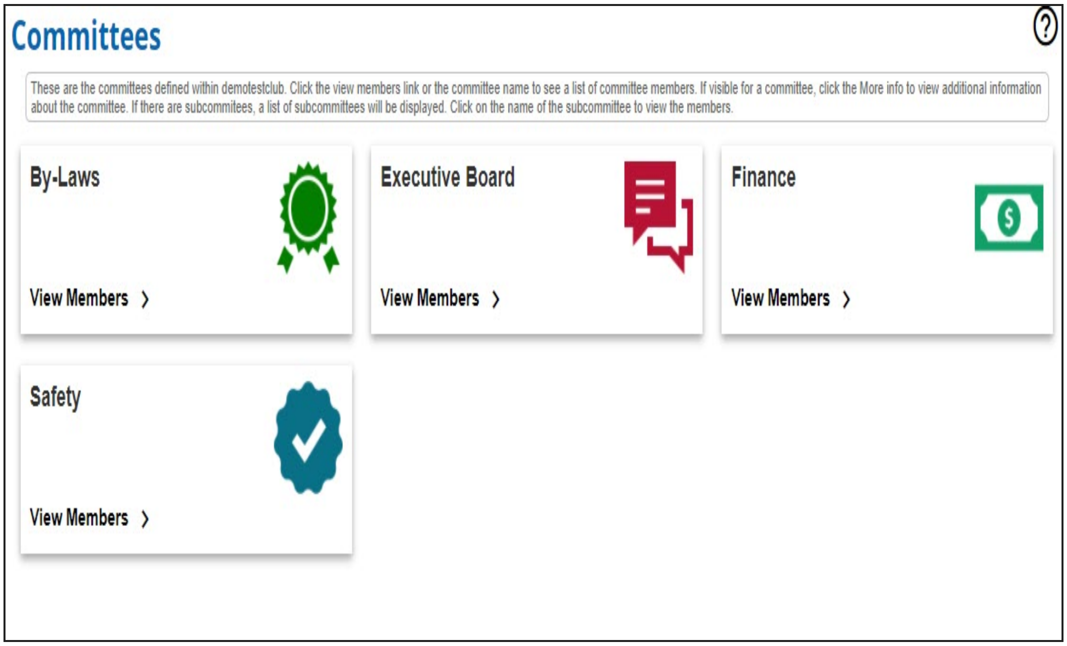
> **Example:** “Poor,Fair,Good,Excellent” will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.

Committees

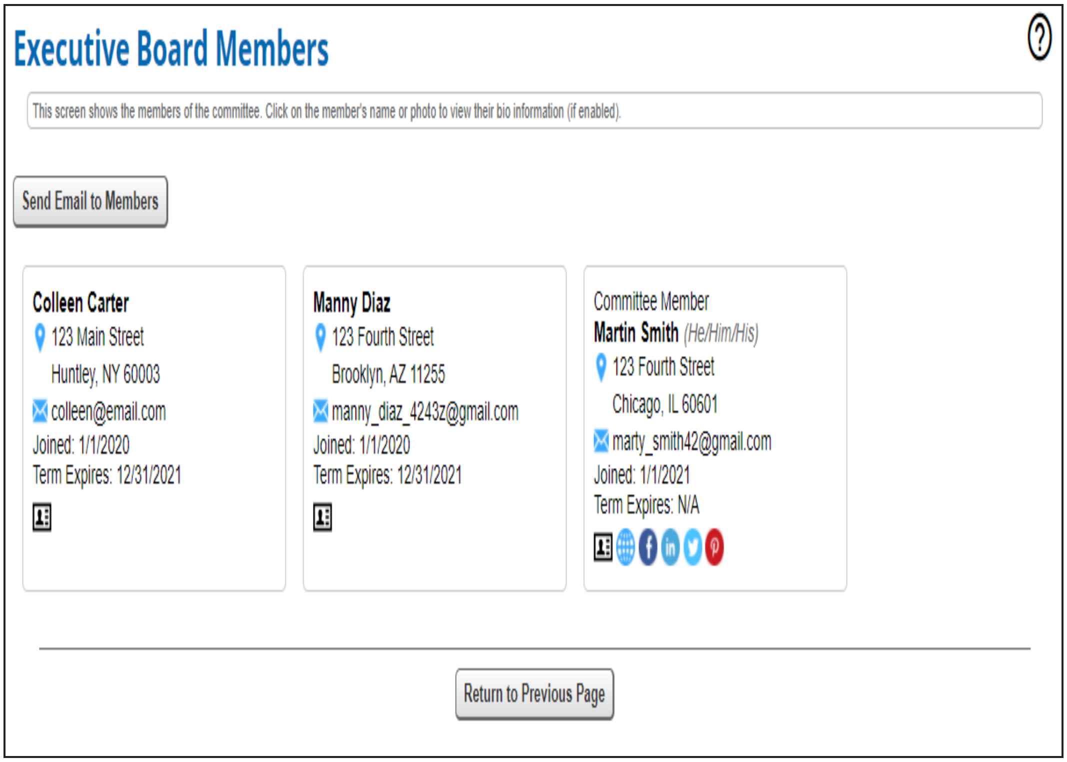
The Committees module allows clubs and associations to track the various committees and other organized groups of members that are chartered to fulfill the group's objectives. Committees include the Board of Directors and its sub-committees, as well as working groups built around events, publicity, the 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:



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

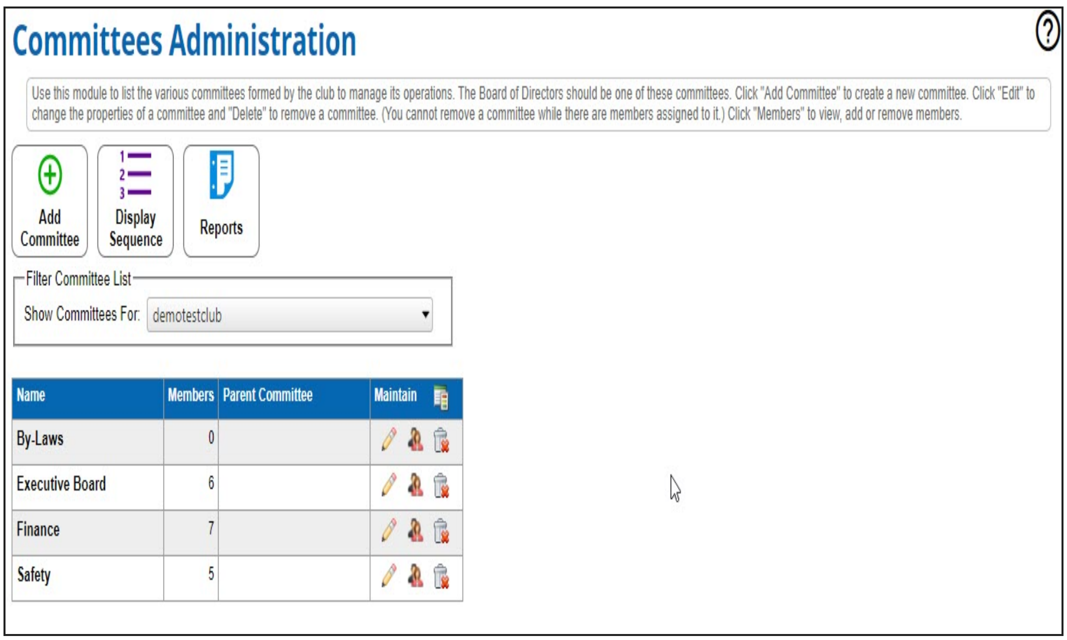
Control Panel > People > Website Modules > Committees

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. 

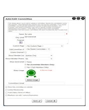
When viewing any screen in the Committees function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

The following screen is displayed:



> **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 (no-one, 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.

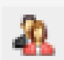
Click **Save** or **Cancel** to close the window.

> **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.
 (Members)	Update the **Members** of this committee.
 (Delete)	**Delete** this committee, including all member assignments. You will be prompted to confirm 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.

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.

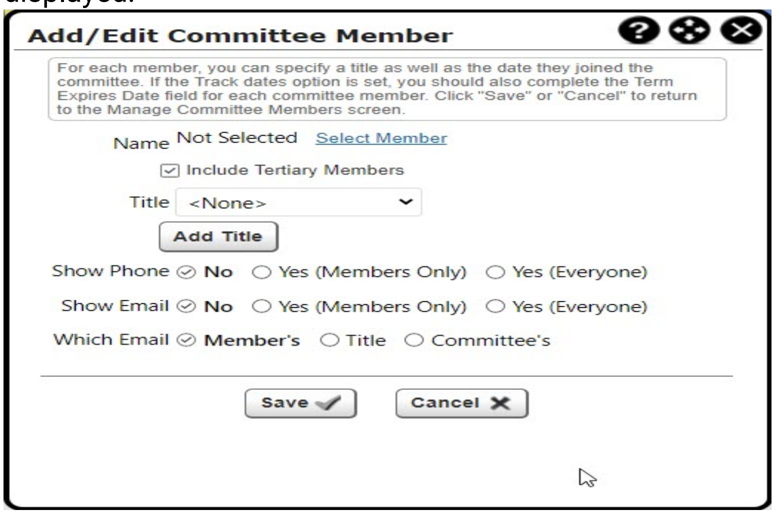
- If a committee does not have a restricted member count, then you can freely add and remove members. The grid will expand and contract dynamically.
- If the committee has a restricted member count, then the grid will always show a number of rows equal to the count.

Maintain Options

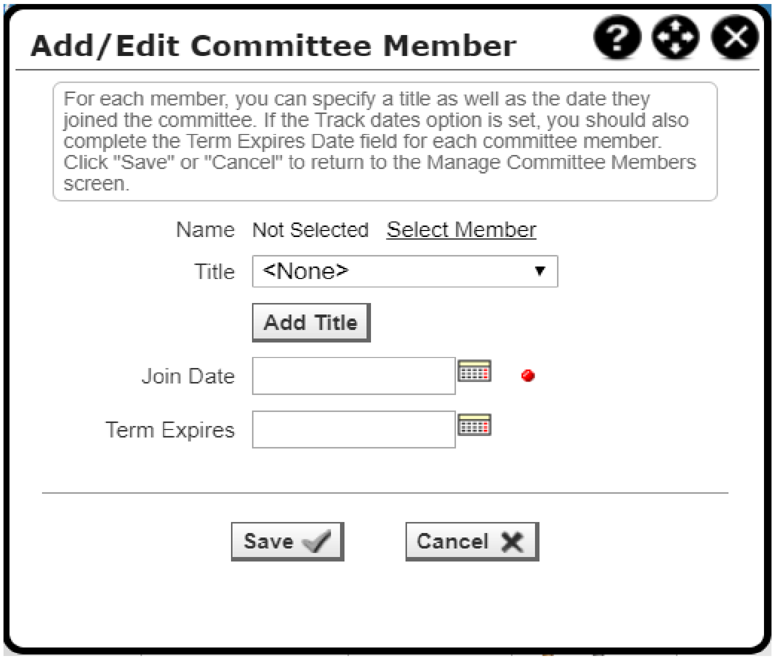
Icon	Description
 (Edit/Assign Member)	**Assign** a member to this committee.
 (Edit/Assign Non-Member)	**Assign** a non-member to this committee.
 (Remove)	**Remove** this member or non-member from the committee.

Maintain Options

When you add or assign a member or non-member to an open committee, the following popup window is displayed:



When you assign a committee member to a committee that has terms of office, the following screen is displayed:



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

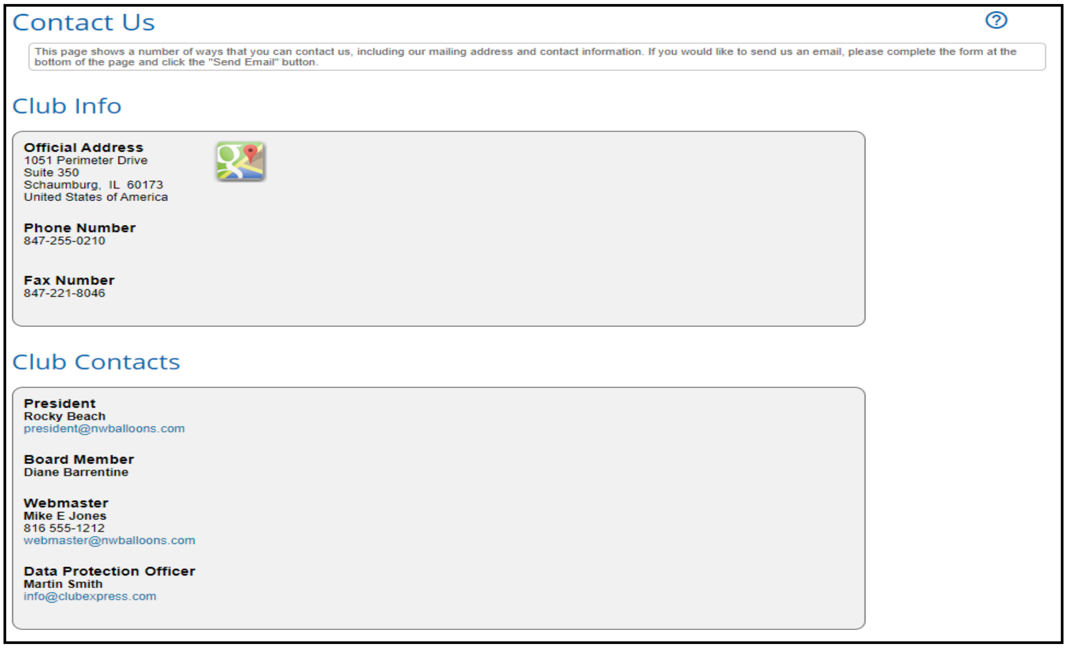
Report	Description	Filter Options
All Committee Members	Committee member name, title, phone and email, sorted by committee	Committee, subgroup (if applicable)
Committee Members	Committee member name, title, address, phone	Committee, subgroup

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

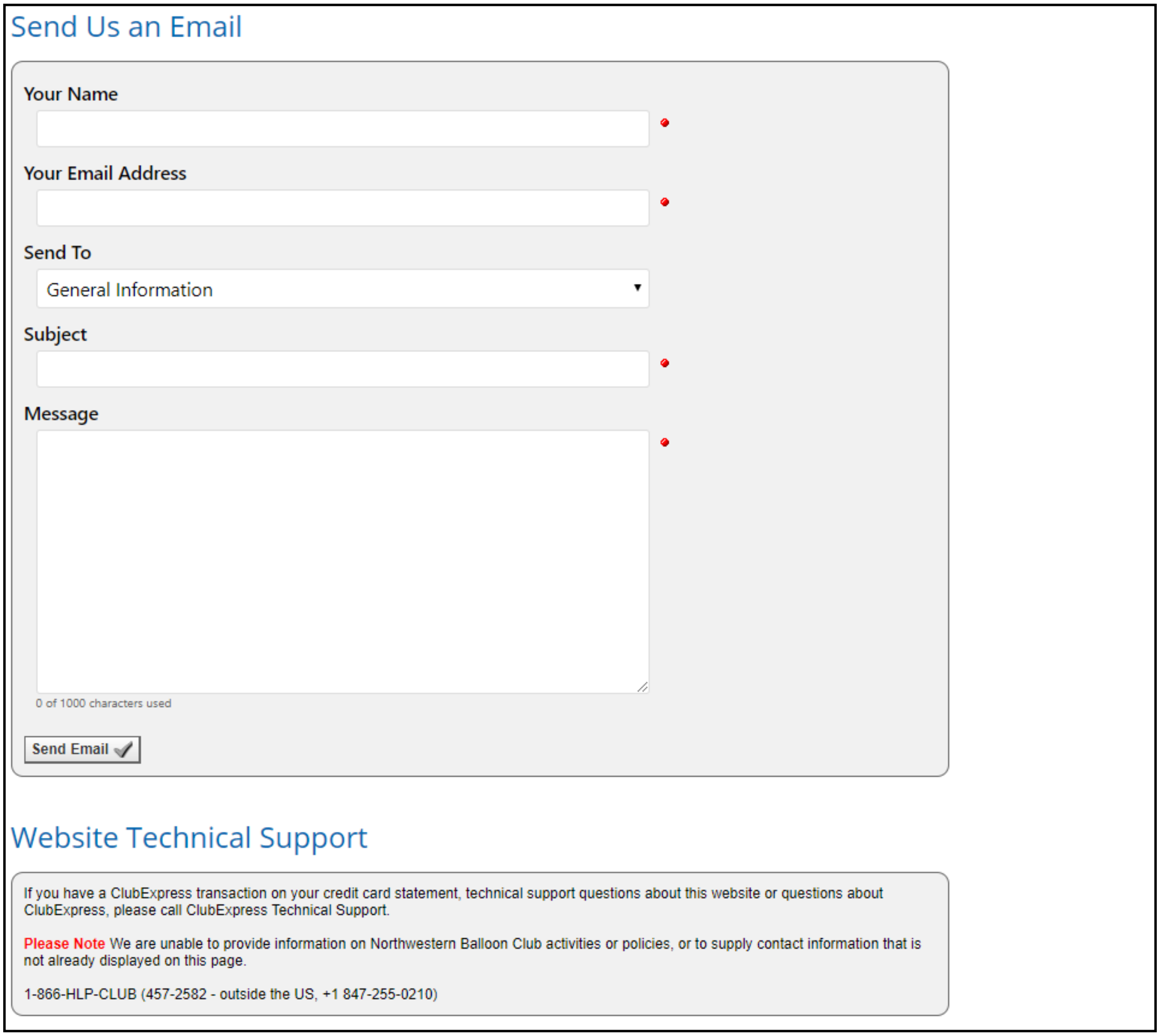
The top part of the Contact Us screen is shown below:



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:



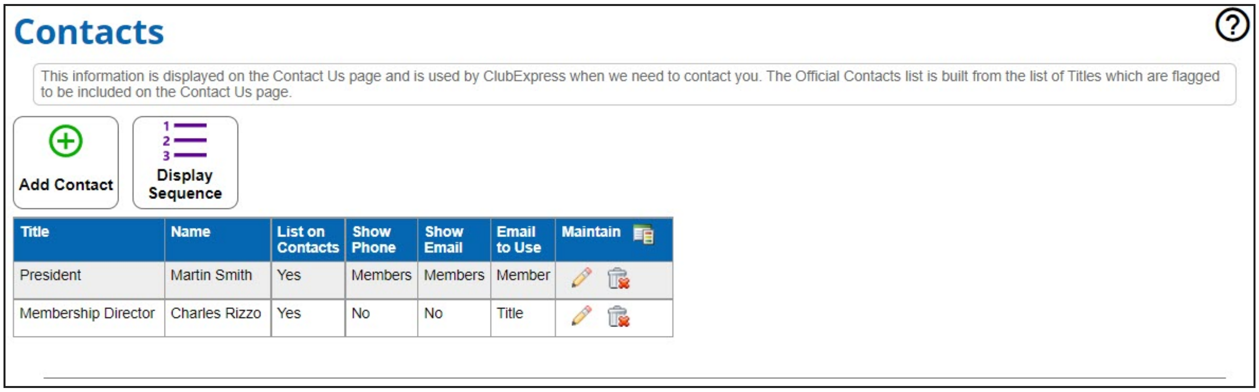
This form allows visitors to contact club or association officers or the general email address. It is designed to protect these actual addresses from spam bots that try to harvest addresses from web pages; the actual email is sent from the server.

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

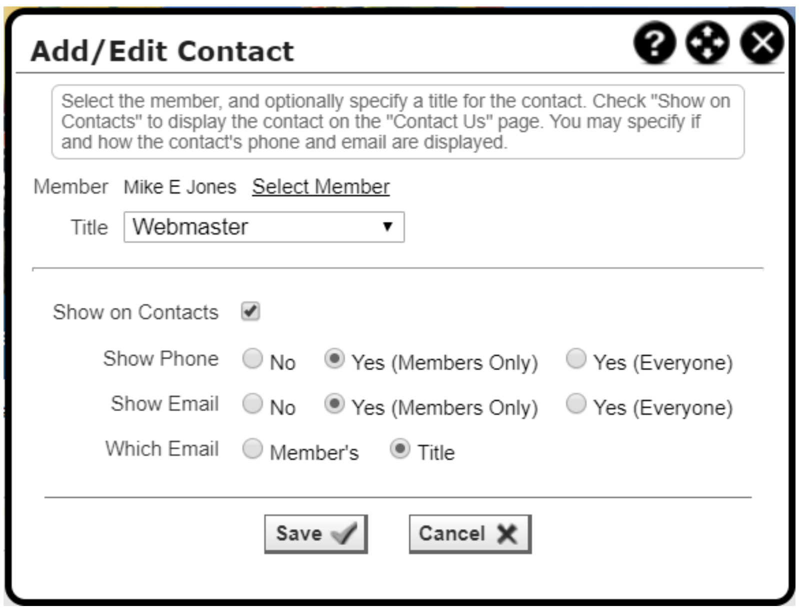
Control Panel > Club > Admin Functions > Contact Us

Click **Contacts** to display the following screen:



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:



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

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.

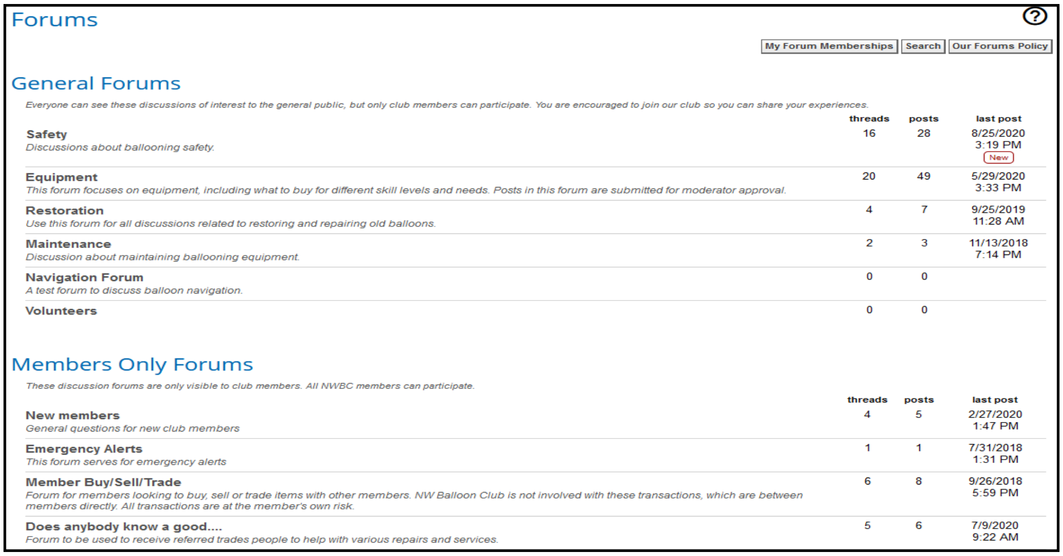
Forums can be configured to be moderated, where new messages must first be approved before they are made visible. Individual members can also be moderated so that only their messages must be approved. Administrators and moderators can also block members from posting completely if they are not following 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



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.

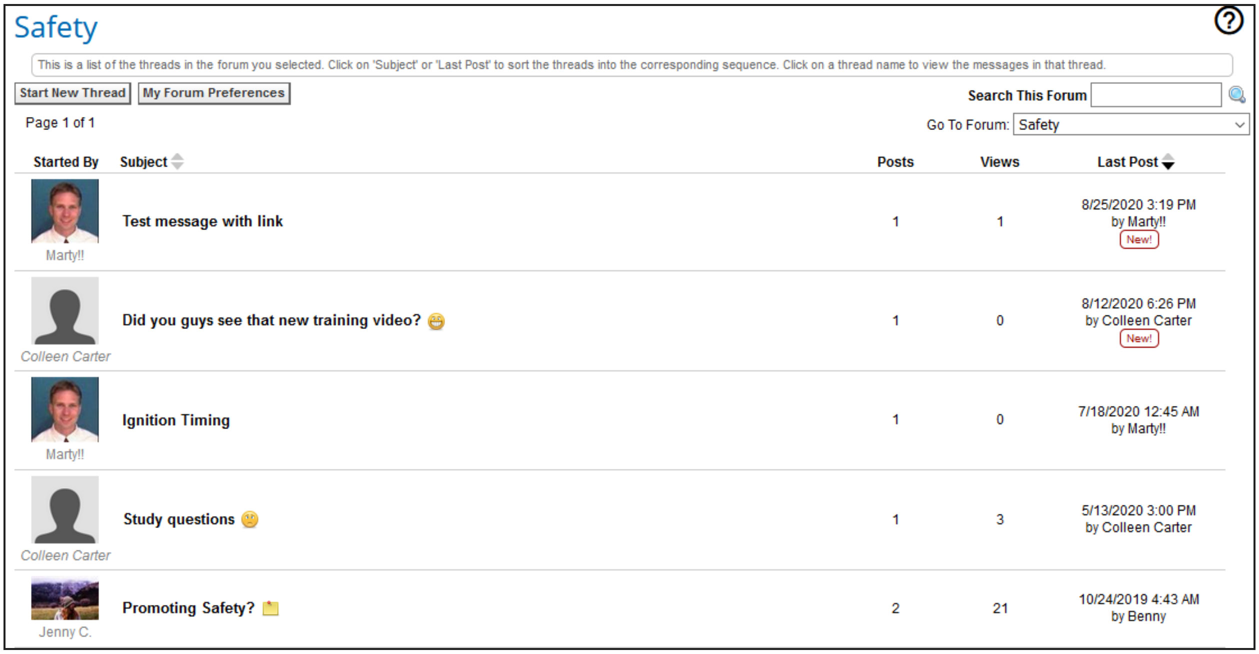
> **Note:** To view a list of all forums to which you are automatically subscribed and forums available for subscription, go to Member Profile > Forum Memberships or select the My Forum Memberships button at the top right corner.

> **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.



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).

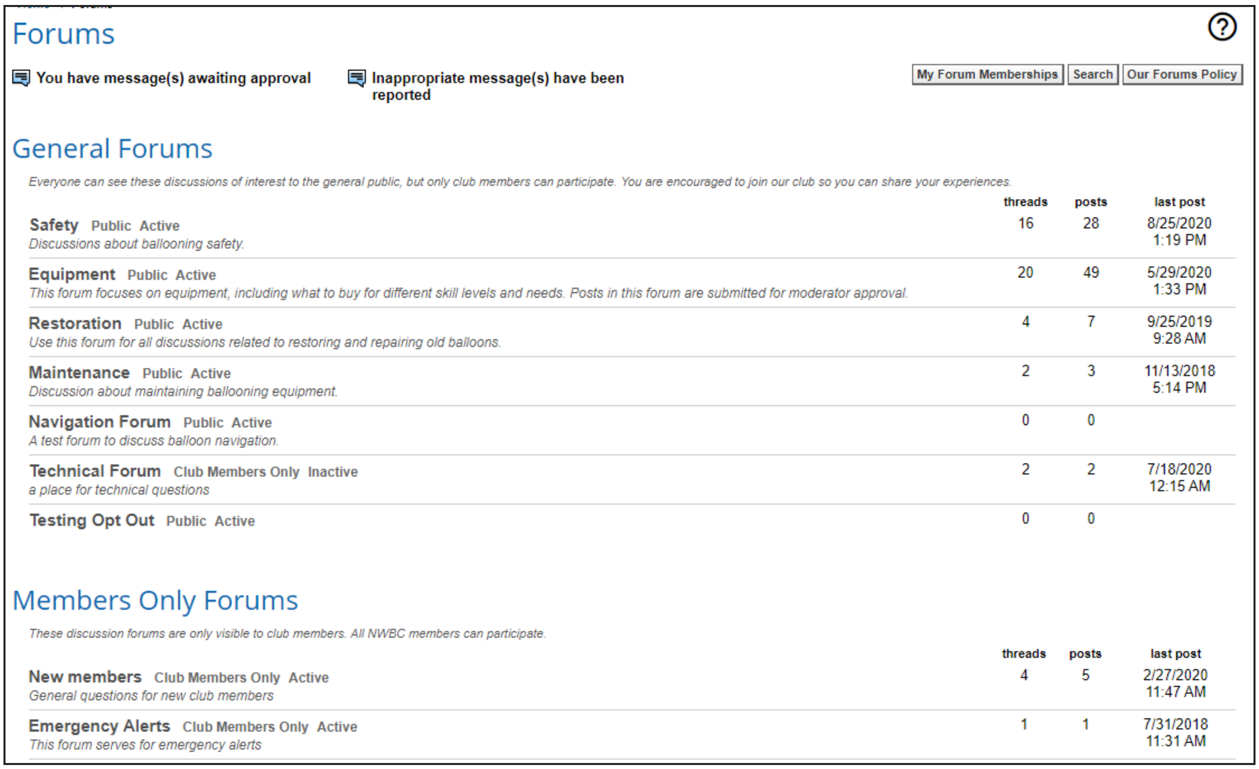
To quickly navigate to another forum, select a forum from the **Go To Forum** drop-down menu.

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:

Select the **Profile - Forum Memberships** link to quickly navigate to the Forum Memberships settings in your member profile and subscribe to the forum.

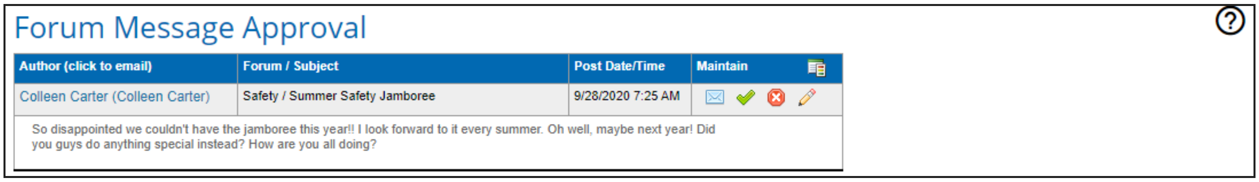
Administrators

> **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.



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

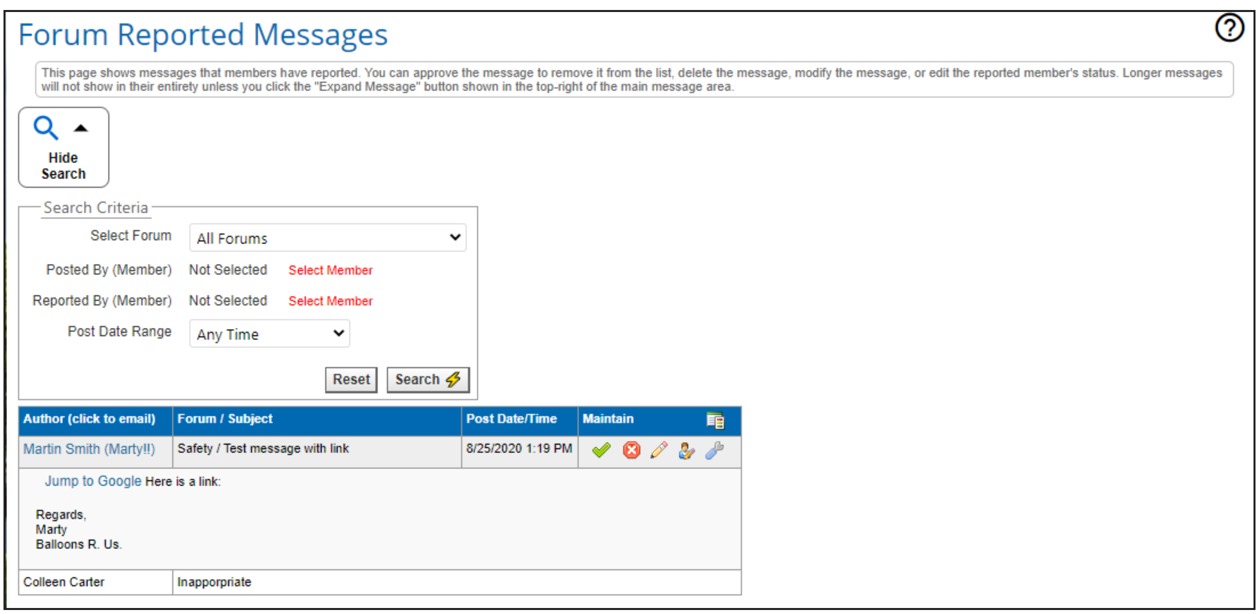


Select this option to view messages posted by members either in forums which require moderator approval of posts, or posts by individual members who happen to be "moderated". The grid displays the name of the original poster as a link. Select the link to view all contact information for the member.

In the Maintain Column:

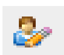
- Select the **Email** icon to send a message to the original poster.
- Select the **Approve** icon to approve the message and display it within the forum.
- Select the **Delete**icon to delete the message.
- Select the **Edit** icon to edit the message. You will see the message editor to change its content. This option is available so that you can fix problems before approving the message.

Viewing Reported Messages



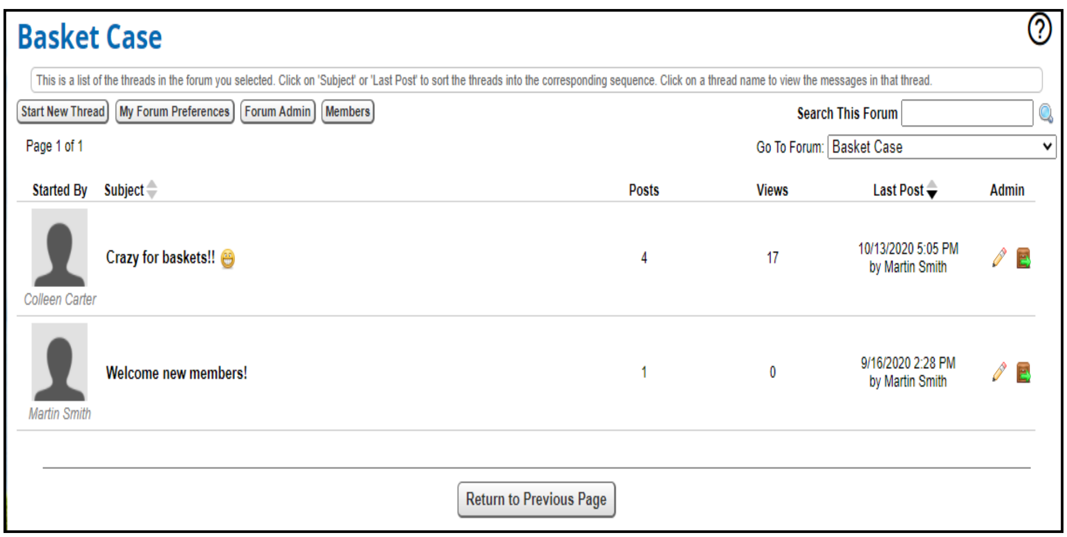
Select this option to view messages reported by members. Search through reported messages by forum, by original poster, by reporter or by date range. The grid displays the name of the original poster as a link. Select the link to view all contact information for the member.

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:

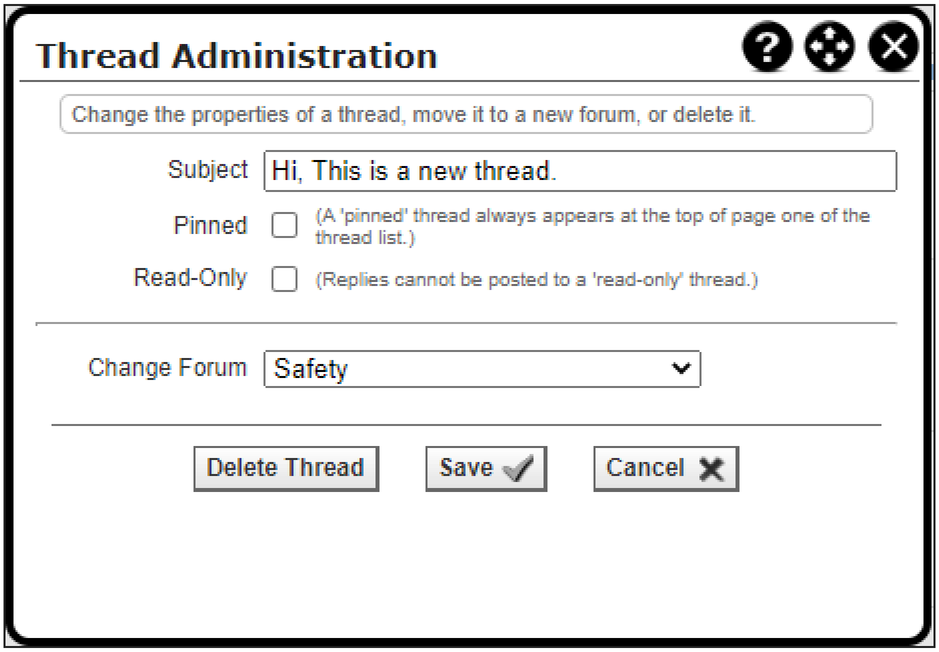


Each row is a separate thread, showing the author of the first post, the thread subject, number of messages in the thread, the number of times the thread has been viewed, and the date and author of the most recent post. You can change the sort order by selecting the **Subject** and **Last Post** headings. 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.

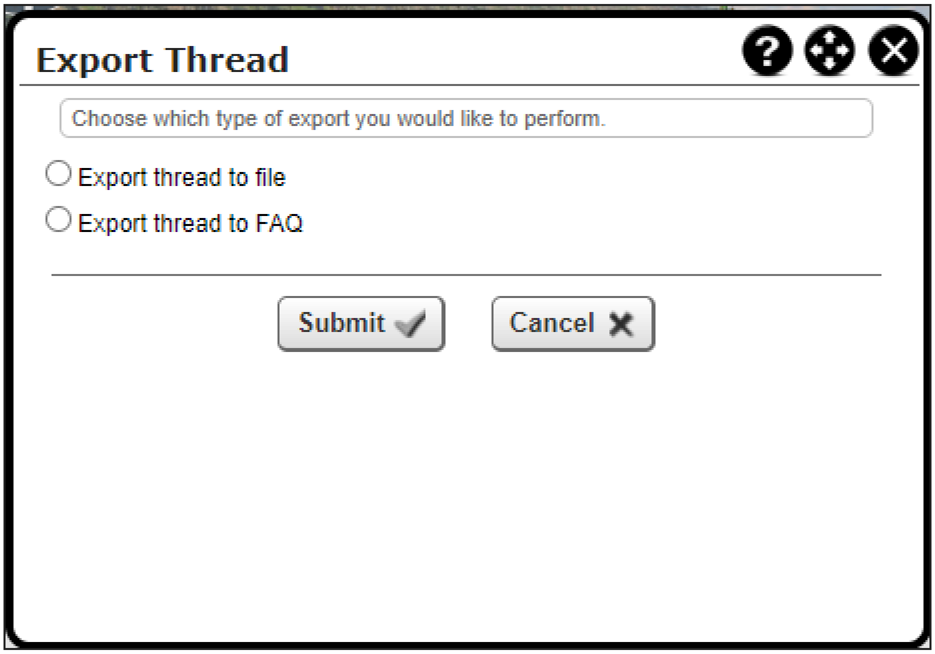


In the *Thread Administration* pop-up window, you can edit the **subject** of the thread.

- 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.

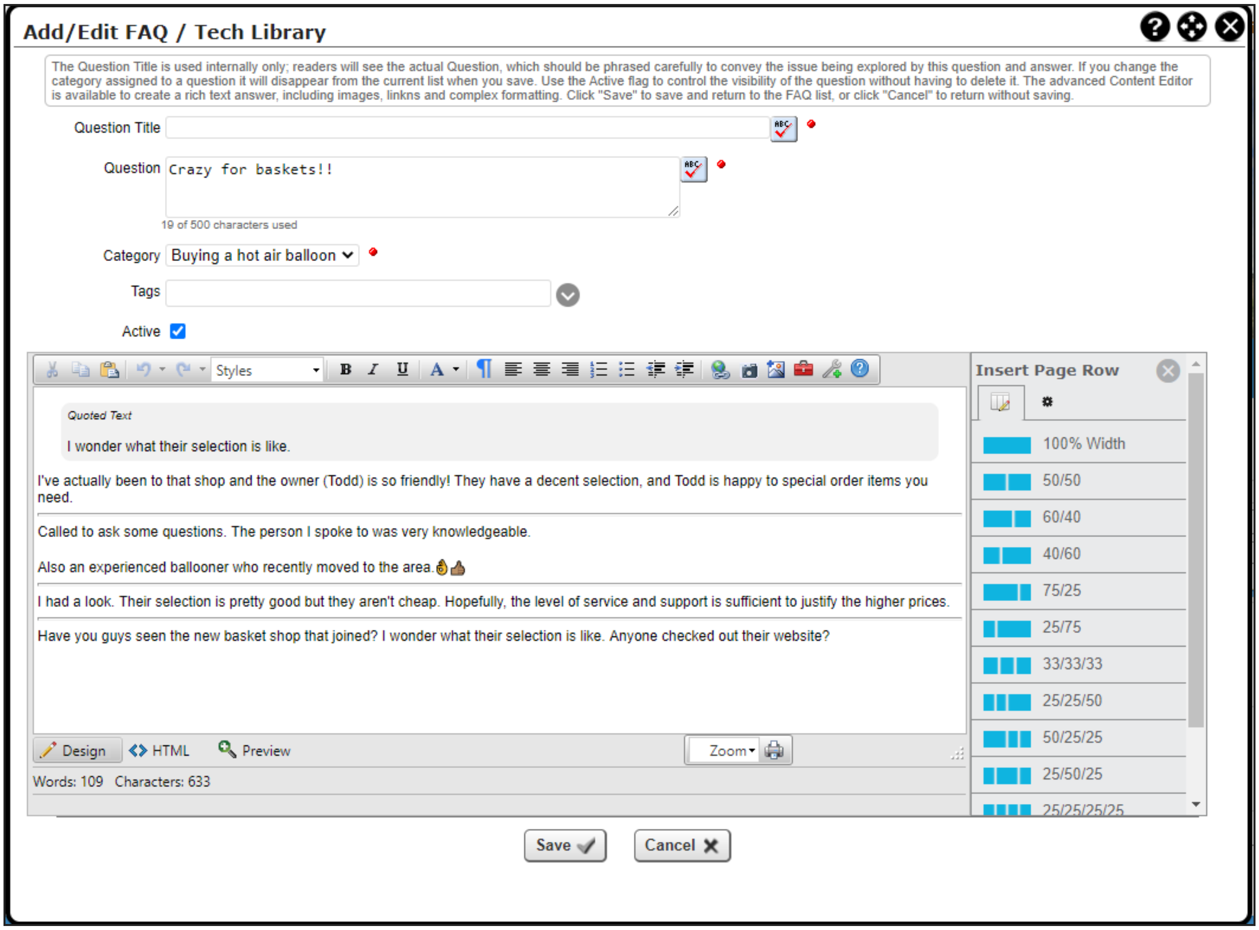
Select **Save** to save your changes, or **Cancel** to exit without saving.

Select the **Export** icon to view the Export Thread window.



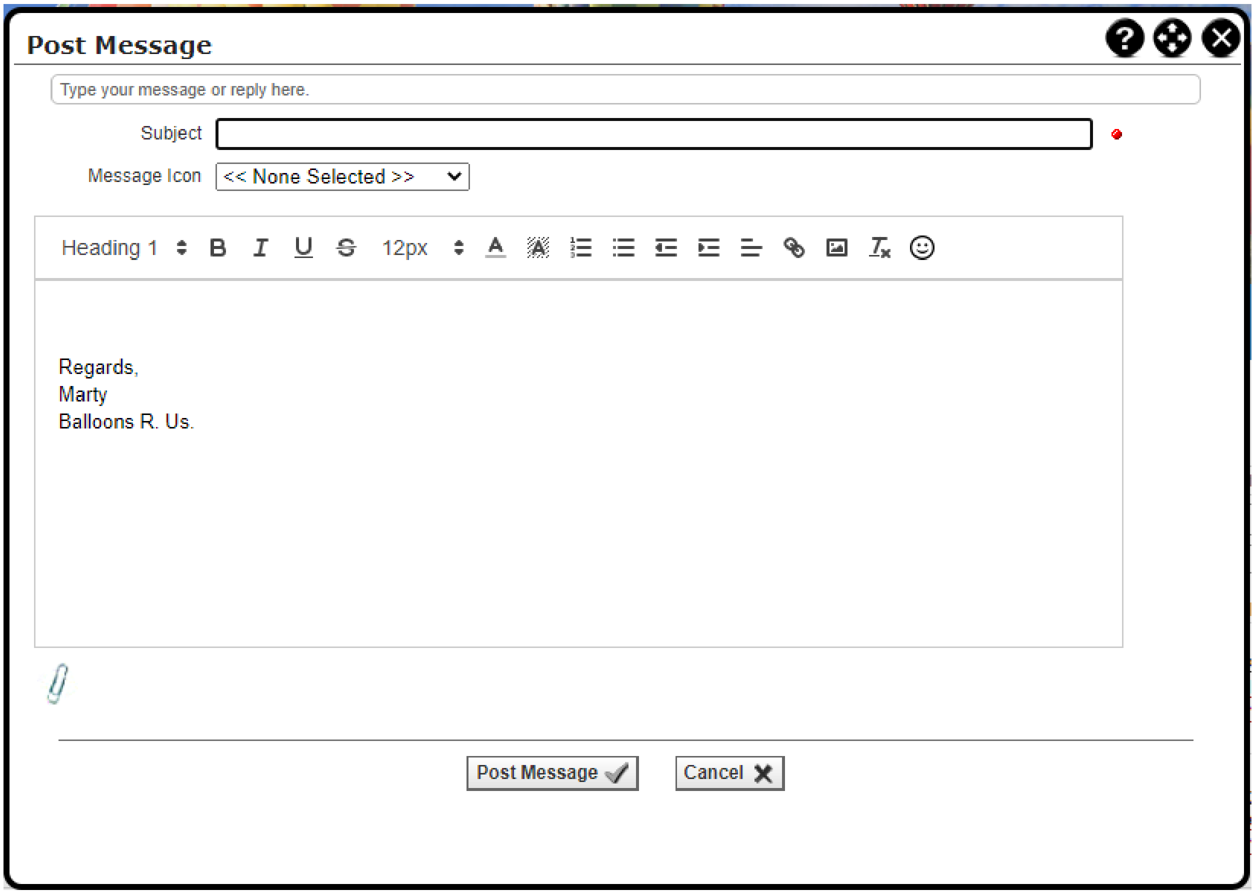
Select **Export thread to file** to export the thread as a .xml file. Select Submit to download the file.

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.



Create Messages in a Forum

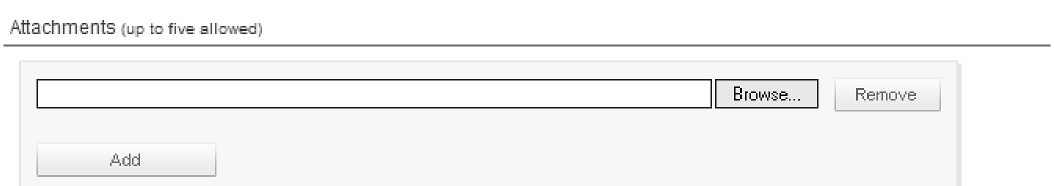
Click the **Start New Thread** button to start a new thread. You will initially see the Formatted Text Editor, shown below (see "Editing Text" on page 197).



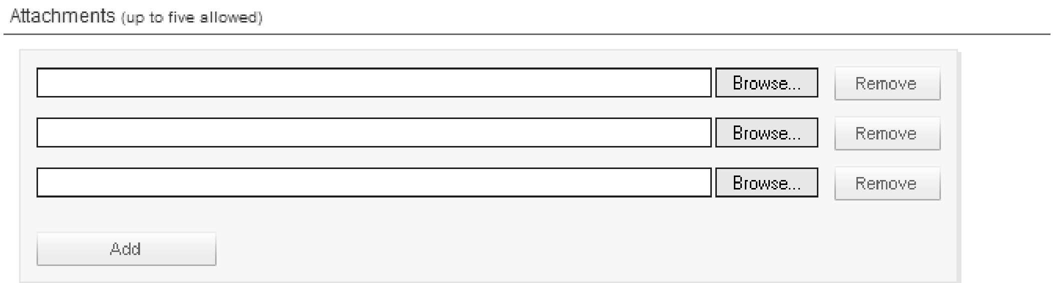
Specify the subject and optionally, a message icon from the drop-down list (the icon is displayed beside the drop-down). Then enter the message text and click **Post Message**. The message will be added to the forum, or if the forum requires approval of new messages, the message will be saved for moderator 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:



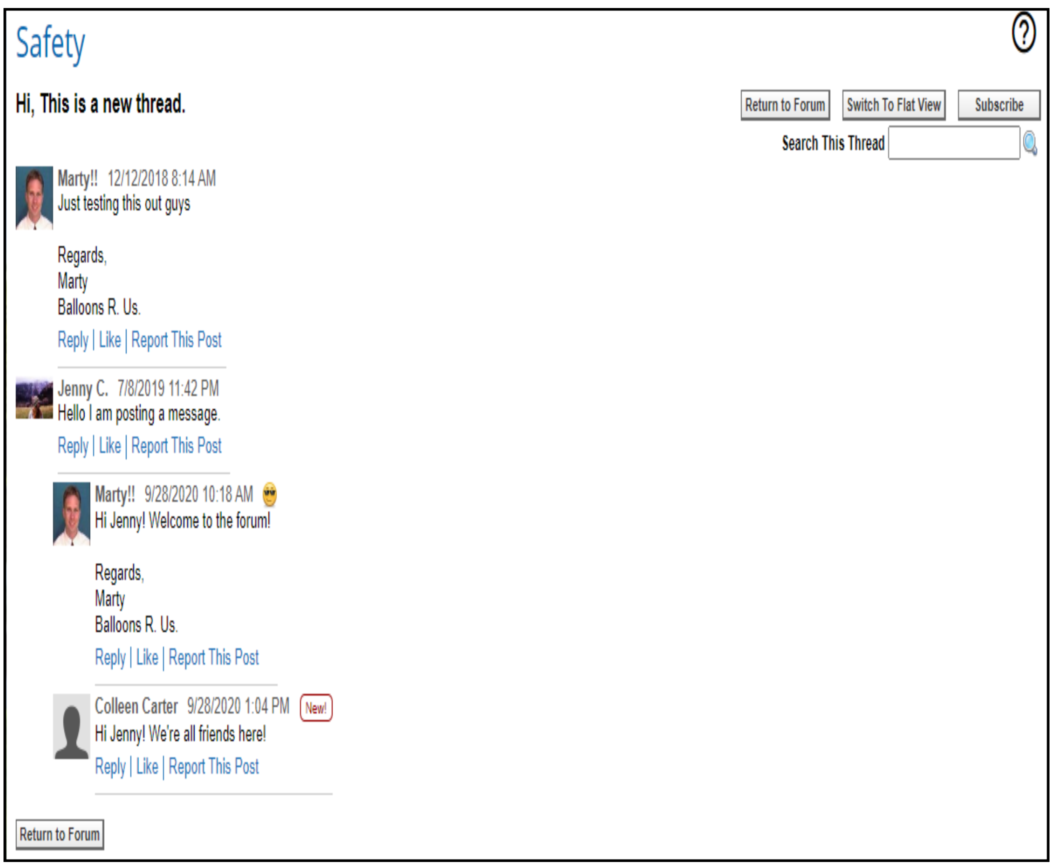
Click the **Browse** button and select a file from your computer or network. It will be added to the message. If you want to add another file, click the **Add** button to display another “Browse” field, as shown below.



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



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.

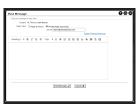
> **Note:** The Edit link will only appear if this option is enabled in forum configuration by your organization. The Admin link will only appear if you are a forum moderator or coordinator, or a club administrator.

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).

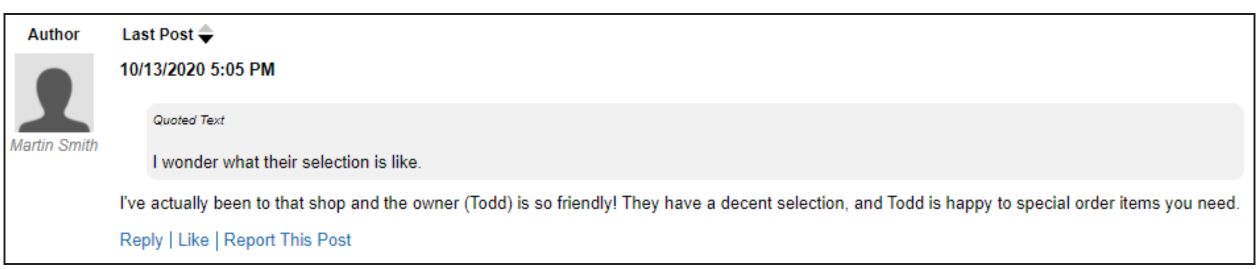
Replying to a Post



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

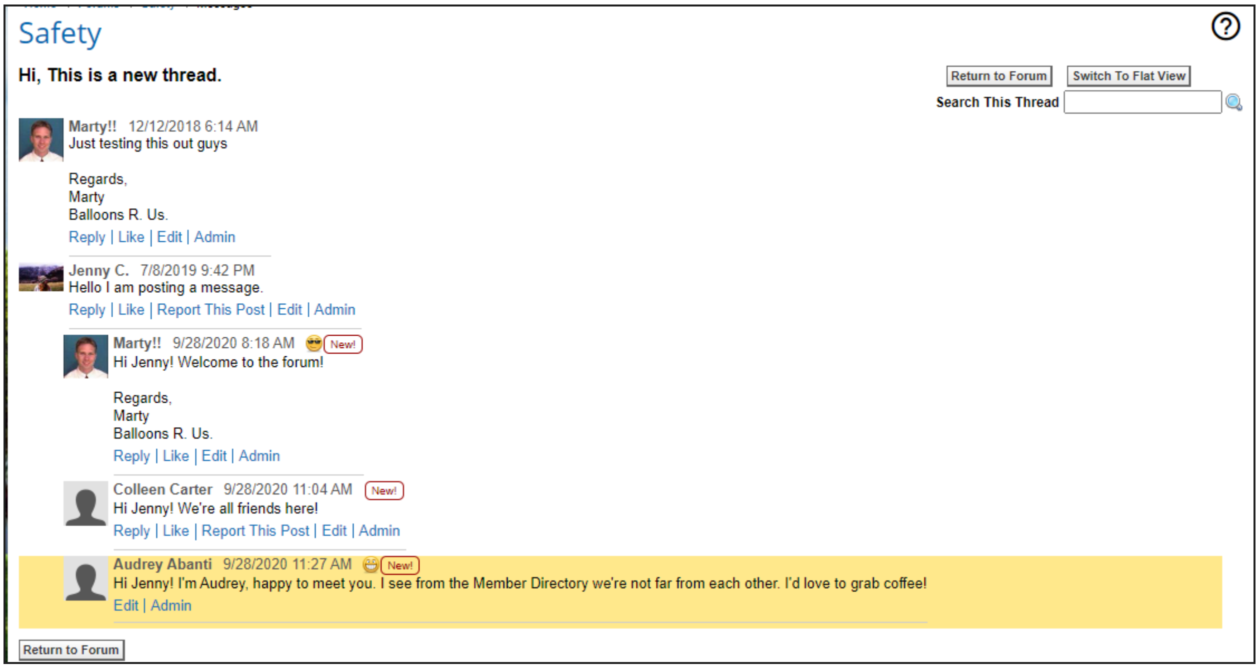
When this option is enabled, you will see a **Subscribe** button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

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

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.

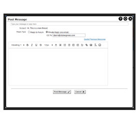
> **Note:** The Edit link will only appear if this option is enabled in forum configuration by your organization. The Admin link will only appear if you are a forum moderator or coordinator, or a club administrator.

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).

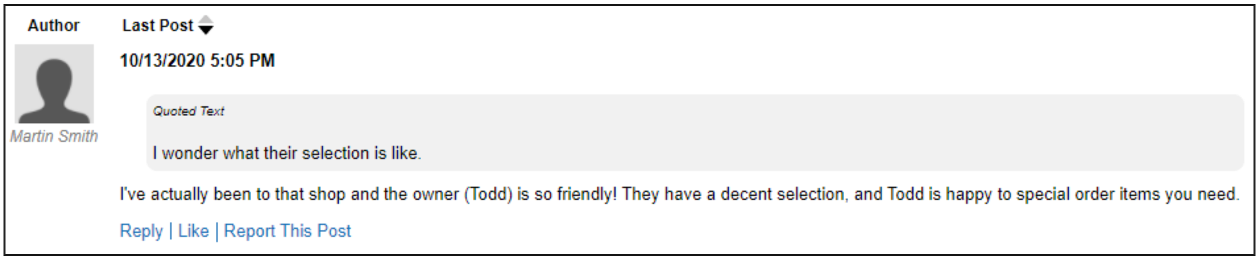
Replying to a Post



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.

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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

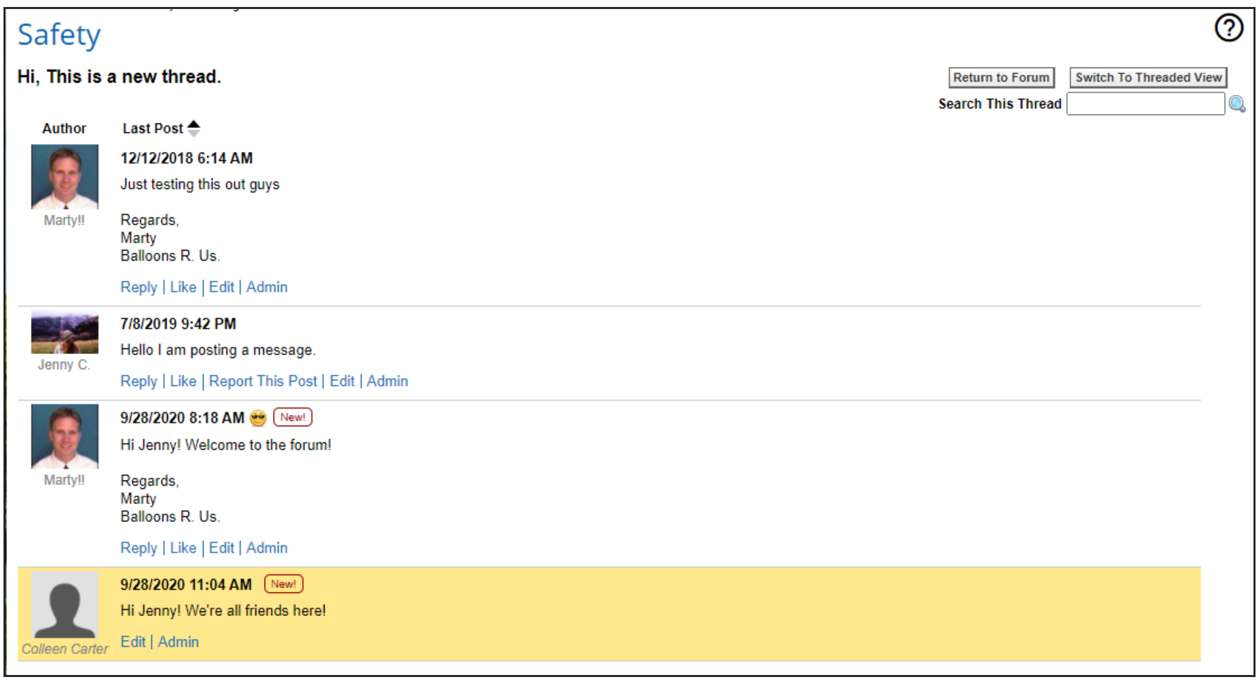
When this option is enabled, you will see a **Subscribe** button at the top of the screen. Click it to subscribe to a thread. Whenever a new message is posted to the thread, you will be notified by email.

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



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.

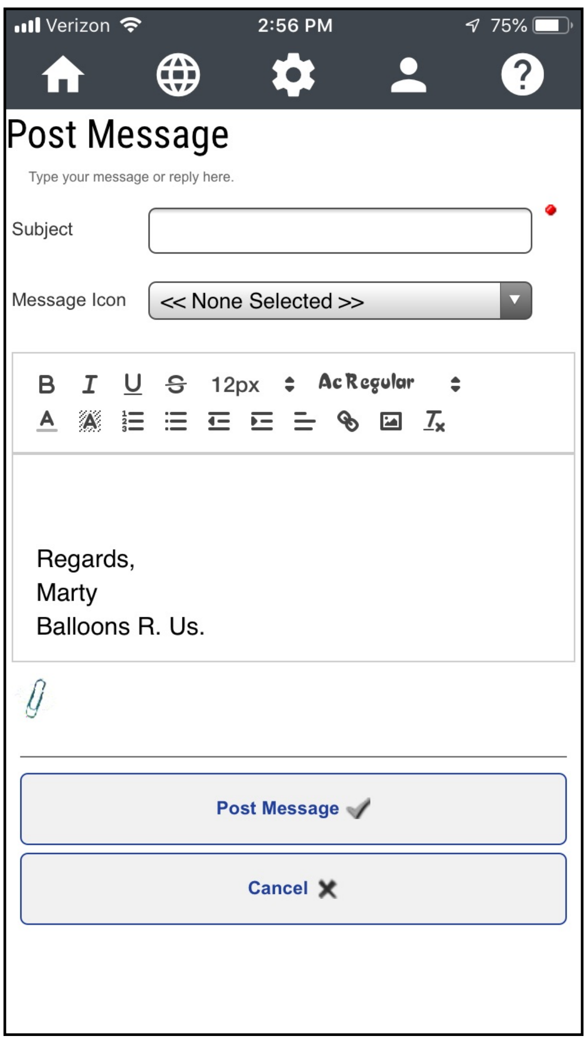
The Admin link below a post allows administrators to edit messages which have been posted. If the message is a new message requiring approval, hovering over the link allows administrators to approve or deny the post.

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:



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.

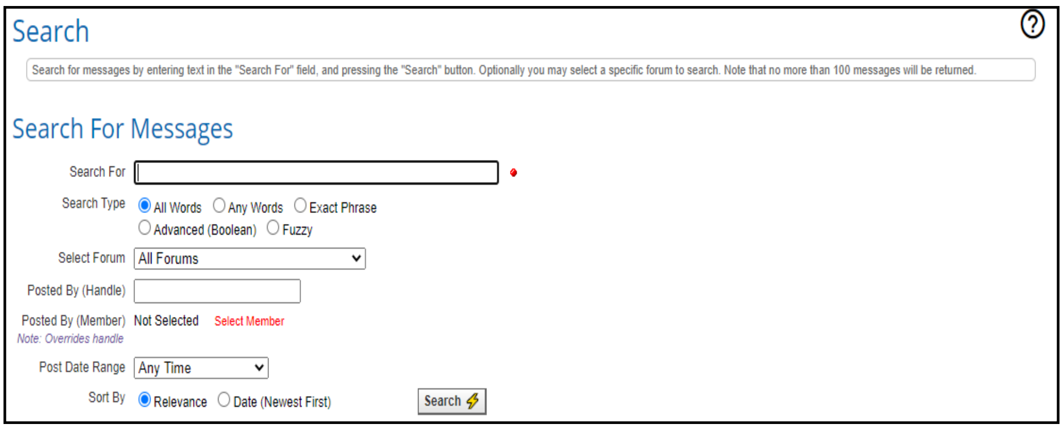
Forums in the Member Profile

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

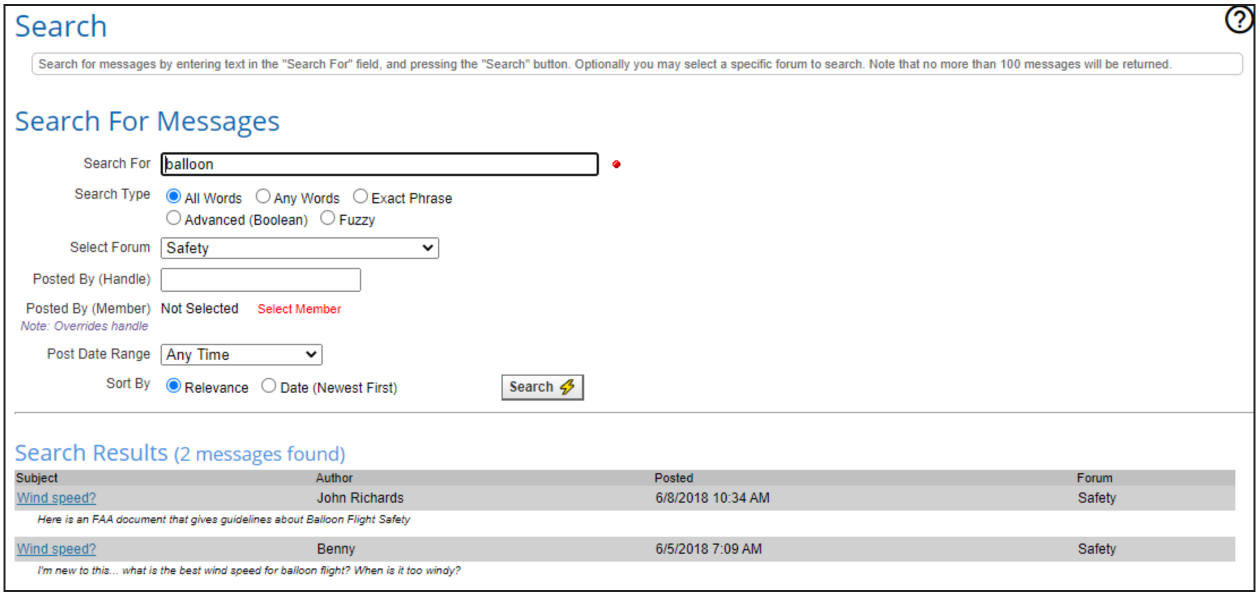
Forum Message Searching Tips

From the main Forum screen, click the **Search** button. The following screen is displayed:

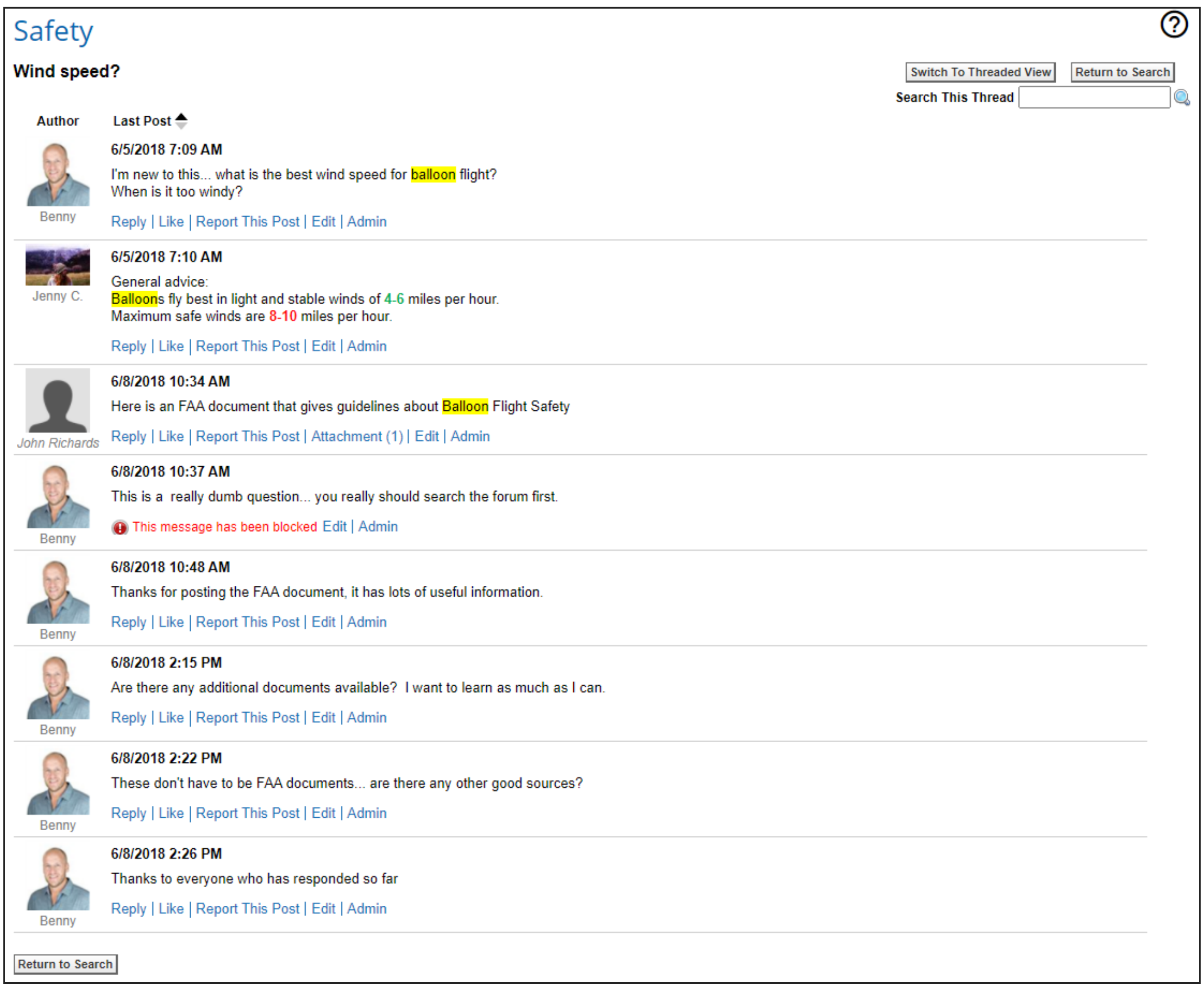


Type in one or more words for which to search and specify a search type, date range and forum. Search results will display below the search panel. Each thread subject is a link, allowing you to quickly navigate to the thread where the search text entered on the Search screen is highlighted in the thread.

For example, a search for "balloon" yields the following results:



Navigating to the first result will take you to the thread, where all instances of the word "balloon" are highlighted.



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.

Fuzzy

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.

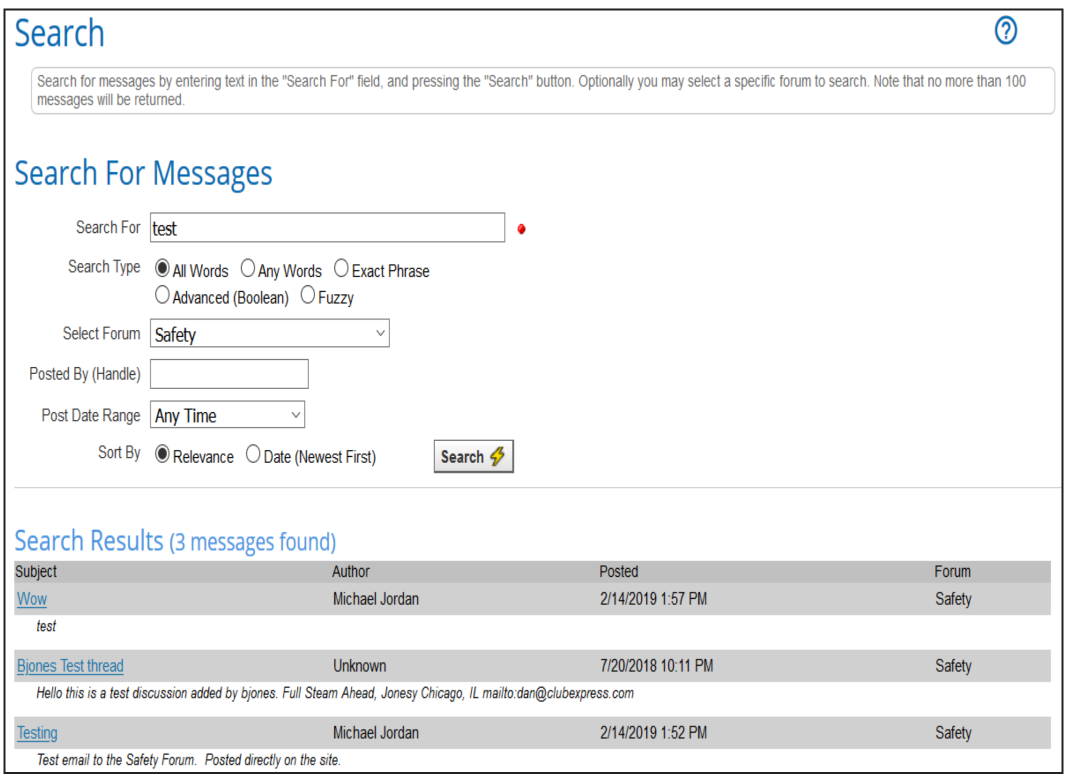
Post Date Range

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:



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 appeear 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.)

Thread Administration Administrators, coordinators and moderators will see 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.

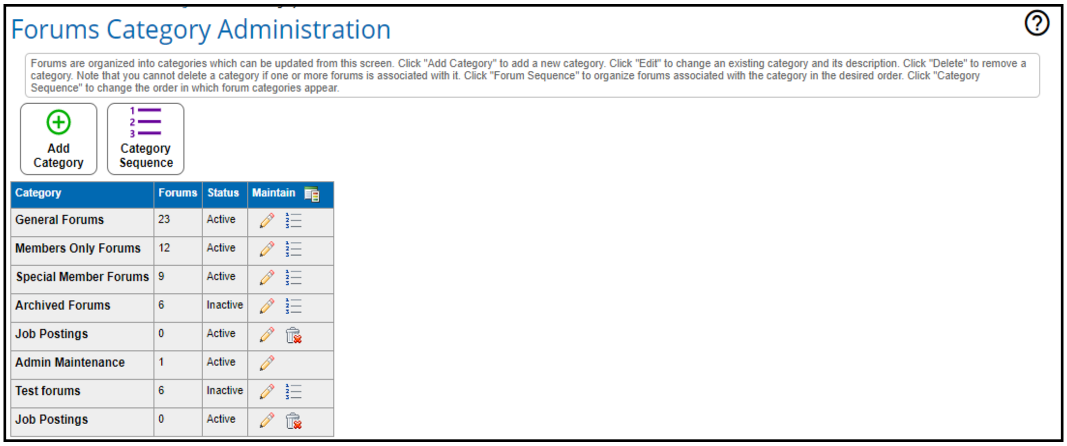
A screen similar to the following is displayed.

The results grid shows the name, category, status, membership type and count of members for each forum.

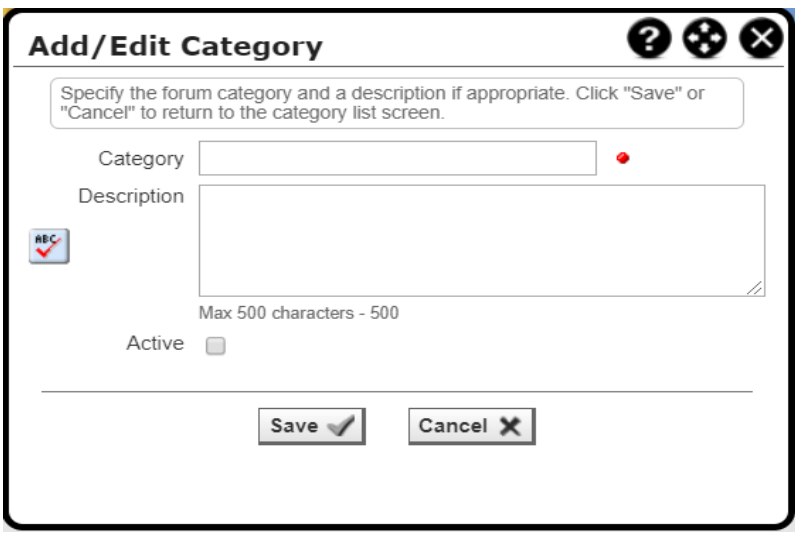
If your club or association has many forums, the search panel can be used to limit the display. Enter a portion of the title, select a category, select one or more status values or a membership option and click **Search**.

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:



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:



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.

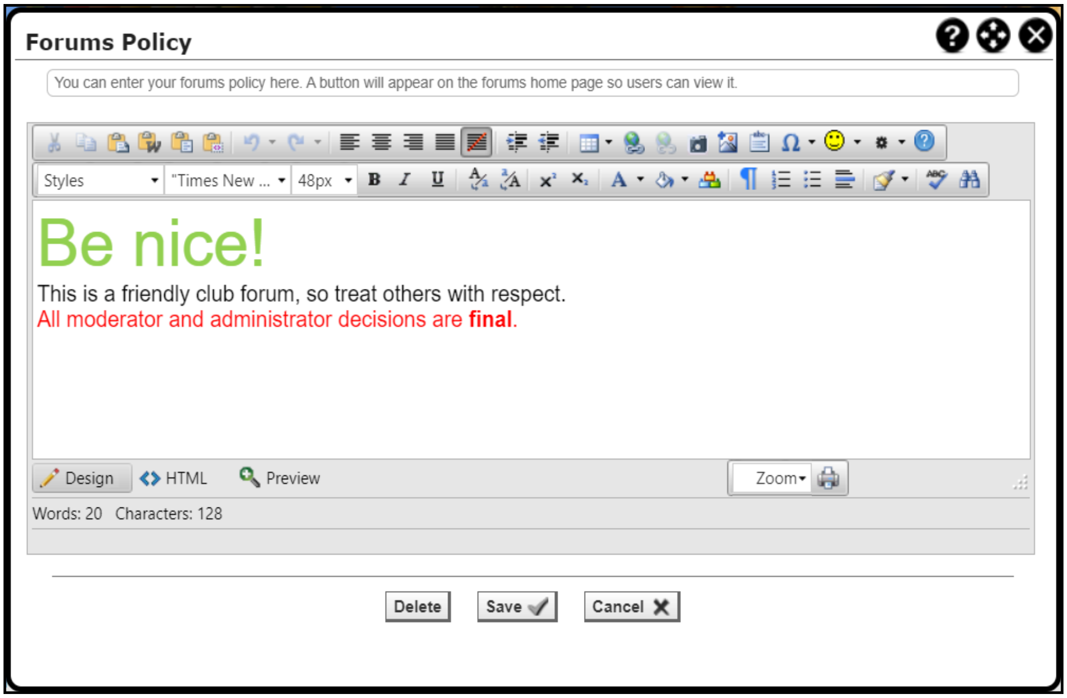
The **Category Sequence** button controls the order in which categories are shown on the main forums page on your website.

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:



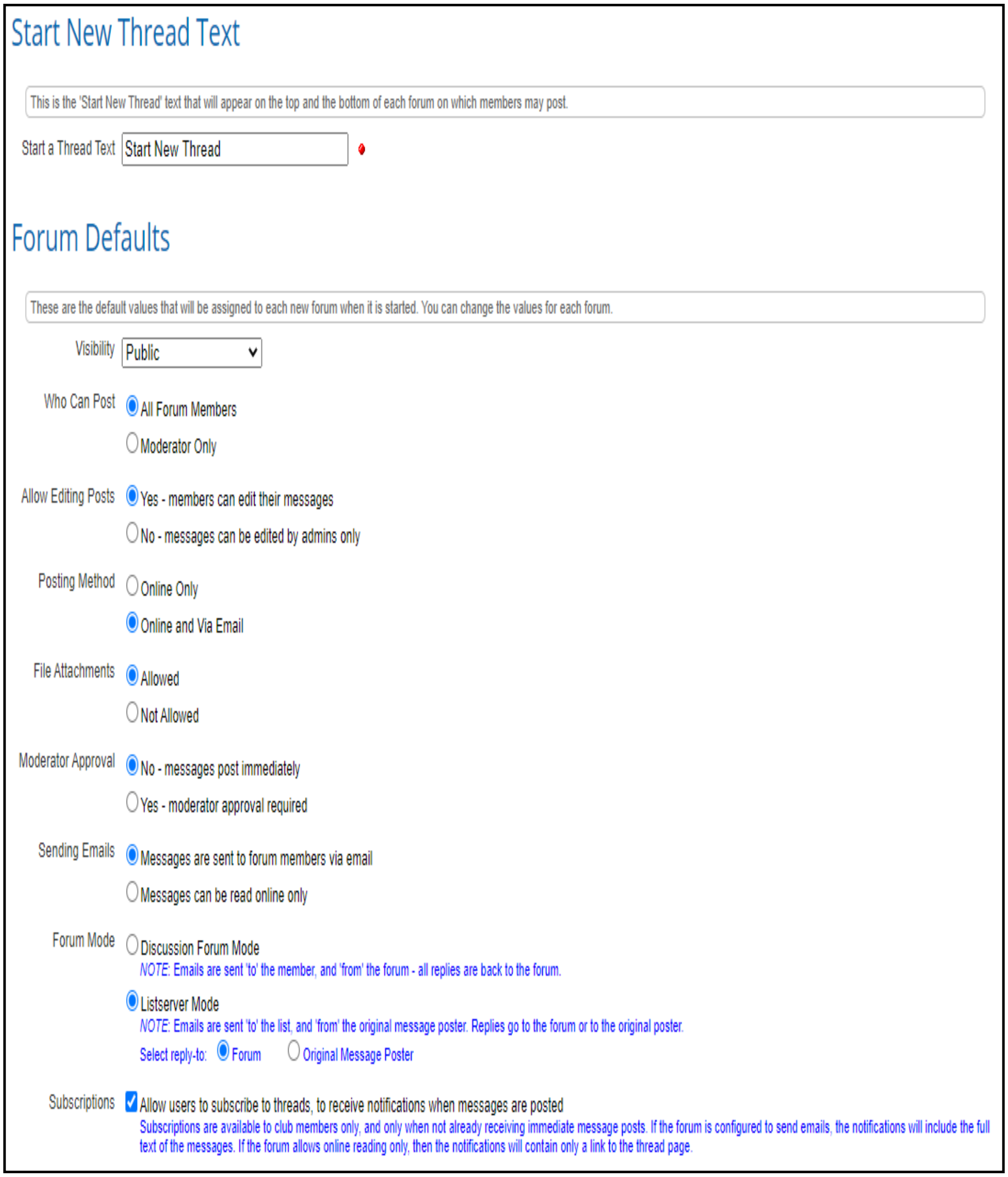
The advanced content editor allows you to define forum policies using the full range of formatting options.

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:



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.

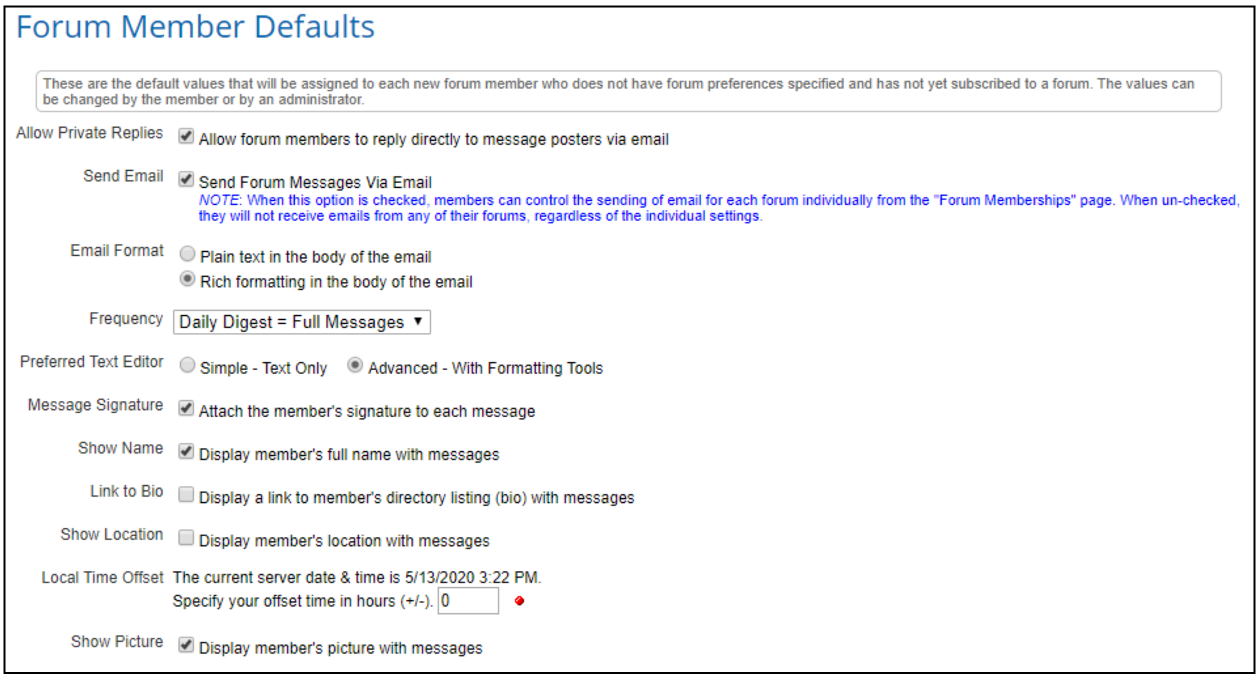
File Attachments - Allow members to include attachments in their posts.

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.



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.

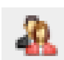
Configure - Forum Email Disclaimer

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:

This text will apear at the bottom of every forum email.

Maintain Options

The following options are available in the Maintain column:

Icon	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.

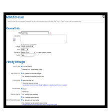
Maintain Options

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.

Status

Forums have one of four status values:

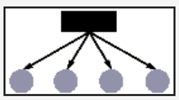
Status	Description
Active	The forum is visible to members and admins, and open for people to post messages and replies
Locked	The forum is visible to members and admins, but messages and replies cannot be posted. This is a “read-only” forum.
Not Active	The forum is not visible to members but it is visible to administrators, coordinators and moderators. Messages and replies are not allowed.
Archived	The forum is not visible to anyone by default. For audit and liability reasons, ClubExpress does not allow you to delete forums. But you can archive them so that they are not normally shown.

Forum Statuses

Membership

The membership of a forum can be defined in a number of ways.

Type	Description
All Active Members	All active club members are automatically members of this forum. Note that members can individually opt out of participating from their Profile – Forum Memberships screen
Member Opt-in	This forum is shown to all active club members on their profile – Forum Memberships screen, and they have the option of opting in to participate in forum discussions.
Moderator Defined	A forum moderator, forums module coordinator or club administrator defines membership in these forums.
Interest Members	Forum membership is maintained automatically, based around an Interest group in the Interests module; if members are in the interest group, they will be in the forum. When this option is selected, a new field will appear allowing you to specify the

Type	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 selected, 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 Additional 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.

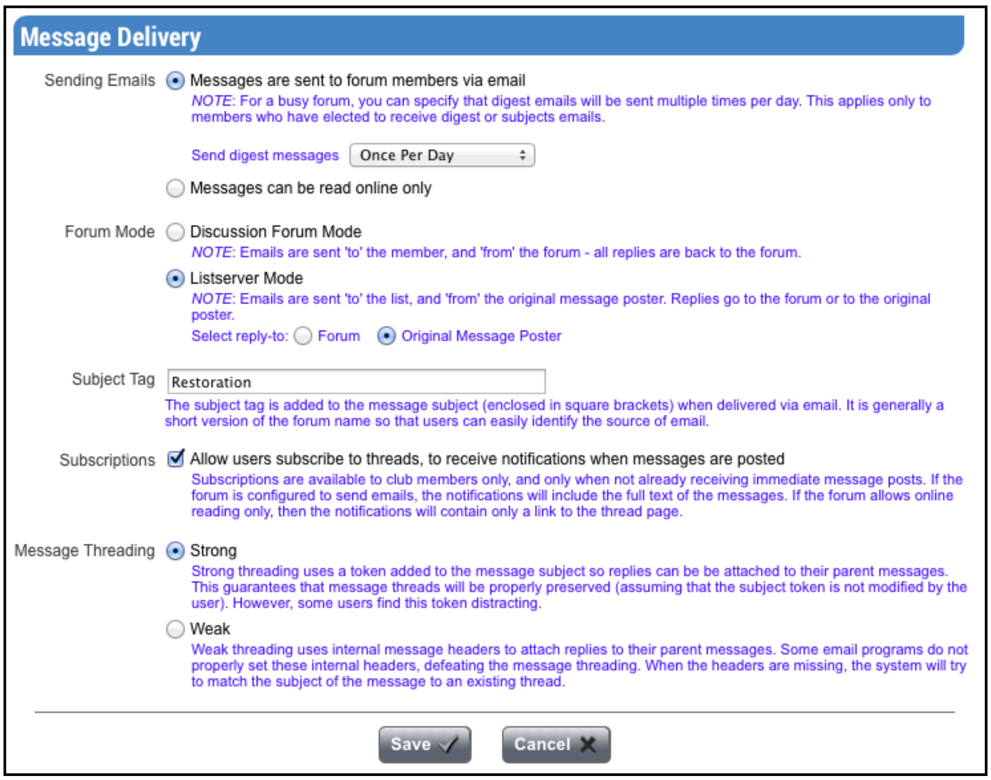
Moderator Approval

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



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).

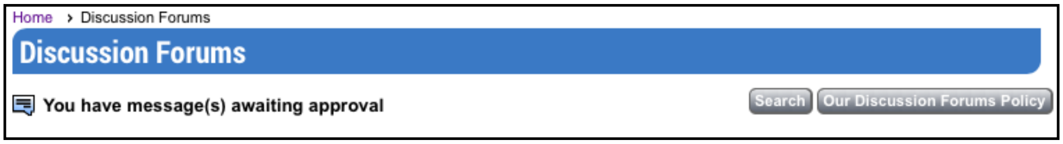
Where club “administrators” control everything on the website and in the membership database, and “coordinators” have admin rights over one module or admin function (see "Administrators/Coordinators" on page 503), a moderator has admin rights over just one forum within the forums module.

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.

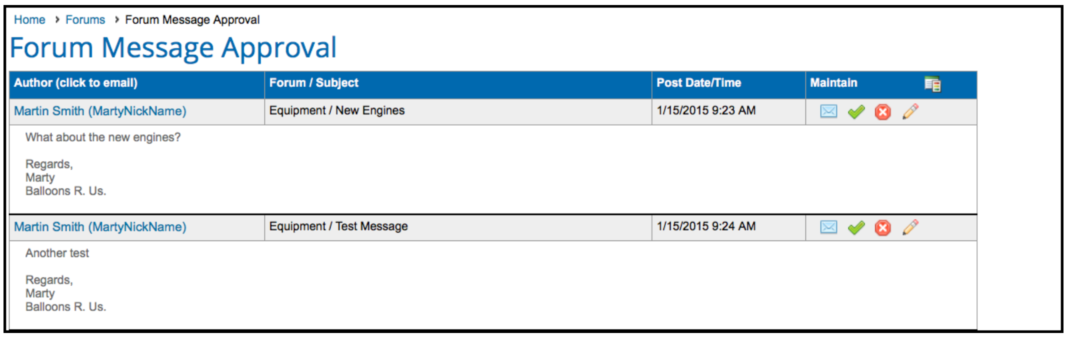
Moderating Messages

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.



Clicking the link takes you to a page similar to the following:



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.

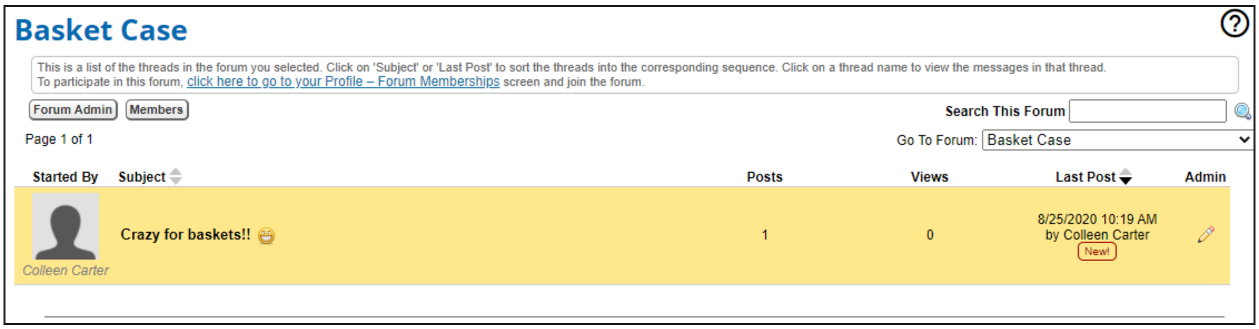
Click the link to open a new email, or copy and paste it into an email already created. There is a Close button of you can wait five seconds and the small popup will disappear.

-  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.

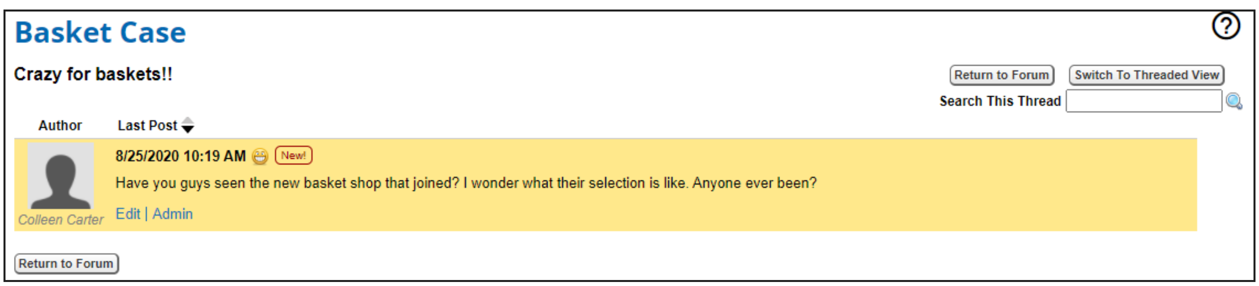
Once a message has been handled, it will disappear from this display.

Moderating Messages in the Forum

When moderators, module coordinators, or administrators view messages in a forum, messages requiring approval will be highlighted in yellow.

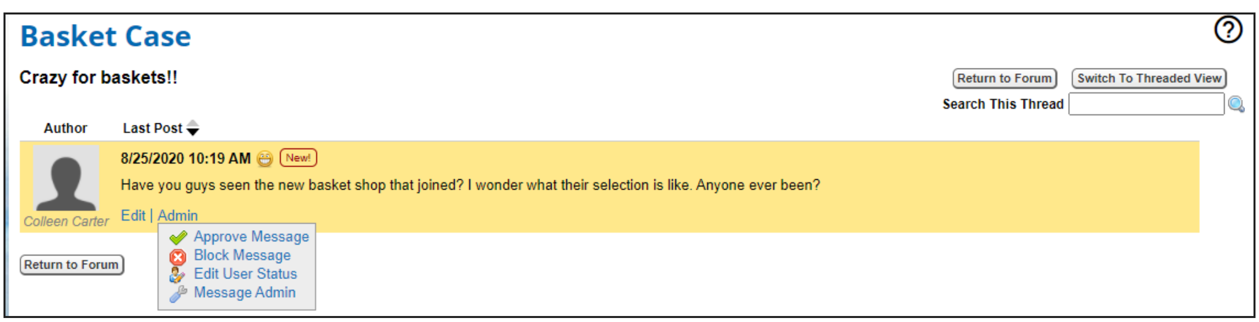


Select the message to review to see a screen similar to the following:



Hover over the Edit link to edit the message.

Hover over the Admin link to view the following options:



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:

The default is to view All Members. Select “Special Members” only to view:

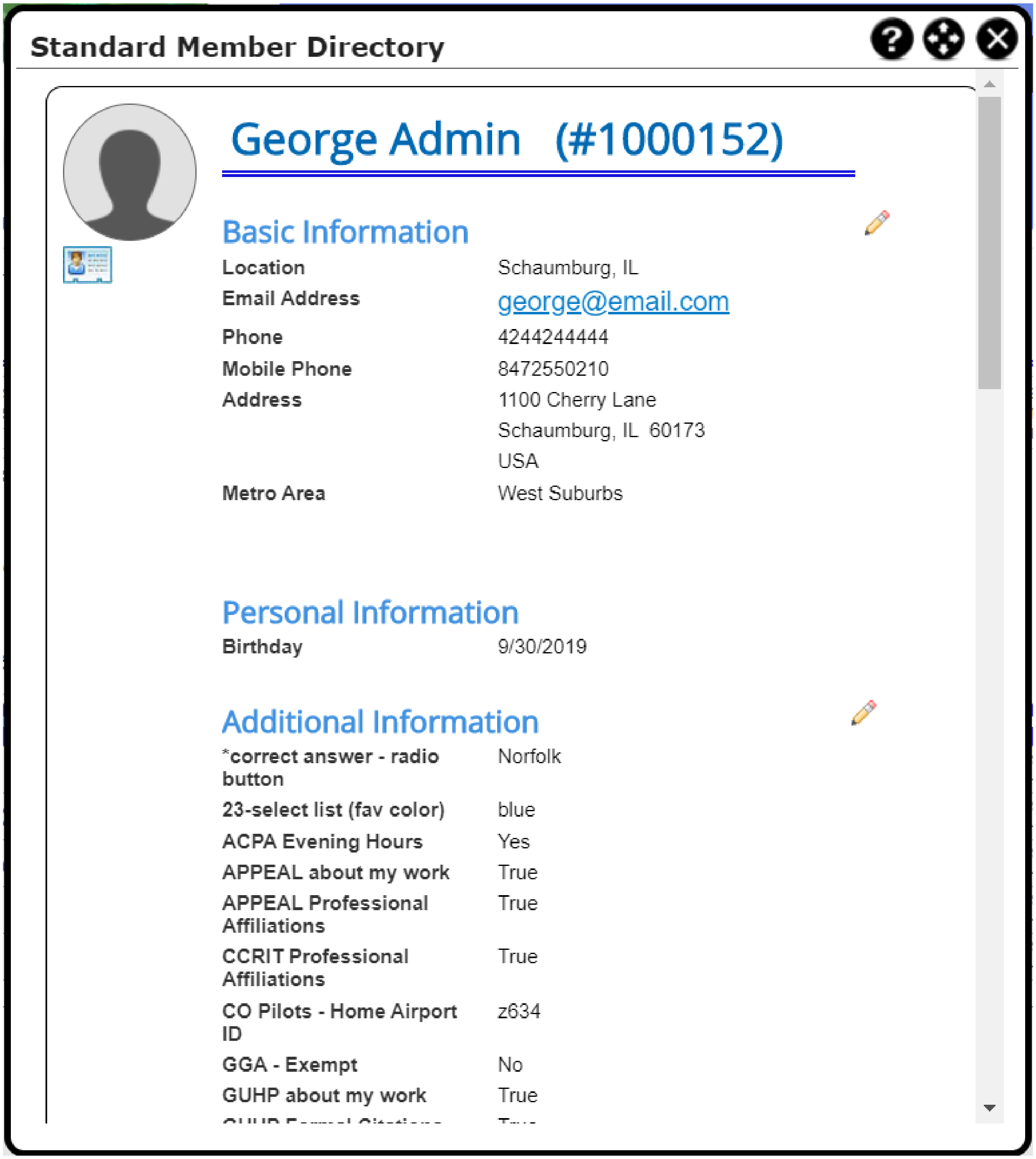
- members who are banned from the forum;
- members whose messages are moderated;
- members who are designated as moderators; and
- members who have opted-out of receiving messages from the forum.

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.

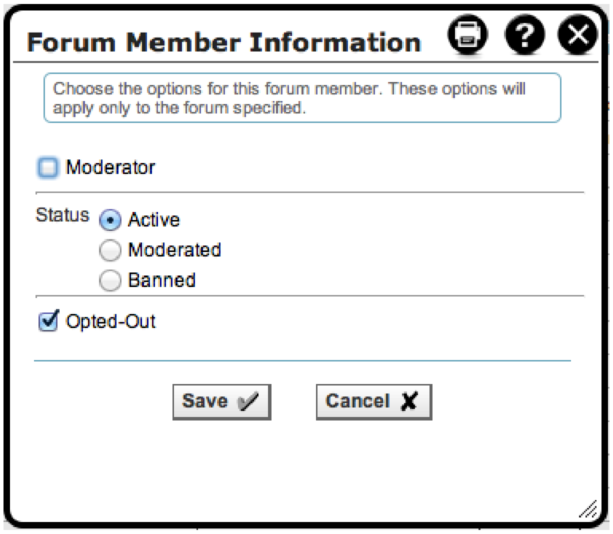
If your club is large and you’re viewing an “All Members” forum, be careful selecting “Show All Members” and clicking the **Search** button without a search value entered; the resulting screen will list every member of the club!

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:



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:

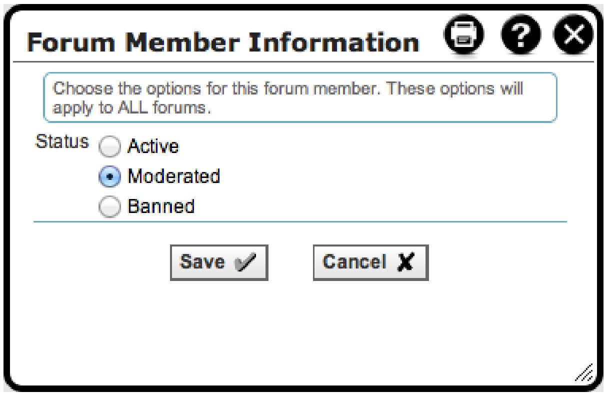
The default is to view "Show All Members". Select "Show Special Members Only" to view:

- 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:

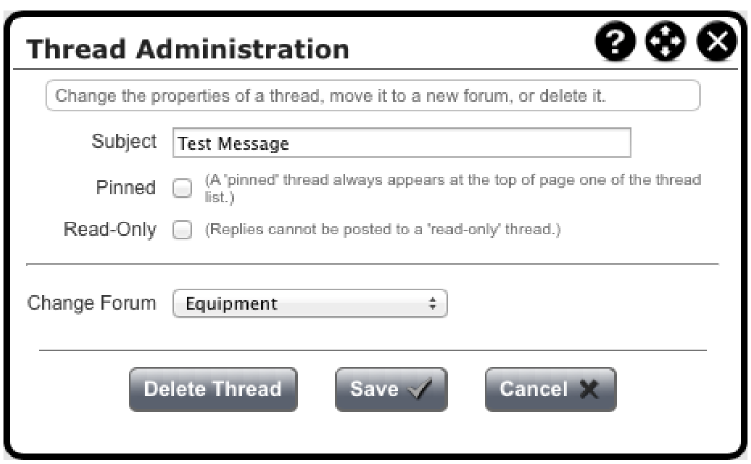


Select the appropriate option and click **Save**, or click **Cancel** to close the dialog without saving. Changes take effect immediately.

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:

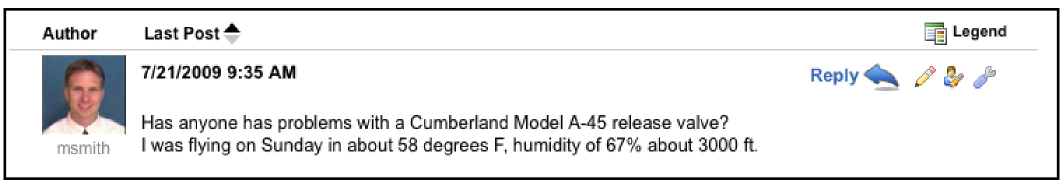
- Specify a new subject for the thread;
- Pin the thread to the top of the forum. This option is often used for frequently asked questions, or for a message explaining thread policies.
- Make a thread Read-Only. Replies cannot be posted to a read-only thread. This option is often used in conjunction 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

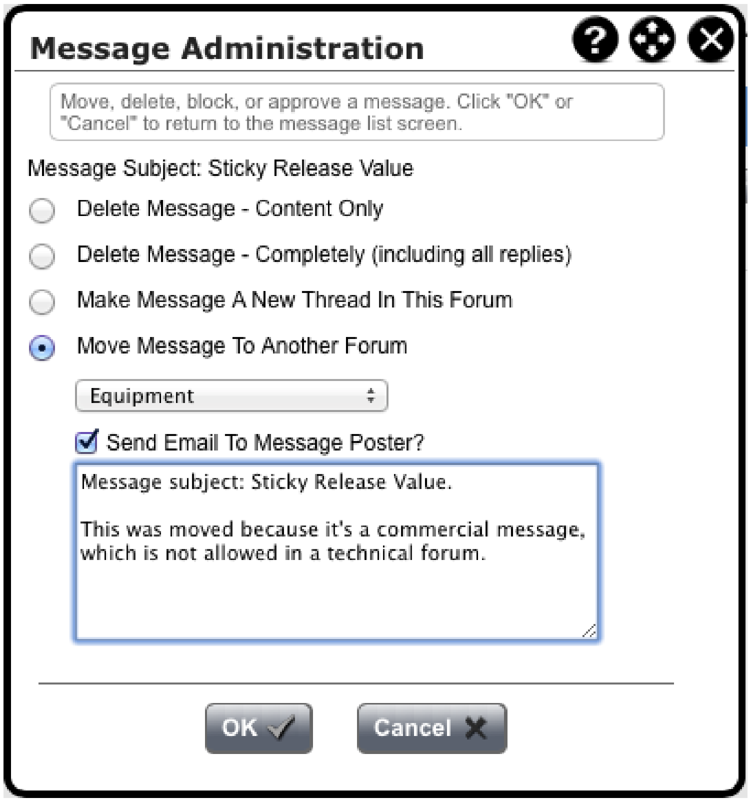
In Threaded or Flat view, administrators, forum module coordinators and individual forum moderators will see additional options for each message:



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:



Using this dialog box, you can perform the following changes:

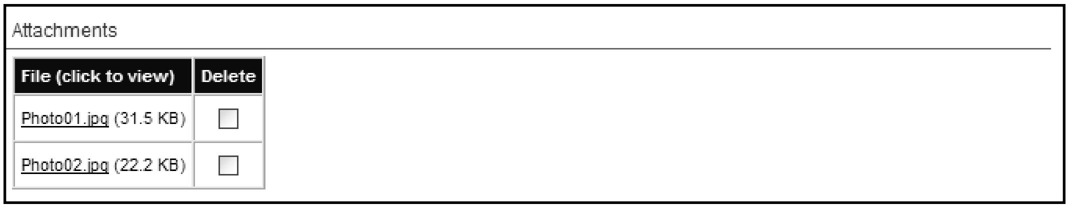
- **Delete Message – Content Only.** The message shell is retained so that threads are not broken but the text of the message is replaced with a standard message that the content was deleted by the moderator. Use this option if the content of the message is objectionable or dangerous in some way and 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:



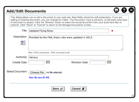
Click the filename to open or save a file. Check the box to delete the file. Your changes take effect when you click the **Save Changes** button.

Documents

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:



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.

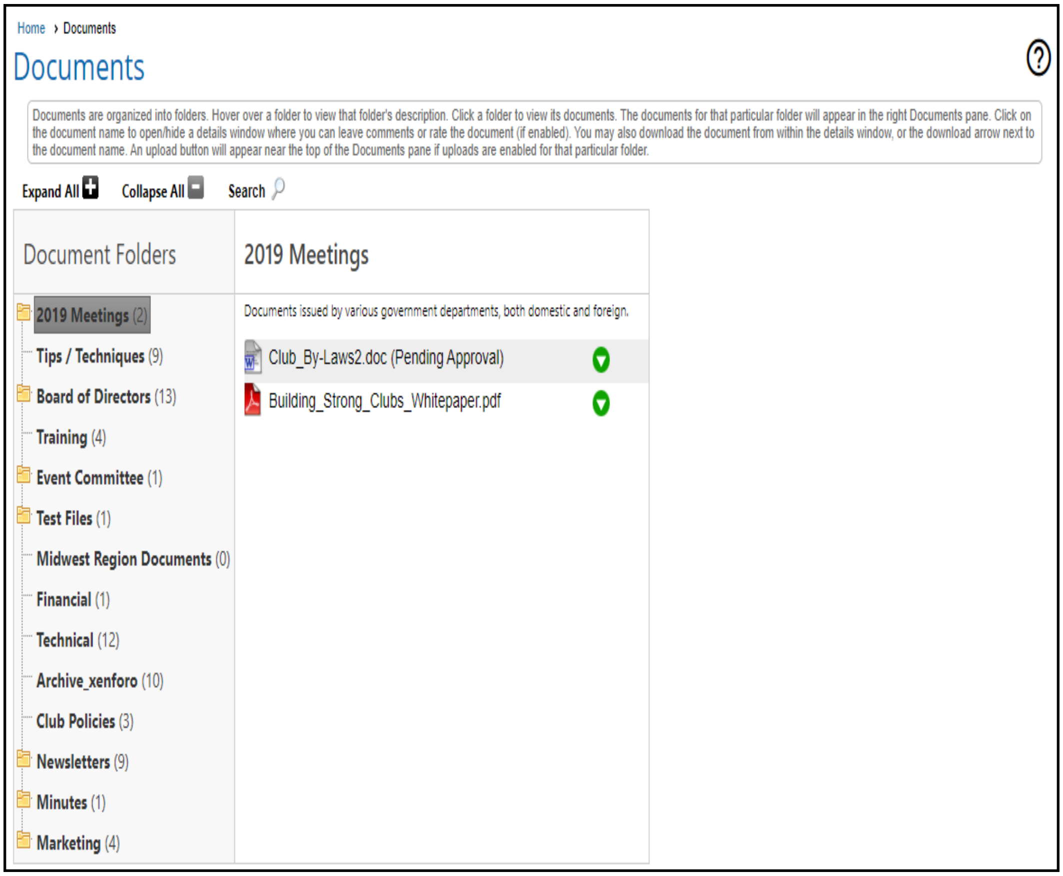
Clubs and associations can allow uploaded documents to be visible immediately or to require that they first be approved by an administrator or module coordinator before they become visible and available for download by others.

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.

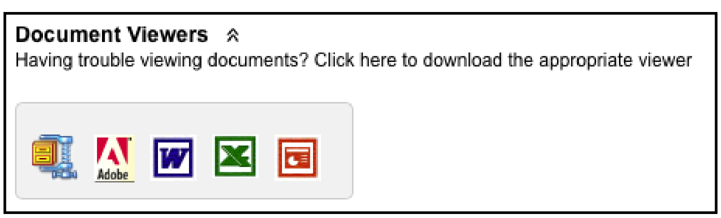


The left panel shows a tree structure of folders and subfolders. If a folder has subfolders, an open arrow will be shown on the left of the folder icon. Click the folder name to expand that folder. For expanded folders, click the parent folder name to collapse that part of the tree. You can also click the **Expand All Folders** and **Collapse All Folders** options above the folder panel.

Hover over a **folder** name to show its folder description.

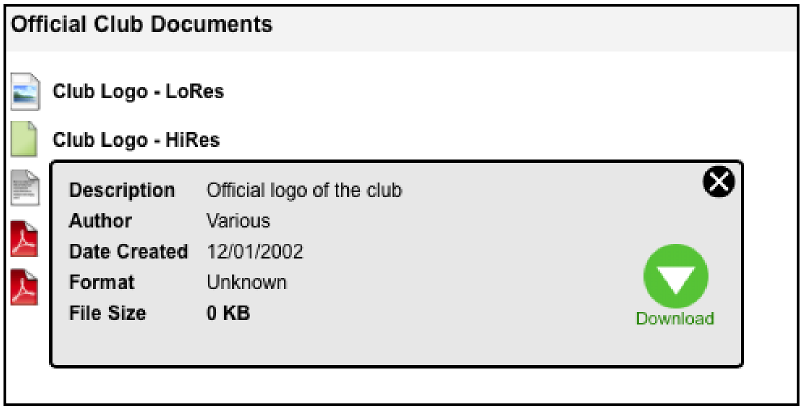
Click and drag the **line** separating the tree from the list of documents within the selected folder to widen or narrow each panel.

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:



This panel includes another **Download** icon. Click the close button or the document title to close this panel.

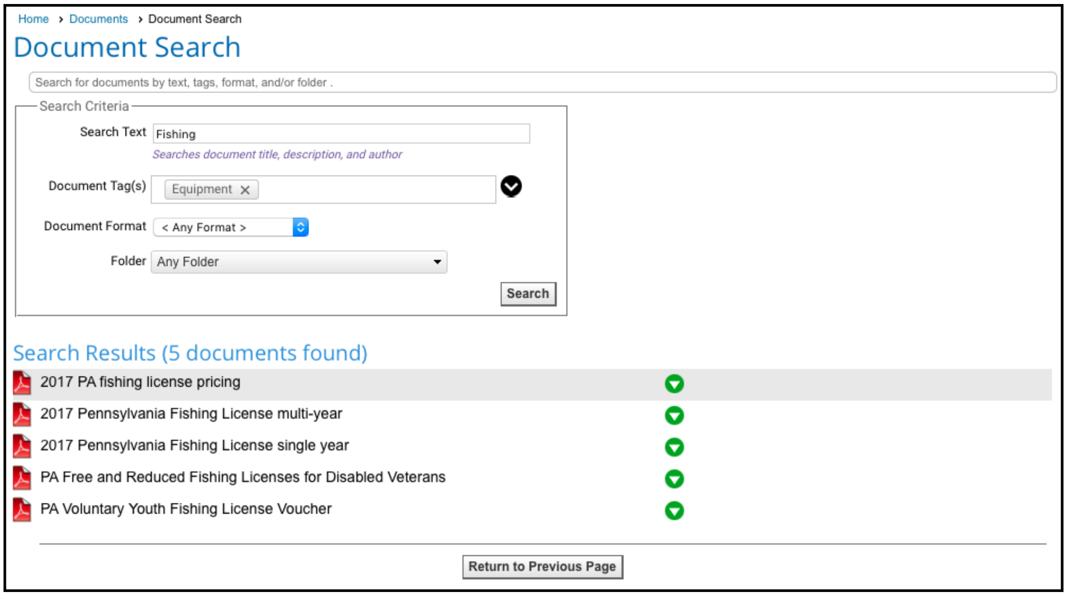
This panel may optionally include **Ratings** and **Member Comments**, as shown in the following example:

Click a rating star to record your rating. You can click ½ stars so the rating range is from ½ 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:



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.

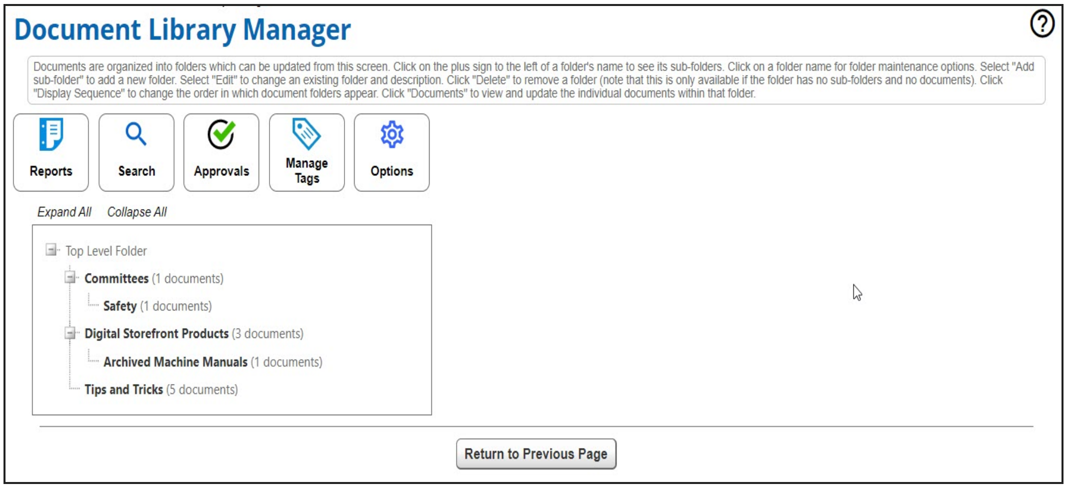
Document Library Administration

Control Panel > Website > Website Modules > Document Library

There are two ways to manage documents:

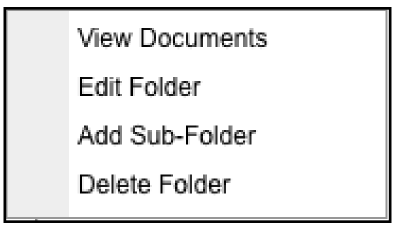
1. Administrators and Function Coordinators can select the module in the Control Panel (Website tab) to access the admin side of the function.
2. When viewing any screen in the Documents function, coordinators and administrators can click the pencil icon in the Page Tools Widget on the right side of the screen.

A screen similar to the following is displayed:



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:



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.

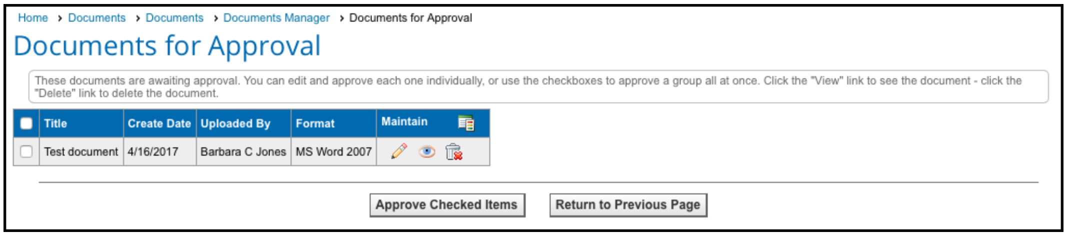
Search

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

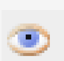
If a folder has been configured to allow member uploads document library coordinators are notified via email that a new upload is awaiting approval, including the member's name, title of the document and its location. If no coordinators have been assigned to the document library, all administrations will receive the notification.

Click the **Approvals** button to see a screen similar to the following:



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:

Icon	Description
 (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.

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:

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.

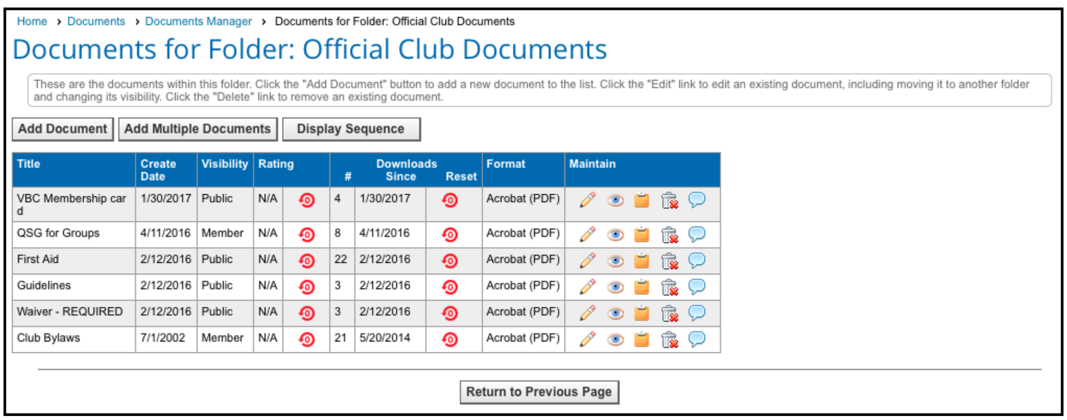
Check **Allow custom tags on documents** if you want to allow administrators and coordinators to create their own tags. If this option is not checked, only master tags can be assigned to a document.

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 › Documents Manager › Documents for Folder: Official Club Documents

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 Date	Visibility	Rating		Downloads #	Since	Reset	Format	Maintain
VBC Membership card	1/30/2017	Public	N/A		4	1/30/2017		Acrobat (PDF)	
QSG for Groups	4/11/2016	Member	N/A		8	4/11/2016		Acrobat (PDF)	
First Aid	2/12/2016	Public	N/A		22	2/12/2016		Acrobat (PDF)	
Guidelines	2/12/2016	Public	N/A		3	2/12/2016		Acrobat (PDF)	
Waiver - REQUIRED	2/12/2016	Public	N/A		3	2/12/2016		Acrobat (PDF)	
Club Bylaws	7/1/2002	Member	N/A		21	5/20/2014		Acrobat (PDF)	

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 non-members.

Maintain Options

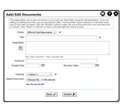
The following options are available in the Maintain column:

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 anywhere (another web page or website, or an email.)
(Delete)	**Delete** the document from the system. You will be prompted to confirm this action.
(Comments)	View **Comments** posted by members. You will see a small popup form listing the comments, with options to display the newest or oldest first.
(Reset)	**Reset** the document rating or the download counter. You will not be prompted to confirm 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:

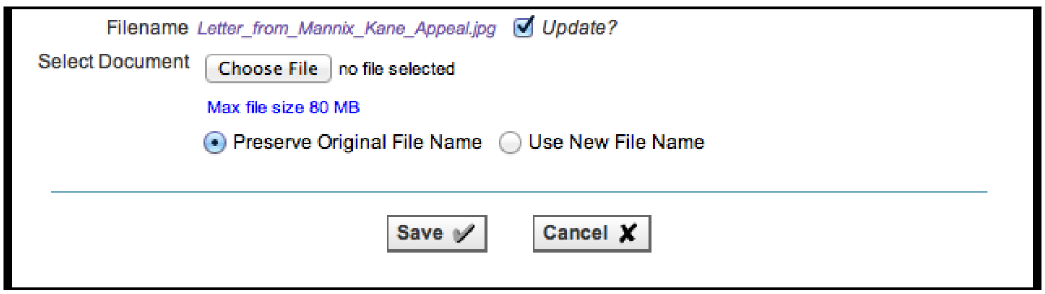
- All Users (Public)
- All Users (Members Only Download) – non-members can see that the document exists but cannot download it. Use this option as an incentive for people to join the club or association.
- Members Only
- Pending Approval – use this option to flag a document as needing review by another 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:

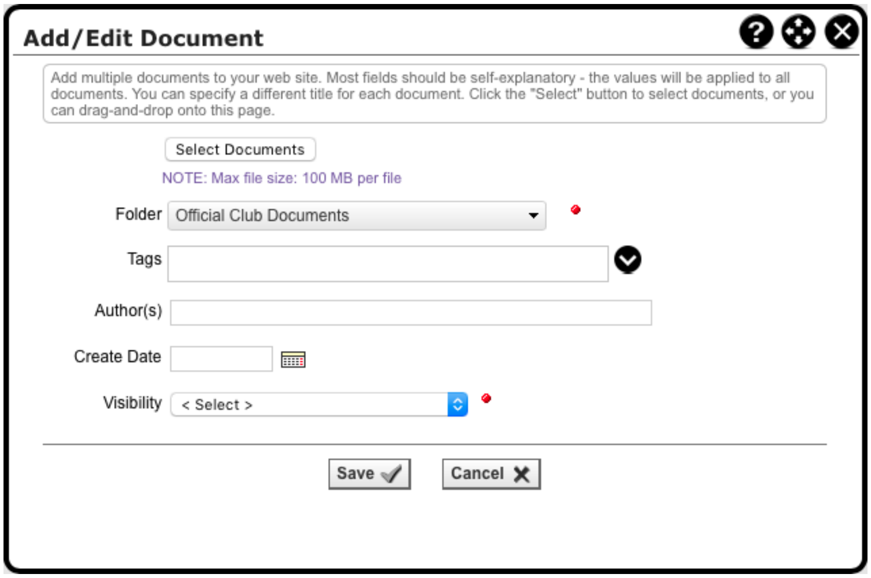


This option allows you to refresh a document already uploaded. Browse to the document on your local hard disk or network and select it. By default, the system preserves the original filename, even if the updated document has a new filename, overwriting the old version of the document. But you can also 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.

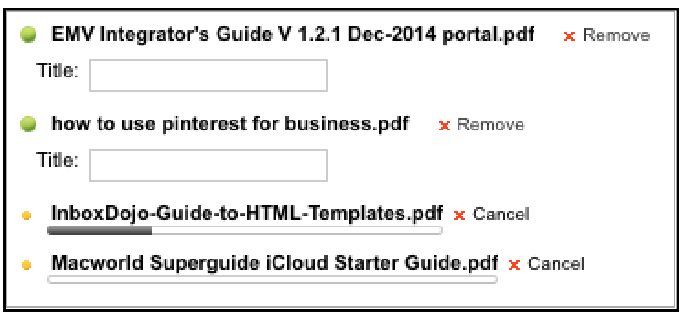
Add Multiple Documents

Click the **Add Multiple Documents** button and you will see a screen similar to the following:



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.

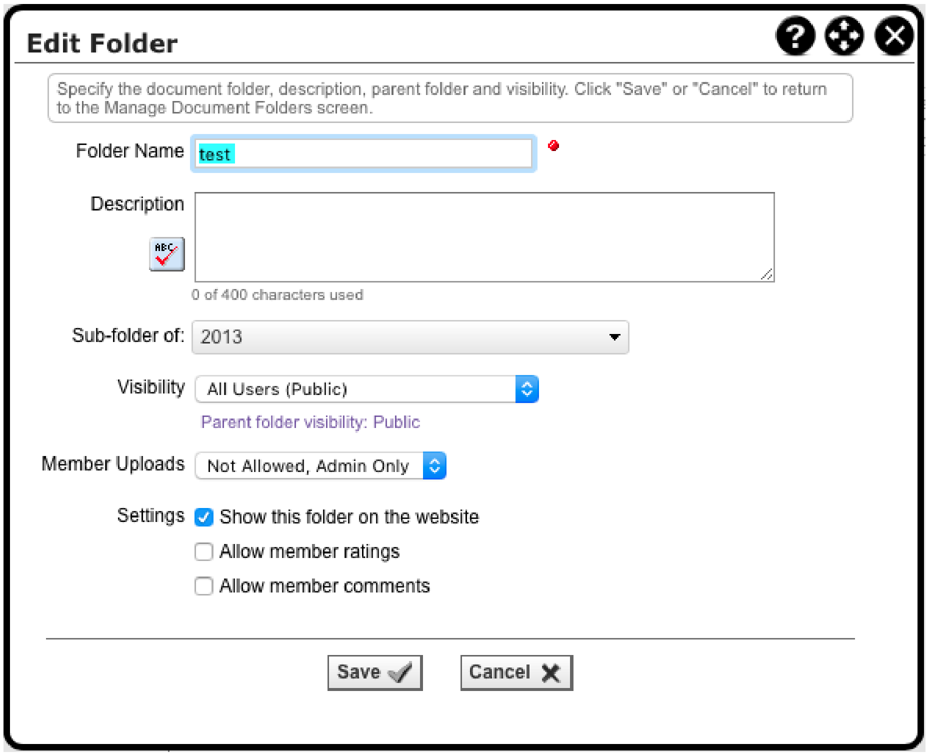
Display Sequence

Click the **Display Sequence** button to show the standard ClubExpress display sequencer.

Manage Folders

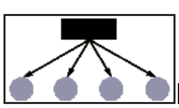
Control Panel > Website > Website Modules > Document Library

Back in the Documents Manager, select **Edit Folder** to edit the properties of an existing folder. You will see the following dialog:



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 drop-down 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 "Sub-folder 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

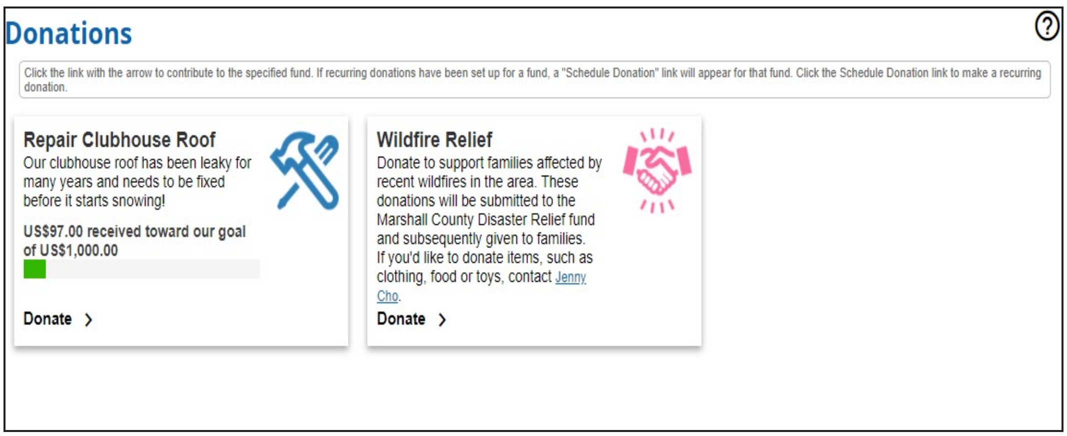
The Donations function allows you to establish funds into which members and non-members can donate. A number of options are provided to control fund visibility, and whether anonymous donations and/or recurring donations are allowed. Donations are processed through the same payments processing module 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

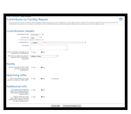
A typical Donations screen is shown below:



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.

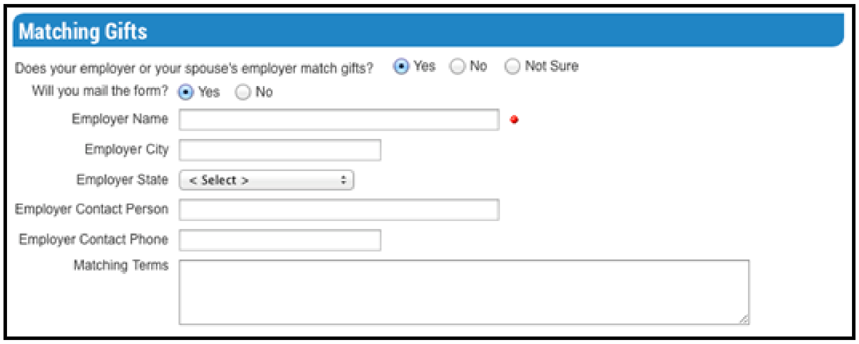
Notify

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:

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:

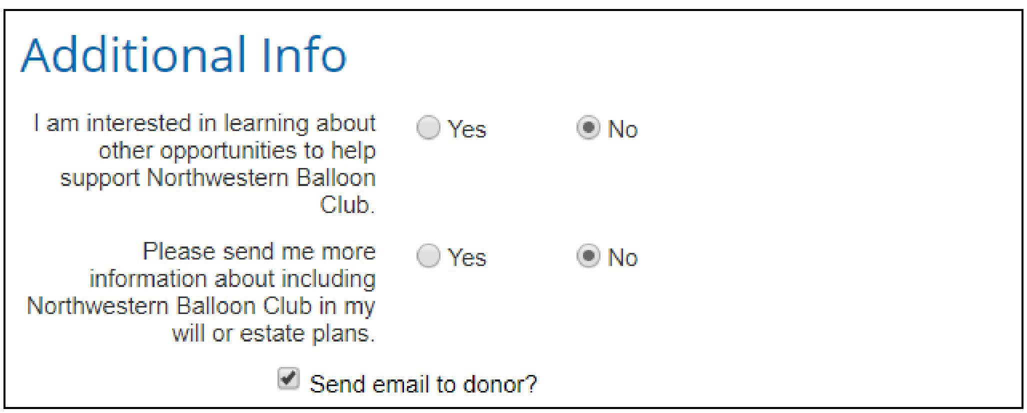


Enter the specified information, including a general description of matching gift terms. The club will follow up with you to obtain the necessary forms and submit them to your employer.

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

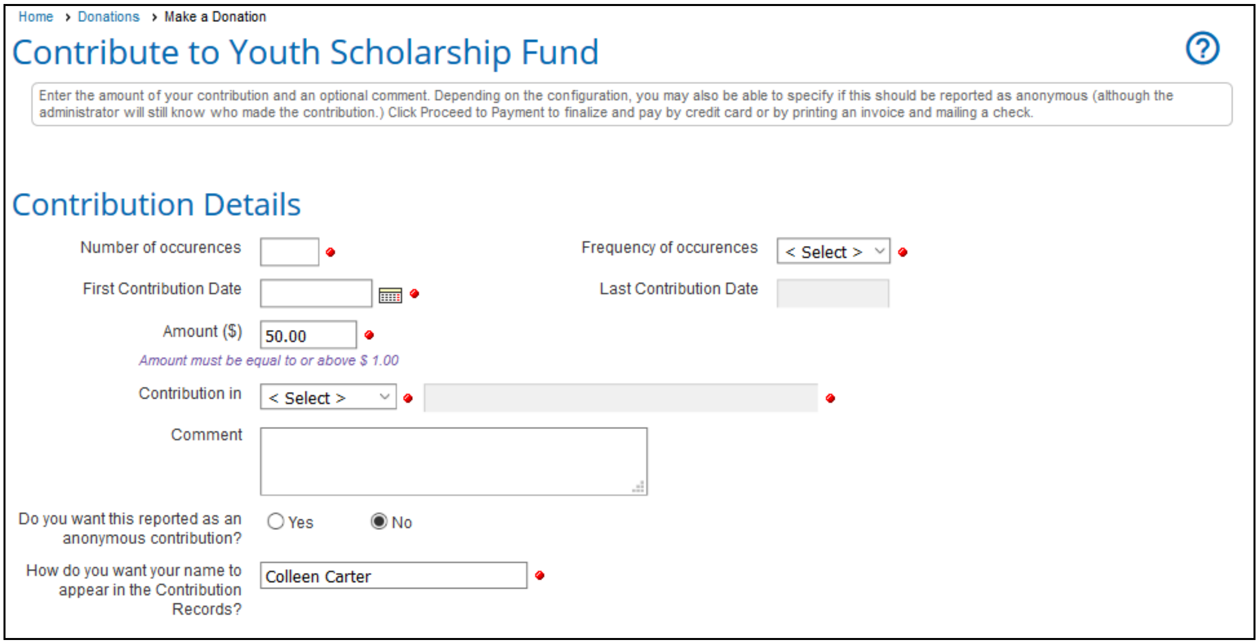
You may ask members or non-members if they'd like to receive additional information related to their donation.



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.



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.

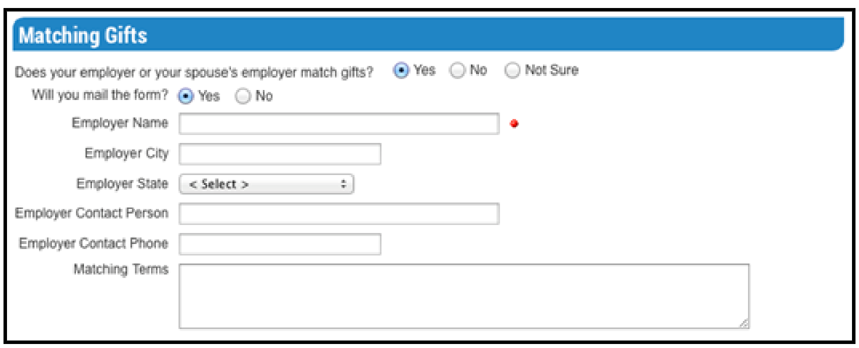
Notify

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:

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:

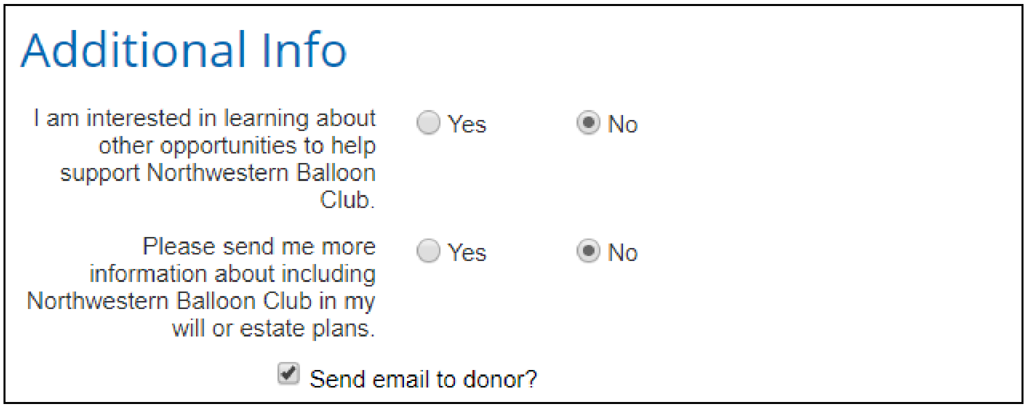


Enter the specified information, including a general description of matching gift terms. The club will follow up with you to obtain the necessary forms and submit them to your employer.

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.

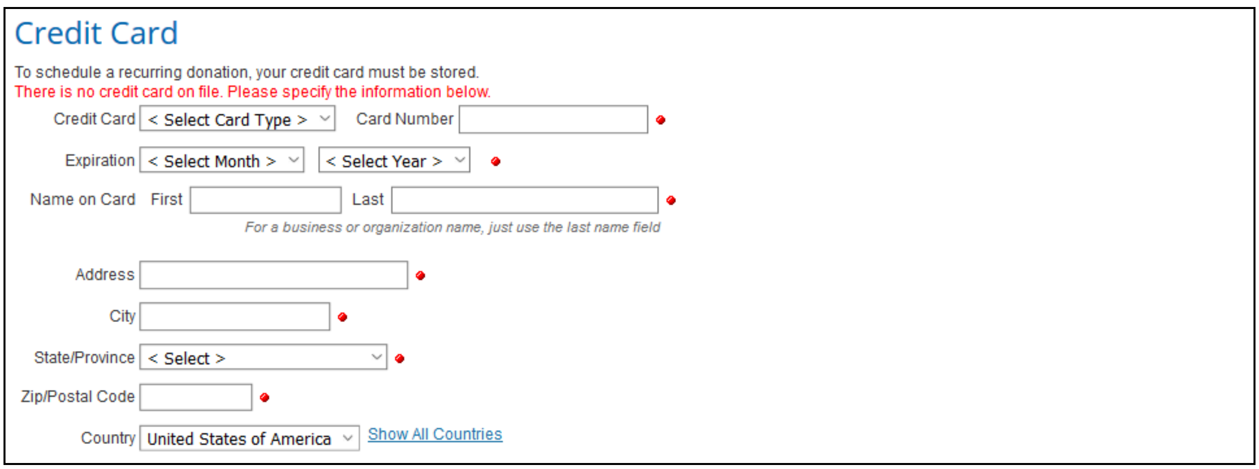
Additional Info

You may ask members or non-members if they'd like to receive additional information related to their donation.



Credit Card

> **Note:** You must have a credit card saved in your member profile to schedule a recurring donation.



Donation Administration

Control Panel > Money > Website Modules

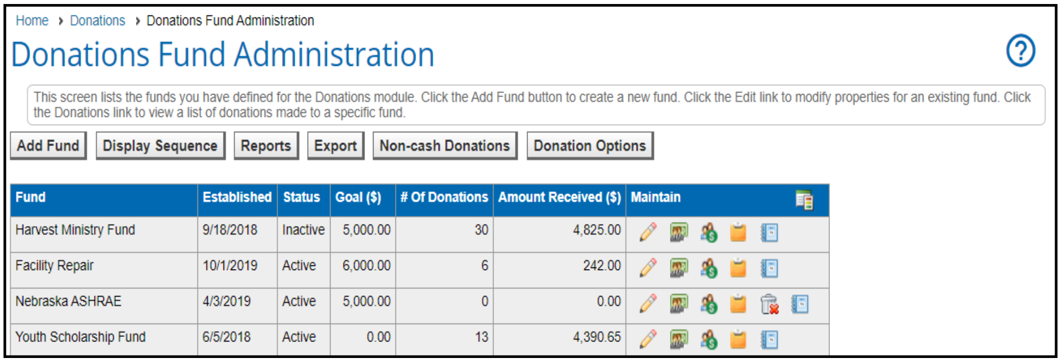
There are two ways to manage Donation funds and Donations:

1. Administrators and Function Coordinators can select the module in the Control Panel (Money tab) to access the admin side of the function.

2. 

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:



This screen shows the various funds you have defined. Funds have a specific purpose and act as buckets into which donations are made.

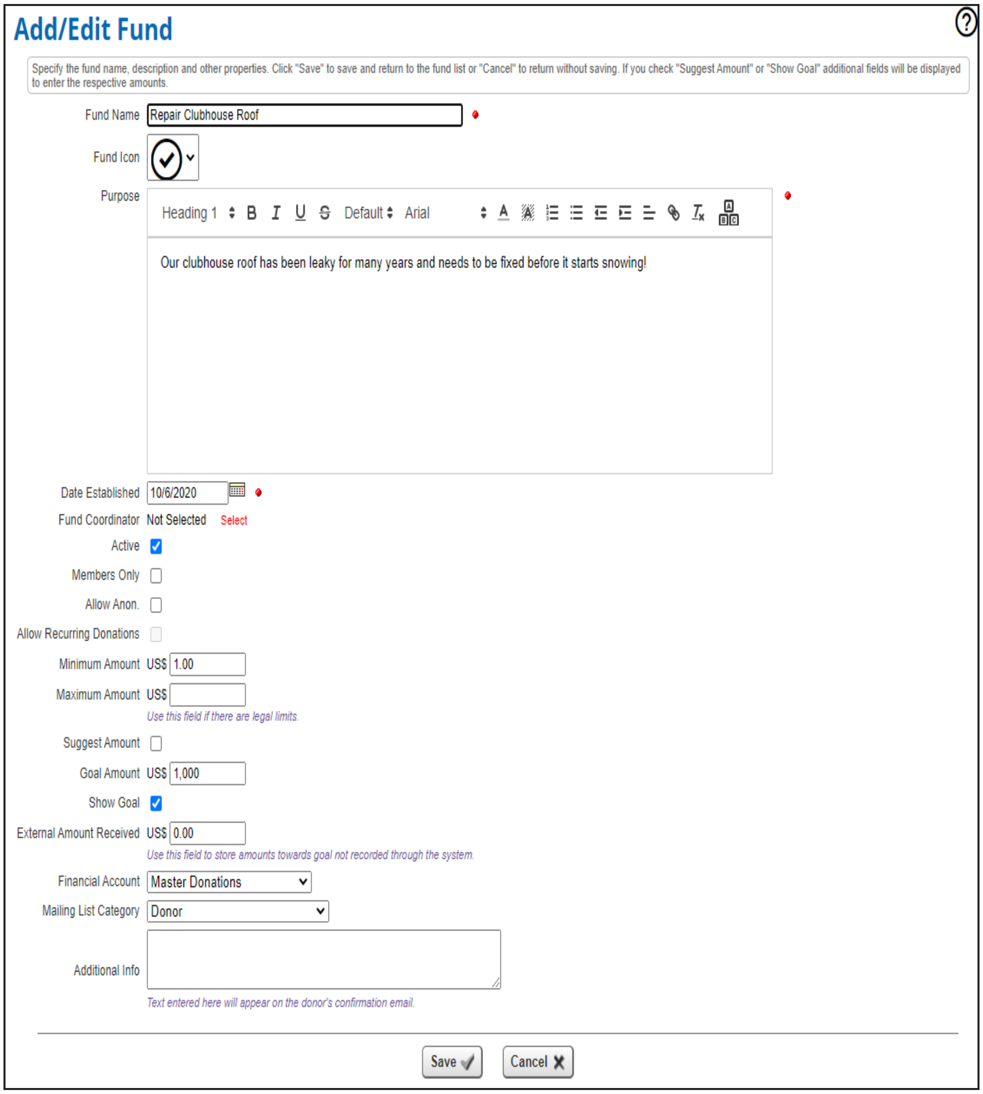
Click the **Display Sequence** button to control the order in which active funds appear on the Donations user pages. You will see the standard ClubExpress display sequencer dialog.

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:



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 Amount** 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

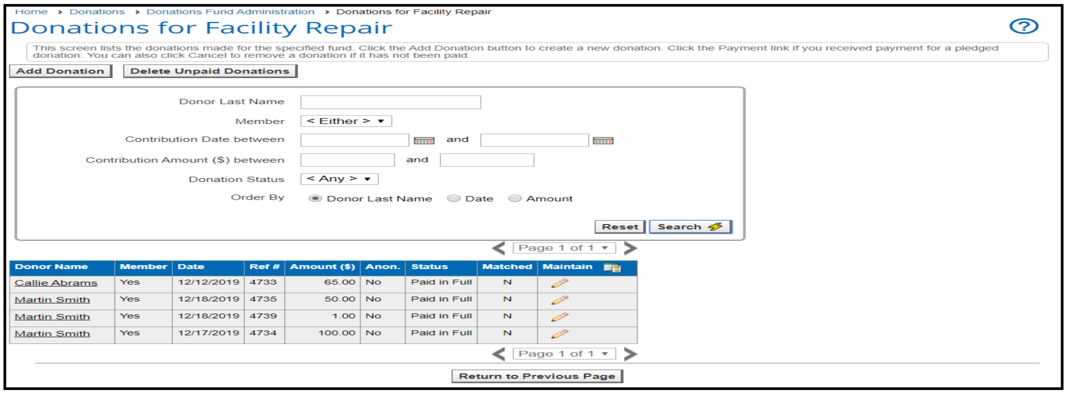
The following options can be found in the Maintain column:

Icon	Description
(Edit)	**Edit** properties for this fund.
(Donations)	View **Donations** made into this individual fund.
(Recurring Donations)	View **Recurring Donations** made into this individual fund. See below.
(Copy)	**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:



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:

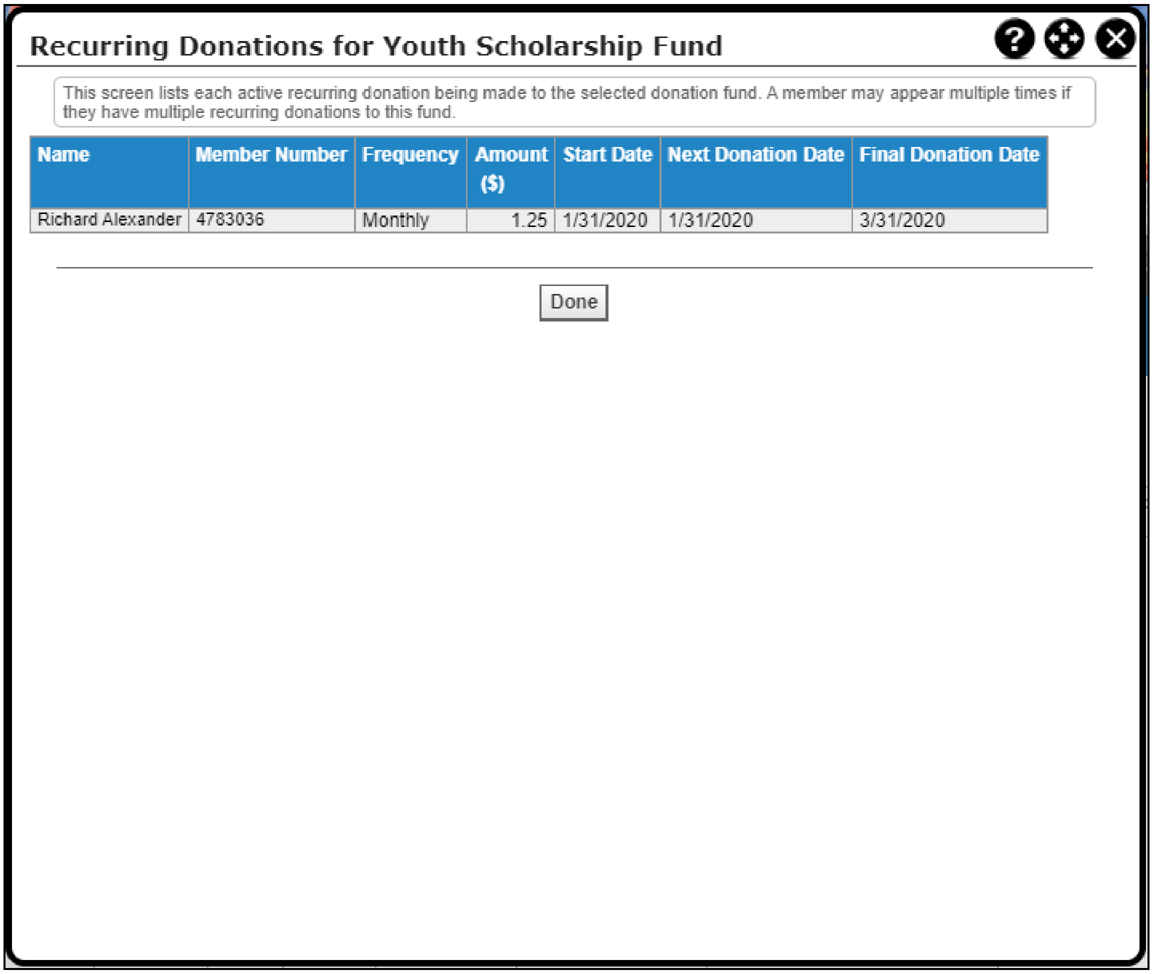
Icon	Description
(Edit)	**Edit** details about this donation. The available options will be different depending on the payment status.
(Delete)	**Delete** this donation. This option is only available if the payment status is "Not Paid".
(Make Payment)	**Make Payment** for this donation. This option is 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

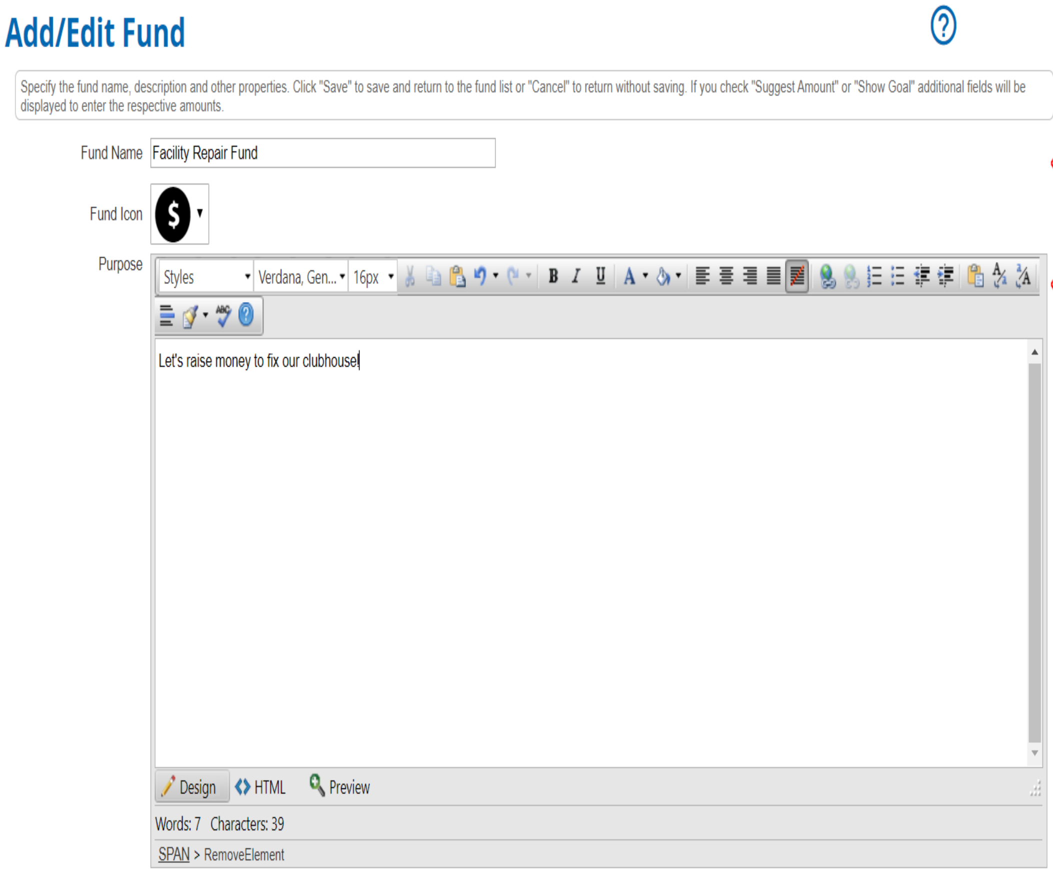
Click the **Recurring Donations** icon to display a list of donations. You will see a screen similar to the following:



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.

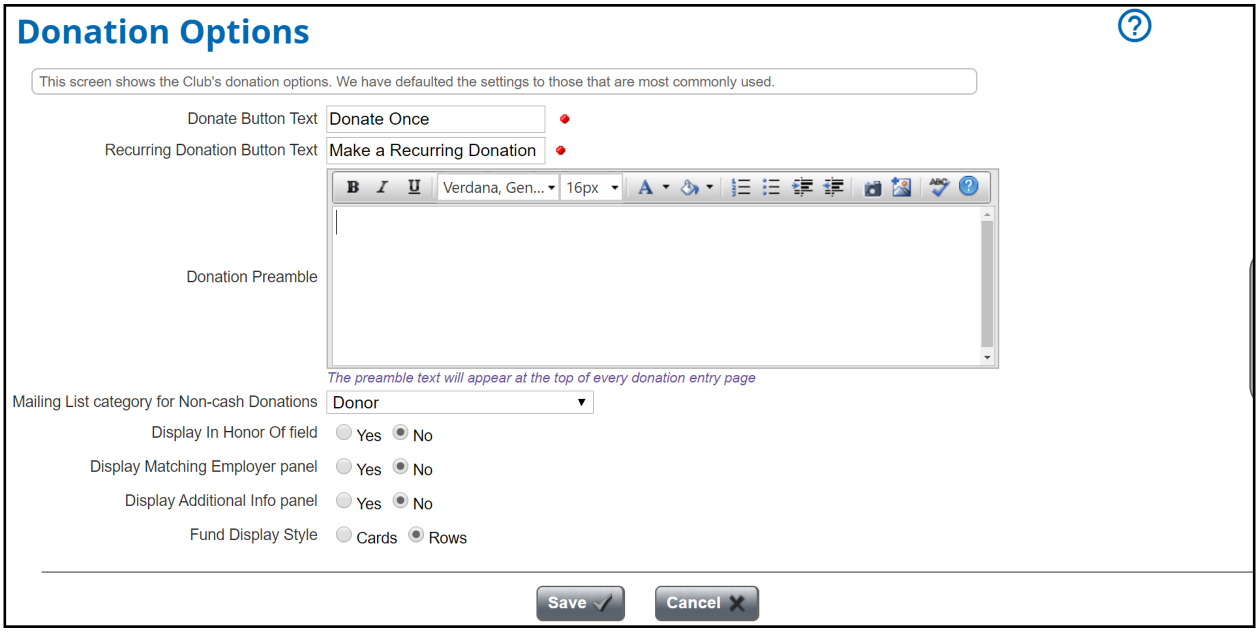


For a paid donation, the fund and donation amount cannot be changed, but all other information is available. For an unpaid donation, the fund and donation amount can also be changed.

> **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



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.

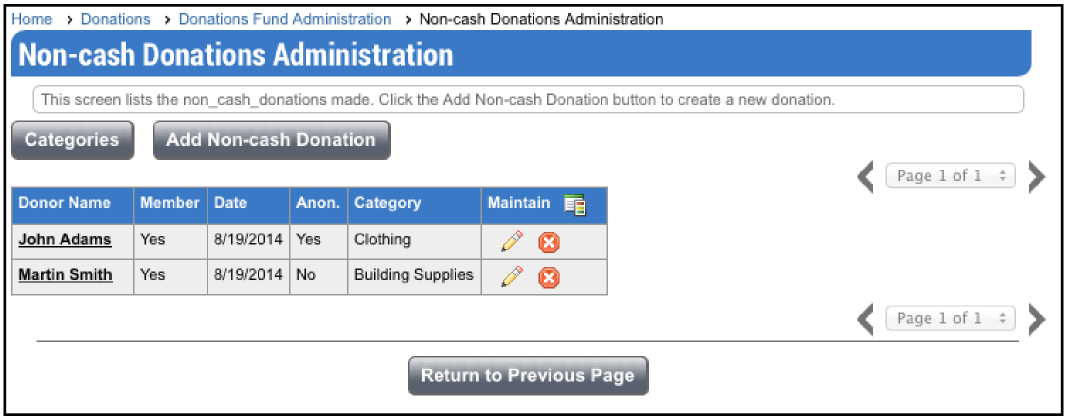
> **Note:** Organizations using the ClubExpress merchant account must contact us to enable recurring donations on their site. Clubs using their own merchant processor will have the option enabled automatically.

- **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

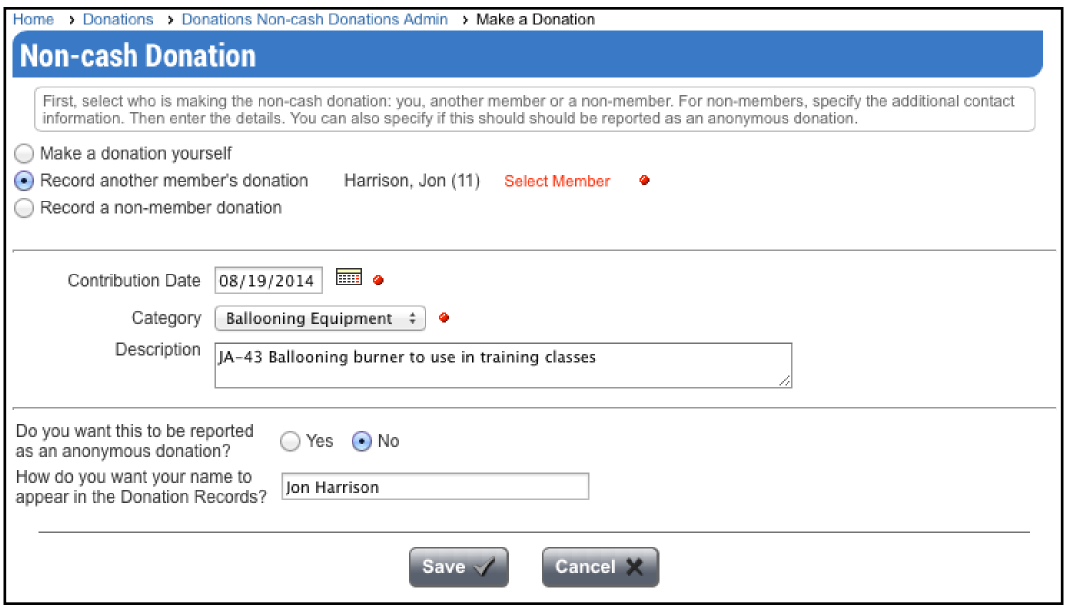
Clicking the **Non-cash Donations** button allows a club or association to track other types of donations, such as clothing, building supplies, etc. You will see a screen similar to the following:



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:



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.

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

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:

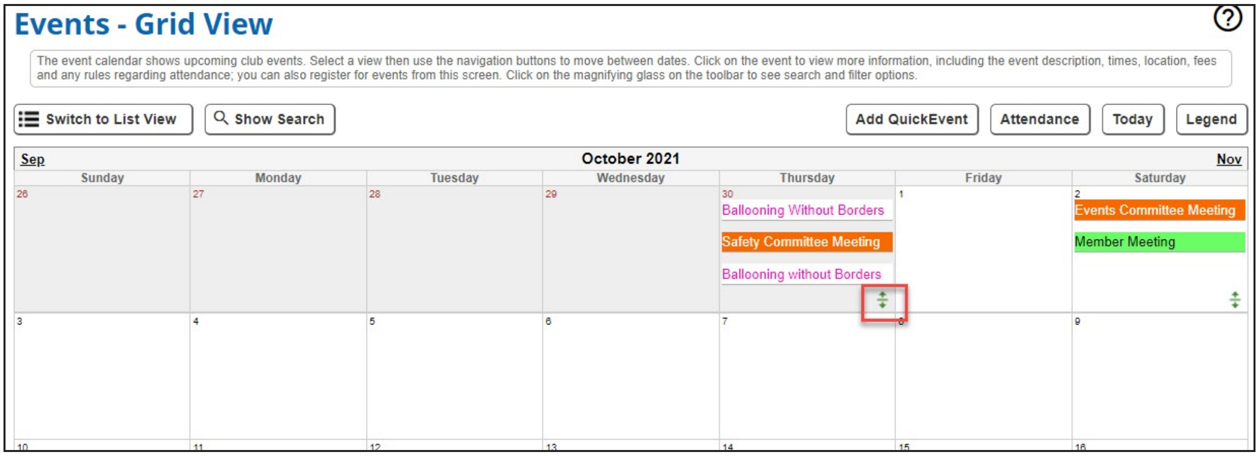
- Single-activity or multiple-activity events;
- QuickEvents, that can be defined and registered for on one screen;
- Notifications (calendar entries that are not full events);
- Event Categories, including color coding;
- Multiple calendar views with filtering by category and metro area;
- Searching 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

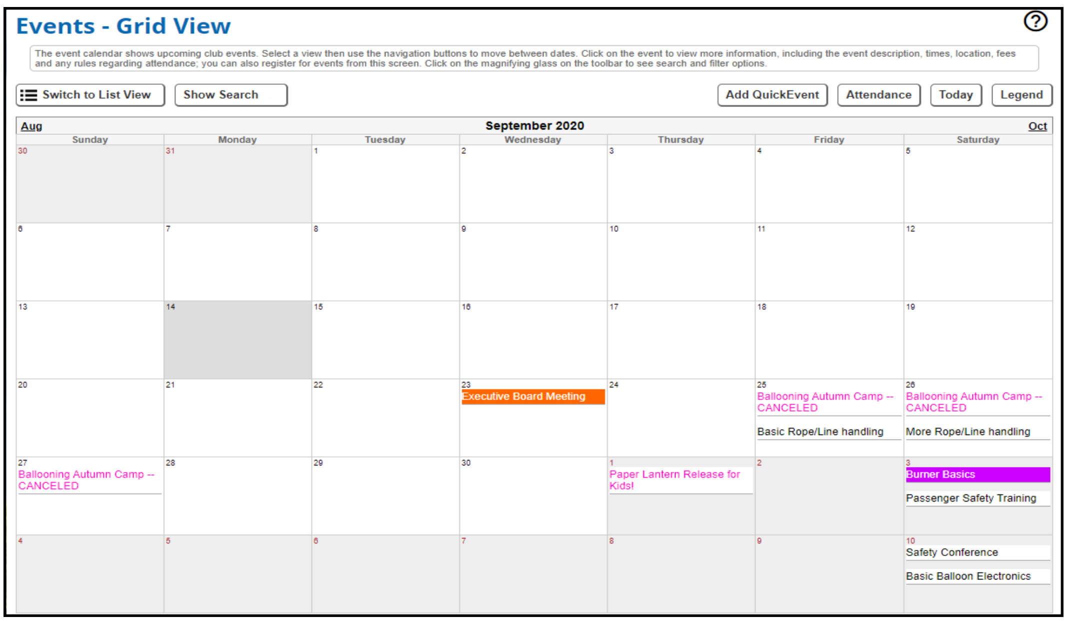
Control Panel > Website > Website Modules > Events

> **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.



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](#).



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.

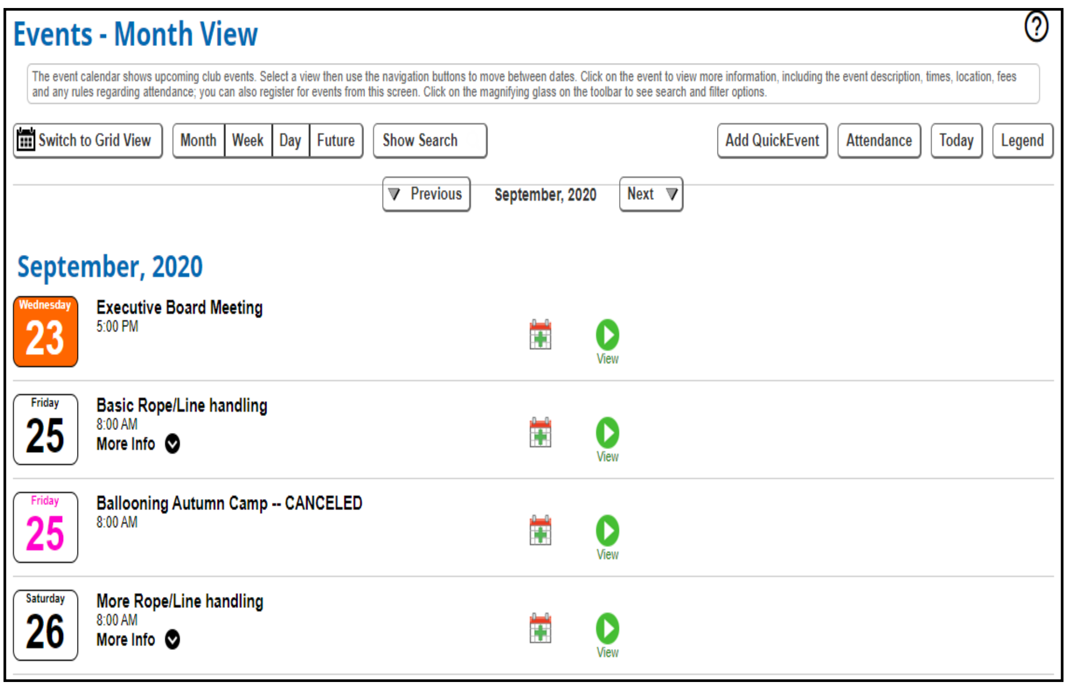
The grid may also include **Notifications**, which are calendar entries with no details, but which may include a link to an external website. It may also include public holidays and other significant days such as Halloween, Mother's Day, etc.

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**- 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:



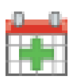
In List View, the View panel has the following options:

- **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.

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

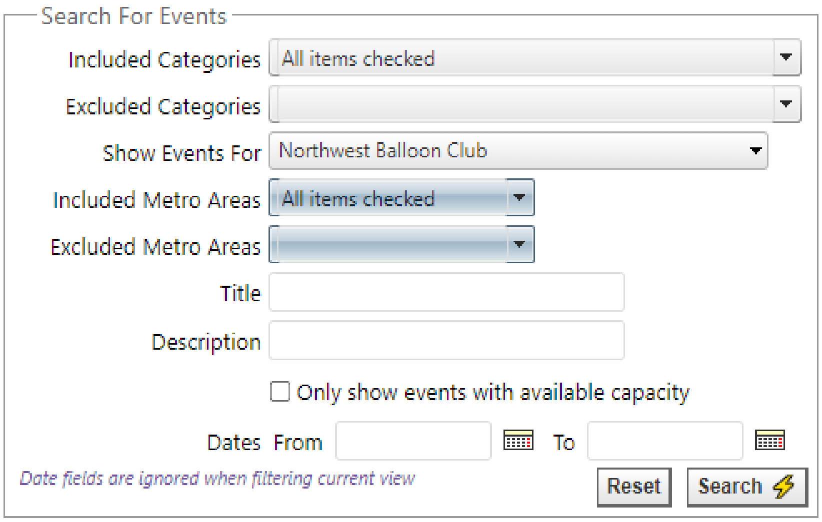
The View panel may include an **Add QuickEvent** button, visible to members only when they are logged in.

> **Administrators:** An event calendar option 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:



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.

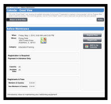
When you search using the Title and Description fields, there is no need to type wildcards; the system will find the specified string wherever it appears.

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

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 registration 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 Waitlsit 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.

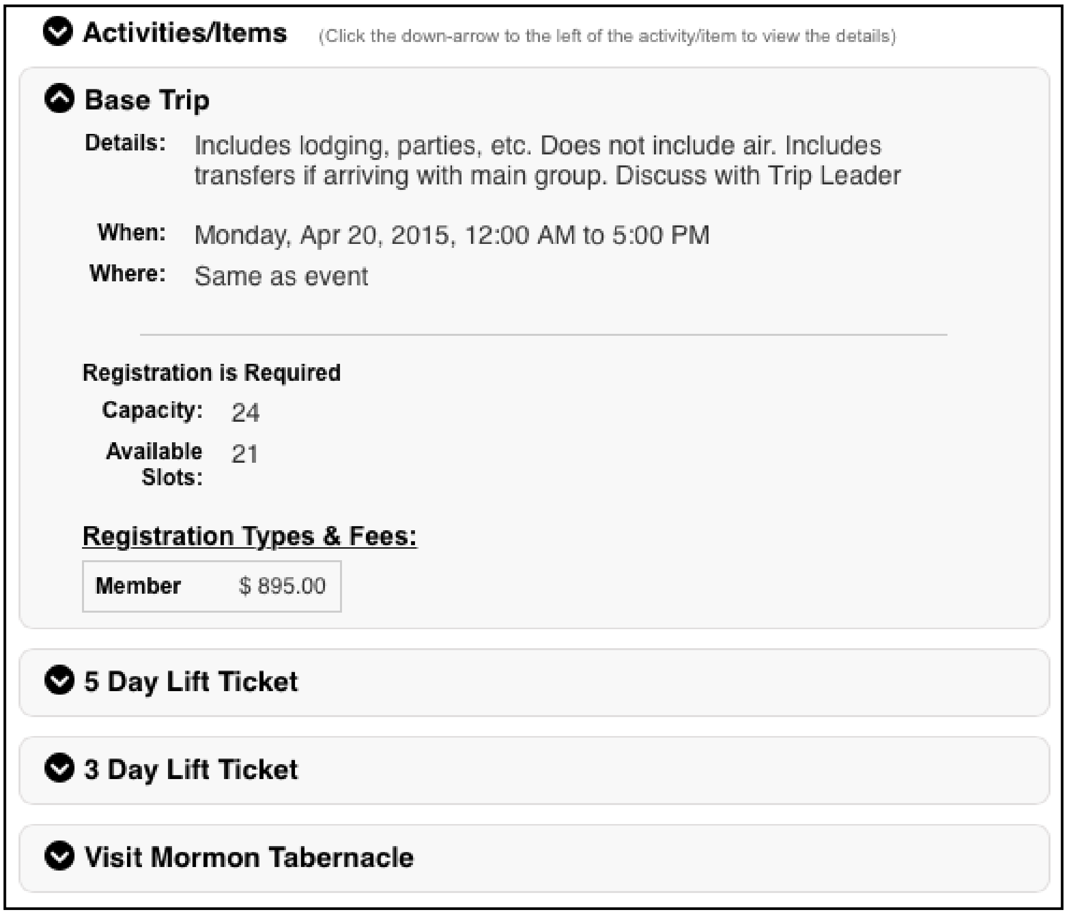
The vCalendar icon is also displayed beside each event in the various List views, allowing you to quickly add multiple events to your PIM calendar.

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:



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.

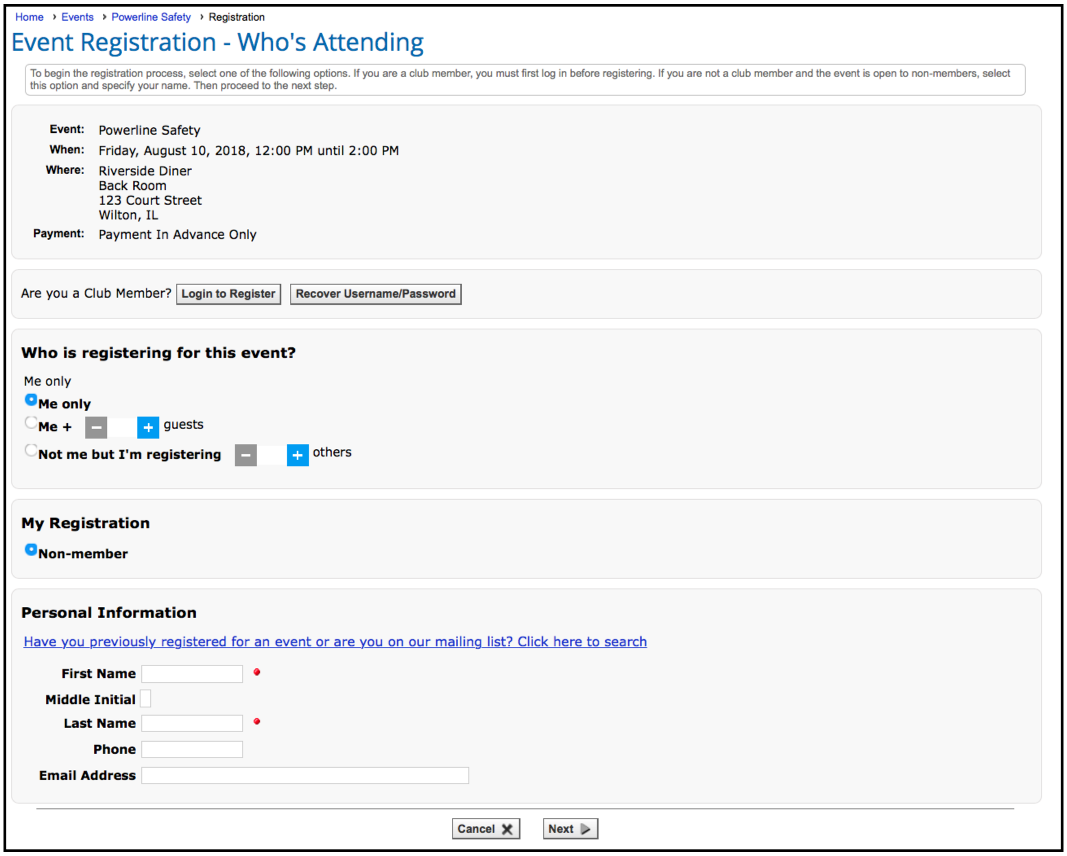
If you have already registered for this event, a warning message will be displayed, but the system will not stop you from registering again unless duplicate registrations are explicitly blocked.

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.



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:

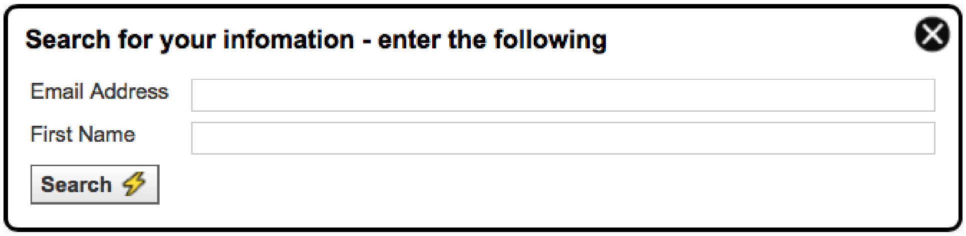
- The current user only
- The current user plus 1 or more guests
- Not the current user but he or she is registering others

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.

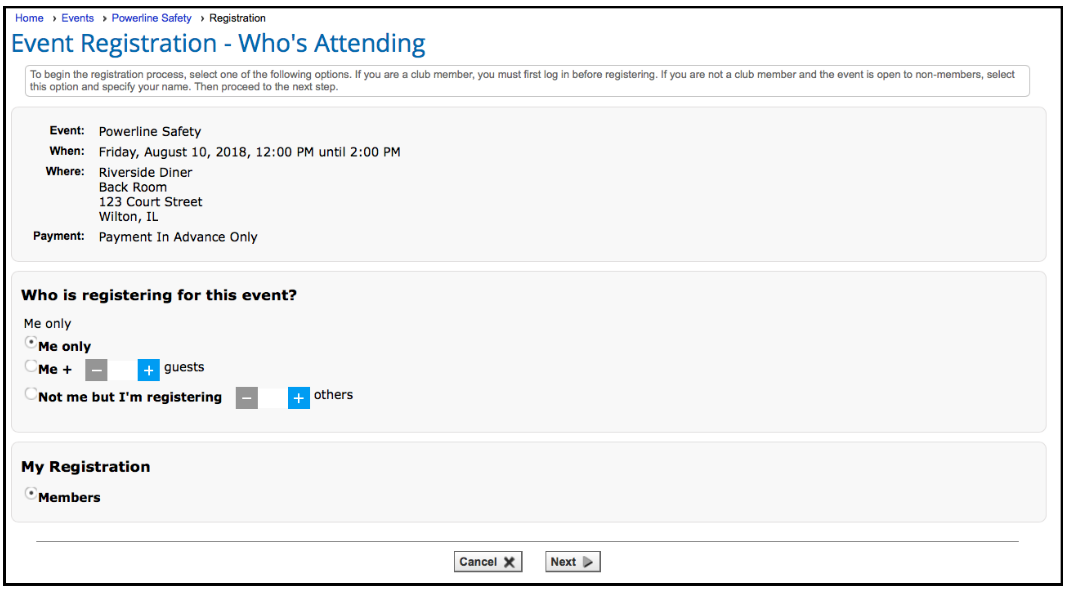
Because this is a non-member registration, the system next prompts for the user's contact information. Non-members are asked if they have previously registered for an event. Some information may be required depending on the event configuration.

Select the **Click here to search** to display the following panel:



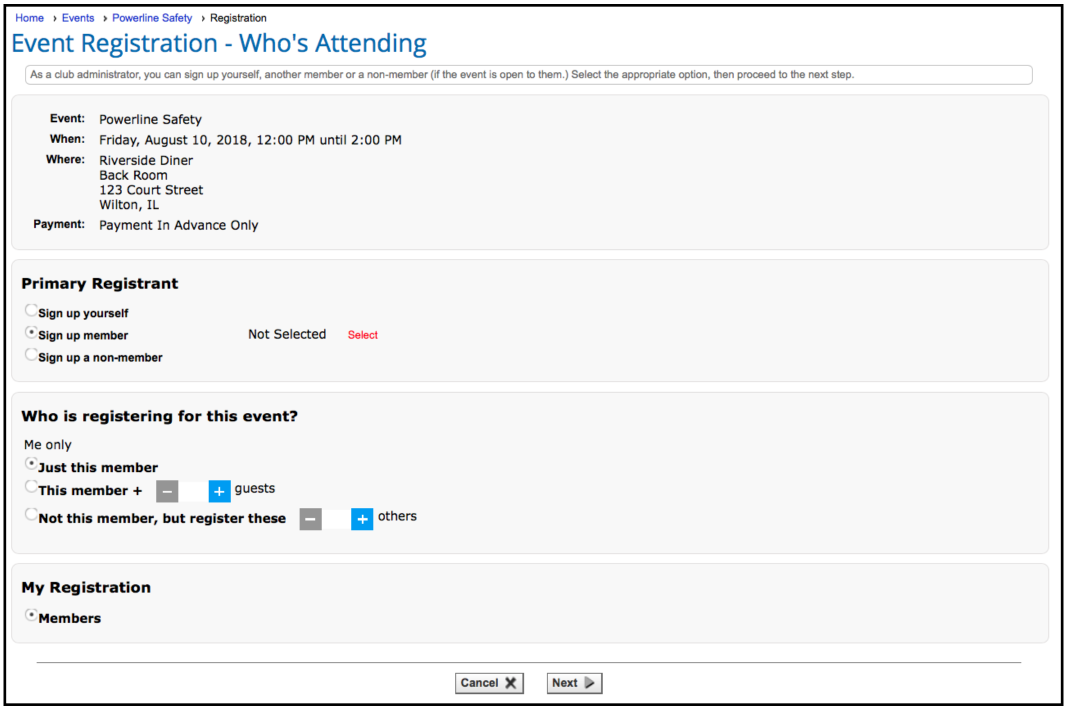
Enter an email address and first name then select the **Search** button. If a match is found, the contact fields are refreshed with the information from the database. Users can update this information and it will be saved. The event registration will be attached to the existing non-member record instead of a new one.

If the current user is a **logged-in member**, he or she will see the following screen:



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:



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:

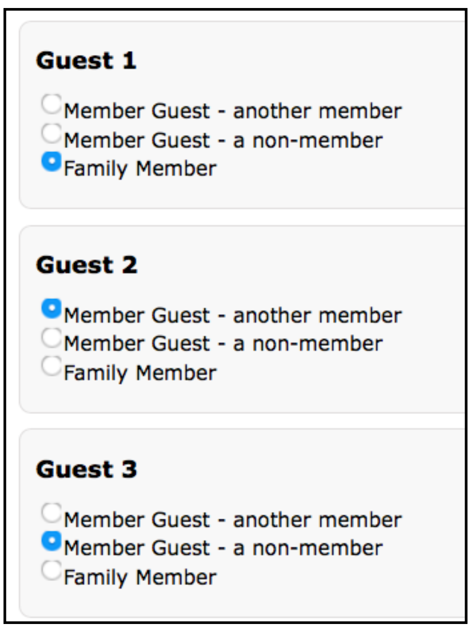
- Everyone (usually used on its own, when everyone pays the same fee)
- Members based on their member type
- Members of a specified committee
- Members of a specified subgroup (chapter, district, or region)

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.

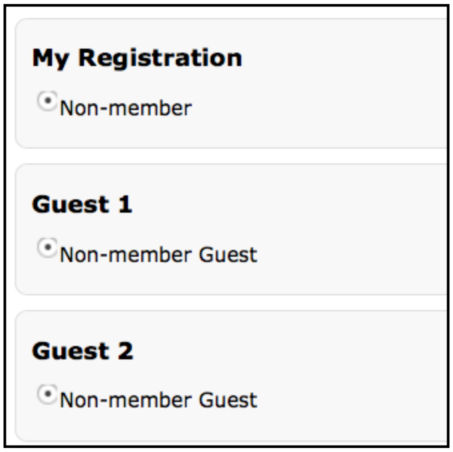
> **Example:**
> Members of a Committee – Board of Directors - $20
> Members of a Committee – Education - $25
> Non-Members in a Category – Press - $10
> Non-Members in a Category – Servicemen in Uniform - $0

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:

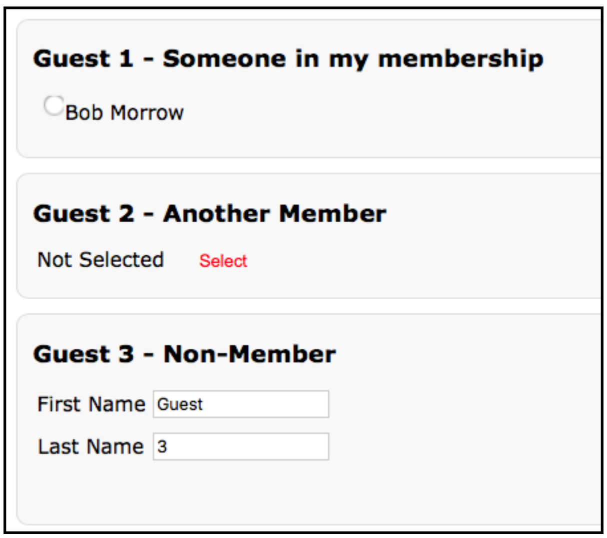


And this registration is for a non-member with two guests:



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:



- 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

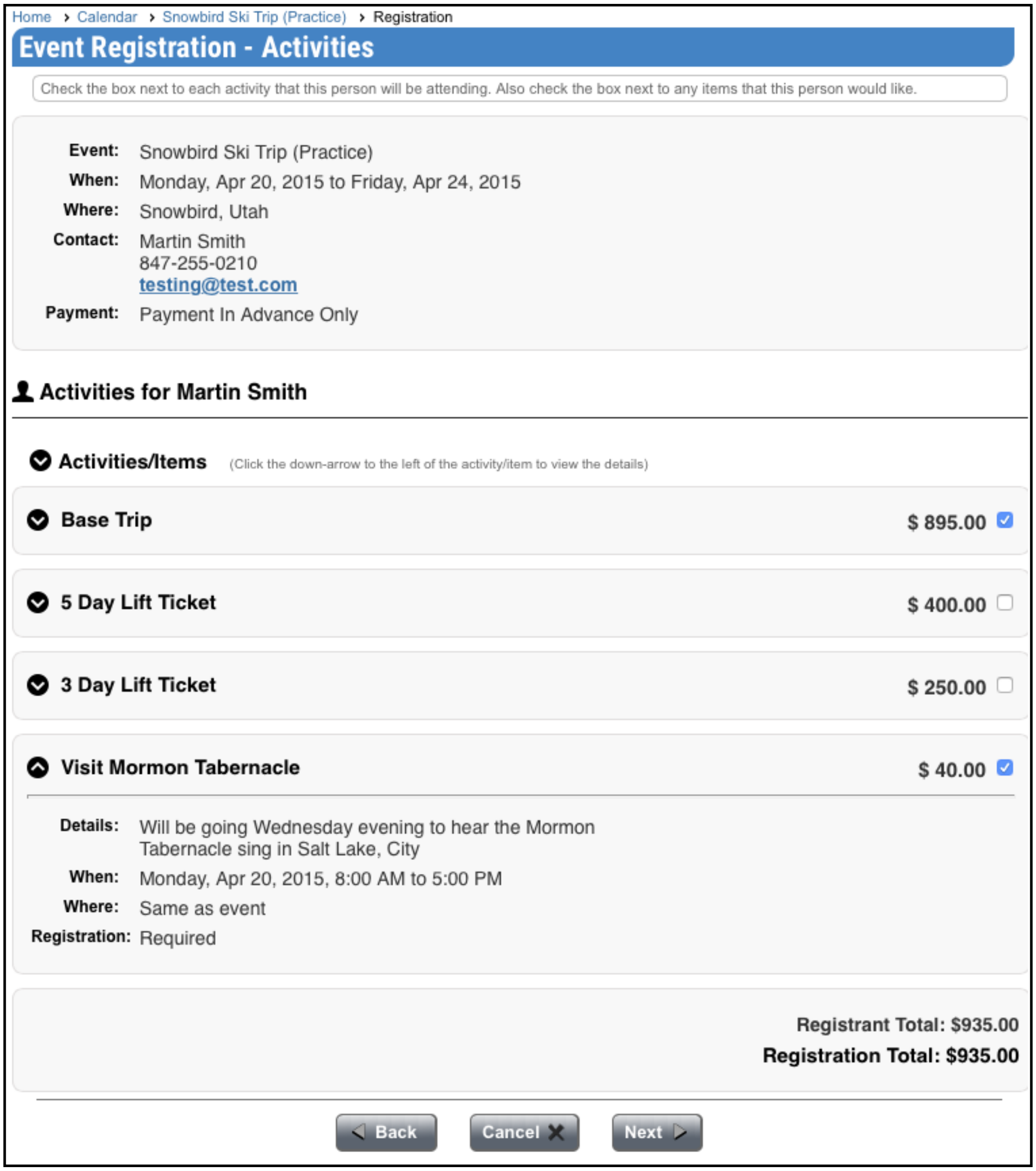
> **Note:** If text messaging is enabled for the club or association and you would like to receive text messages regarding event updates, you must opt-in to receive text messages.

> **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.



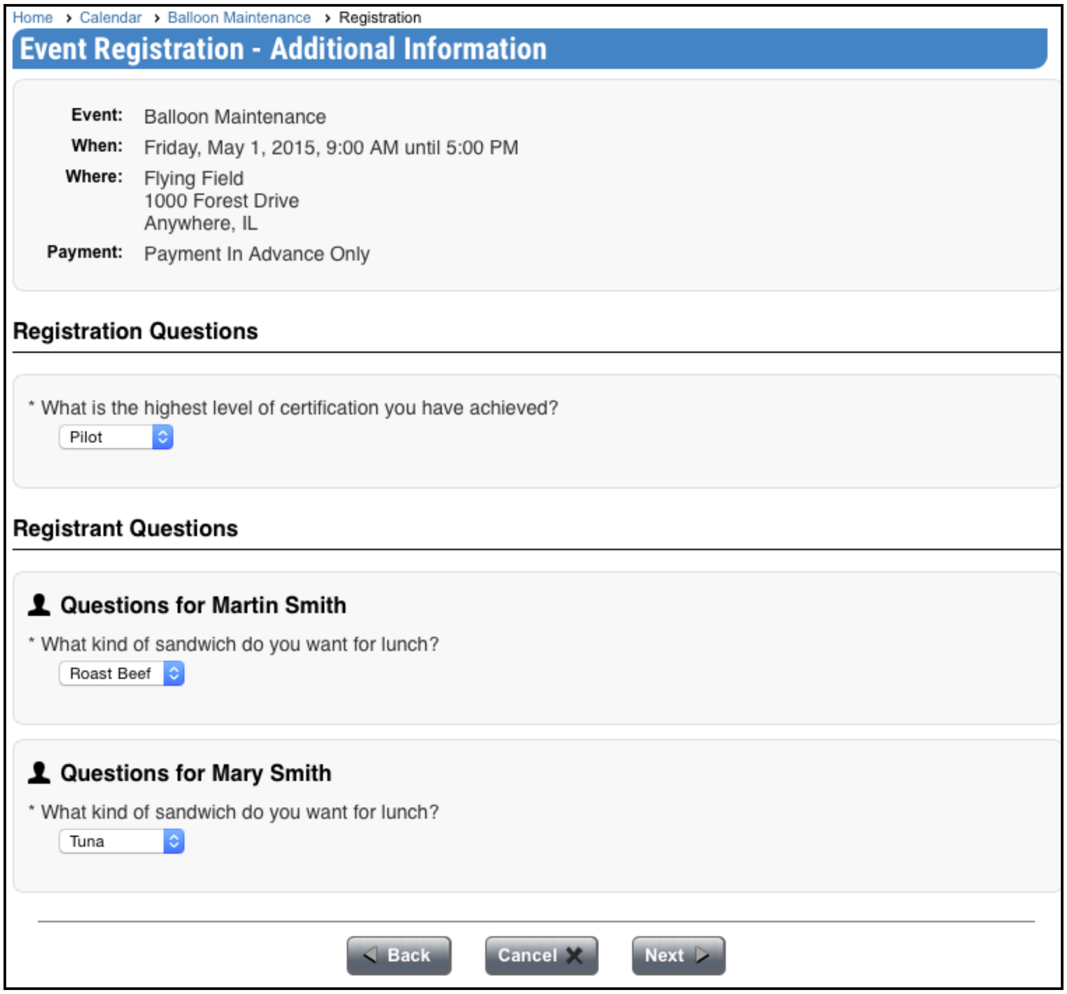
This wizard screen will be displayed once for each person who is part of the registration, first the primary registrant and then each of his or her guests in turn. Only activities that each individual user or guest can sign up for will be shown on each iteration of the wizard page. Registration is a 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:



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.

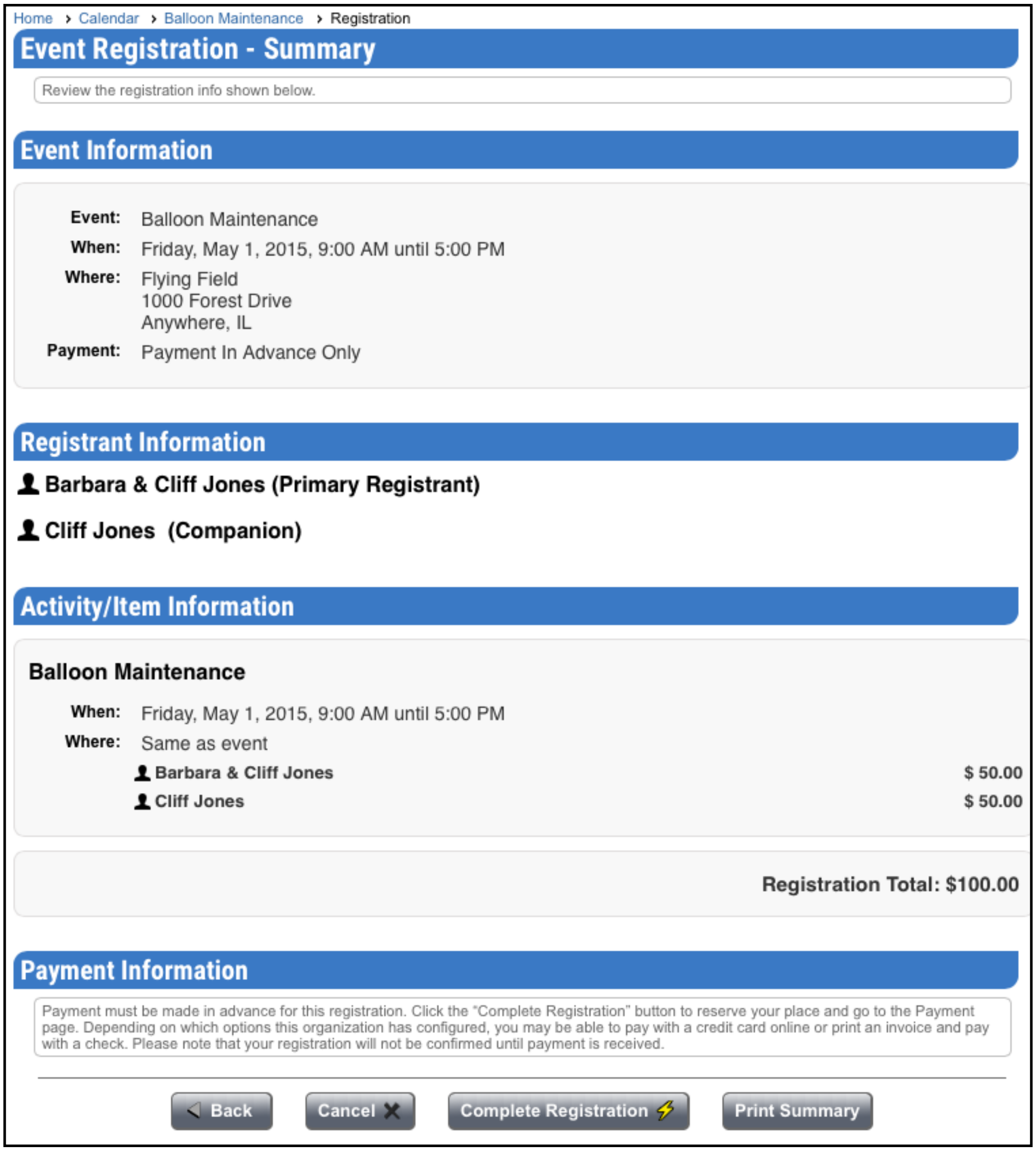
If the event has both questions and a release agreement, the questions page will be displayed first, then the release agreement page.

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.

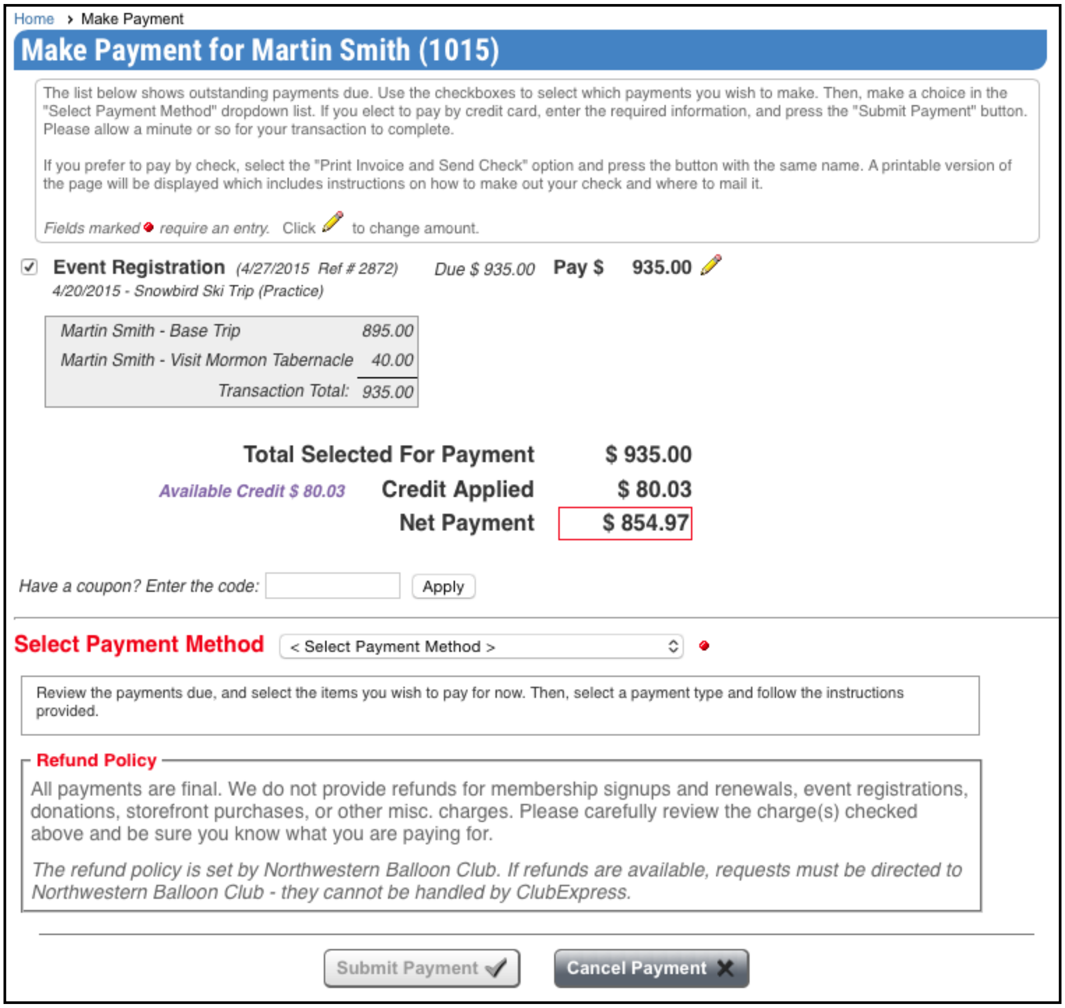


At this point, users can still click the **Back** button to return to a previous step, or the **Cancel** button to cancel the registration process.

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.



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

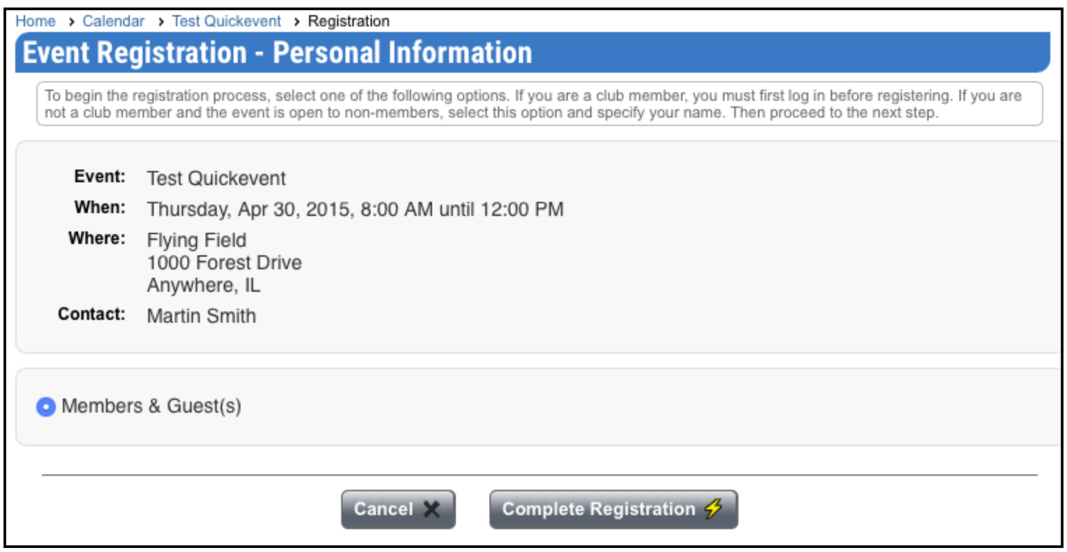
Some events may be configured to allow partial payments.

> **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.



If the QuickEvent does not allow guests, just select **Complete Registration**, and you're done!

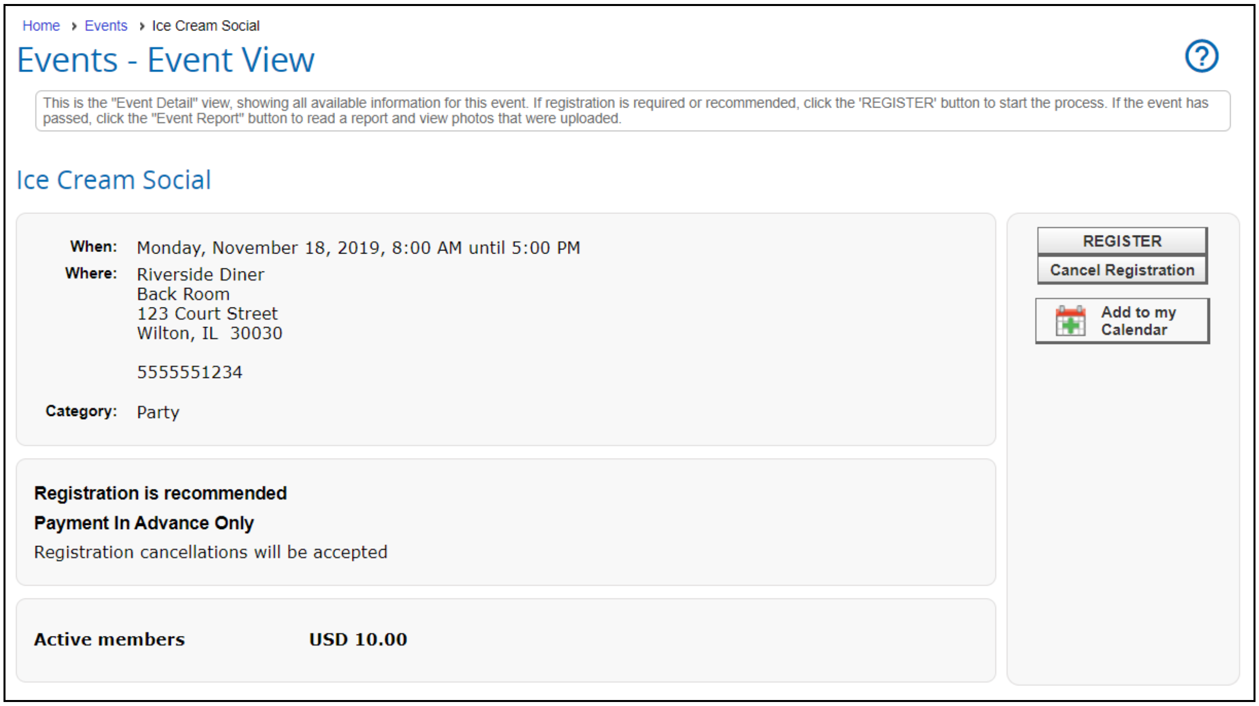
If the QuickEvent allows guests, the wizard will have a second screen. Select the **Next** button to see the Add Guests screen. You can quickly add guests or people who are part of your membership (such as family members.)

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.



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

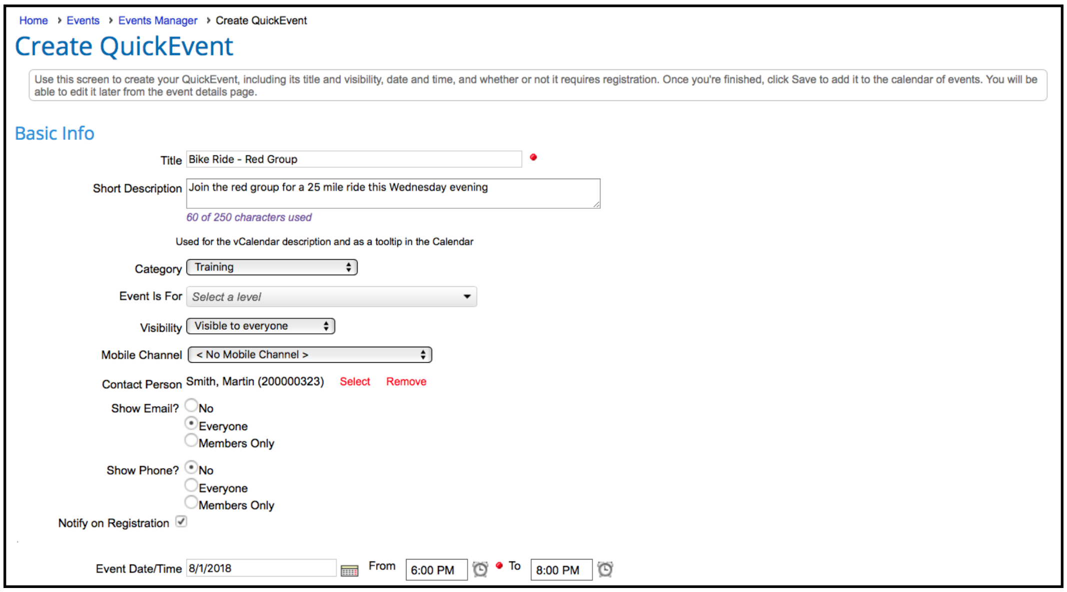
> **Administrators:** Not sure if you need a QuickEvent or a full event? Check out the differences: Skin/Formats/CrossReferencePrintFormat("" on page 1)

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)

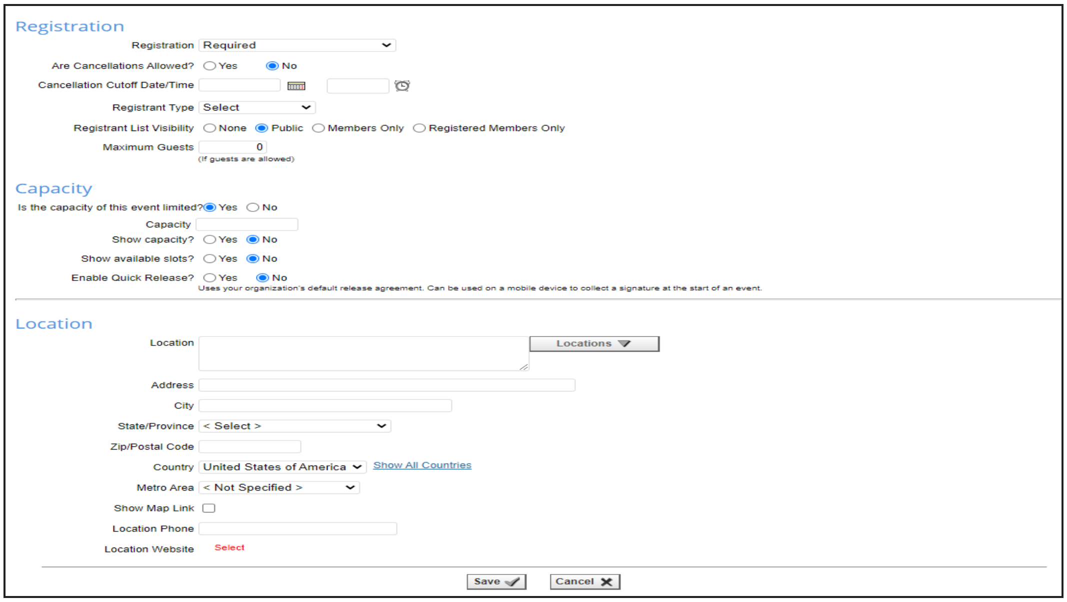
To create a QuickEvent, click **Add** then select QuickEvent from the drop-down menu. You will see a single page of options to define the event.



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:



- 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.

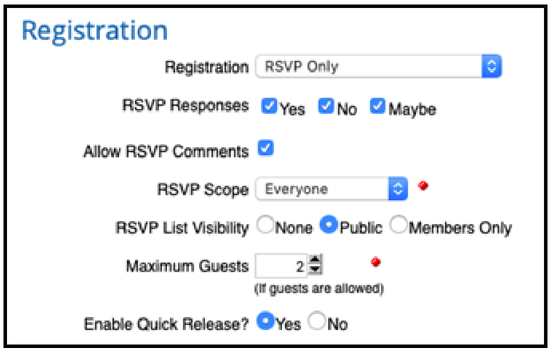
Click **Save** to save this QuickEvent and add it to the calendar, or **Cancel** to return to the Event Calendar Manager without saving.

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:



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.

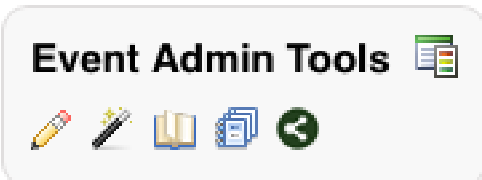
When someone responds "No", no further action is required; their response is immediately recorded in the database.

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:

QuickEvent Admin Tools

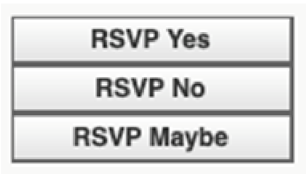
Icon	Description
(Edit)	Select **Edit** to edit the QuickEvent. You will see the Add/Edit QuickEvent screen.
(Convert)	Convert this QuickEvent to a Single Activity Event. You will be asked to confirm this step because it cannot be reversed.
(Regis-trations)	Select this option to see a list of people 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, LinkedIn Group page, or Twitter feed.

Convert a QuickEvent

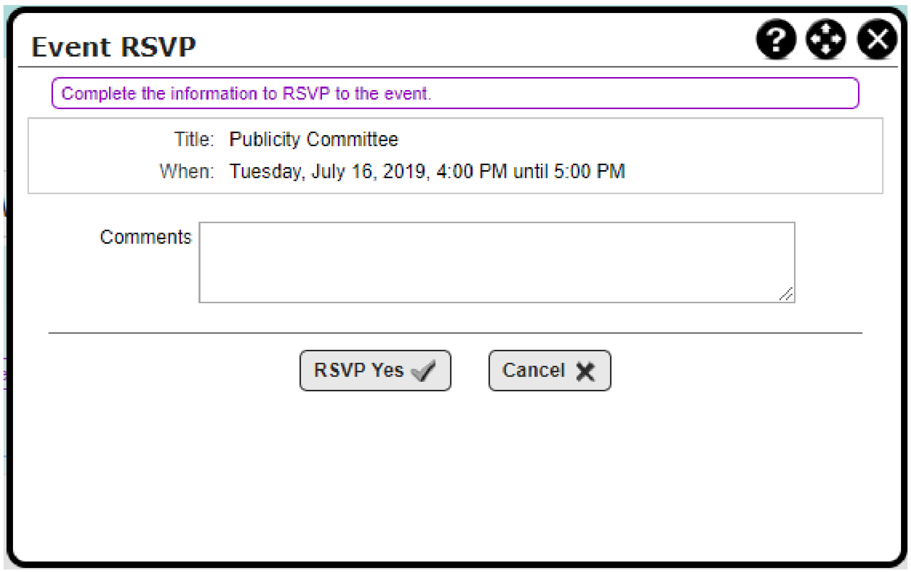
To convert a QuickEvent to a regular event, click the Convert QuickEvent icon in the admin options. You will be asked if you want to register all respondents/ registrants for the regular event, and if you want to send an email to current registrants.

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:



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:



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.

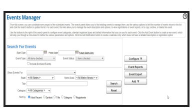
Events Manager

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:

Icon	Description
(View/Edit)	Click the **Edit** icon to jump to event detail view, including the options necessary to modify/update the event.
(Copy)	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 (Delete)	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.

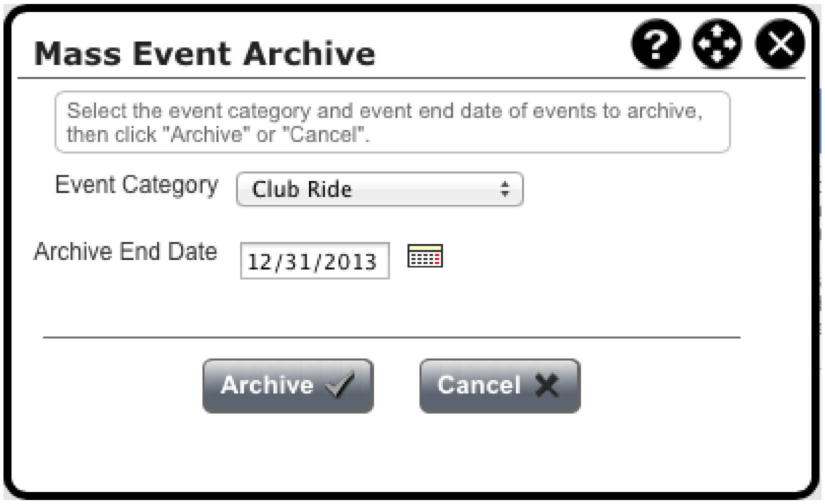
Maintain Options

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

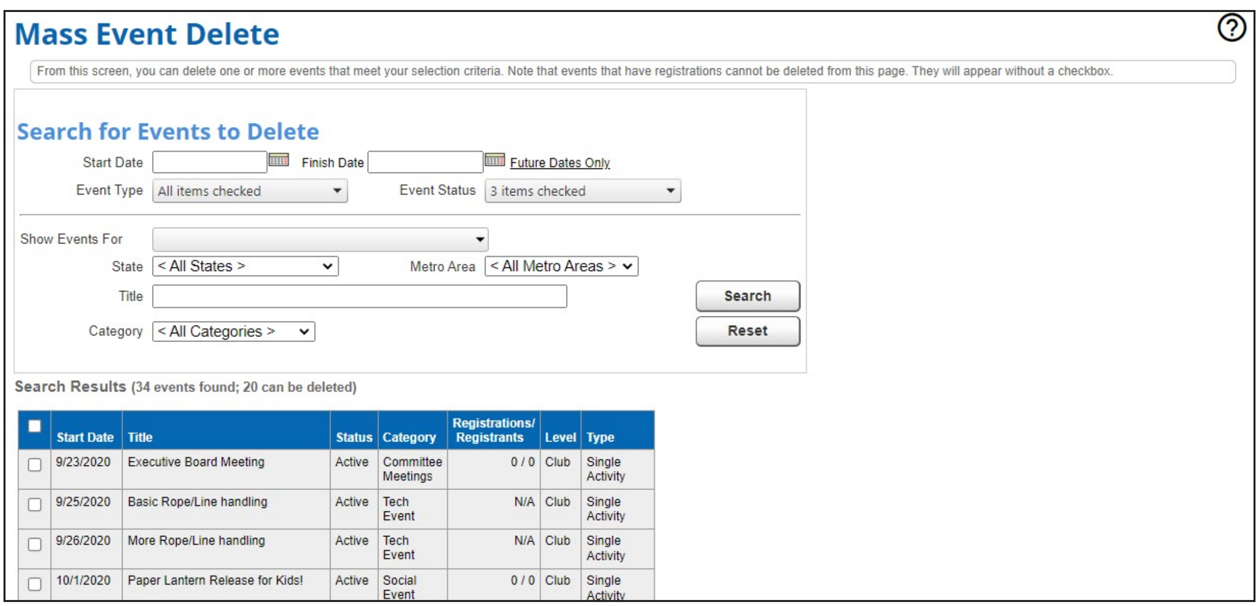
Select the **Configure – Mass Event Archive** option to archive all events within a specified category that are older than or equal to a specified date. You will see the following screen:



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.

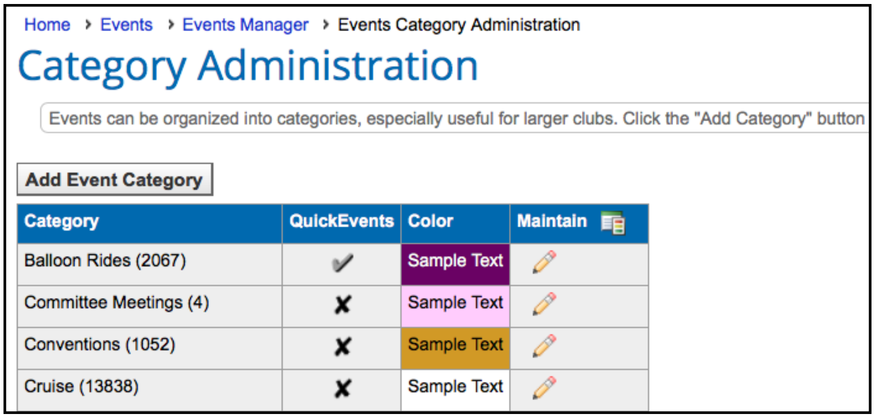


Search through events using the same search criteria you use on the Event Manager screen. Each event that can be deleted will have a check box. Select the check boxes corresponding to the events you wish to delete. Scroll to the bottom of the list and select Delete to delete the selected events.

> **Note:** Note that single or multiple-activity events with registrations and fees will not have a checkbox; these events cannot be deleted.

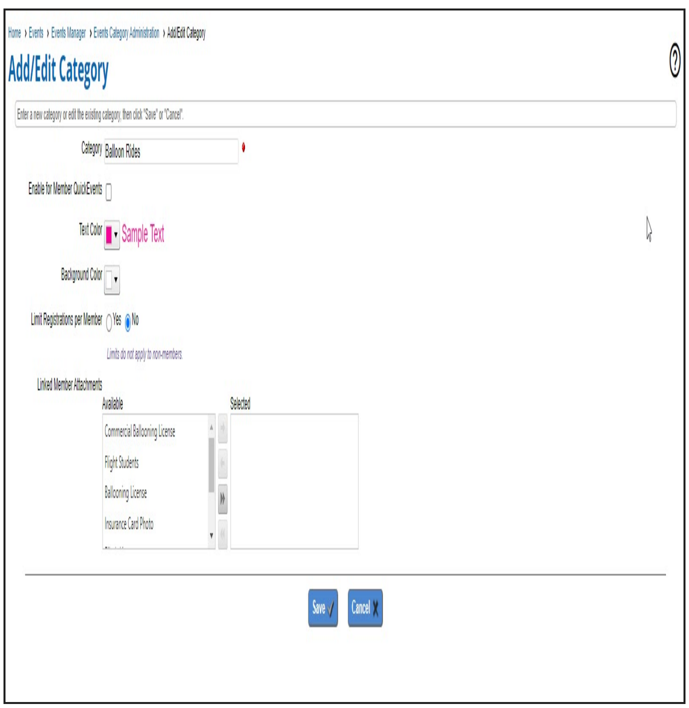
Event Categories

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:



> **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:



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.

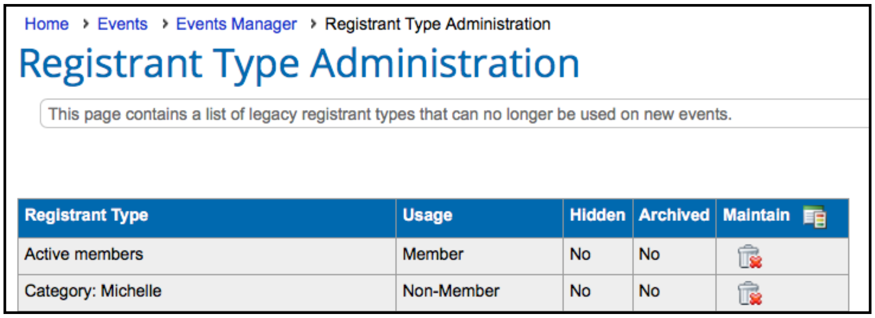
To edit an existing category, click the **Edit** icon. To remove an existing category, click the **Delete** icon. You will be asked to confirm this action.

> **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:


Home › Events › Events Manager › Registrant Type Administration

Registrant Type Administration

This page contains a list of legacy registrant types that can no longer be used on new events.

Registrant Type	Usage	Hidden	Archived	Maintain
Active members	Member	No	No	
Category: Michelle	Non-Member	No	No	

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.

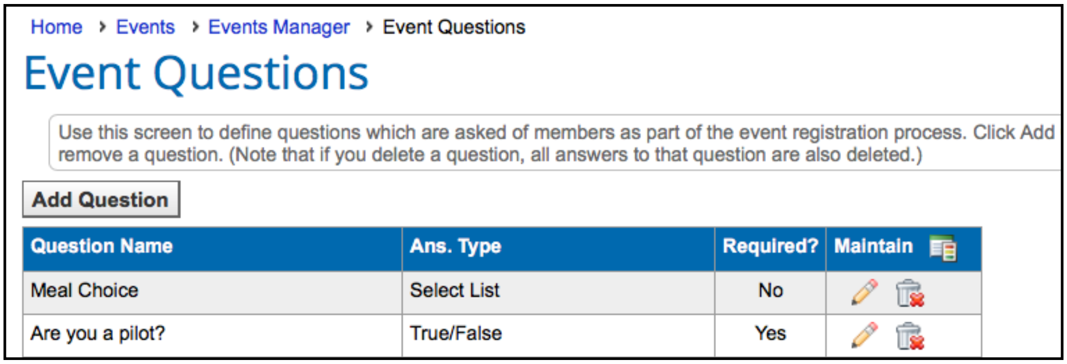
> **Administrators:** To learn how to configure questions on your ClubExpress website, go here.

> **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.

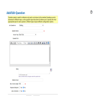
You can also reuse data you've already collected from your members by linking an event question to contact information from the Member Profile and Additional Member Data questions.

> **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:



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.

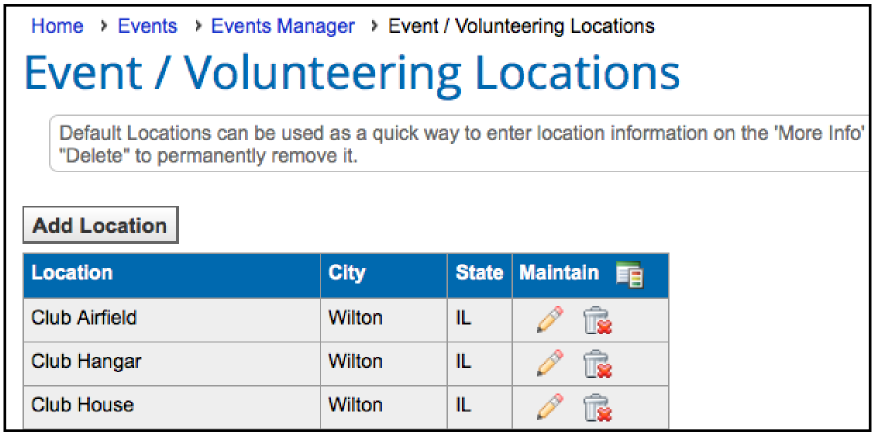
Some answer types support an **Other** field. Select “Yes” to display this option at the end of your specified options. You do not need to add ‘Other’ to your list; the system will do it for you. If the user selects this option, he or she will see a field where another response can be entered.

Some answer types support a **Comments** box. Select “Yes” to display this box, so that event registrants can add comments beyond their main answer.

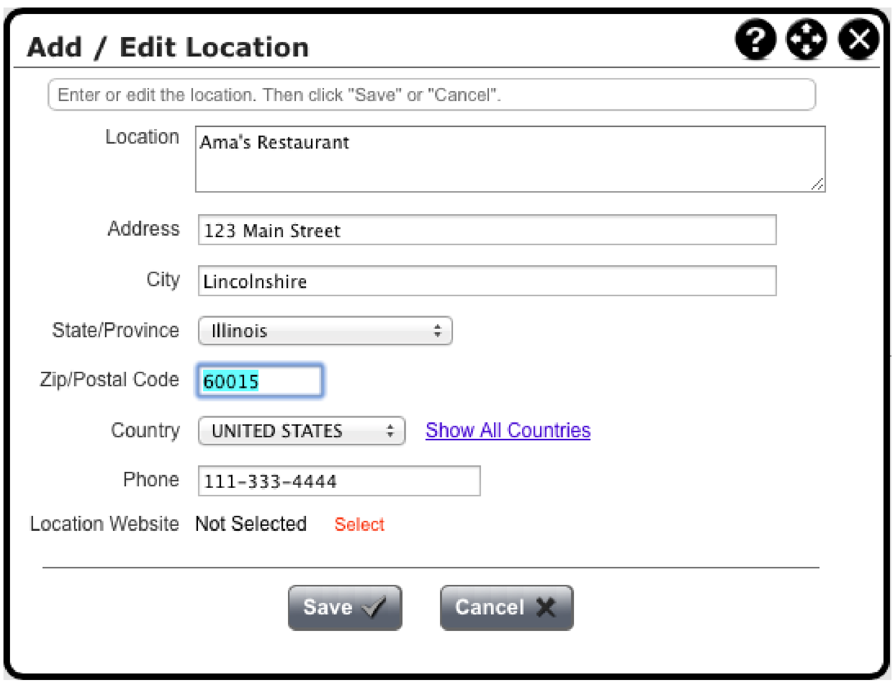
Click **Save** to save your question and return to the Event Questions grid, or **Cancel** to return without saving.

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:



Click the **Add Location** button to add a new location. You will see the following screen:



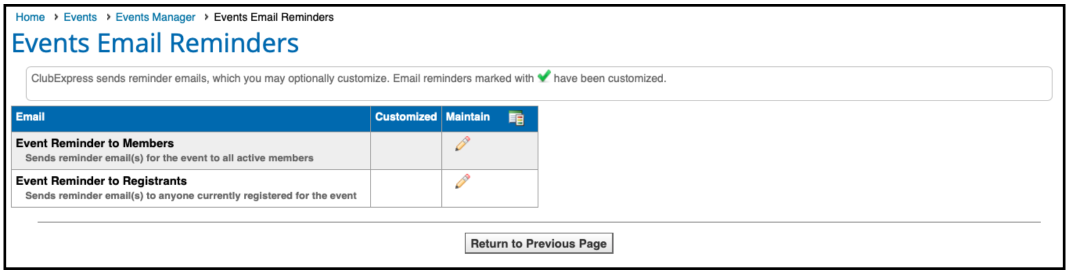
Enter the default location and click **Save**. Or click **Cancel** to return without saving.

Click the **Edit** icon to edit an existing location. Click the **Delete** icon to delete a saved location.

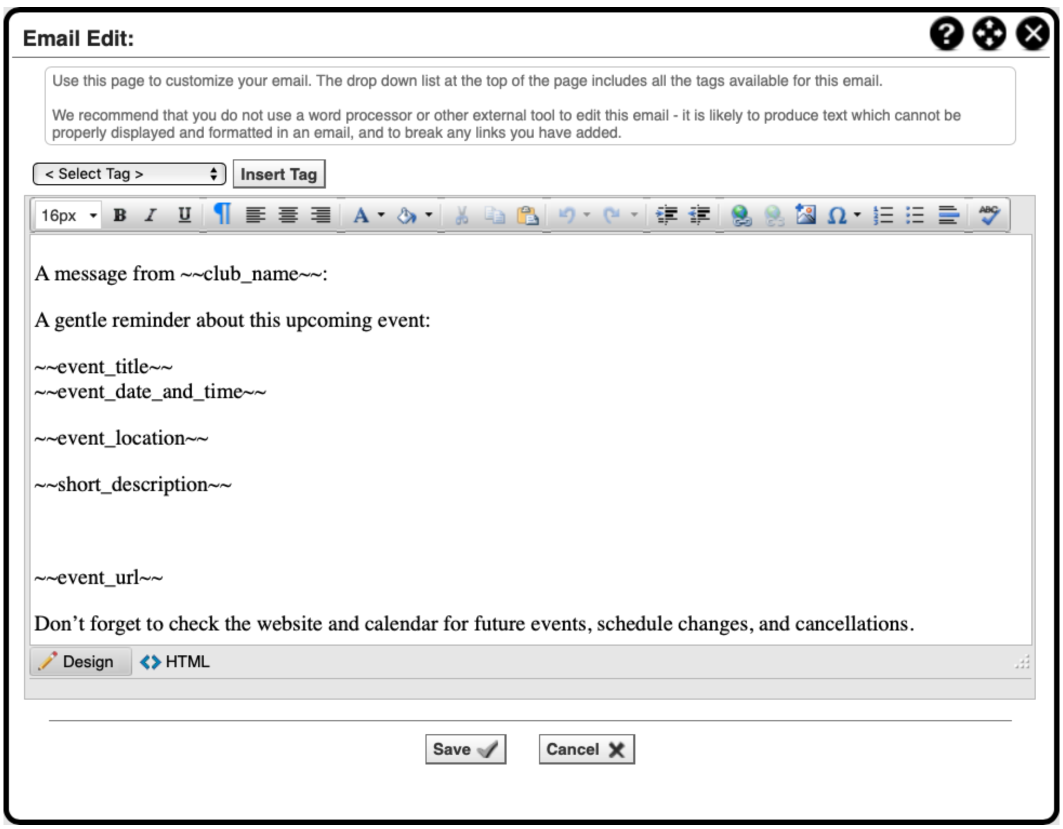
> **Note:** The Volunteering module uses this same list of frequently used locations. Further, any locations you add to the Volunteering module will be added to the Events module.

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:



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.

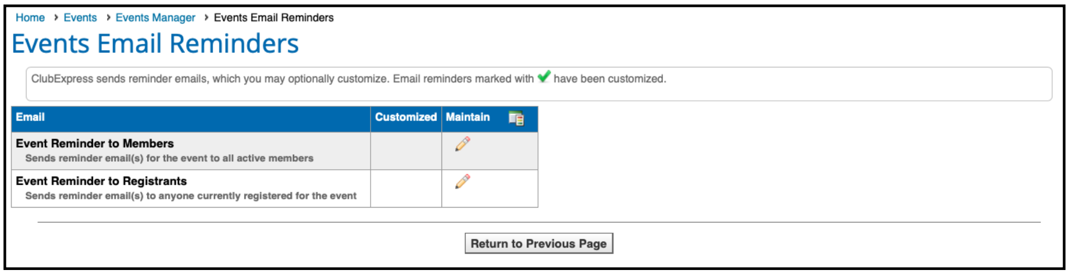
Exports

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.

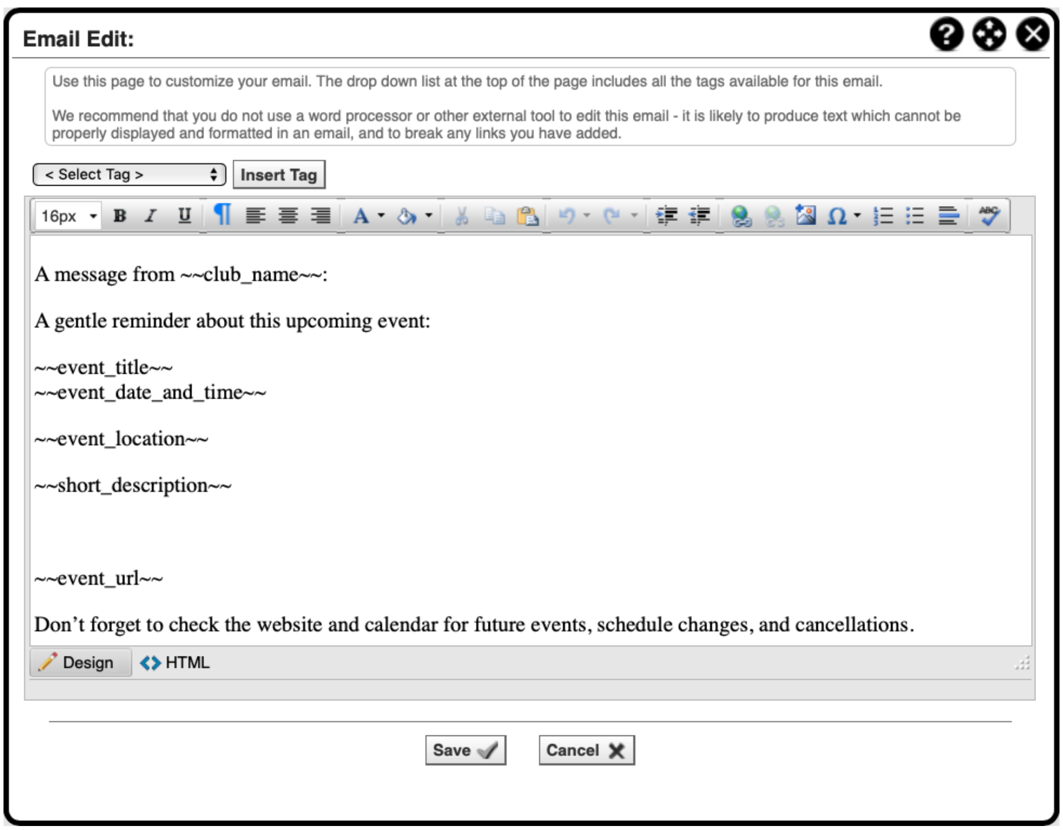
Event Reminders

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:



Click the Edit (pencil) icon to edit each reminder. You will see the following screen:



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	X	X
Select a subgroup	X	X
Visibility	Only (1) visible to everyone, (2) visible to members only, (3) visible to everyone, details for members only	X
Event Web Page	X	X
Repeating Dates		X
Multiple Days		X
Short Description	X	X
Formatted Description		X
Event Coordinator	Only one (1) contact allowed	Multiple contacts allowed
Location	X	X
RSVP Registration	X	
Cancellation cut-off	X	X
Cancellation Policy		X
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, committee, member type, subgroup, mailing list category
Allow guests	X	X
Charge a fee		X
Track attendance		X
Ask registrants questions		X
Configure automatic reminder emails		X
Blast emailing with event-specific distribution lists	X	X
Waitlist		X
Share event to social media		X

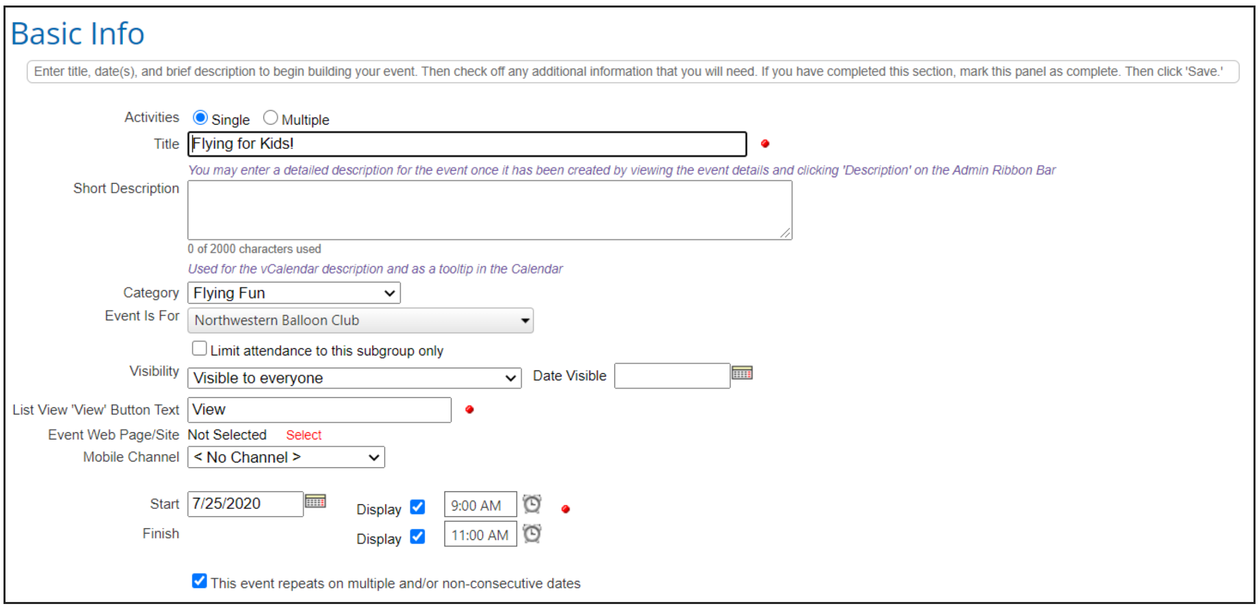
Create an Event

Control Panel > Website > Website Modules > Events

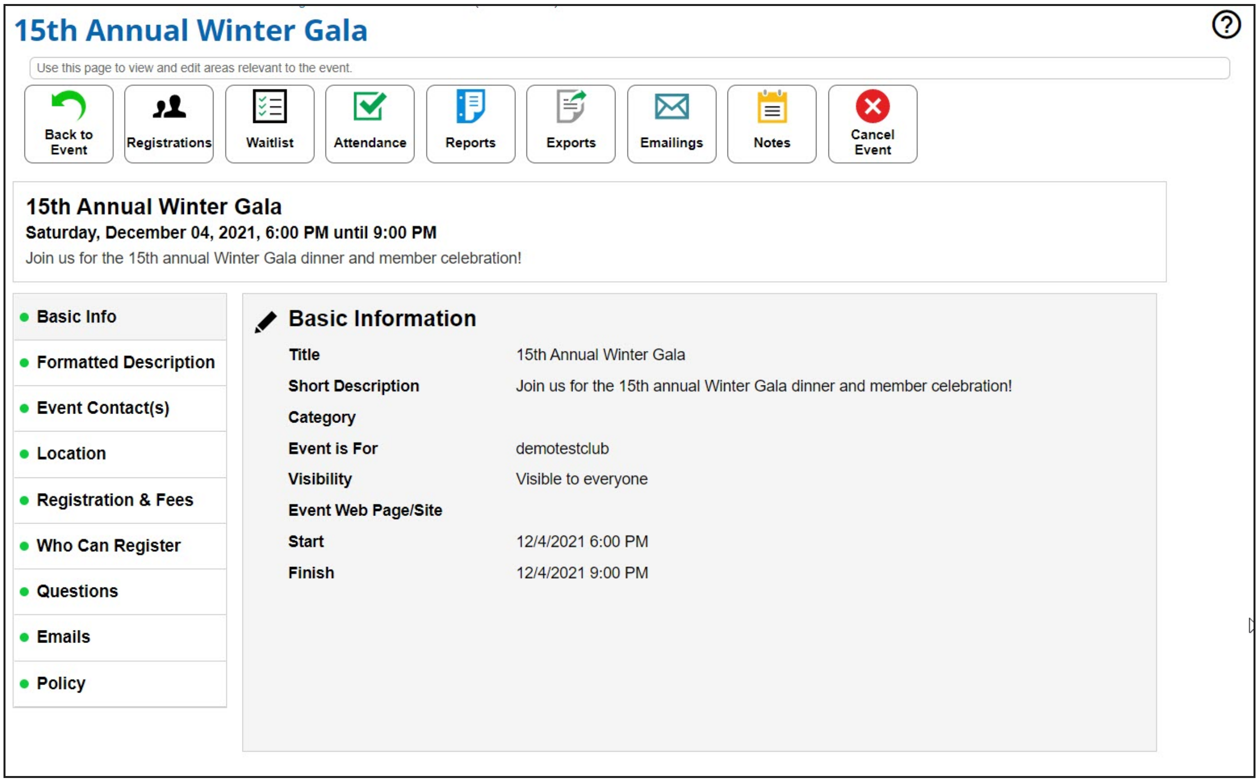
> **Administrators:** Check out our step-by-step guide to creating a Single Activity Event; see How to Create a Single Activity Event.

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).



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:



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.

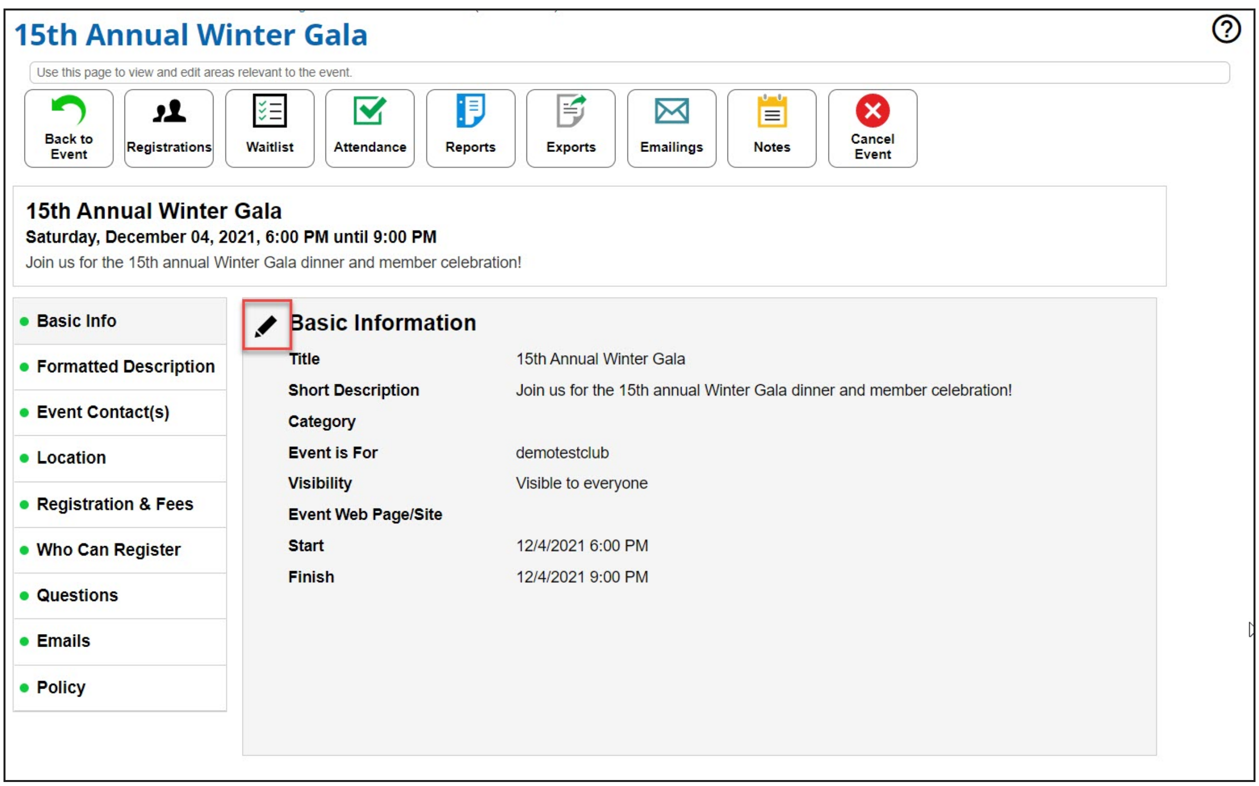
- A **Notification** is an entry on the calendar that people do not register for. Rather, it tells them about a deadline or milestone, something they need to know about that is date-constrained in some way. Or it could be an event created by another organization (with a link to the other website.)

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.



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.

Visibility

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.

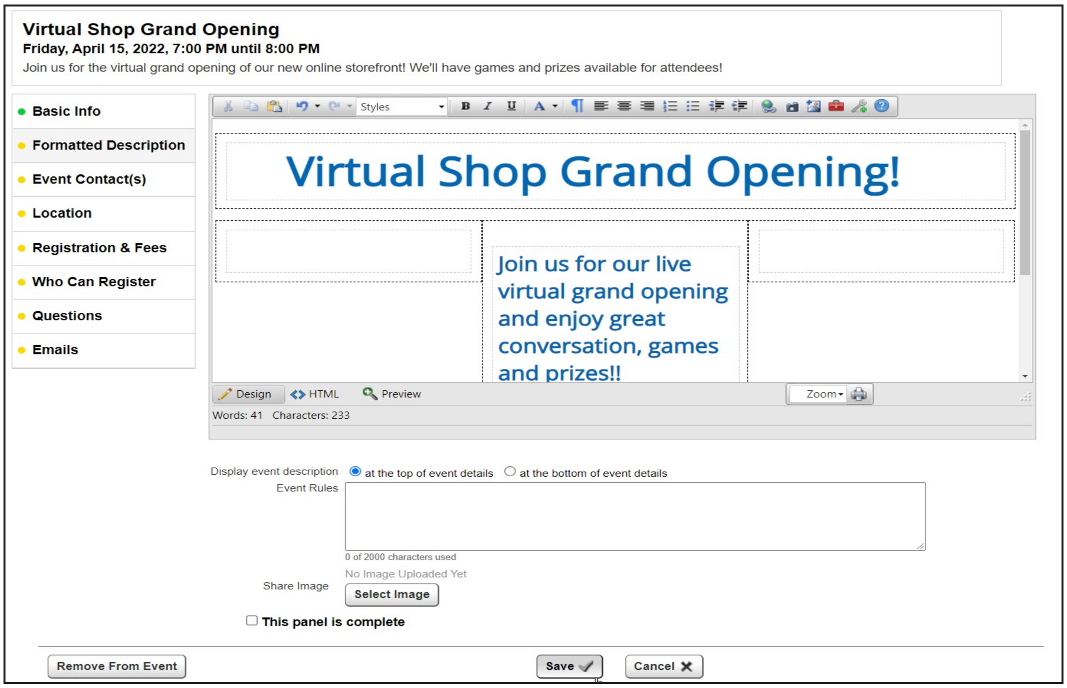
When you have completed a panel, check the box in the bottom left corner to indicate that “This panel is complete.” It controls the progress bar on the main event admin screen.

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:



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.

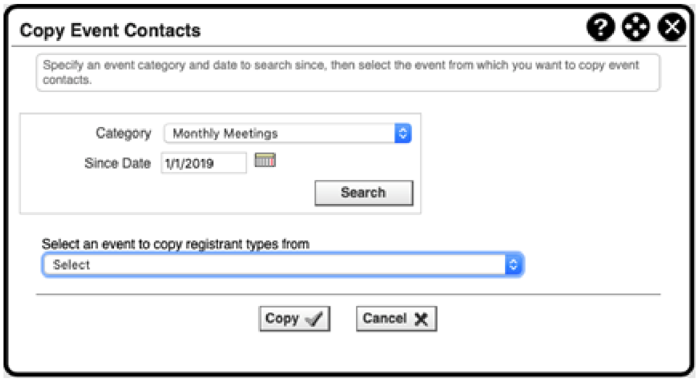
Click the **Select** link to select a member as the event coordinator. When you do so, additional options will appear:

- 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:



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.

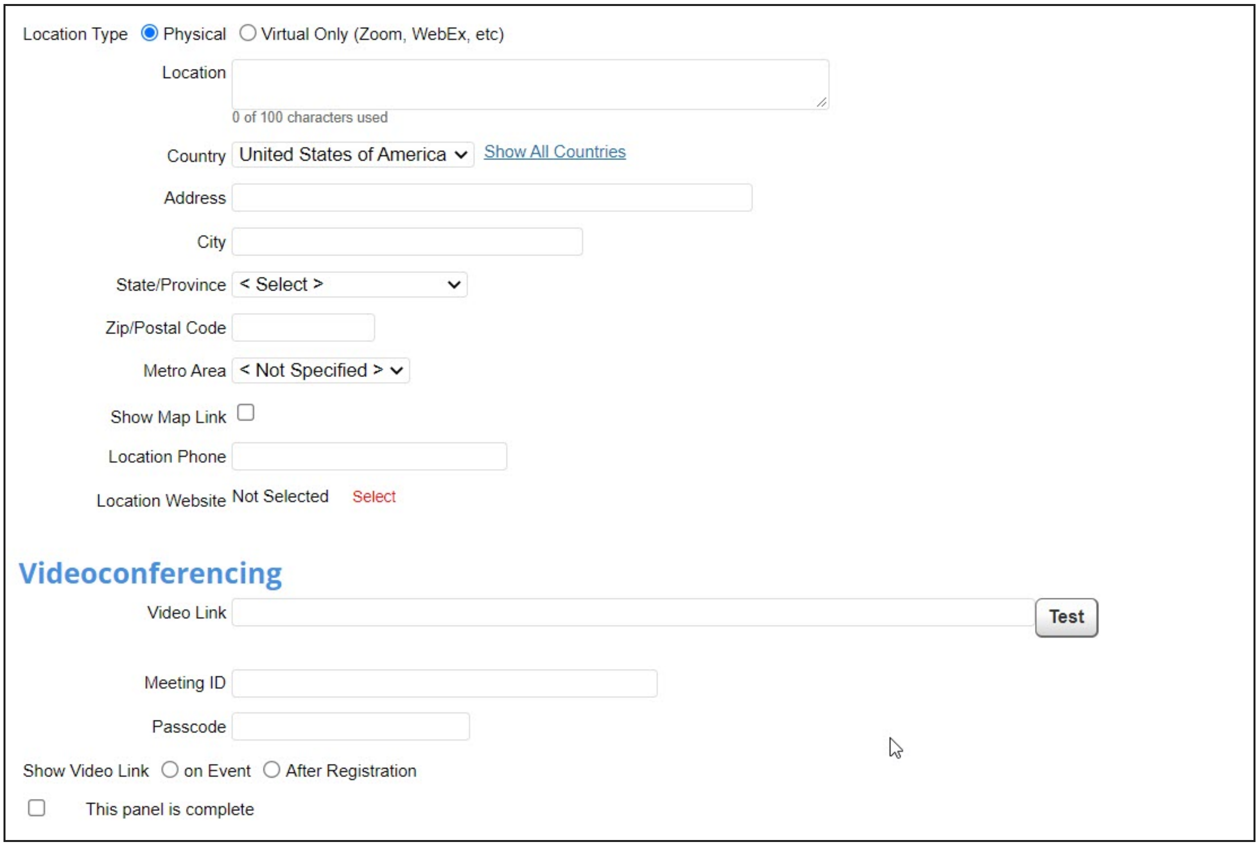
Click the **Display Sequence** button to change the order in which event coordinator appear. You will see the standard ClubExpress display sequence dialog.

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.



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.

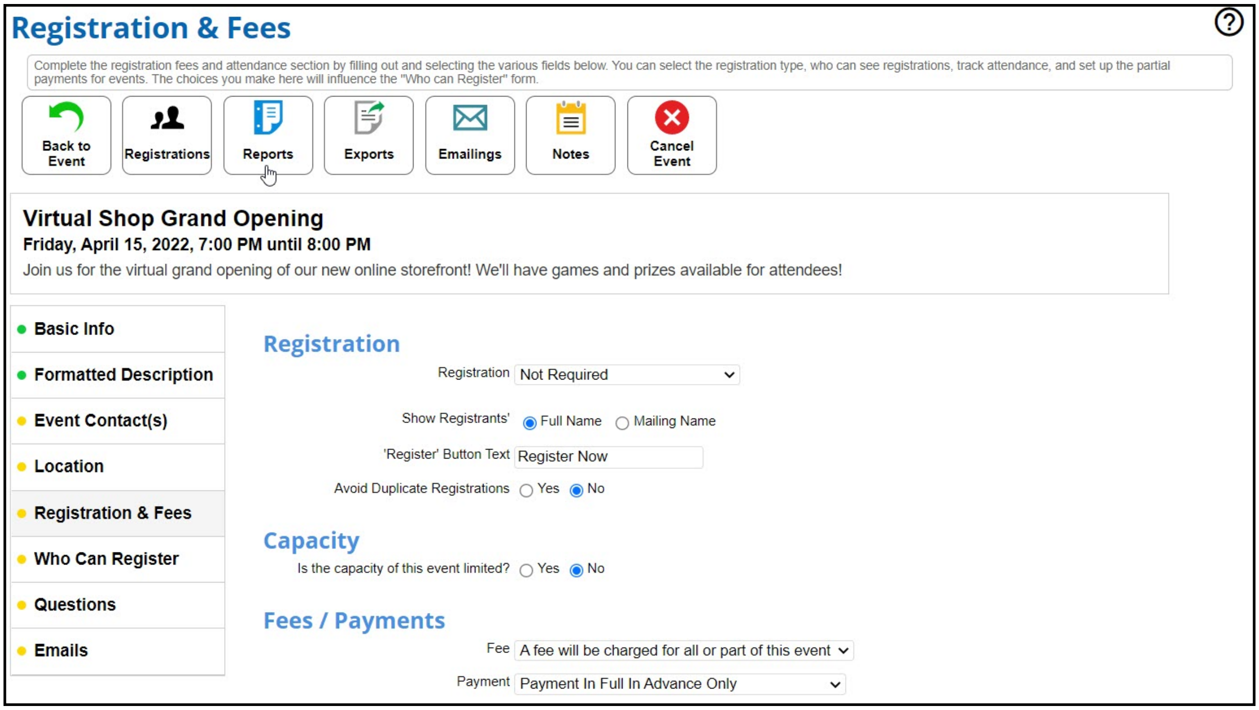
Videoconferencing

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

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 initial default while you are defining the event.
Closed	A note is shown that online registration has closed.
External	The button is displayed. Clicking it jumps to the specified external site.

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

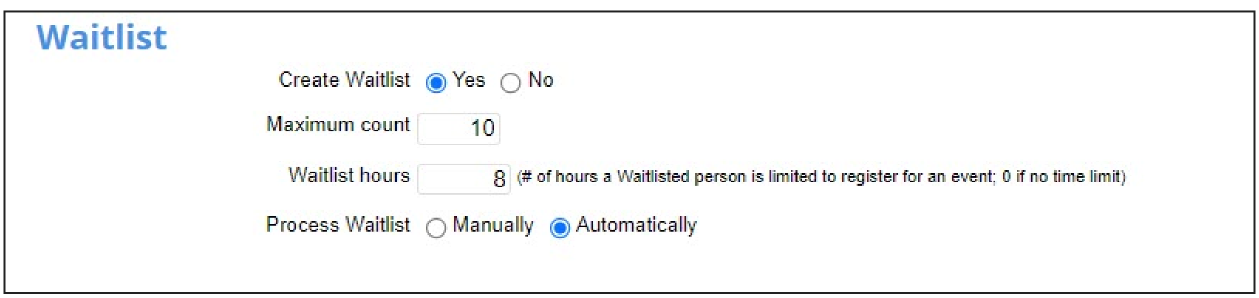
If the event capacity is limited, select **Yes** then specify the maximum number of attendees that can be accommodated for the event. Capacity is strictly enforced for members and non-members registering for events (although admins can always add members even if the event is full.) If an event is close 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.



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.

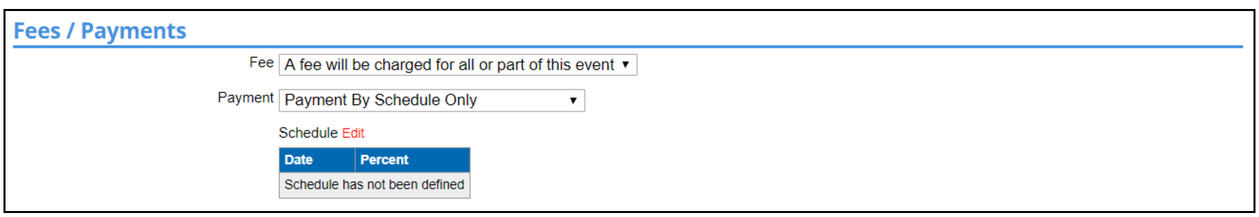
Determine how the Waitlist will be processed, either manually or automatically. A Waitlist processed manually will require administrators or event coordinators to send notifications to Waitlisted registrants manually by notifying each person individually or all Waitlisted registrants at the same time. 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

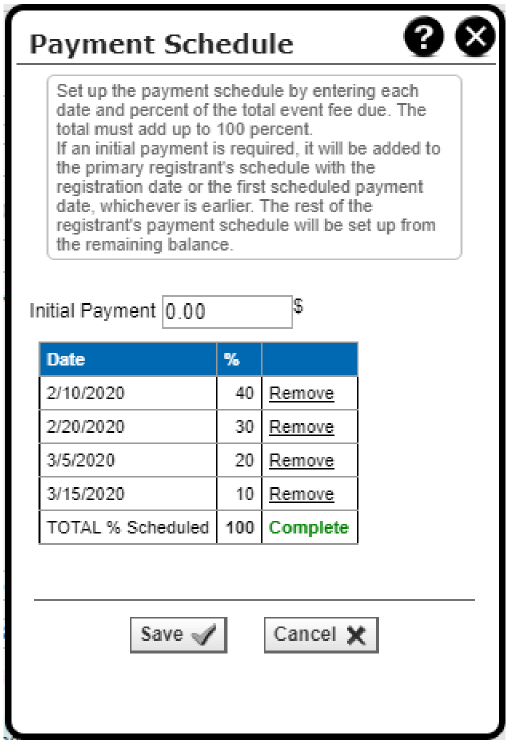
Specify whether a fee is charged for all or part of the event. For a single activity event, the system will later prompt you to enter the fee(s) for the whole event for each registrant type. For a multi-activity event, the system will later prompt you to enter the fee(s) for each activity for each registrant 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

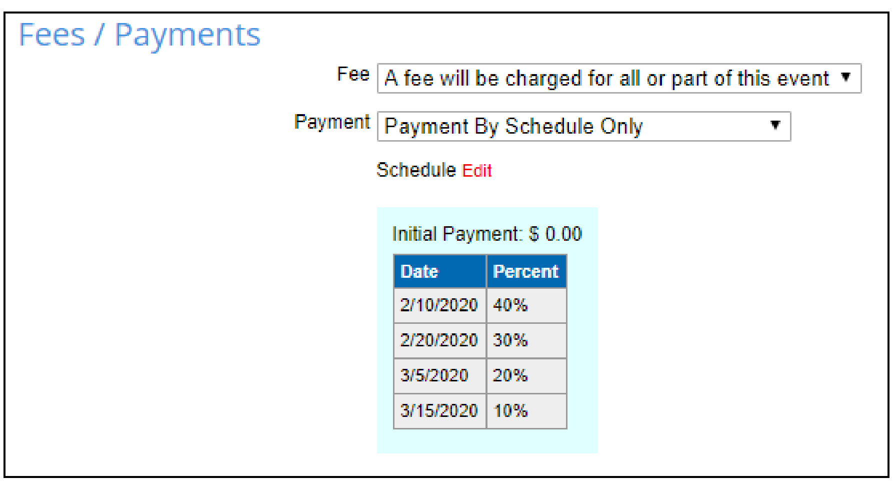


Click Edit to configure the payment schedule.



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.



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.

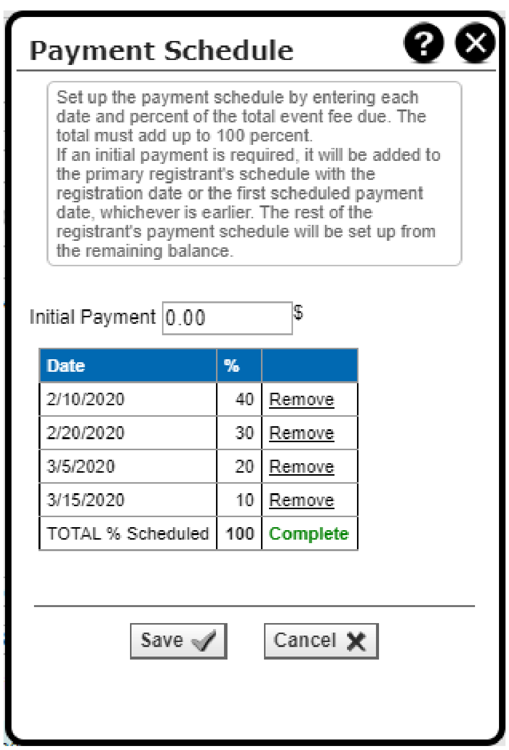
Scheduled Payments

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 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.
Non-Member of a specific category	When non-members in a category may pay a different fee than other non-members. **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 Members	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.
Committee Members	When committee members are eligible for a different fee. **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. **Example:** Members of the chapter sponsoring the annual convention might pay less than other members.
Member Guest – secondary or tertiary	When members can bring other people in their own membership, such as spouses, children, or business associates.
Member Guest –	When members can sign up other members of the organization to be their guests.

Option	Description
another member	
Member Guest – a non-member	When members can bring non-members to the event as their guests.

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.

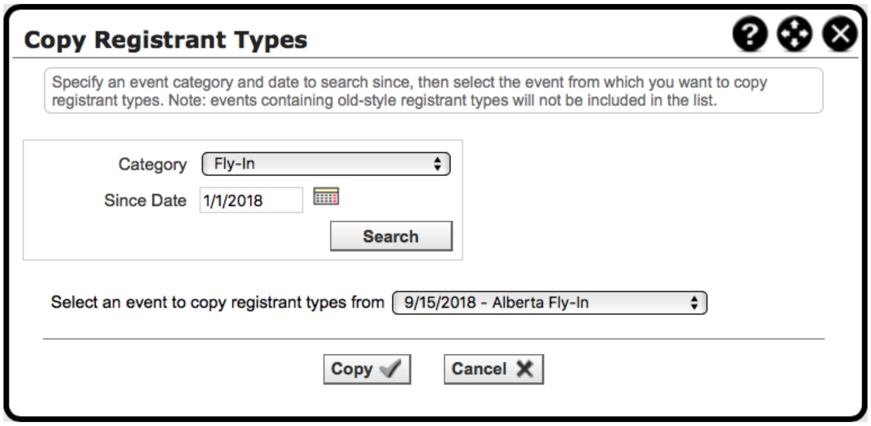
Click the **Who Can Register** arrow or edit icon to define these registrant types.

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:



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.

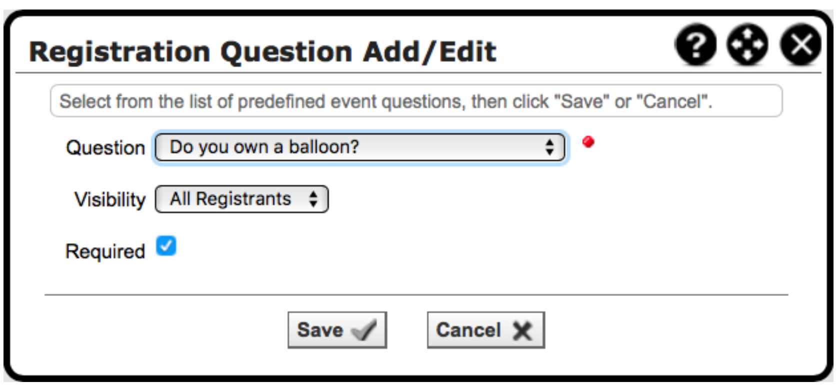
Questions can be defined at multiple levels:

- 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:



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 question 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 questions only, which activity the question 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.

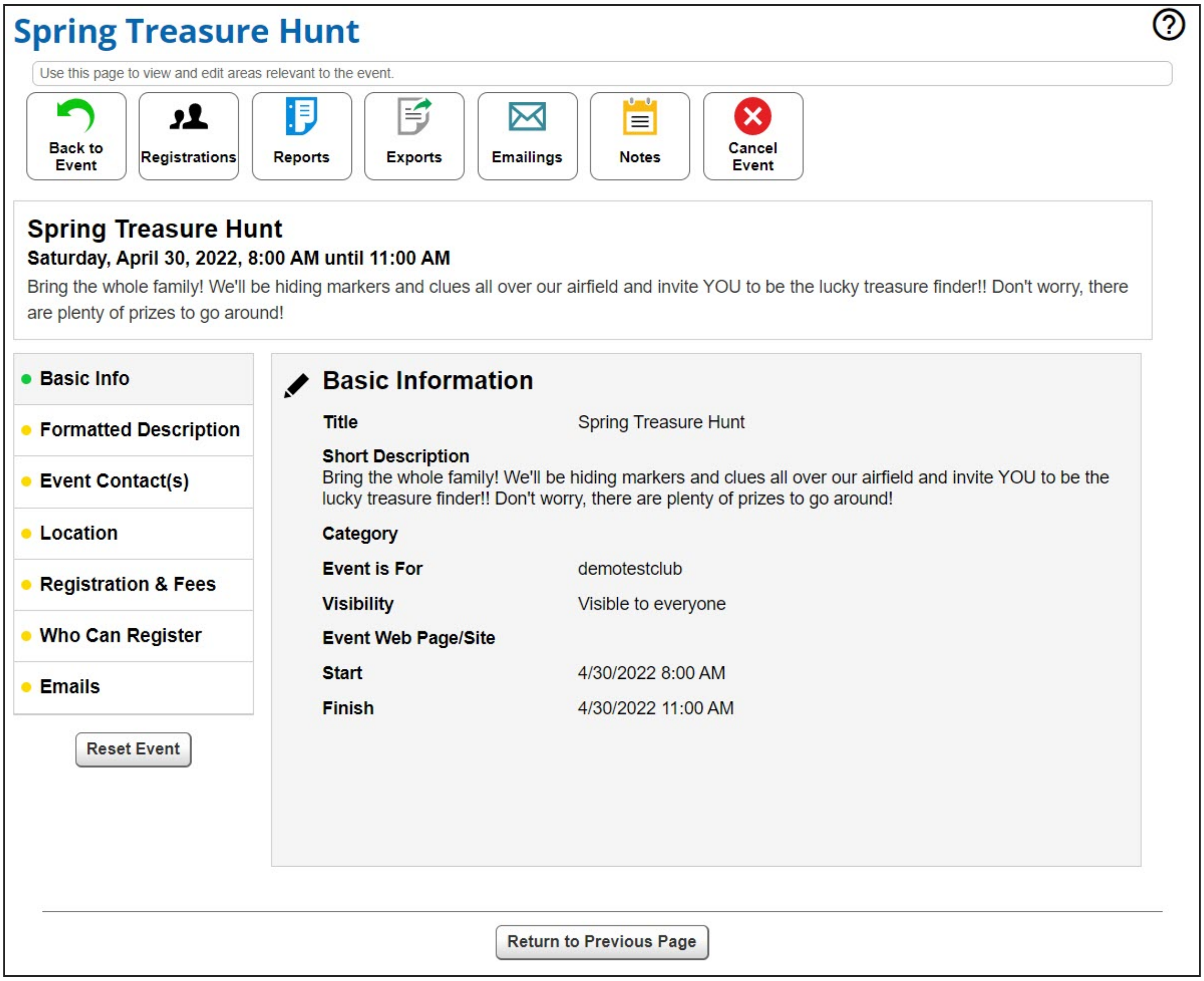
Event Definition is Complete

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

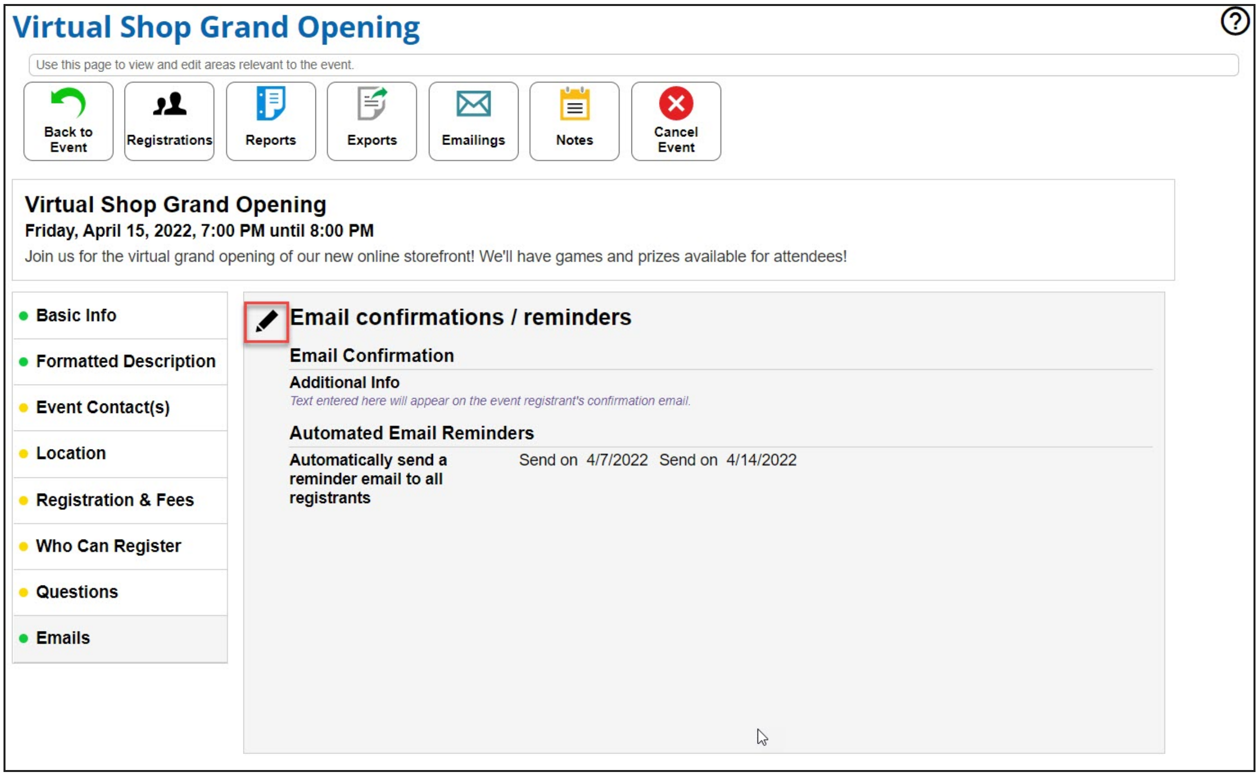
When you create a new event and save the **Basic Info** screen (and assuming that you checked the “This panel is complete” box, you will be taken to the event admin screen. Initially, it looks similar to the following:



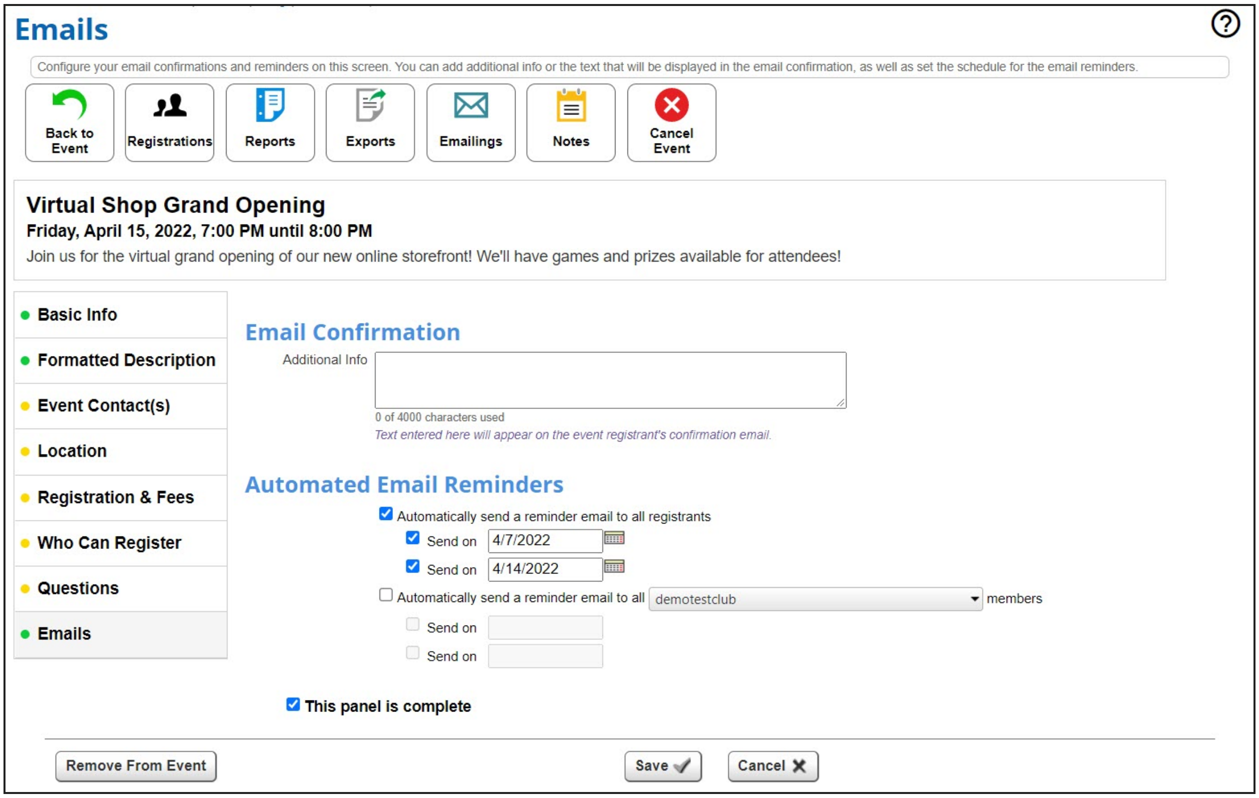
At the top of the screen you'll see the Event Manager Buttons. Click **Back to Event** to jump to the screen that users will see when they click an event in the calendar. It shows the details of the event and allows them to register, add the event to their calendar, see who else is coming, or view an 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 here.

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.



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.

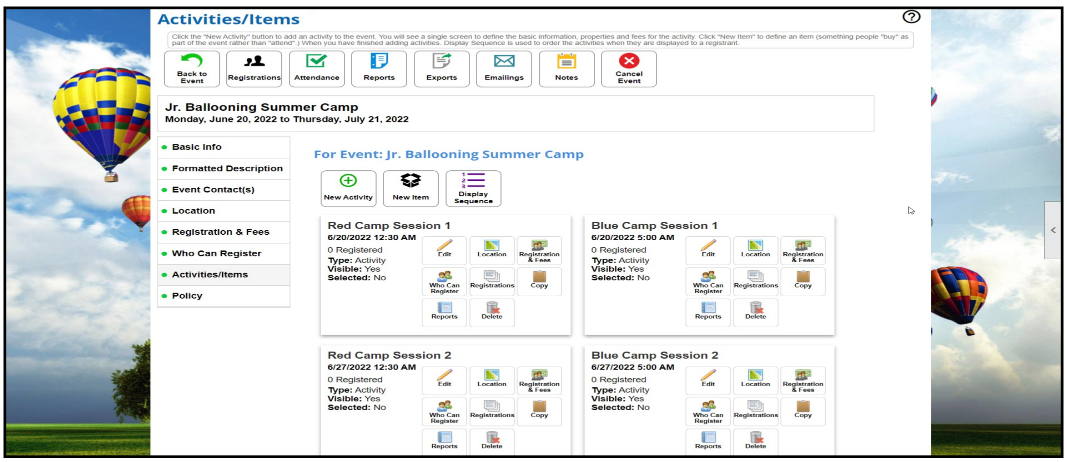
When you do so, a new menu option appears: **Activities/Items.**

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.

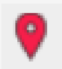
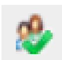
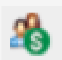
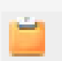
Click the **New Activity** button to create an activity, something that people attend. Click the **New Item** button to create an item, something that people purchase (such as an event sweatshirt.) An Activity has a date, time and place associated with it, whereas an Item does not.

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:

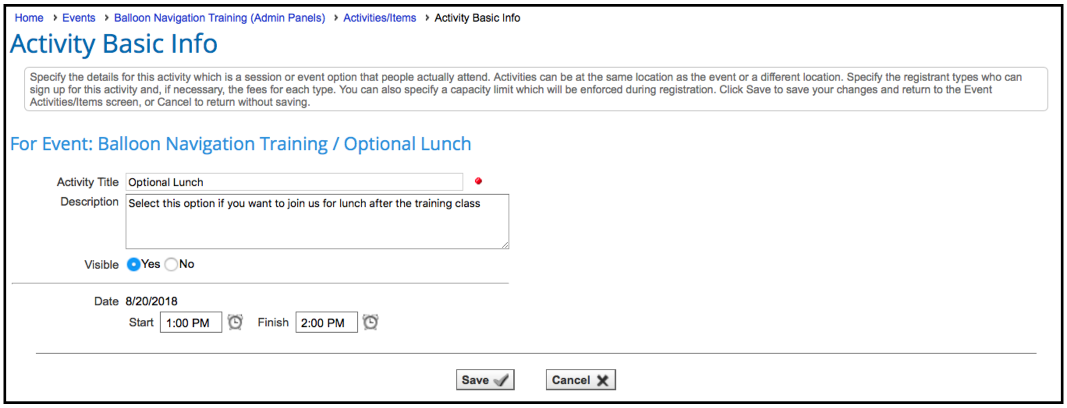
Icon	Description
	Edit the Basic Information for this activity or item
	Specify the location of an activity. This option does not appear for items.
	Configure registration and fee details for an activity or item.
	Who can register for this activity or purchase this item, and what will they pay.
	Configure any activity- or item-specific questions.
	View who has registered for this activity or item.
	Delete this activity or item. You will be prompted to confirm this action. If there are paid registrations 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 available for this activity or item.

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:

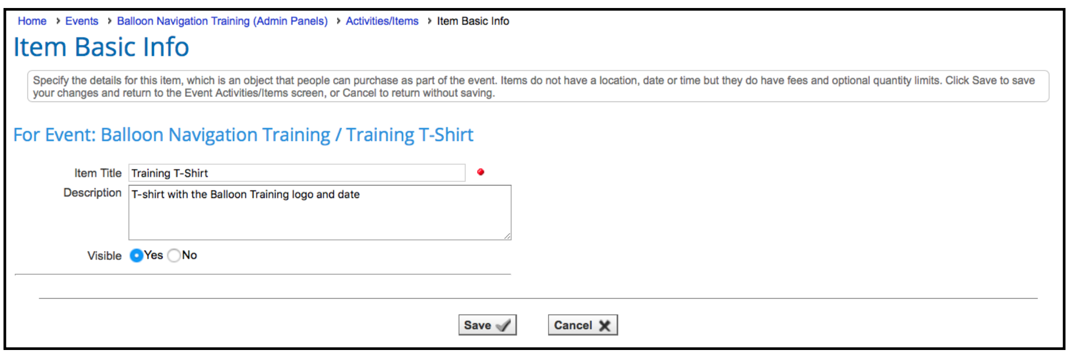


Each activity has a title, description and visibility. Activities also have a date and start and finish times.

Click **Save** to return to the Activities/Items screen, or **Cancel** to return without saving.

New Item

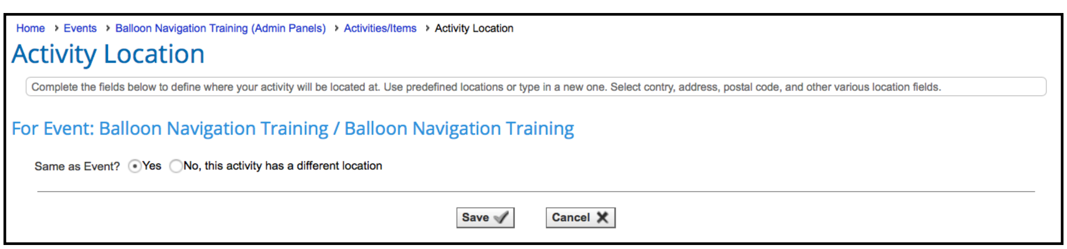
Click **New Item** to define an item for the event. The following screen is displayed:



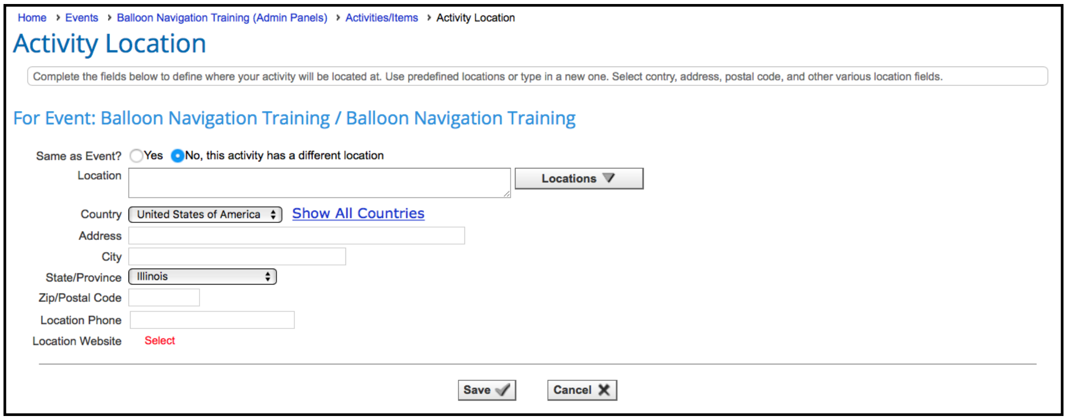
This screen is the same as the New Activity screen, except without the date and time fields.

Activity Location

Click the **Location** icon for an activity to see the following screen:



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:



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:

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.

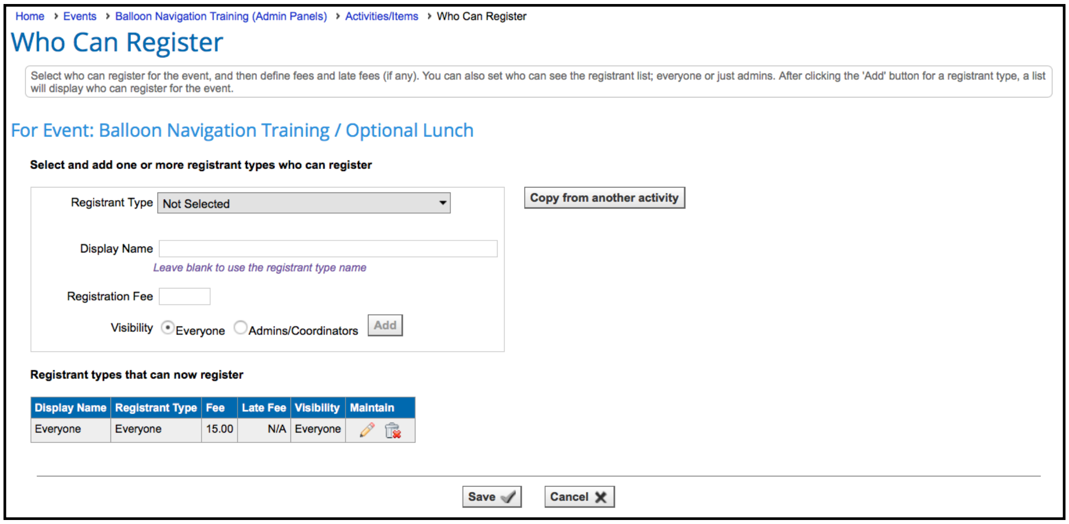
Select the applicable Sales Tax Rate, Financial Account and QuickBooks®Item Name to be associated with the activity.

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:



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.

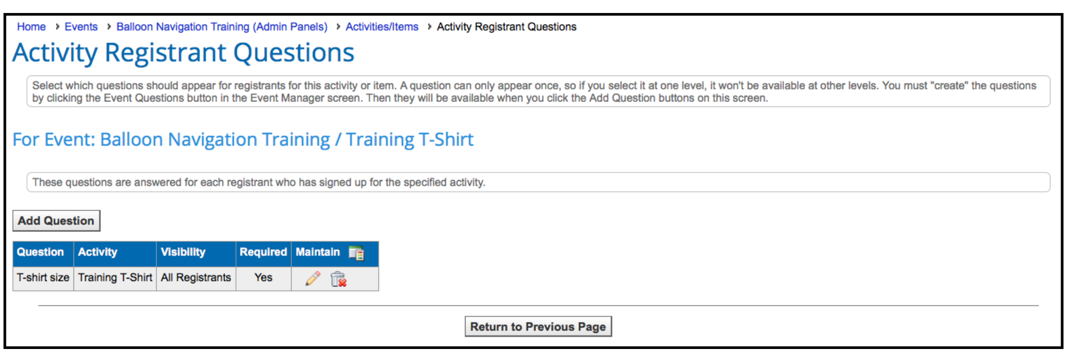
> **Note:** Remember that only registrant types you add will be able to register for the activity or select the item. Be sure to add all registrant types you want to be able to add or select the item.

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:



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

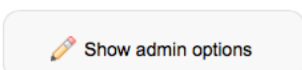
When you have defined all the activities and items you need, check the "Panel is Complete" box and click **Return to Previous Page.** The "Activities/Items" progress arrow will now be in green.

Editing Events

Control Panel > Website > Website Modules > Events

Once an event is created, you can show the event Admin Panels in two ways:

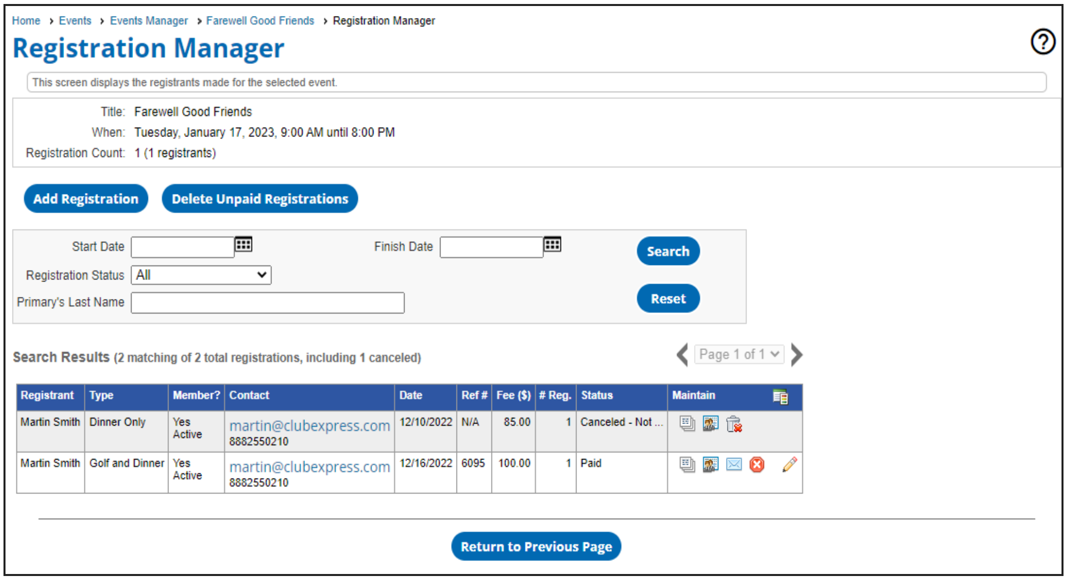
- From the Event administration screen, click the **Edit Event** (pencil) icon.
- From the Grid View or a List View, click the event title. You will see the Event Details screen, with a special option in the top right corner:



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:



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 non-member 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:

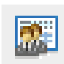
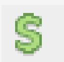
- Paid
- Open – still to be paid.
- Cancelled.
- Cancelled – not paid in time limit (for events where the Immediate Payment Required option has been enabled and the registration was not completed within the 30 minute time limit.)

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.

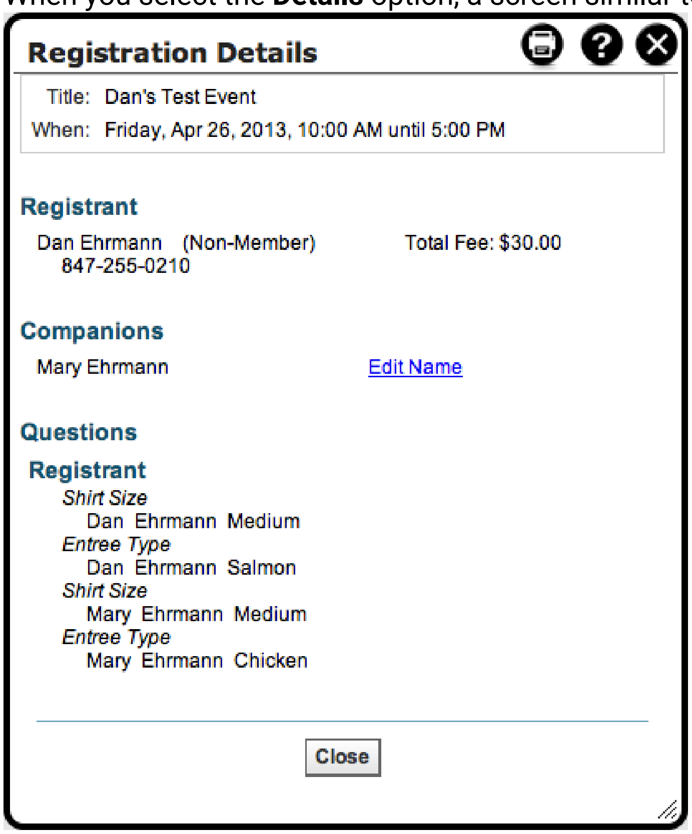
Click the **Delete Unpaid Registrations** button to cancel and completely remove registrations that have not been paid, perhaps to free up capacity. You will be asked to confirm this action.

The following options are available in the Maintain column:

Icon	Description
	View registration details.
	Edit this registration.
	Jump to the member’s Profile. This option is only available for member registrations.
	Jump to the Payment page for this Open (unpaid) registration.
	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.)
	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:



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.

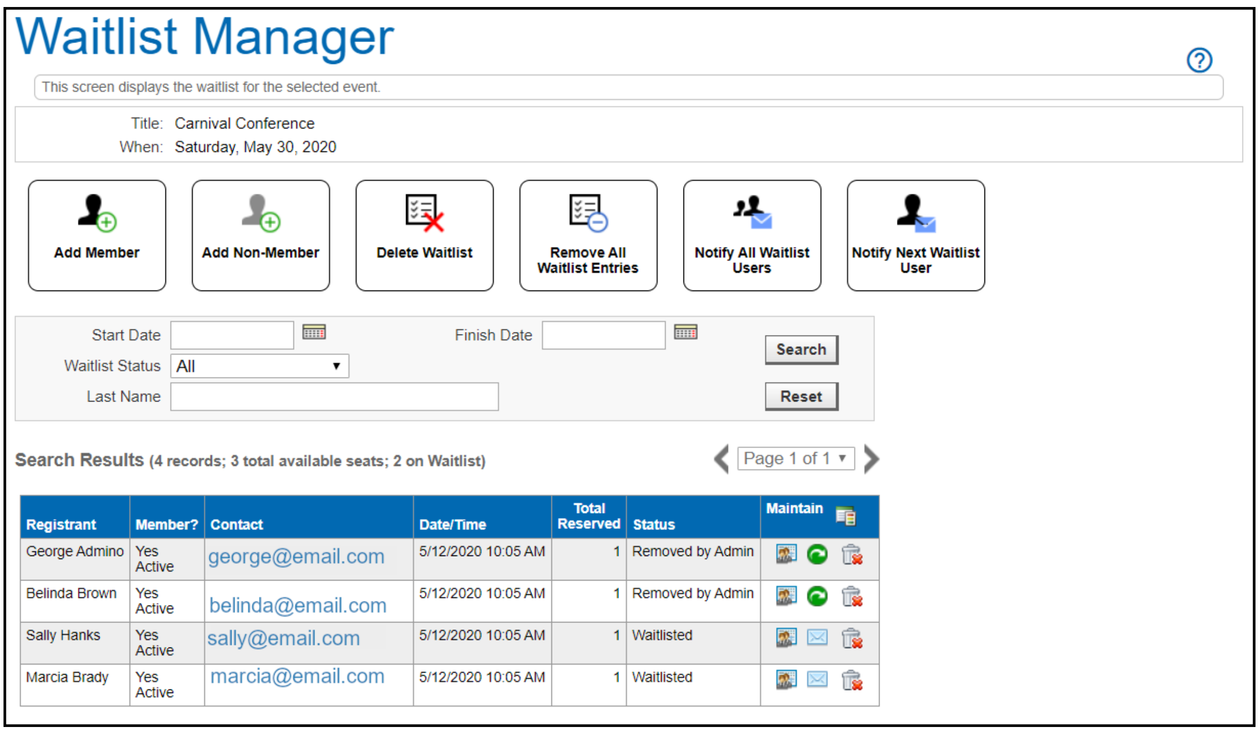
Waitlist

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:



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:

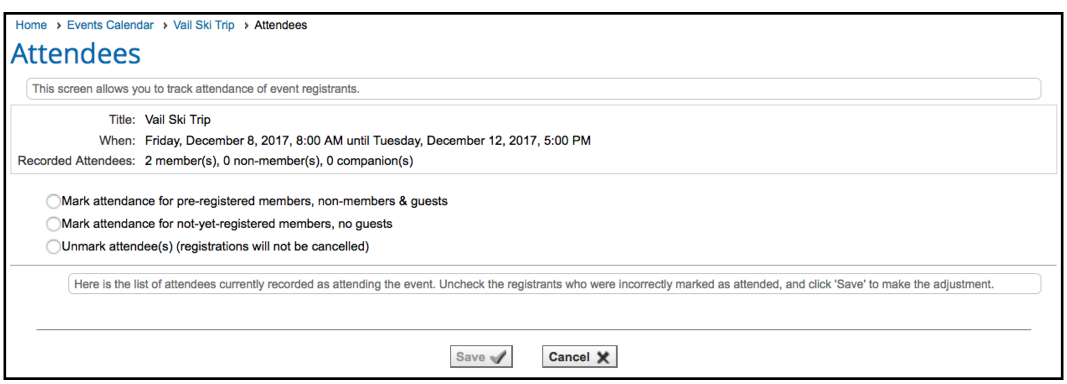
- **Waitlisted** - The user has been added to the Waitlist.
- **Send Notification** - The user has not yet been notified via email.
- **Notified** - The user has been notified via email.
- **Time Expired** - The elapsed time specified in the event Waitlist section of Registration & Fees has passed.
- **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:

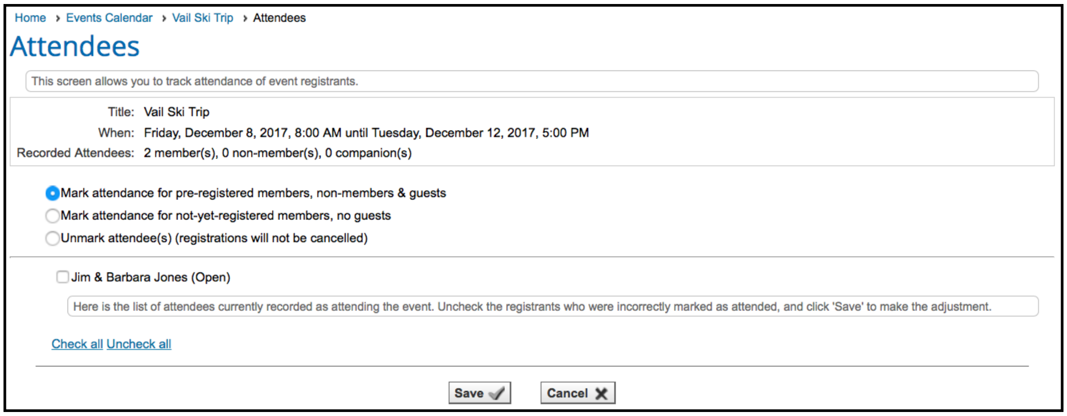
- **Edit profile** - Takes the administrator to the member's profile (not available for non-members).
- **Reactivate user** - Adds a removed or timed-out user back to the Waitlist.
- **Notify user** - Sends the user an email notifying them that a spot for registration is open.
- **Remove user** - Removes 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):



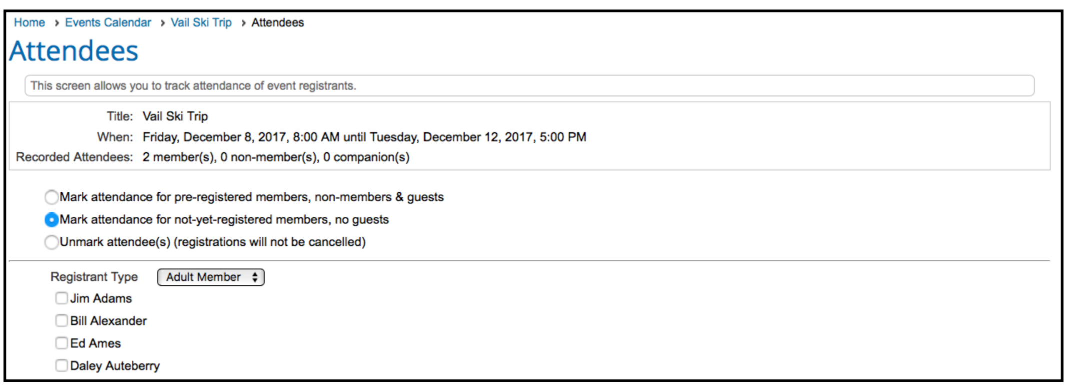
Select “Mark attendance for Pre-registered members, non-members & guests” and the screen will refresh as follows.



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:

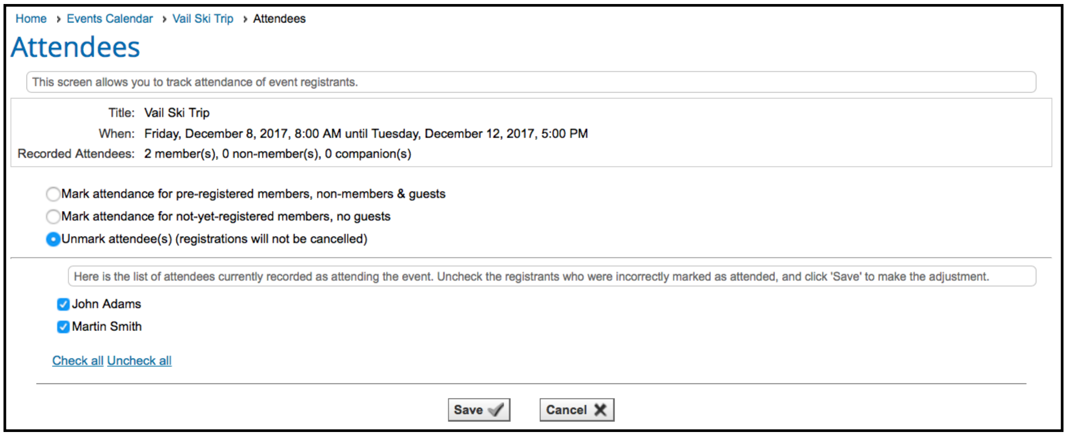


You will see an alphabetical list of members who are not registered for the event. Select a registrant type then check or uncheck as many people as you need to record, then click **Save**. The system will generate the event registration records, send an email to confirm their registration, and flag their 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.

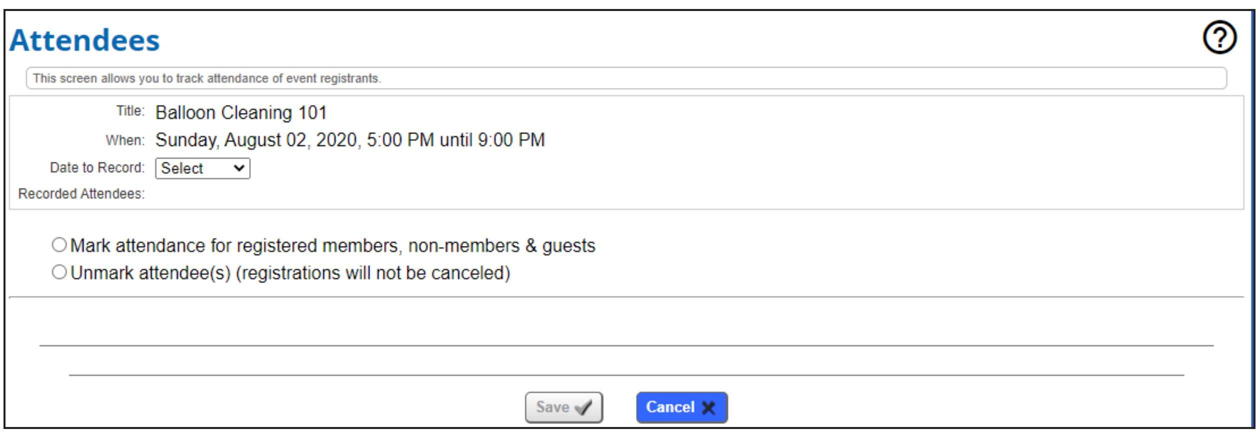
Note that this option is not available for multi-activity events.

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:



Uncheck the box beside anyone who was flagged as attending in error.

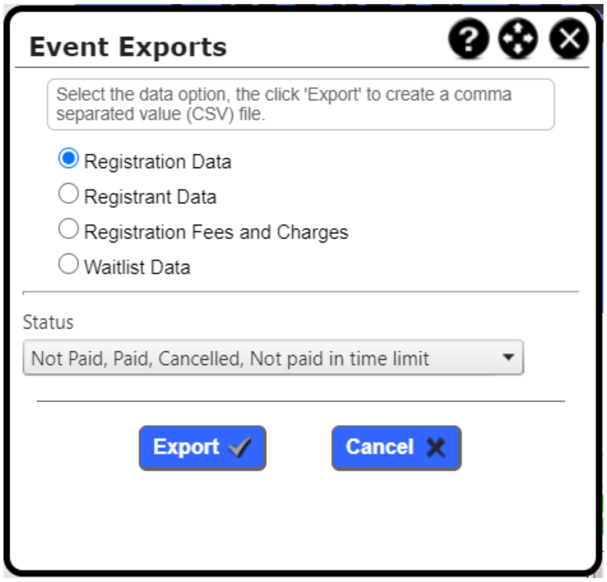
If you are marking attendance for an event which repeats over multiple dates, you have the option to mark attendance for a specific date.



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:



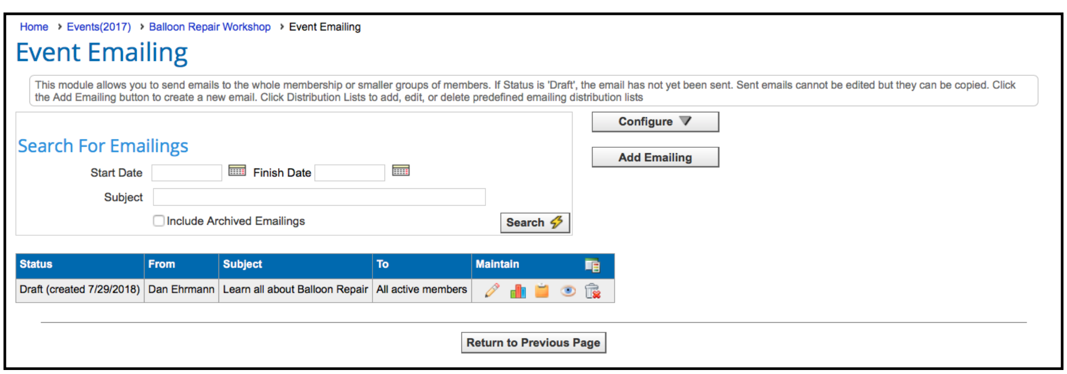
Because of the nature of event registration data, it's not possible to include everything into a single export file. Each registration may contain multiple registrants, and each registrant may be signed up for multiple activities. You can also have event-specific questions at each of these three levels. 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:



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*

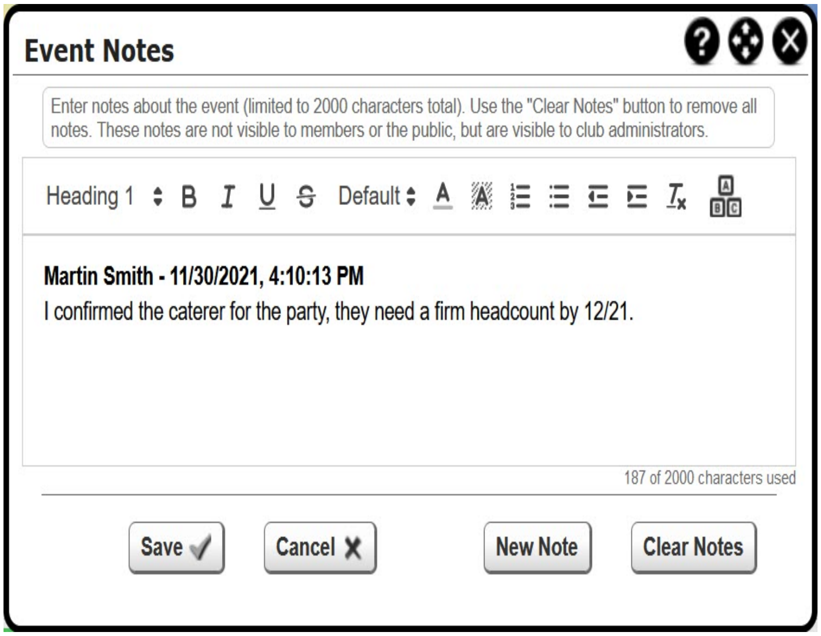
> **Note:** These distribution lists ignore the member's opt-out setting since recipients will have explicitly registered for the event.

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.

Notes

Click **Notes** to write notes on the event that are then available to other event administrators. You will see a screen similar to the following:



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

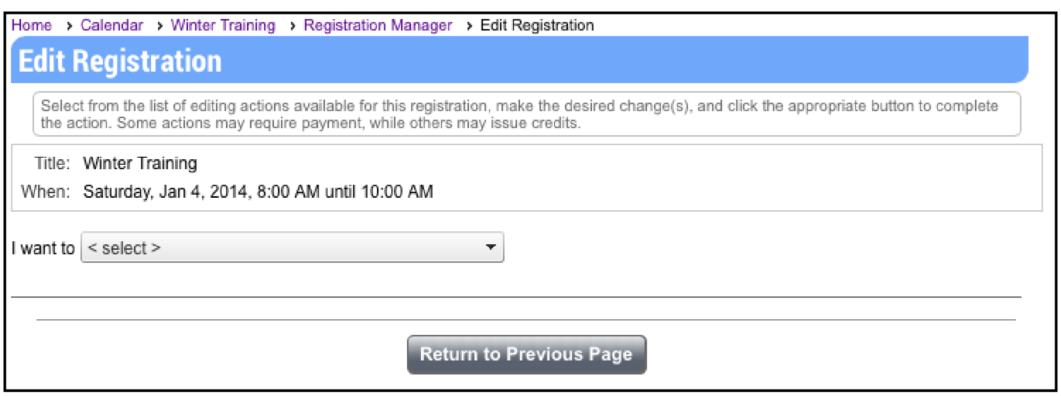
Icon	Description
 (Edit)	Select **Edit** to edit the QuickEvent. You will see the Add/Edit QuickEvent screen.
 (Convert)	Convert this QuickEvent to a Single Activity Event. You will be asked to confirm this step because it cannot be reversed.
 (Regis-trations)	Select this option to see a list of people 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:



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.

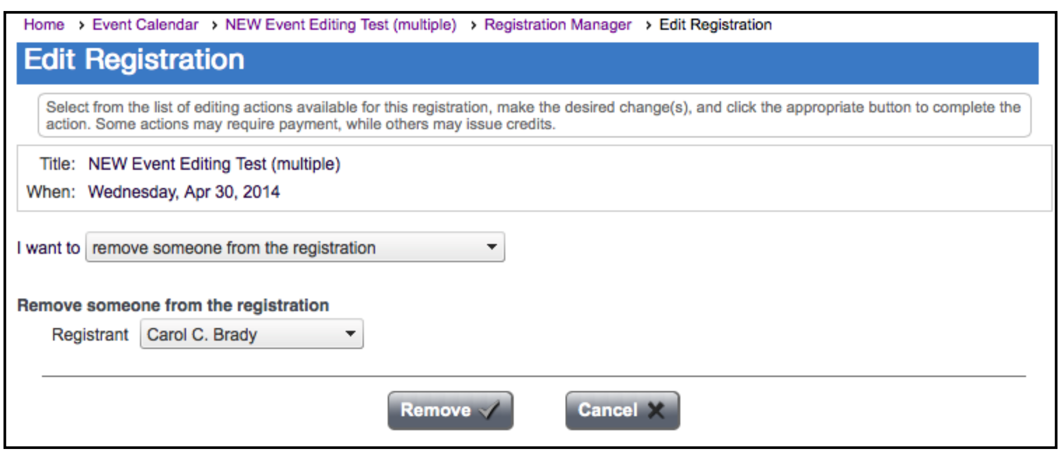
Manage RSVPs

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

Selecting this option displays the following screen:



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

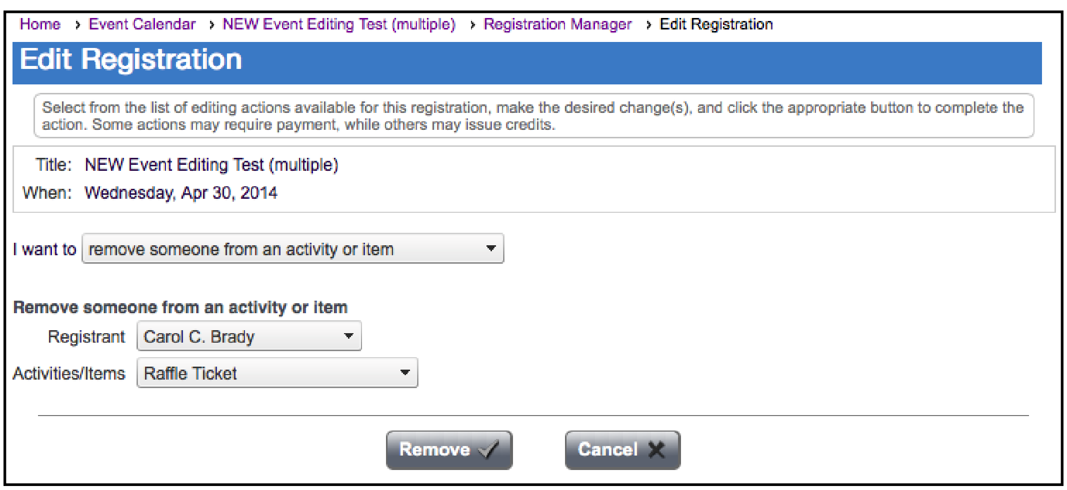
- If the registration was not paid, the pending transaction is adjusted to reflect the new balance. The individual transaction items for the removed person are also removed. The status remains as Not Paid.
- If the registration was paid, individual credits are issued for the cost of each activity for 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

Selecting this option displays the following screen:



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

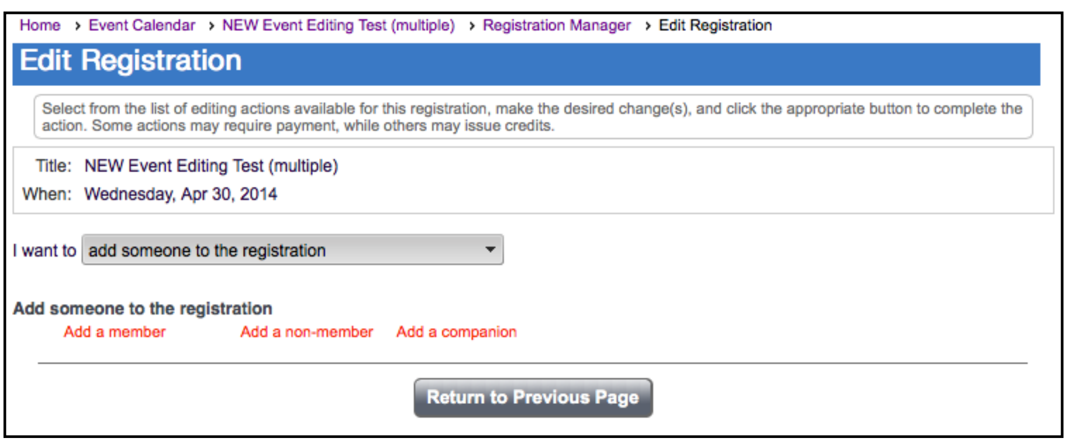
- If the registration was not paid, the pending transaction is adjusted to reflect the new balance. The individual transaction item is also removed. The status remains as Not Paid.
- If the registration was paid, a credit is issued for the cost of the removed activity. The individual transaction item 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

Selecting this option displays the following screen:

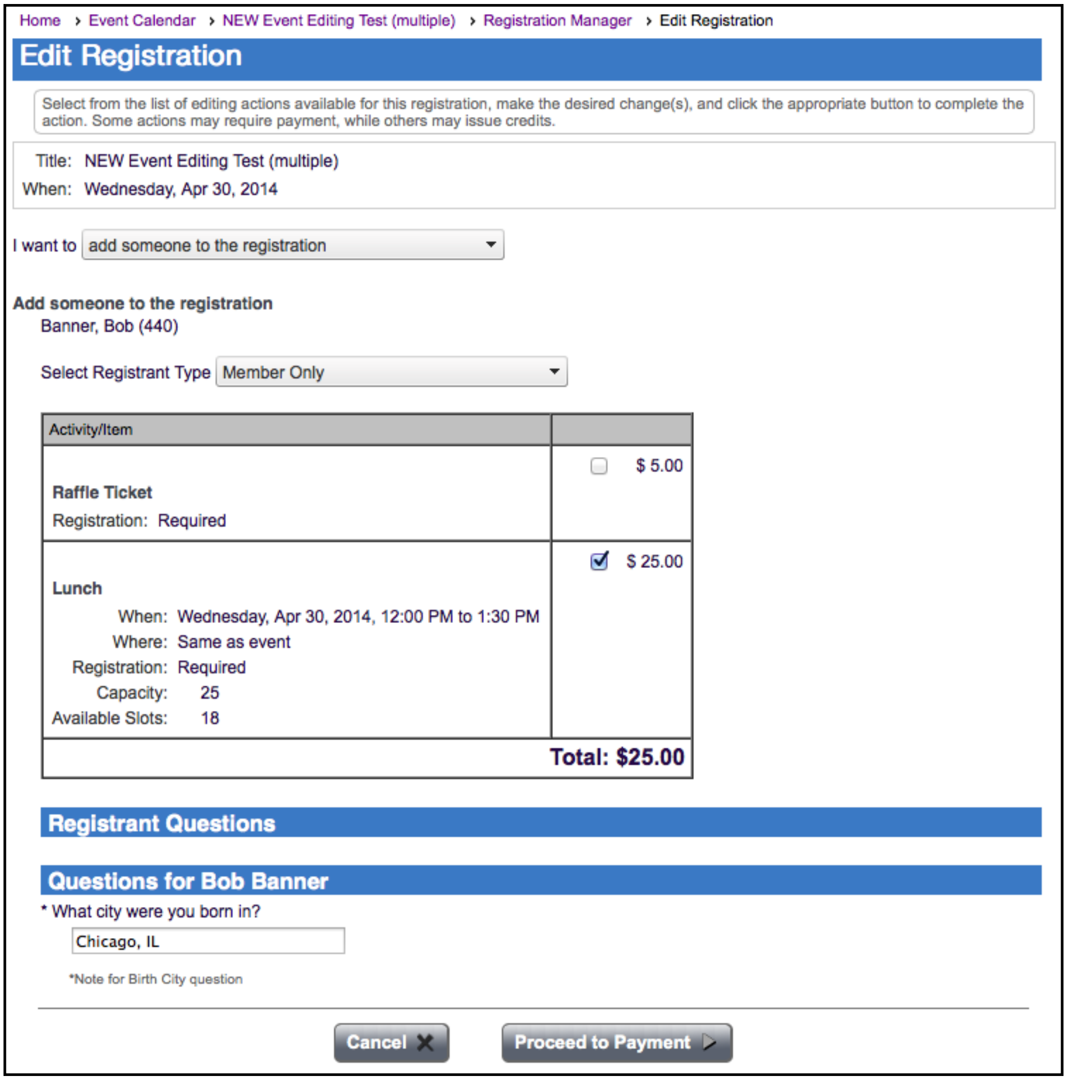


Click one of the links to add a member, non-member, or companion. For members and non-members, you will see a standard selector. For companions, you will be prompted to enter their first name, last name, email address and phone number.

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.



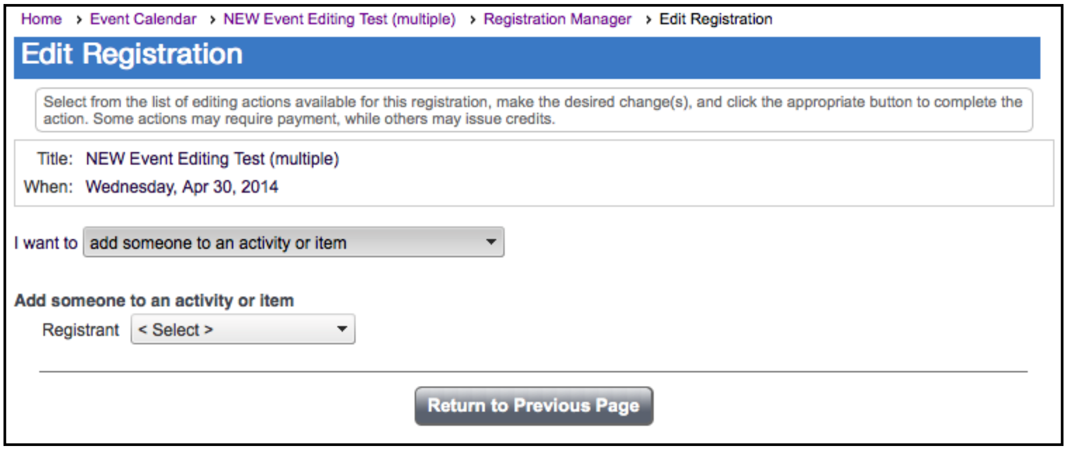
Transaction and Payment Status

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

Selecting this option displays the following screen:



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.

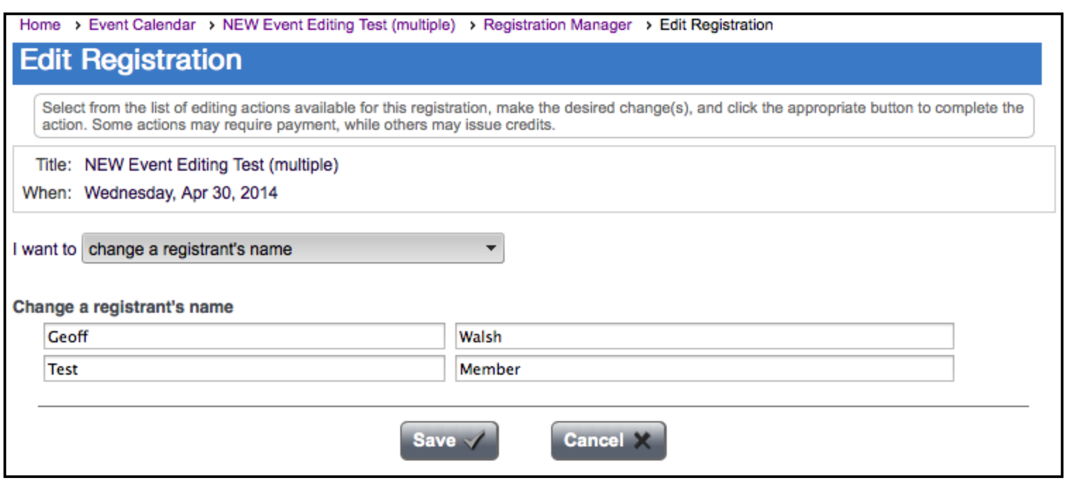
Transaction and Payment Status

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

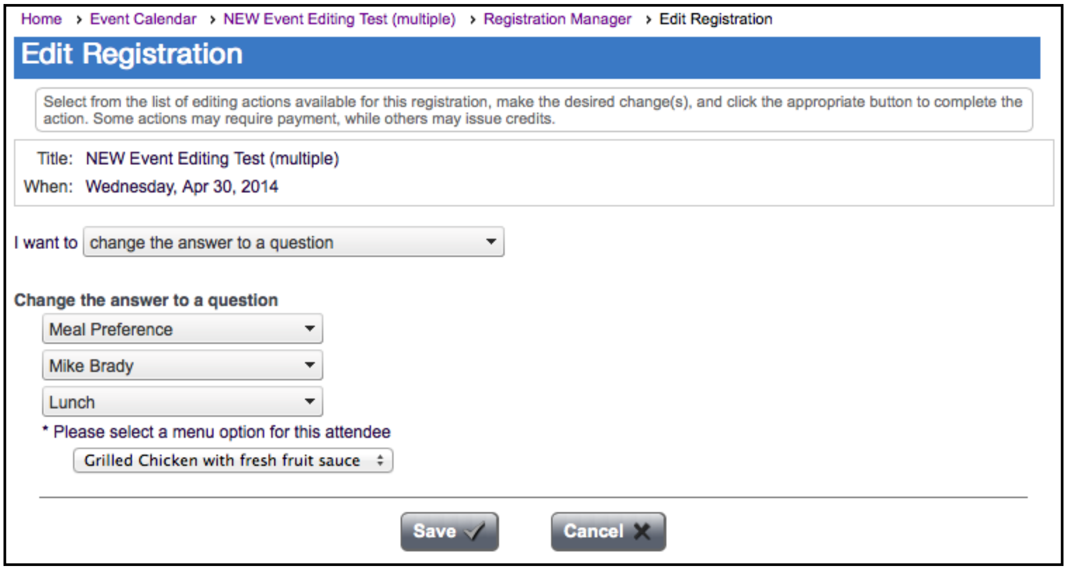
Selecting this option displays a list of each registrant attached to the registration and allows you to edit their first and last names.



Click **Save** to complete the change or **Cancel** to return without saving.

Change the answer to a question

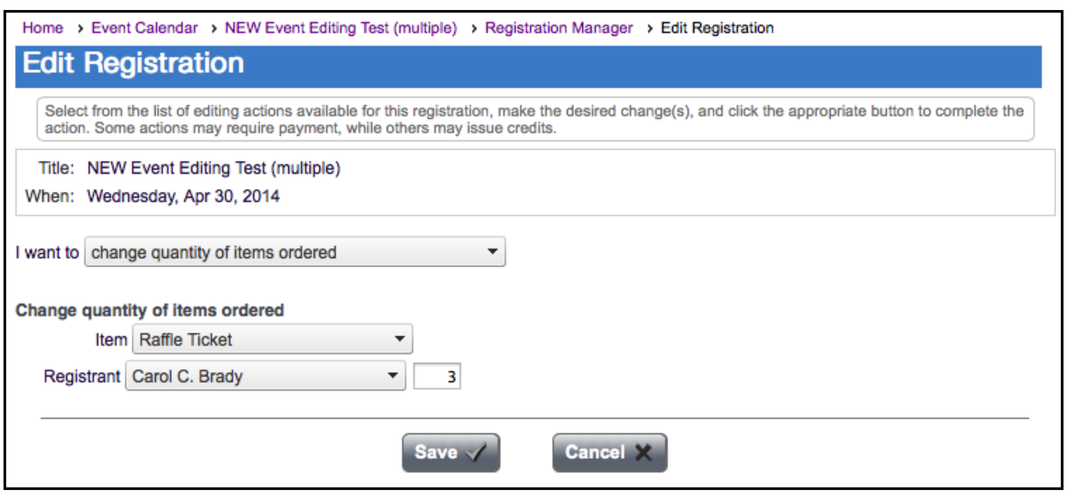
Select this option to see the following screen:



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:



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.

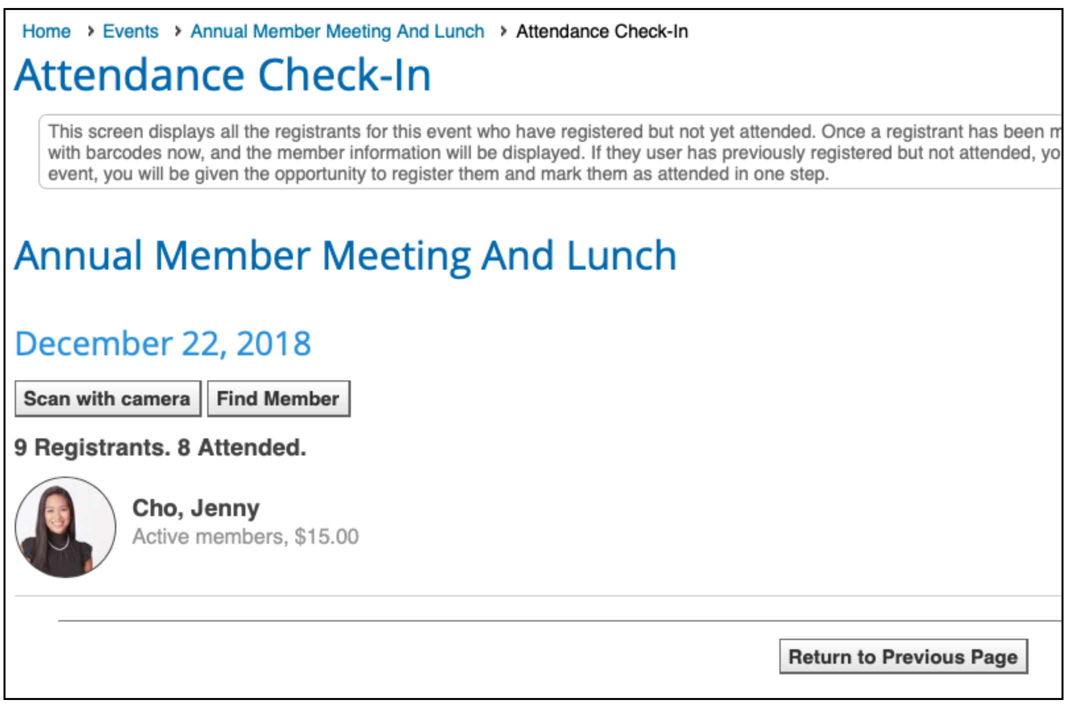
Mark Attendance

Control Panel > Website > Website Modules > Events

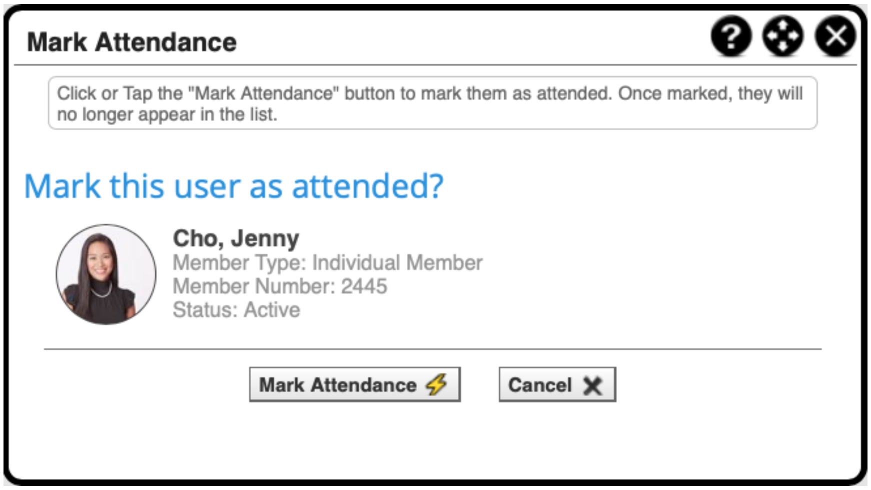
If an event is flagged to track attendance, a special **Mark Attendance** button will appear on the Event View button bar for the following classes of users:

- 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:



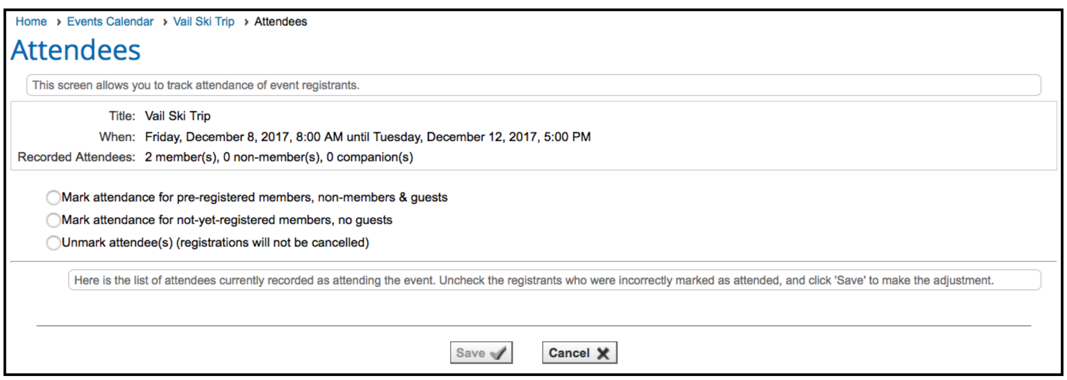
The system will list registrants who have not yet checked in (where their attendance has been marked.) Clicking the attendee image or name displays the following popup screen:



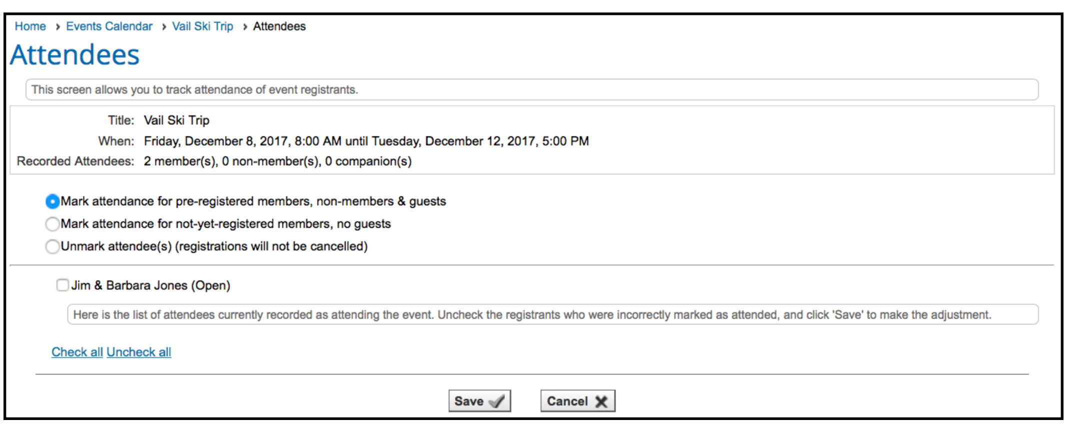
Click the **Mark Attendance** button to confirm or **Cancel** to close the dialog without confirming this registrant's attendance.

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):



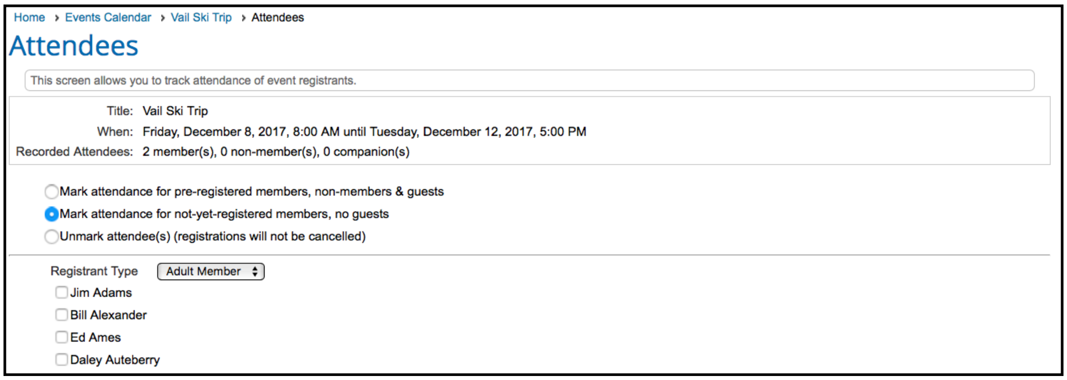
Select "Mark attendance for Pre-registered members, non-members & guests" and the screen will refresh as follows.



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:

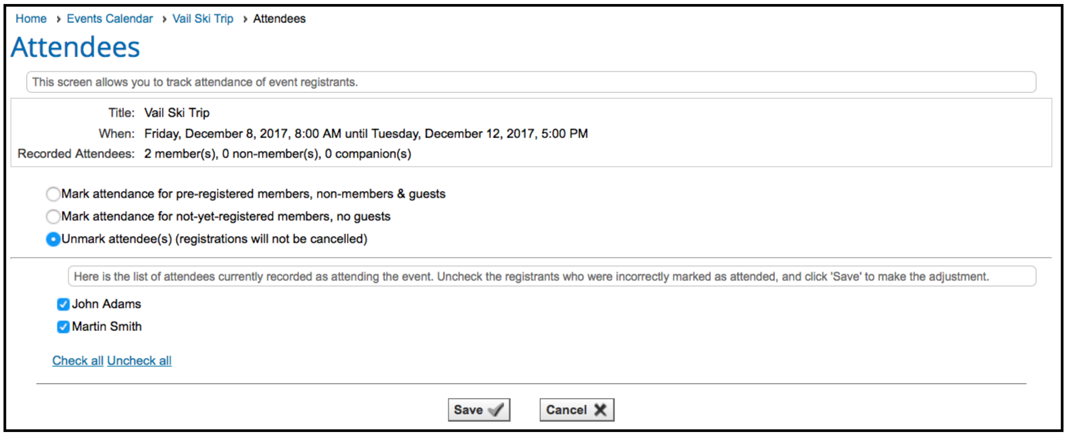


You will see an alphabetical list of members who are not registered for the event. Select a registrant type then check or uncheck as many people as you need to record, then click **Save**. The system will generate the event registration records, send an email to confirm their registration, and flag their 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.

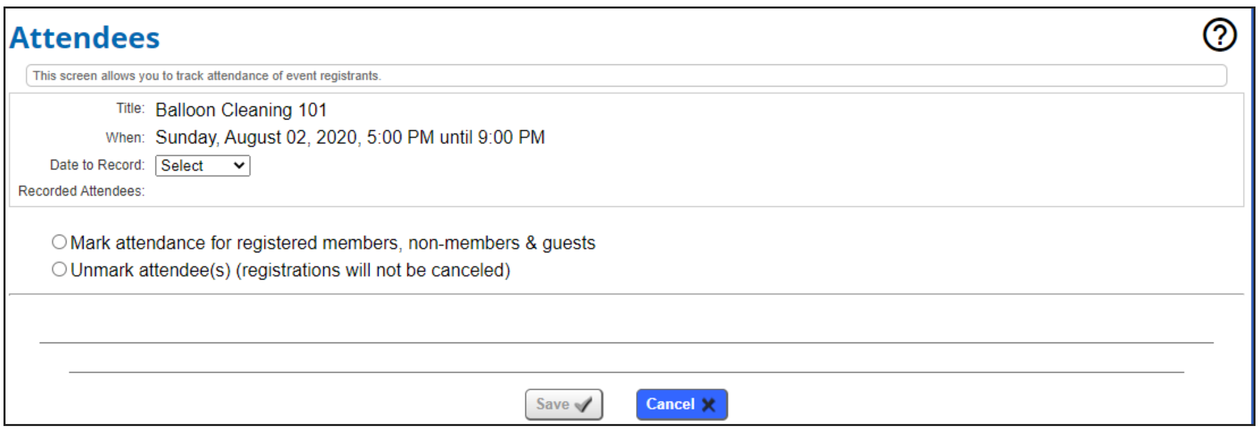
Note that this option is not available for multi-activity events.

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:



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.



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.

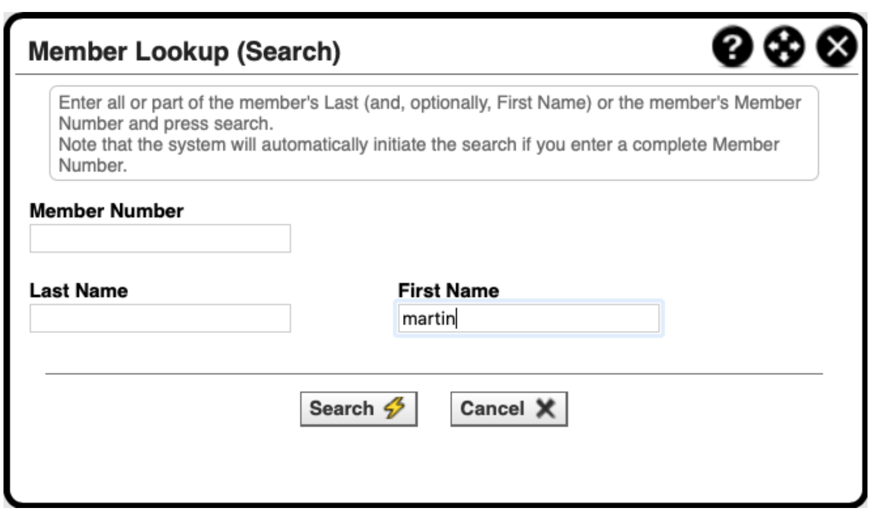
This function will work with any standard barcode scanner, such as the Taotronics TT-BS003 (available from Amazon for under $40.00.)

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

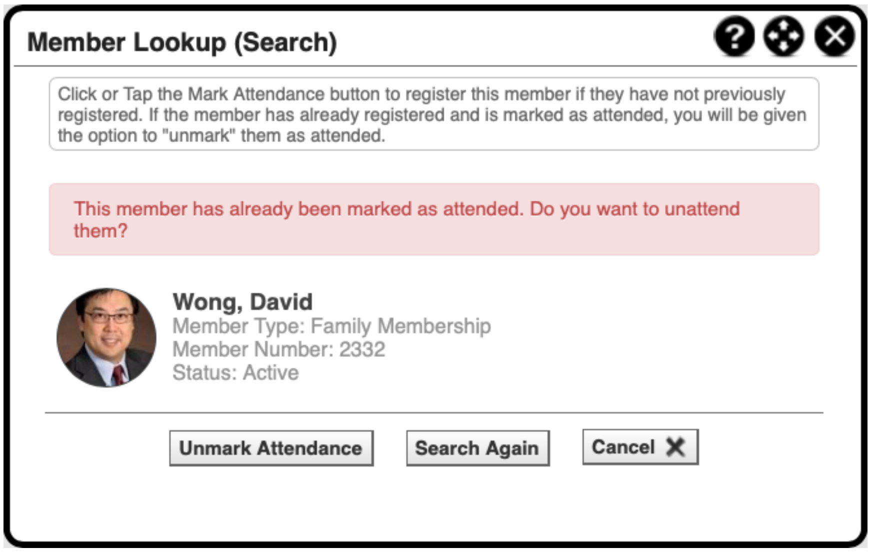
Click the **Find Member** button to search for a member. You will see the following dialog:



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

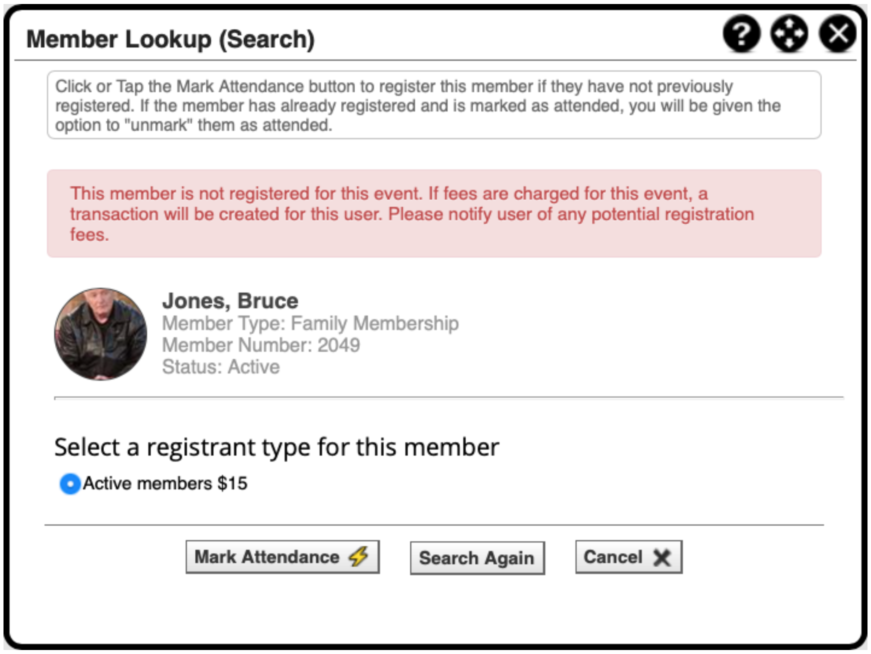
If the event registrant has already been marked as attending the event, you will see the following dialog:



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:

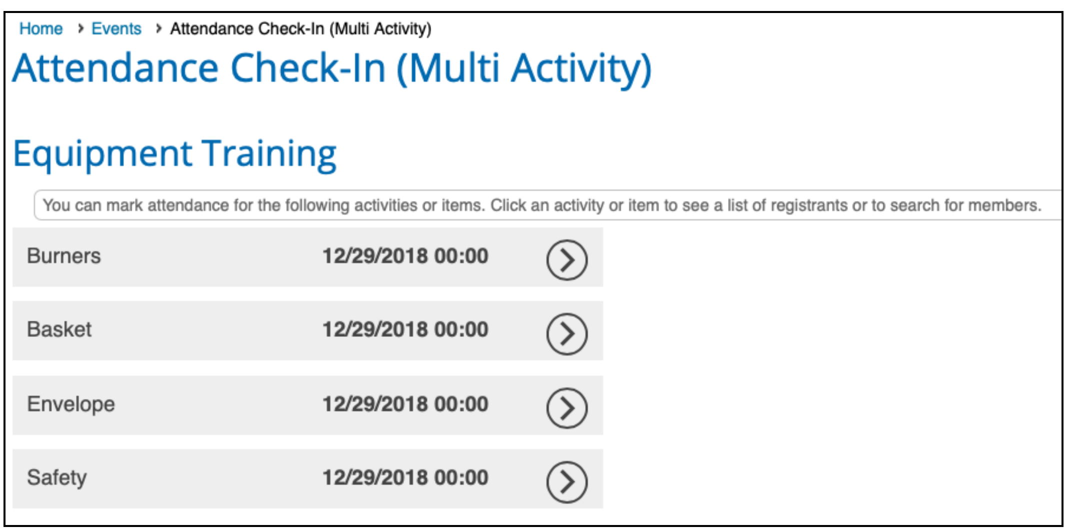


This member is not registered for the event. He can be registered and his attendance marked in one step. If there are multiple, available registrant types, you will need to select one of them. The system will then create the registration and transaction, as well as marking attendance. The member will 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

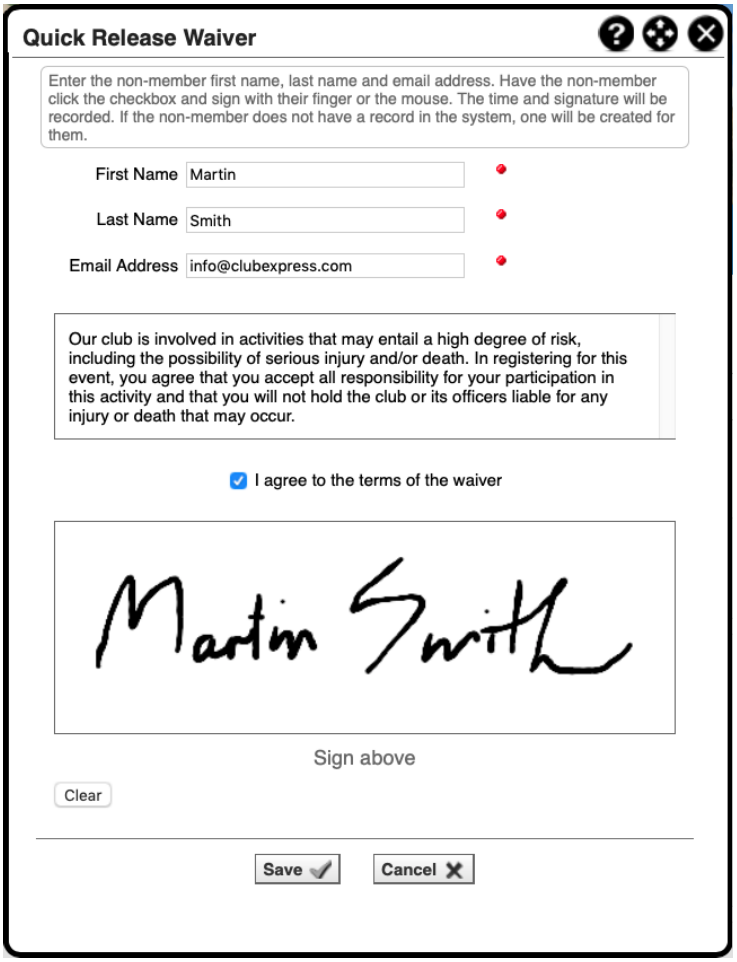
Most clubs and associations that are involved in active sports activities have their members sign a standard Release Agreement / Waiver of Liability. Many of these organizations also attach such a release/waiver to their event registrations, so that each registrant also signs the agreement. ClubExpress 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:



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:

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

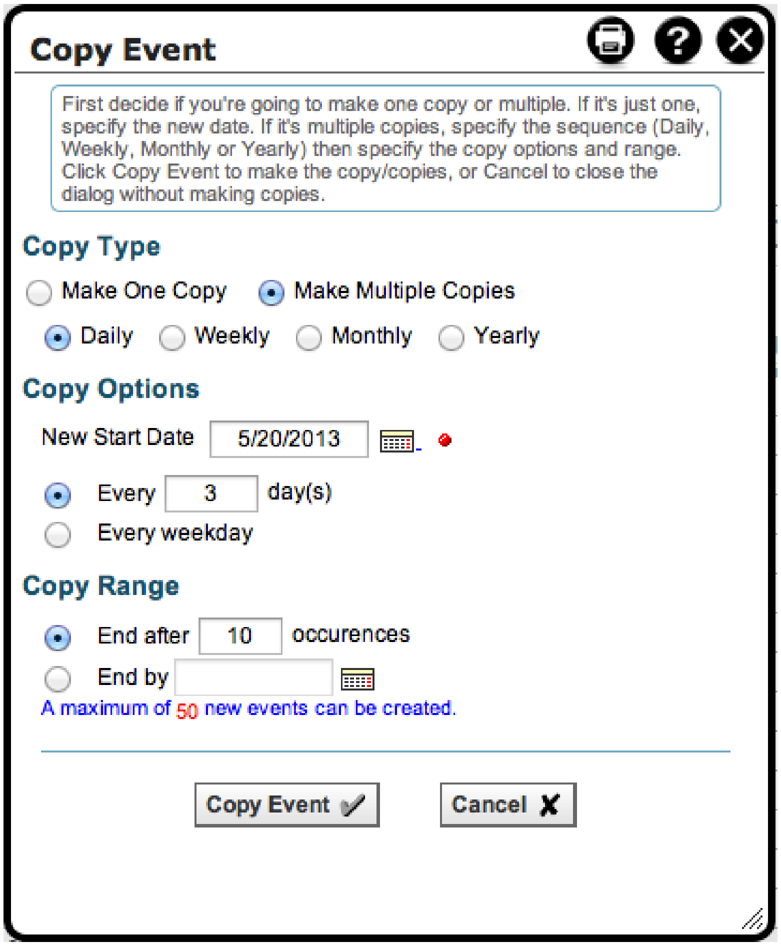
In the Event Manager and in the Maintain column for each listed event, click the **Copy** icon to make a copy of an event, including all properties and activities but not registrant data. After you have defined an event, this option will allow you to copy it one or more times. You will see the following screen:

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:

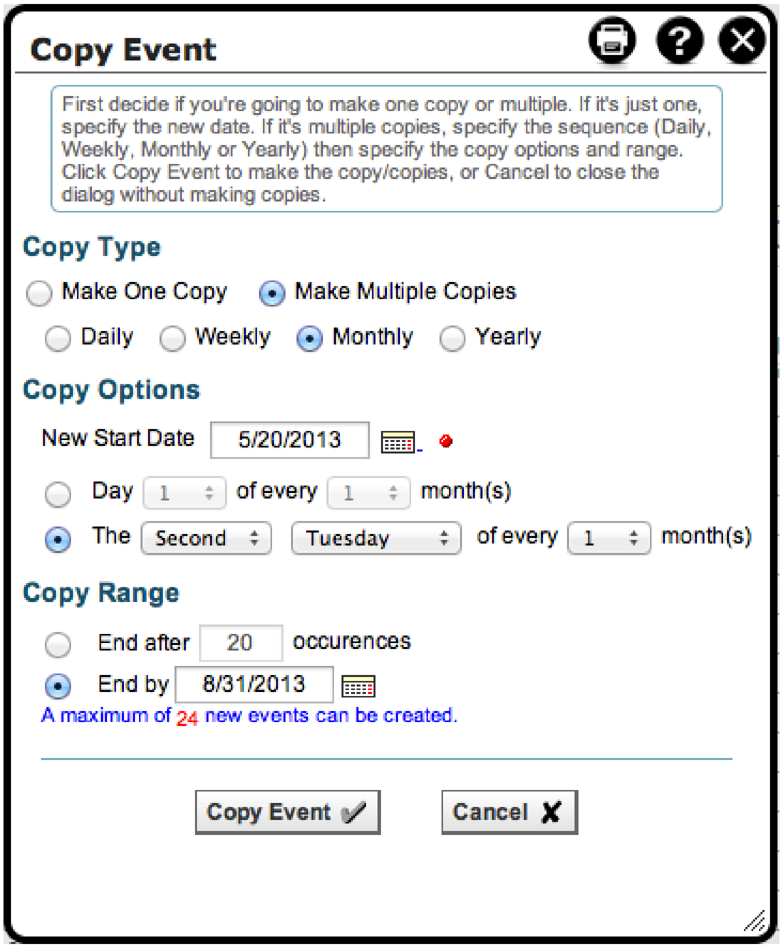


You can copy the event every 1 to X days or on every weekday. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 50 copies can be made. The example shows an event that's copied every three days for 10 occurrences.

If you choose **Weekly**, the following screen will be displayed:

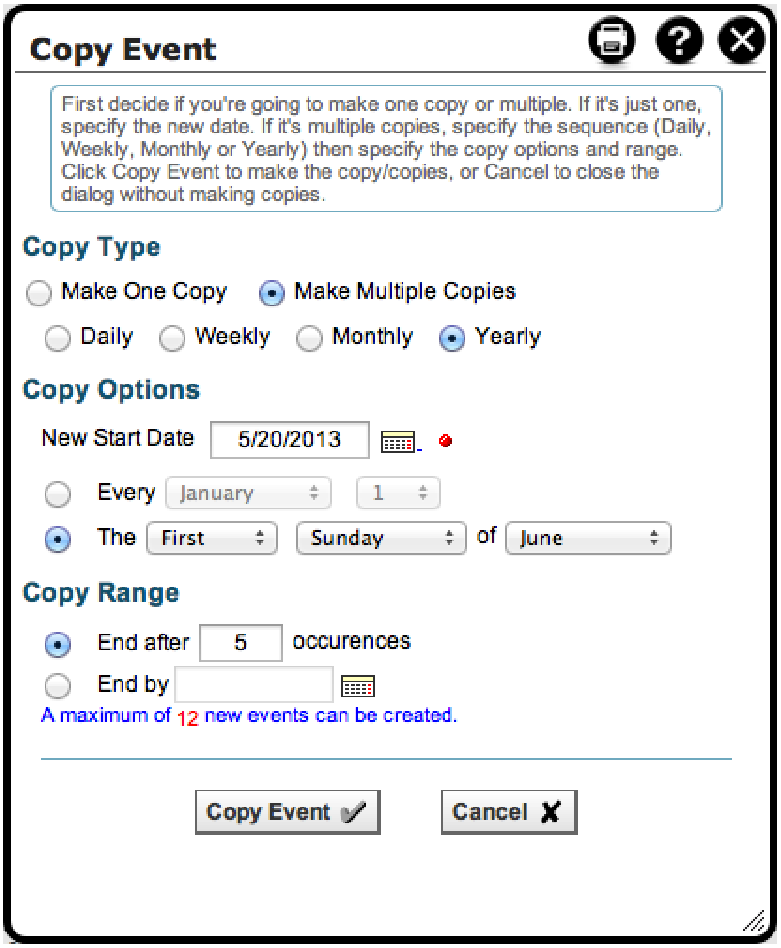
You can copy the event every X weeks, with individual control over which days of the week will receive the copies. For the Copy Range, specify a number of occurrences or the finish date. A maximum of 52 copies can be made. The example shows an event that's copied every other Saturday for the next 38 weeks (20 times).

If you choose **Monthly**, the following screen will be displayed:



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:



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.

Archived events are not included in the event list by default. You must explicitly check the **Archived Events** box in order to show them.

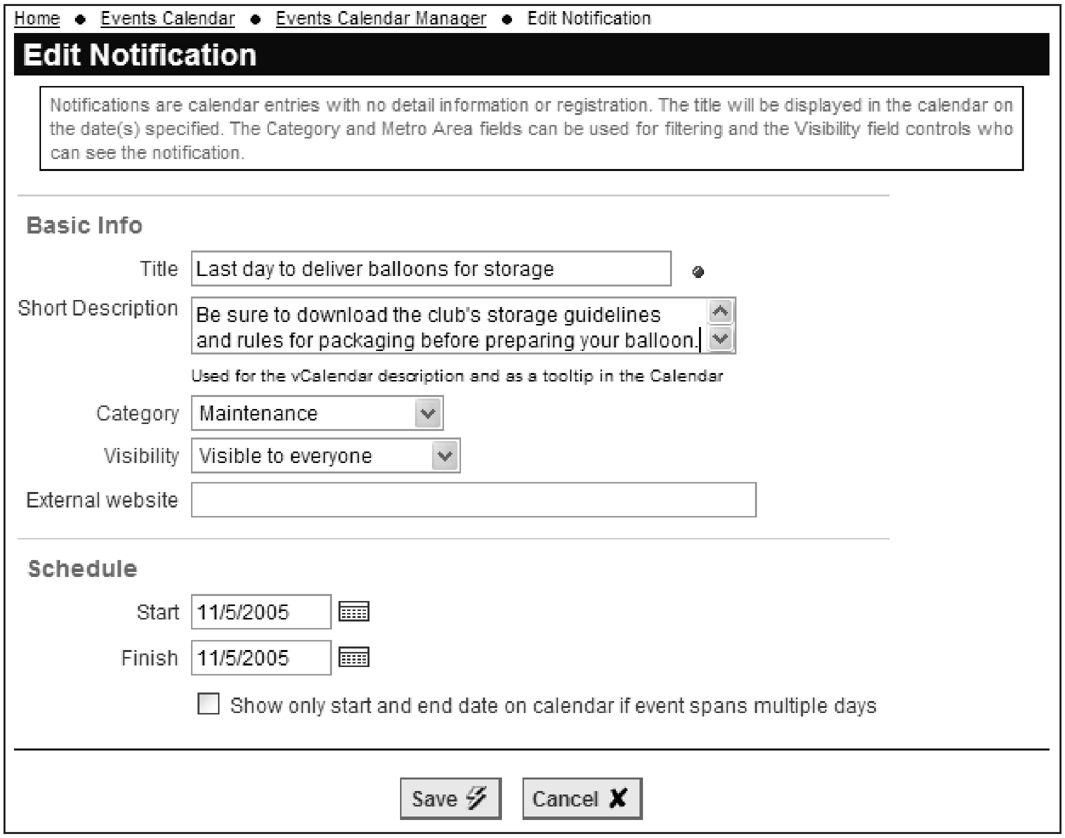
Another way to organize archived events, as shown in the dialog above, is to create one or more event categories for these archived events.

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:



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.

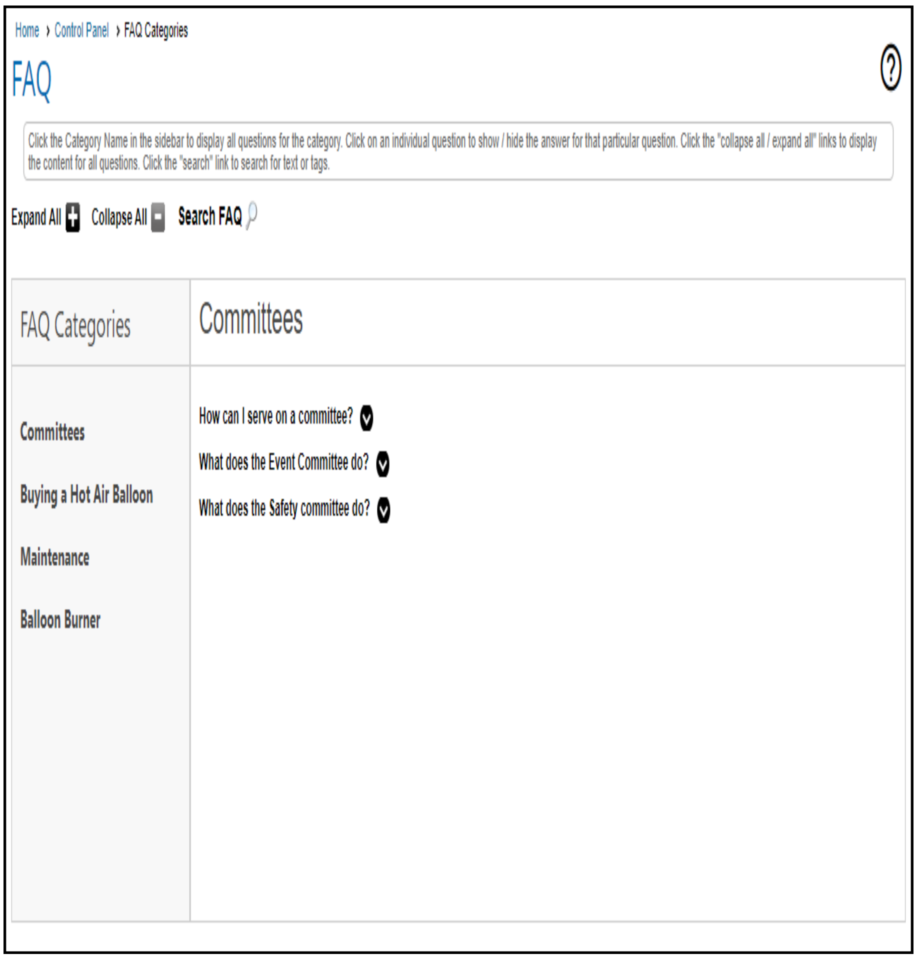
Note also that a Search on the calendar or clicking the **Reset** button will cancel these settings.

FAQ / Tech Library

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.



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:

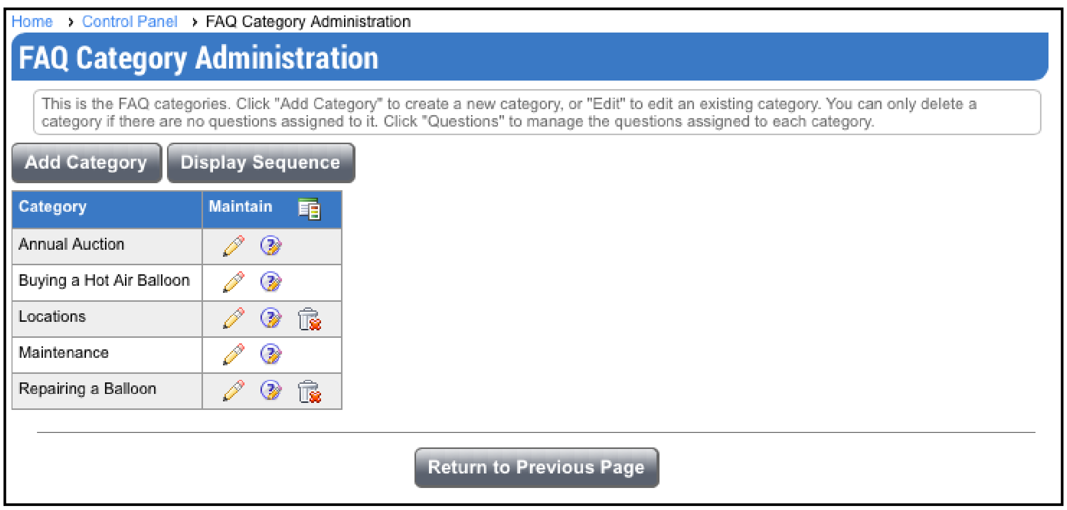
1. Administrators and Function Coordinators can select the module in the Control Panel (Website tab) to access the admin side of the function.

> **Administrators:** Don't see the module in the Website Tab? Enable the module.

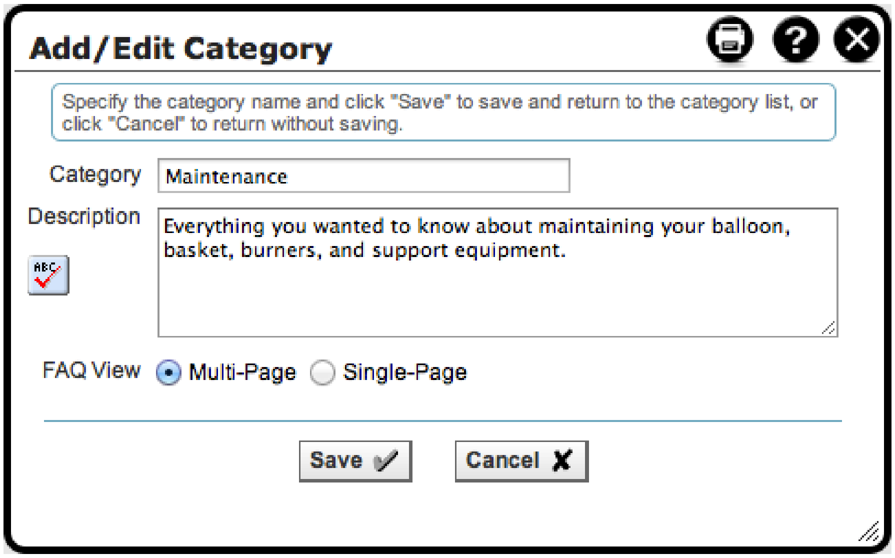
2. 

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:



The grid lists each category. To create a new category, click the **Add Category** button. You will see the following screen:



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.

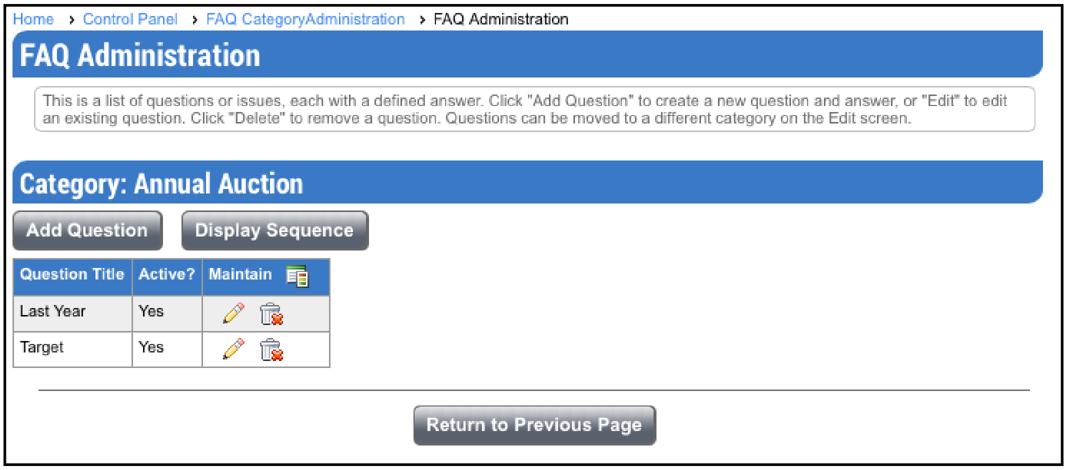
Maintain Options

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

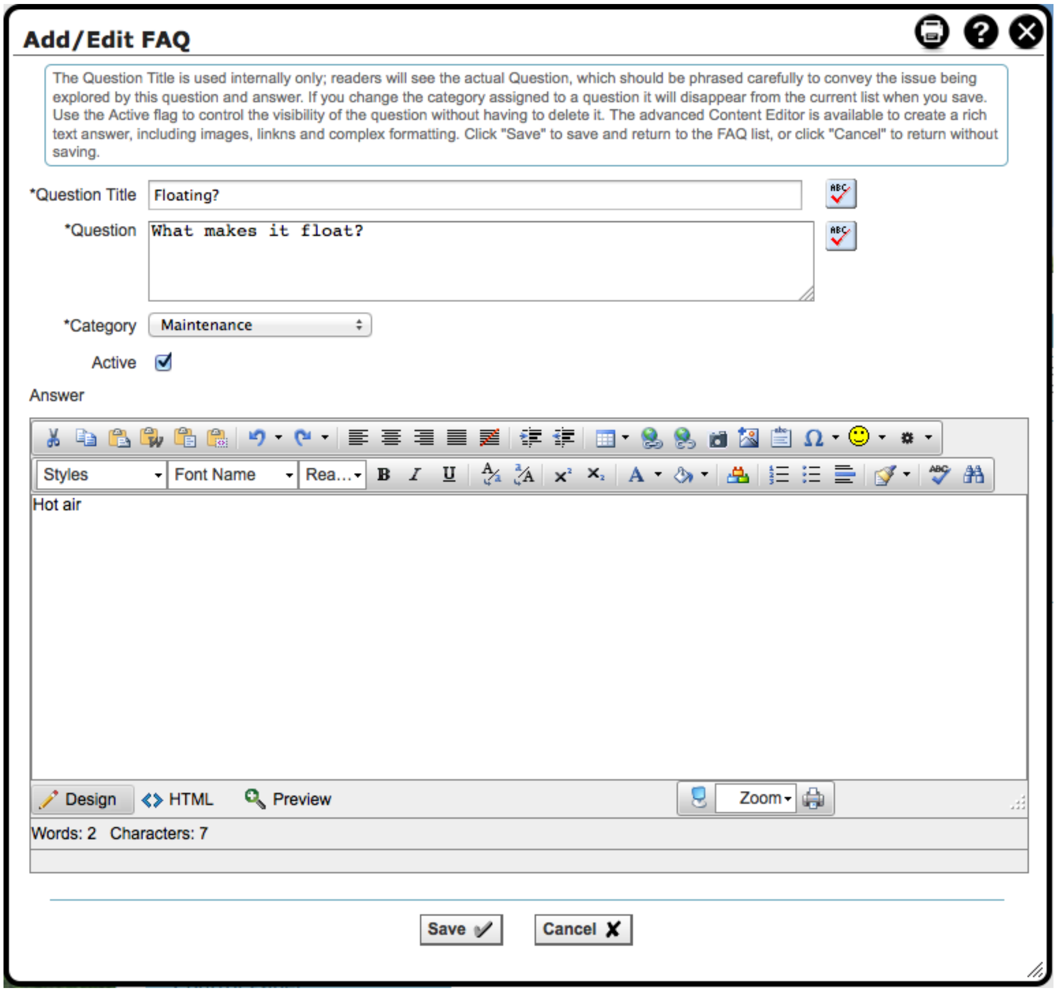
To manage questions within an FAQ category, click the **Questions** icon. You will see a screen similar to the following:



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:



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.

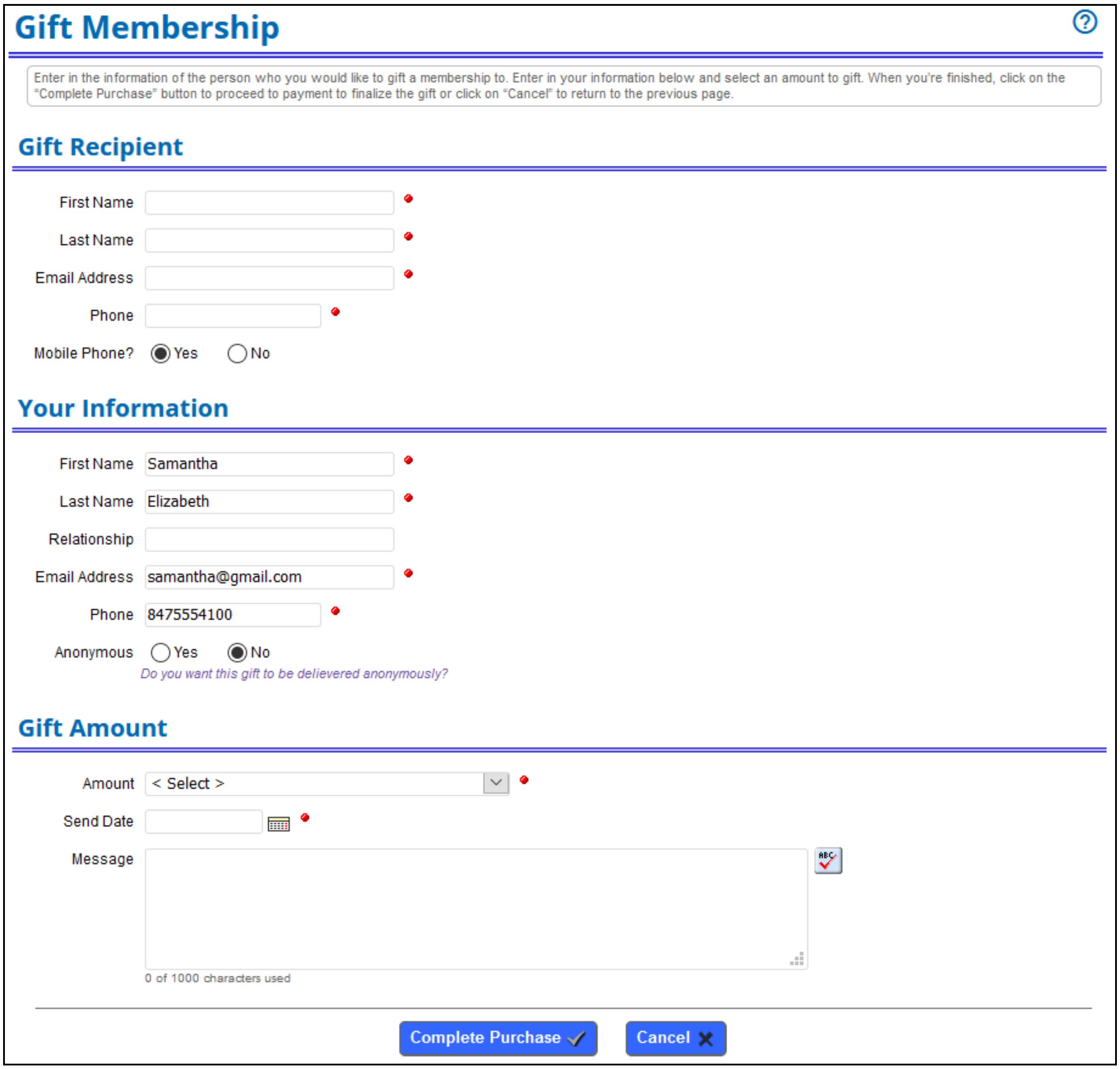
Gift Memberships

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:



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

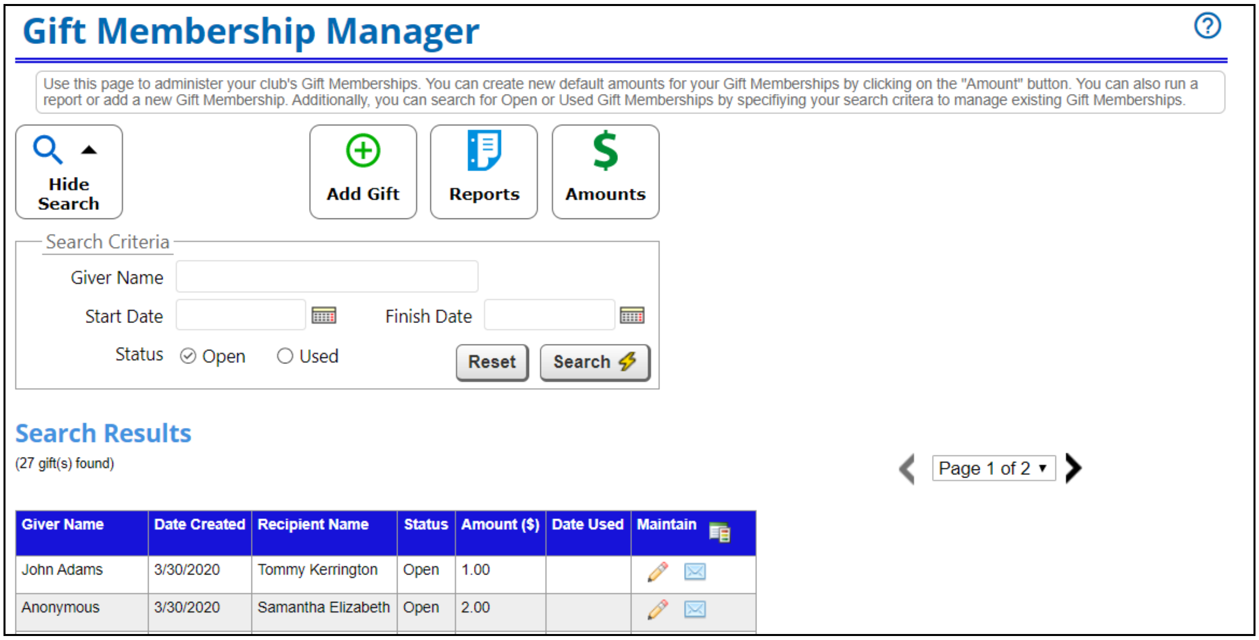
1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

> **Administrators:** Don't see the module in the People Tab? Enable the module.

2. 

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:



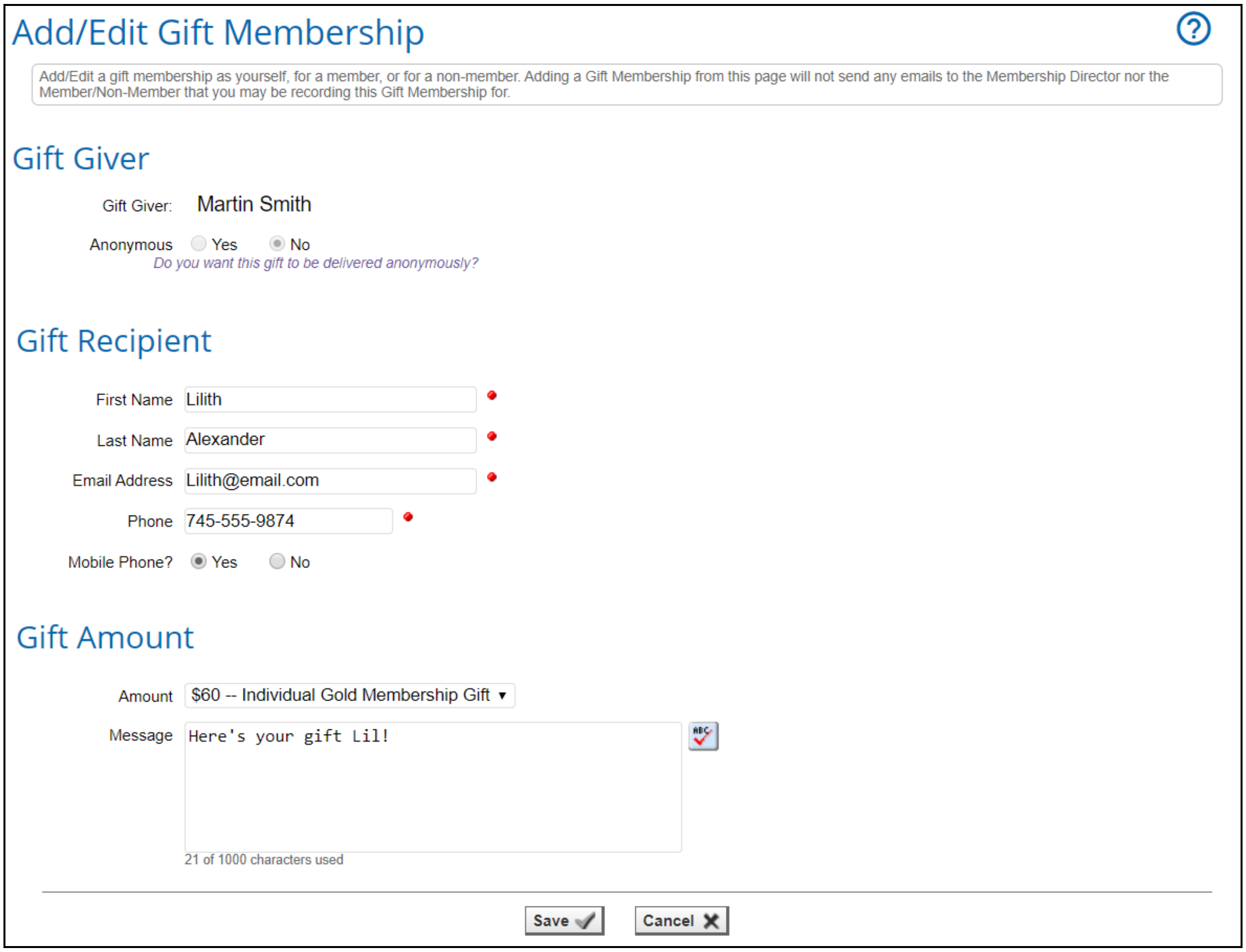
The Search Results are displayed in a grid with columns for the giver name, date created, recipient name, gift status, date used (if the gift membership has been applied), and maintain options.

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:



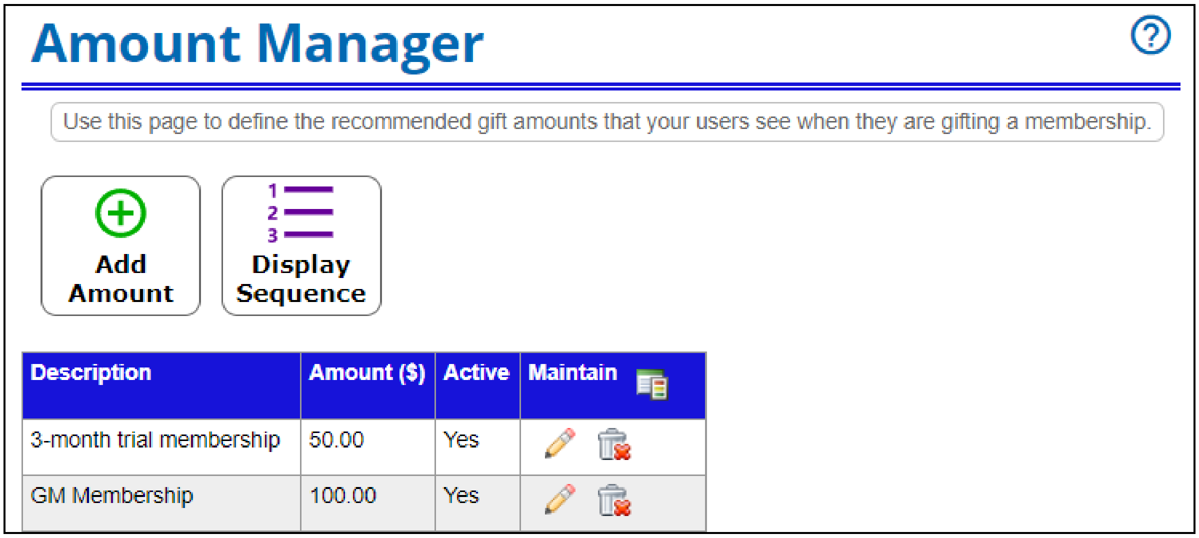
If a gift membership has been created but not yet paid for, administrators and coordinators may change the amount, the message, and the recipient information.

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.

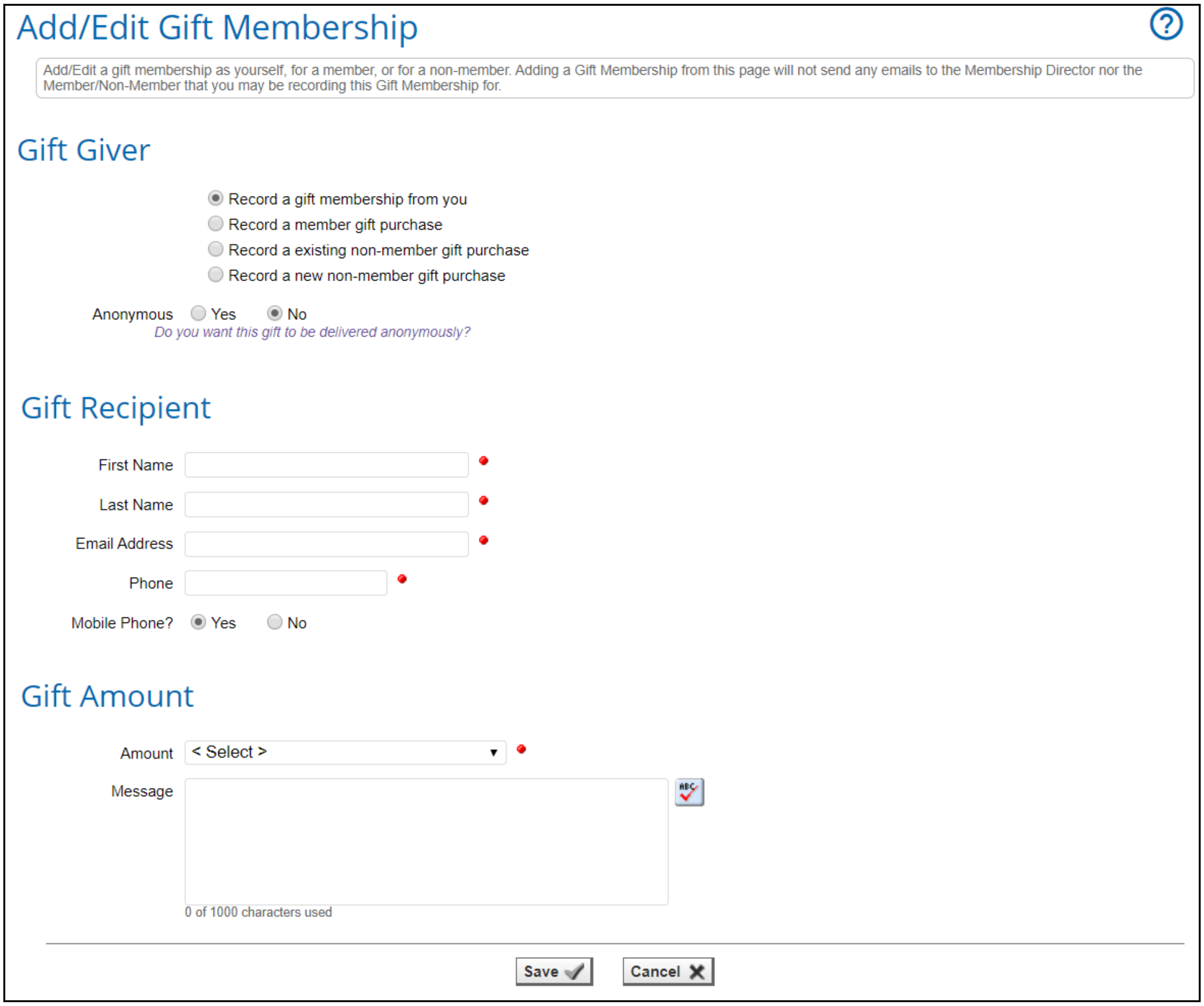


Note: Gift Membership categories are configured in Discount Coupons.

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:



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 By Date Range	Giver and recipient name, gift information (description, message), date used (if applicable), date created, date sent and gift amount	Date range

Gift Membership Reports

Interests

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.

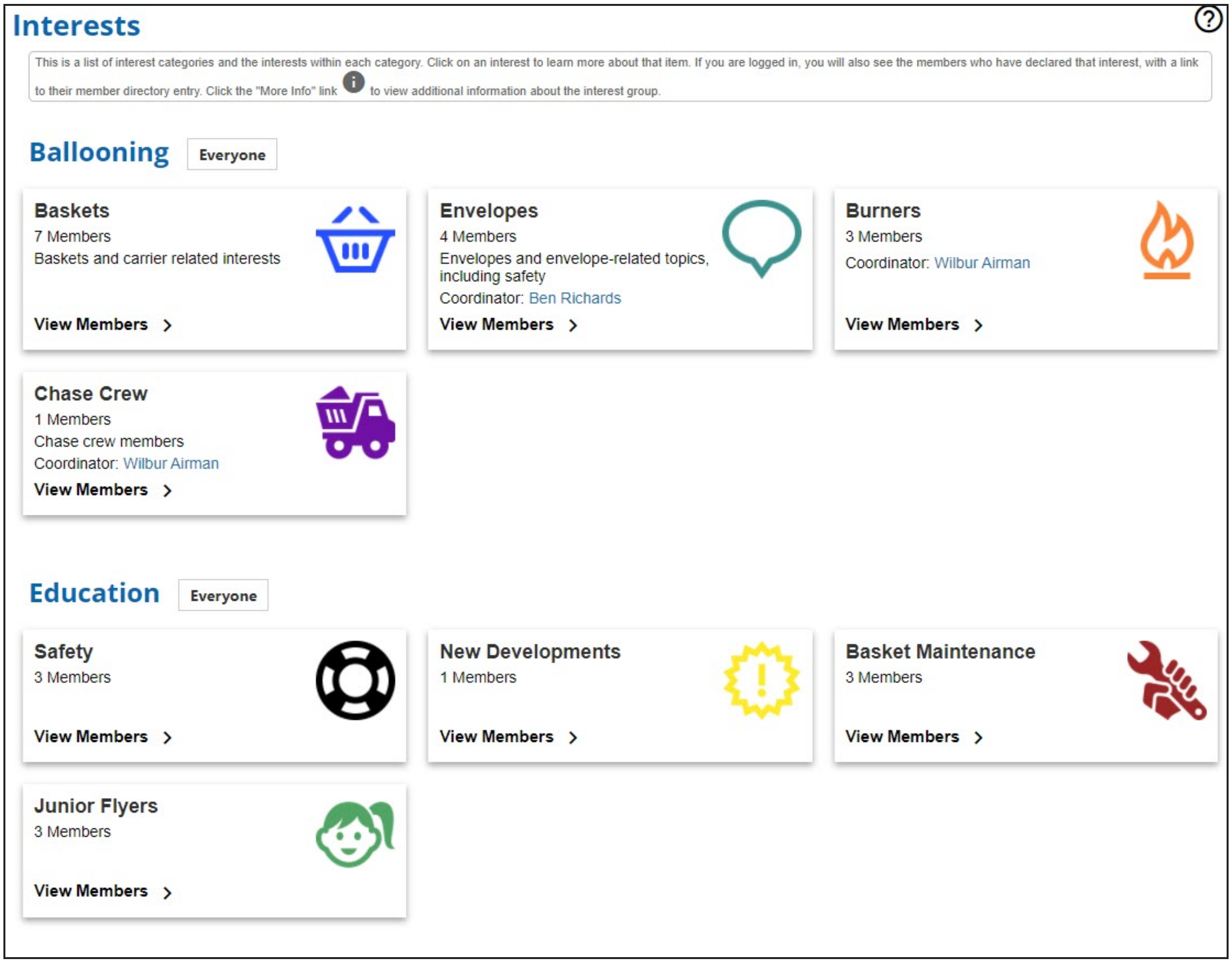
Interest categories can have one or more coordinators who are responsible for managing that interest and the underlying activities around that interest. You can also create a discussion forum around an interest and forum membership will be automatically maintained as interest members come and go.

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.

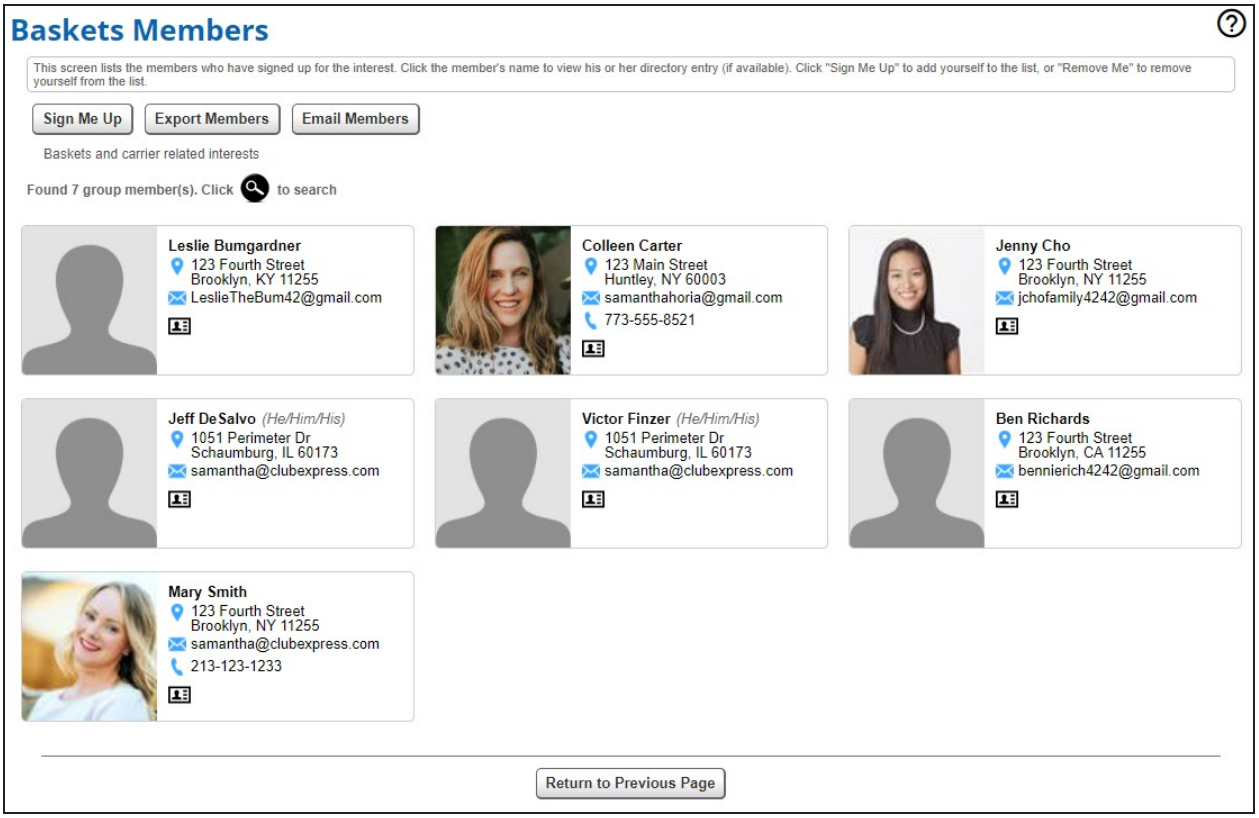
Administrators can send emails to members of an interest group, both from the Interests module and from the Control Panel – Emailings option. And with the visibility options at the Interest Category level, you can use this module to create ad hoc lists within your club or association that are visible to admins only.

Register for an Interest

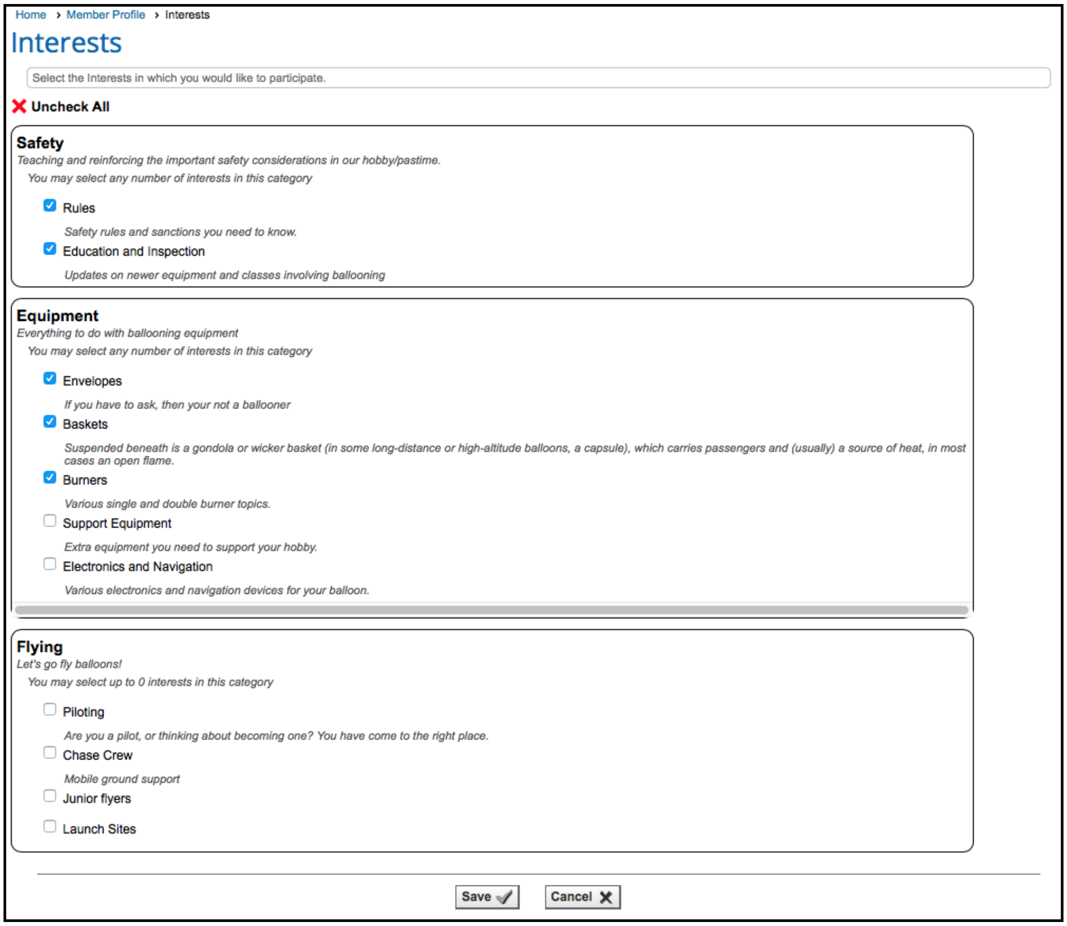
Members register for an Interest by navigating to the Interests module from their website menu, if available.



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.

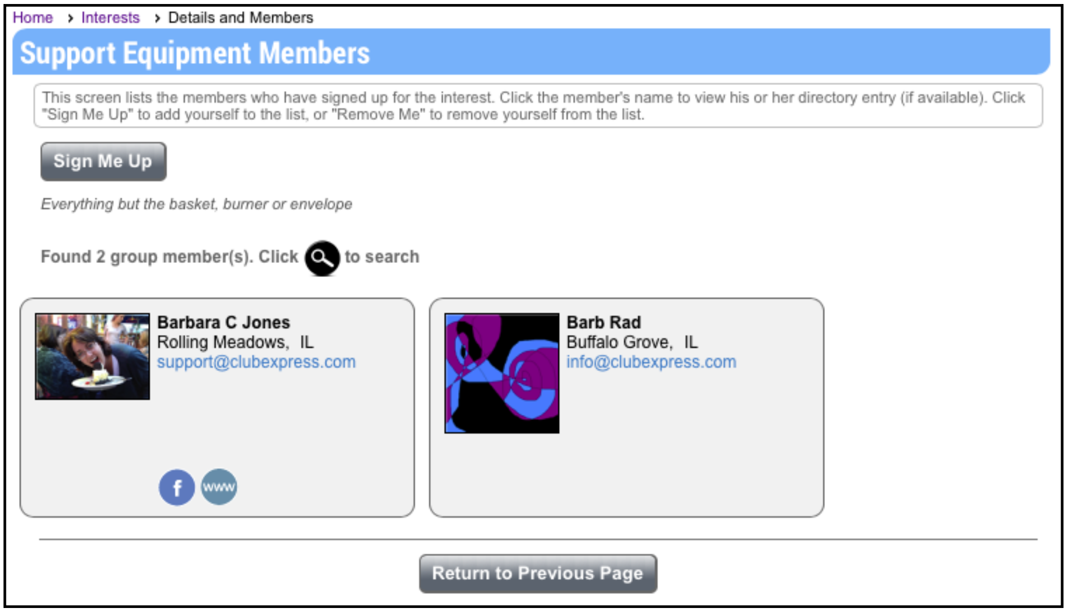


Members can also register for an Interest from their **MemberProfile**. A screen like the following is displayed:



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:

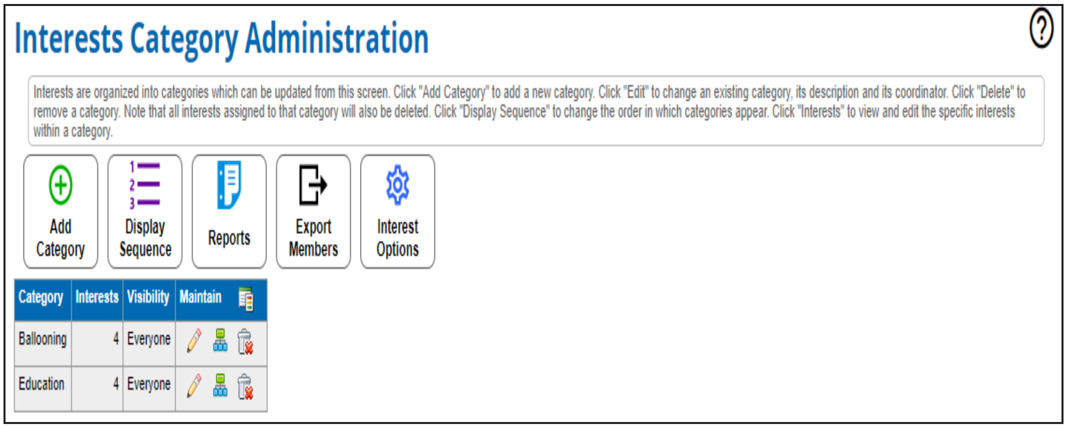
1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the admin side of the function.

> **Administrators:** Don't see the module in the People Tab? Enable the module.

2. 

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:



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.

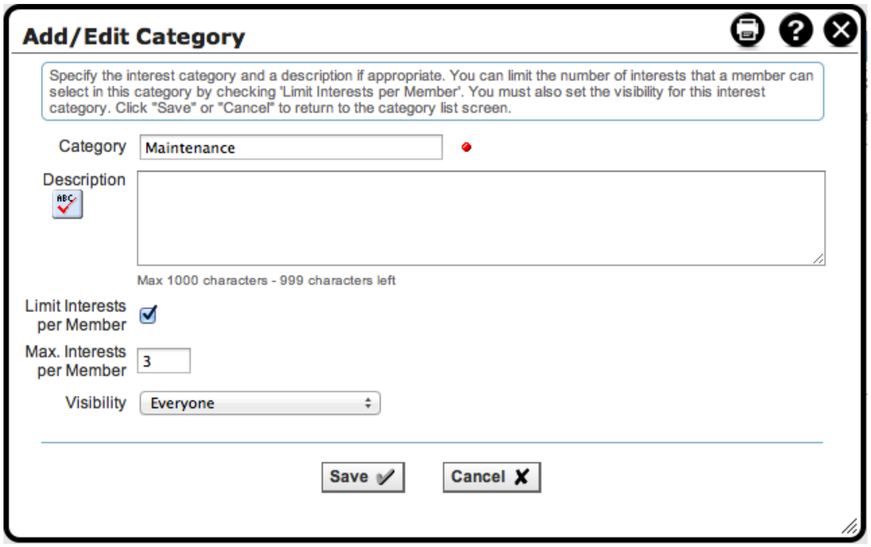
Maintain Options

The following options can be found in the Maintain column:

Icon	Description
 (Edit)	**Edit** this interest category. You will see the Add/Edit screen described below.
 (Interests)	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:



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

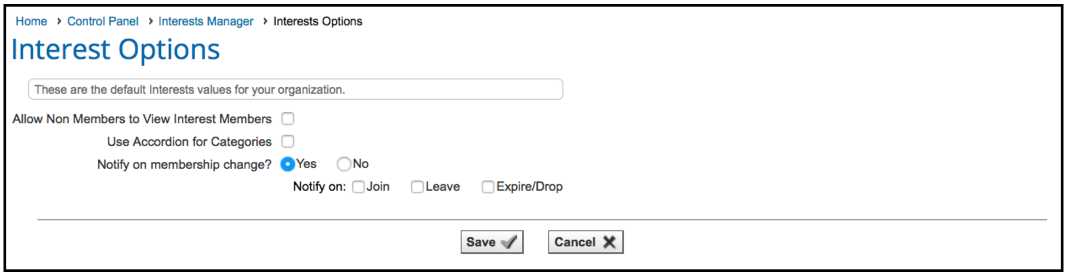
Click **Display Sequence** to change the order in which Interest categories are displayed. The standard display sequence window is displayed. Highlight a category and click the **Up** and **Down** arrows to change the display order. Click **Save** or **Cancel** to close the window.

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:



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.

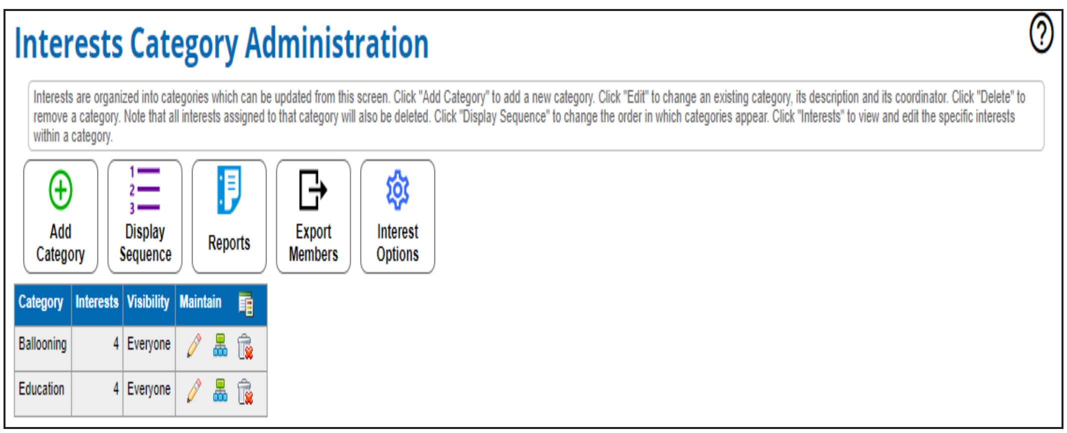
You can also configure the system to notify an Interest coordinator when a member joins or leaves an interest group, either voluntarily (Leave) or as a result of a system action (Expire/Drop).

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.



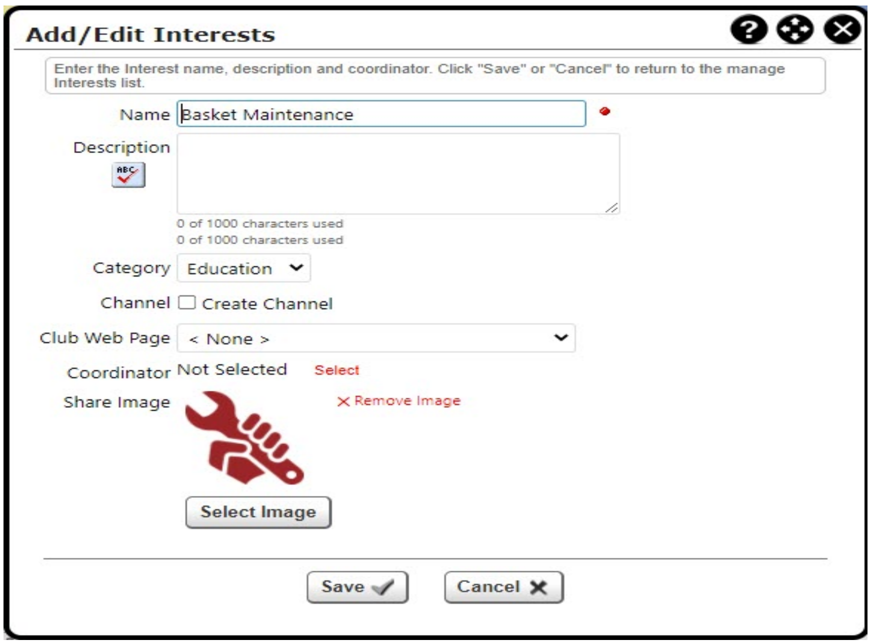
Maintain Options

The following options can be found in the Maintain column:

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:



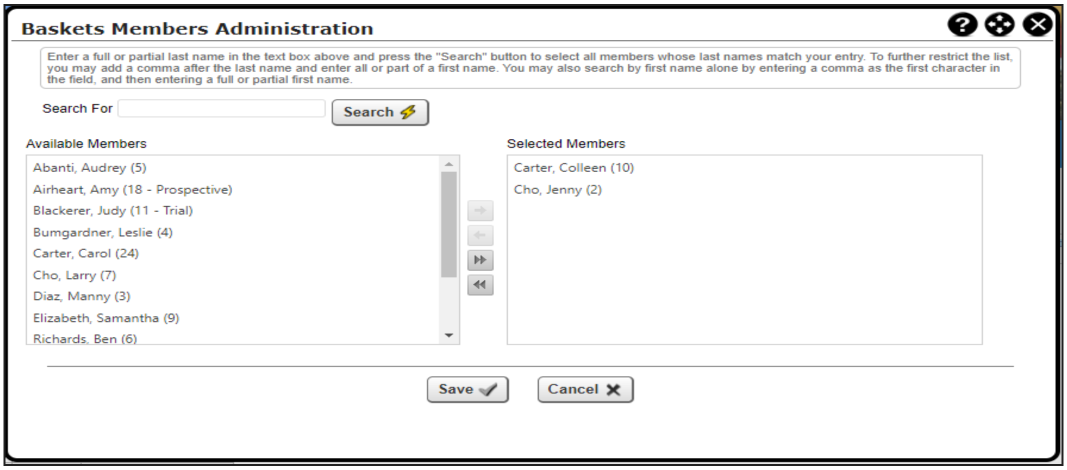
When adding an interest, you can specify the Interest name, a detailed description (up to 200 chars), a web page and a coordinator. When editing an existing interest, you can also change the overriding category in which the interest appears.

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



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.

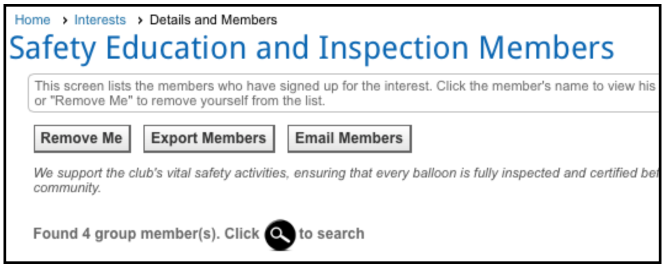
Concept Information

Reference Materials

Interest Coordinator Special Functions

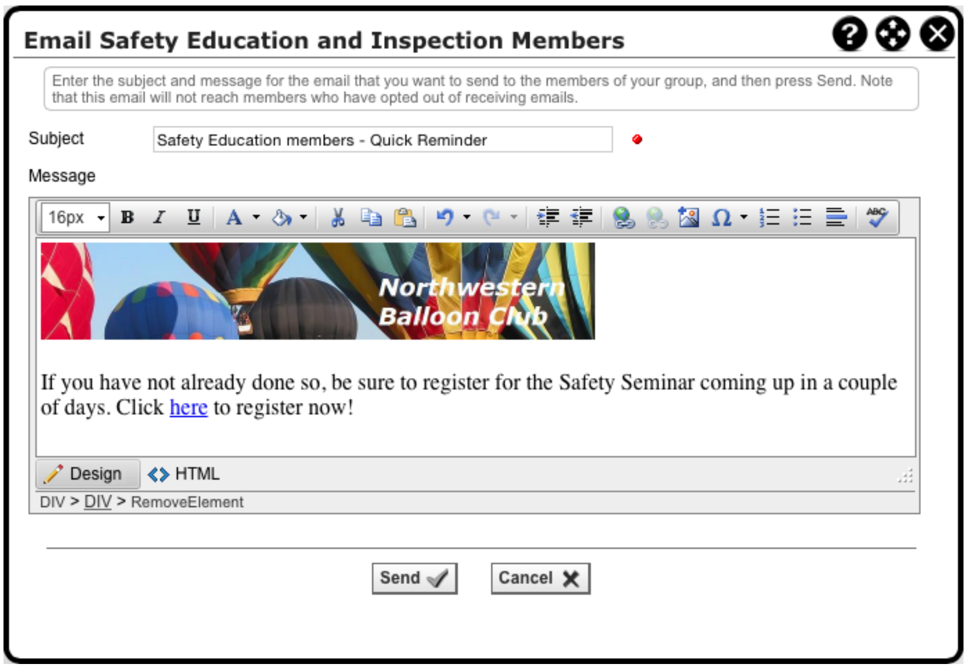
Control Panel > People > Website Modules > Interests

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.



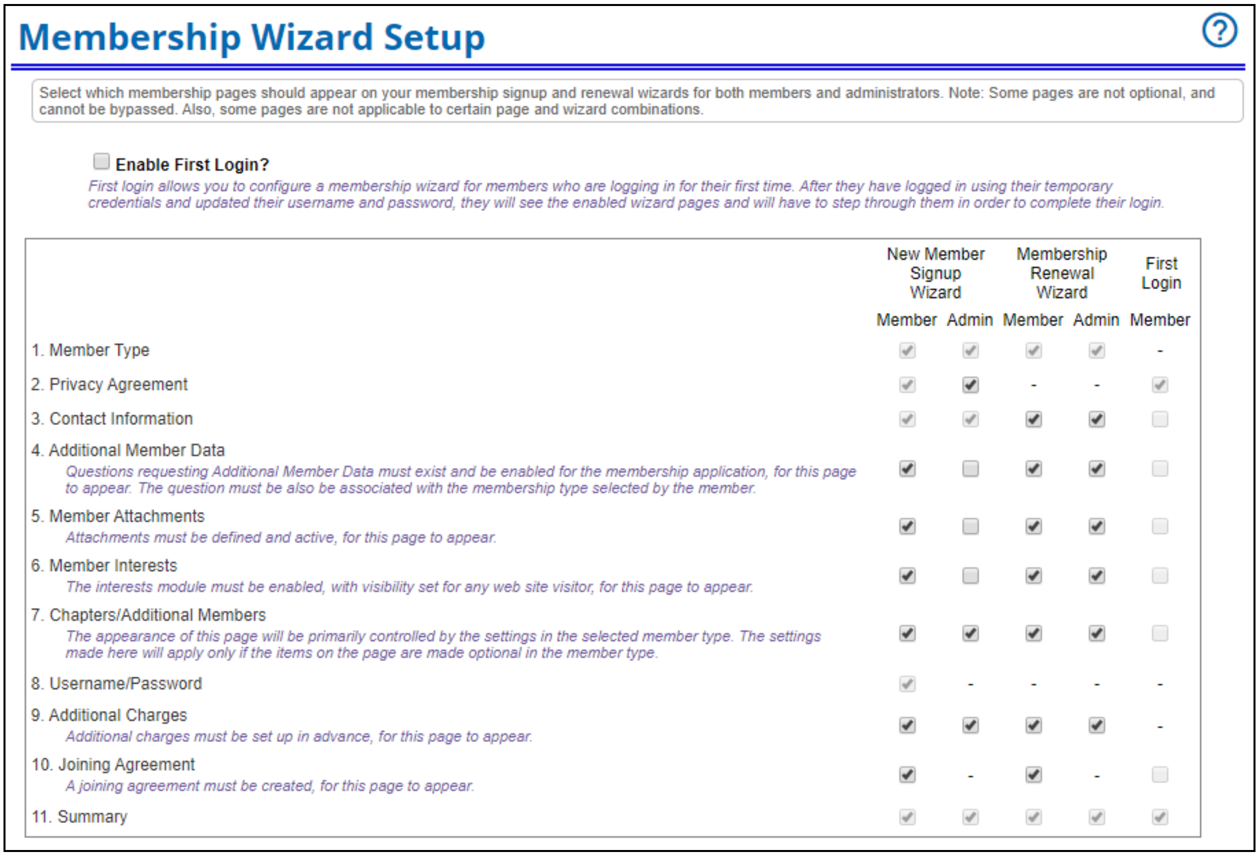
Enter the Subject and content of the message. A simplified version of the content editor is provided. Click **Send** to send your email immediately, or **Cancel** to close the dialog without sending an email.

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.



Membership Wizard Setup

Select which membership pages should appear on your membership signup and renewal wizards for both members and administrators. Note: Some pages are not optional, and cannot be bypassed. Also, some pages are not applicable to certain page and wizard combinations.

☐ **Enable First Login?**
First login allows you to configure a membership wizard for members who are logging in for their first time. After they have logged in using their temporary credentials and updated their username and password, they will see the enabled wizard pages and will have to step through them in order to complete their login.

	New Member Signup Wizard		Membership Renewal Wizard		First Login
	Member	Admin	Member	Admin	Member
1. Member Type	☑	☑	☑	☑	-
2. Privacy Agreement	☑	☑	-	-	☑
3. Contact Information	☑	☑	☑	☑	☐
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.*	☑	☐	☑	☑	☐
5. Member Attachments *Attachments must be defined and active, for this page to appear.*	☑	☐	☑	☑	☐
6. Member Interests *The interests module must be enabled, with visibility set for any web site visitor, for this page to appear.*	☑	☐	☑	☑	☐
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.*	☑	☑	☑	☑	☐
8. Username/Password	☑	-	-	-	-
9. Additional Charges *Additional charges must be set up in advance, for this page to appear.*	☑	☑	☑	☑	-
10. Joining Agreement *A joining agreement must be created, for this page to appear.*	☑	-	☑	-	☐
11. Summary	☑	☑	☑	☑	☑

For Administrators

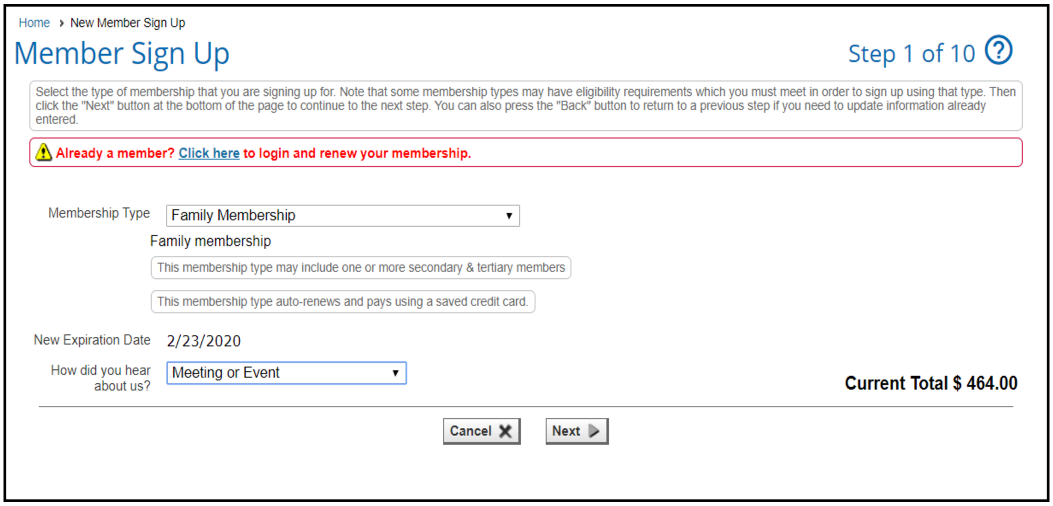
- For members logging in to the site for the first time. If enabled, this version requires new site users (whether they are a new member, an existing member, or a member up for renewal, and whether they are a primary member or a secondary member) to review and update their information. Completing this 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



> **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.

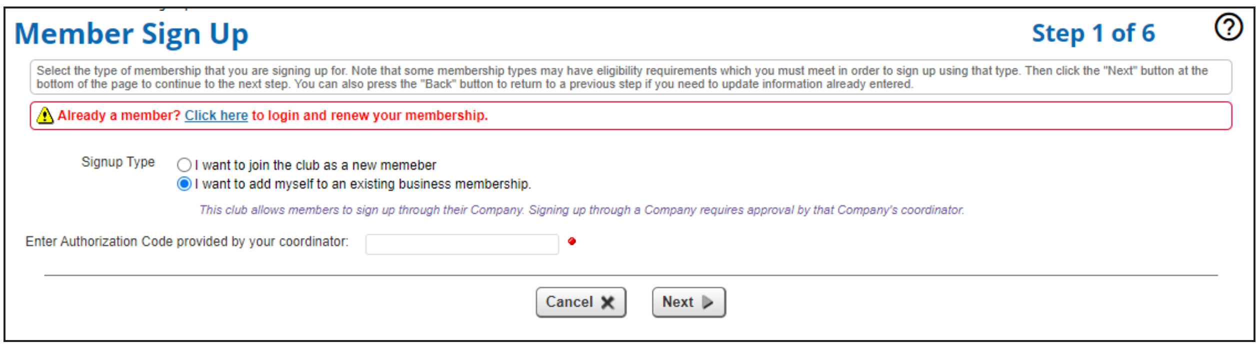
> **Administrators:** When an administrator steps through this signup wizard, all member types are shown in the drop-down, allowing you to select types that are only available under special circumstances.

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:

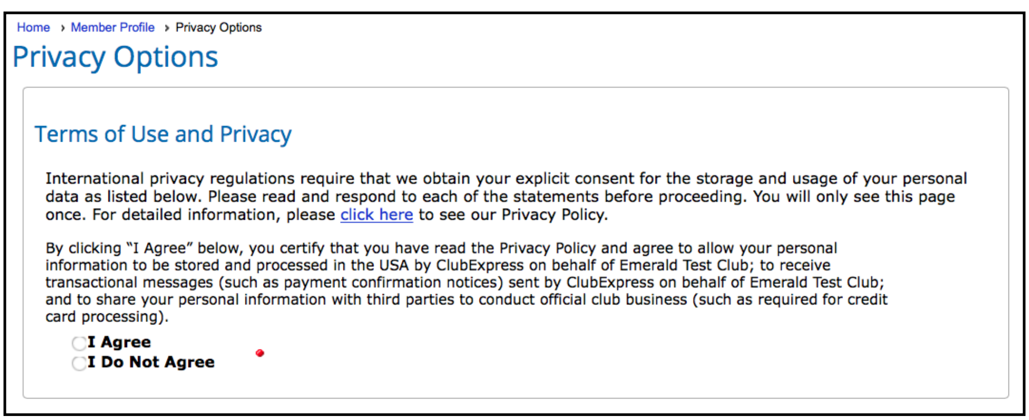
Selecting I want to add myself to an existing business membership opens a new field where you will enter the unique code provided to you by the primary member contact for your business.



Enter the code and proceed through the Membership Signup Wizard.

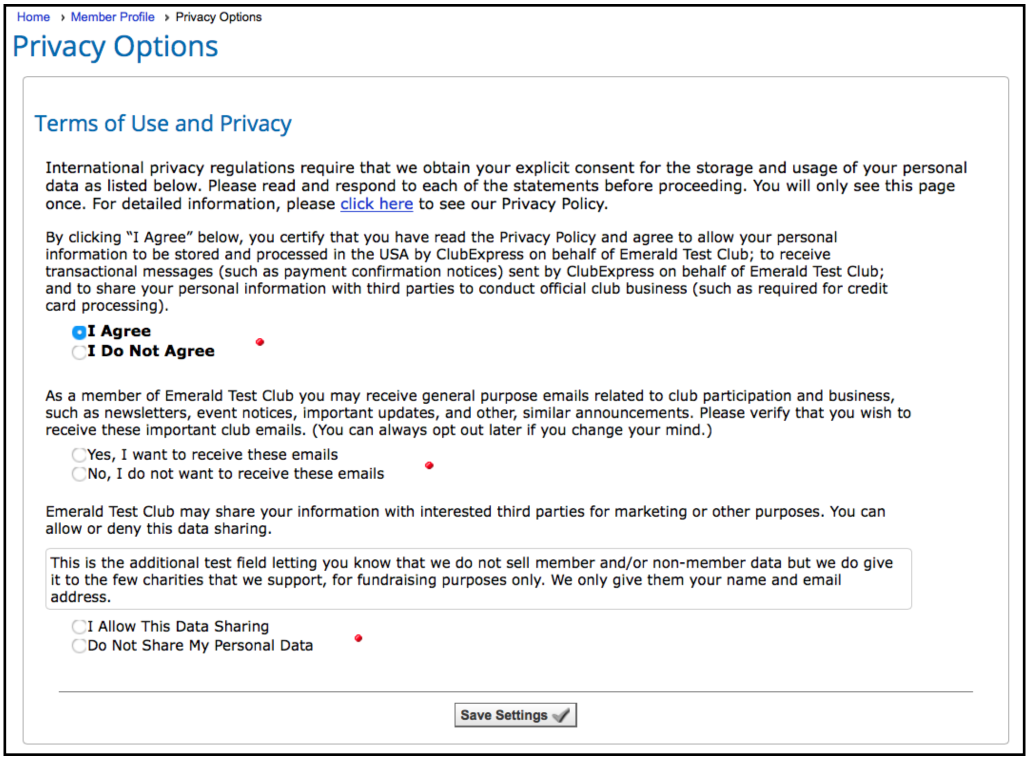
Privacy Agreement

> **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:


Home › 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 click here 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).

I Agree
I Do Not Agree

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

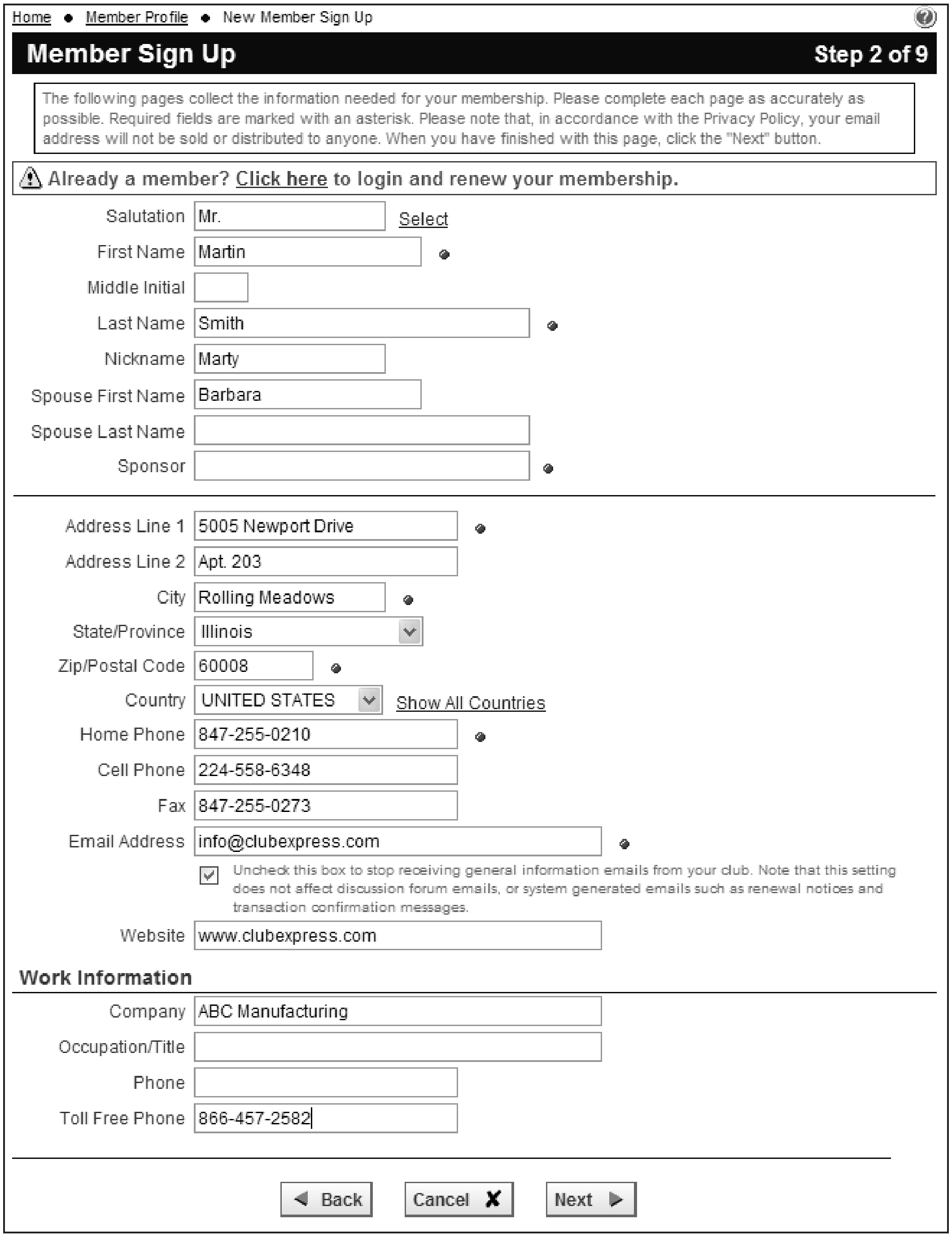
Members also may receive general purpose emails from the organization, such as newsletters, event notices, etc. They have the option to receive or decline these important emails.

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.

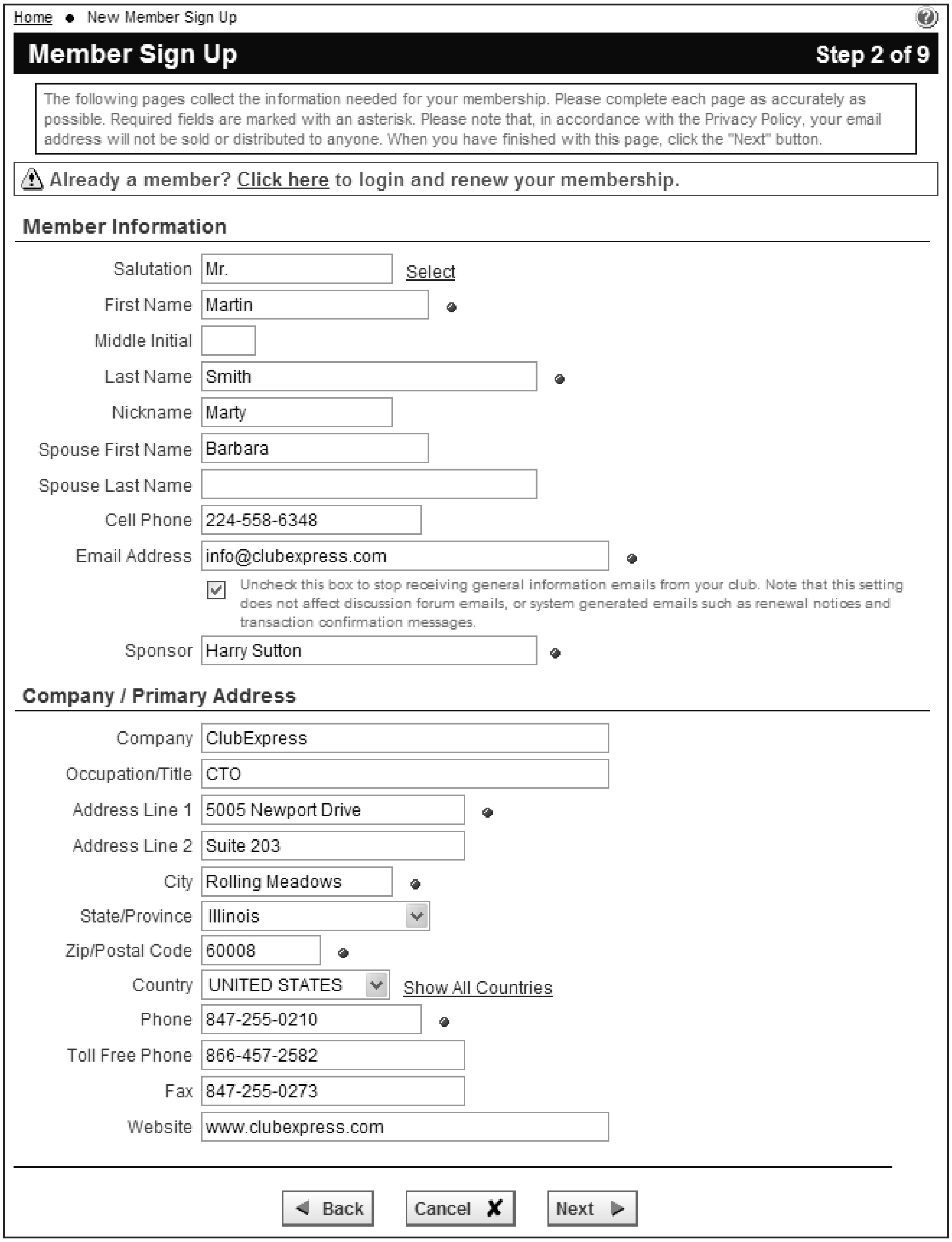
This third question is defined on the Privacy Options page. On this page, organizations can also enter custom text to be shown as part of this question, perhaps explaining how and why personal data is shared for marketing or other purposes.

Basic Contact Information

> **Note:** Required for new memberships, optional for renewals.



A different version of this page, designed for organizations with company or business memberships, is also available and shown below.



Home • New Member Sign Up

Member Sign Up **Step 2 of 9**

The following pages collect the information needed for your membership. Please complete each page as accurately as possible. Required fields are marked with an asterisk. Please note that, in accordance with the Privacy Policy, your email address will not be sold or distributed to anyone. When you have finished with this page, click the "Next" button.

Already a member? Click here to login and renew your membership.

Member Information

Salutation	Mr. Select
First Name	Martin
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 / Primary Address

Company	ClubExpress
Occupation/Title	CTO
Address Line 1	5005 Newport Drive
Address Line 2	Suite 203
City	Rolling Meadows
State/Province	Illinois
Zip/Postal Code	60008
Country	UNITED STATES Show All Countries
Phone	847-255-0210
Toll Free Phone	866-457-2582
Fax	847-255-0273
Website	www.clubexpress.com

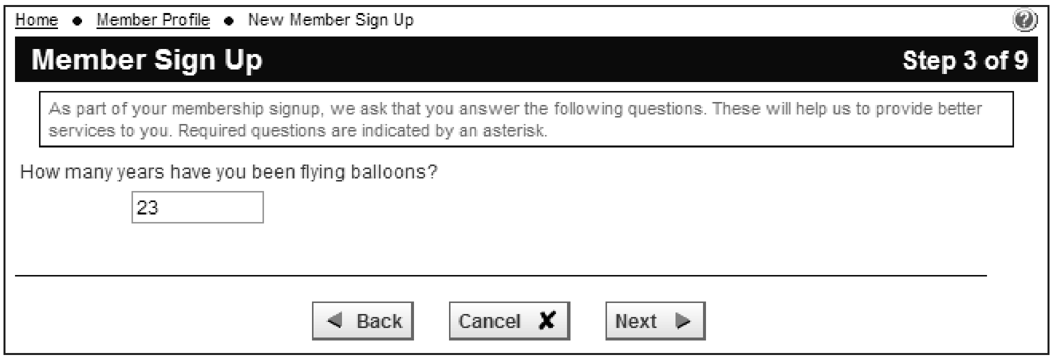
Back Cancel Next

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.

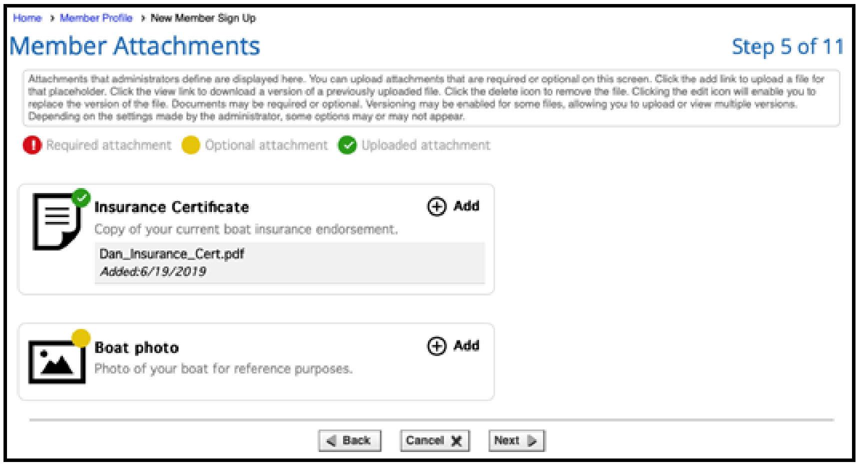


Some clubs and associations require members to answer specific questions as part of the membership application. ClubExpress allows you to configure questions by following these steps:

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.



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.

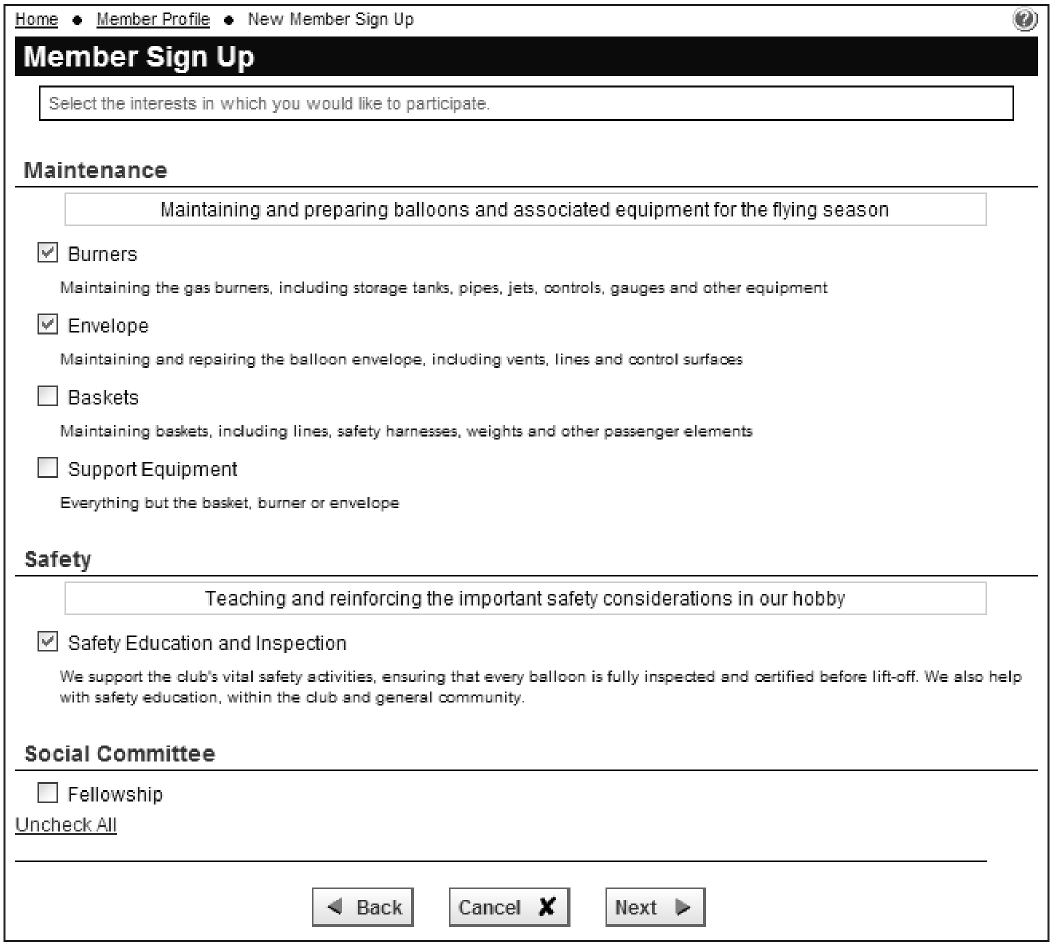
Files or images can be required (indicated with a red icon) or optional (yellow icon).

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

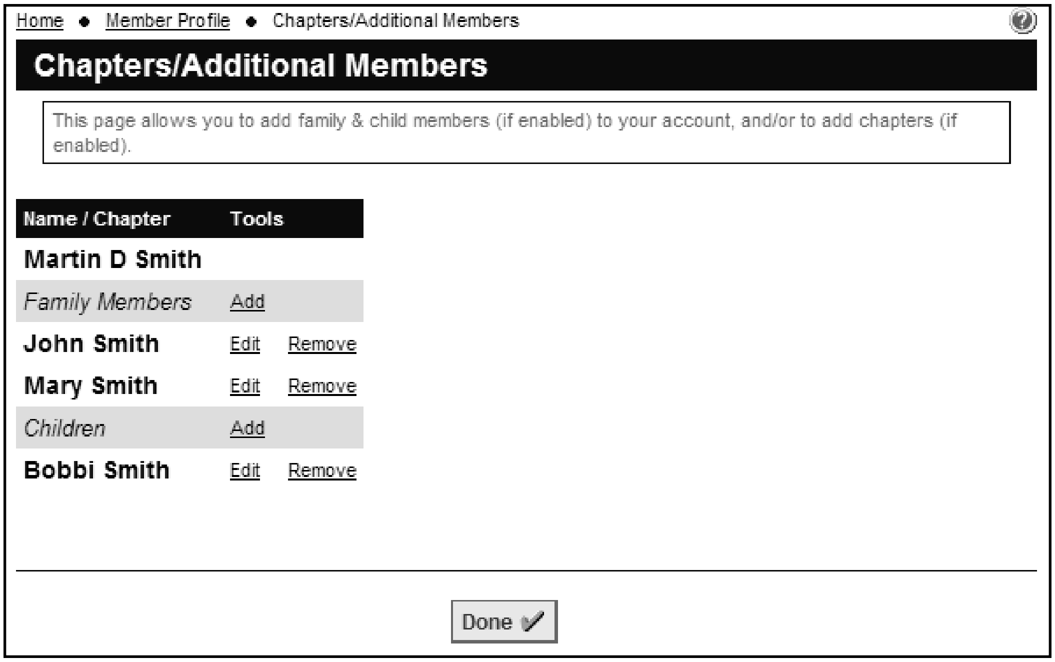
> **Administrators:** The Interests module must be configured to be visible to “Any Website Visitor” in order for this page to appear in the wizard.



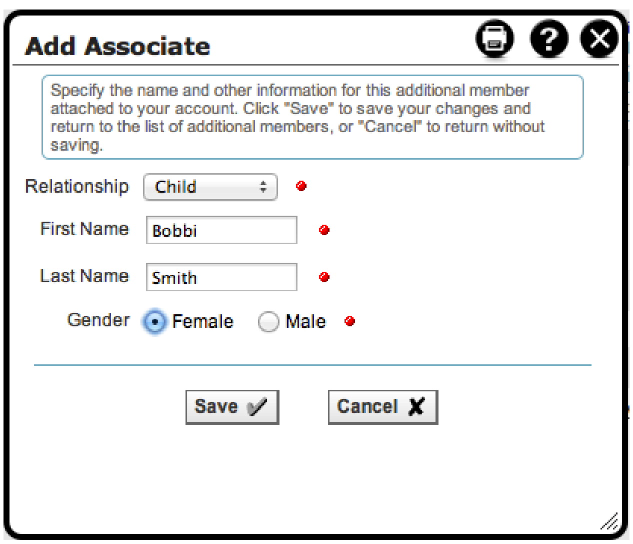
If the Interests module is defined, you can optionally configure the Profile – Interests screen to also appear in the Member Signup Wizard. This is done on the **Control Panel – People tab – Admin Functions– Membership Wizard Setup**.

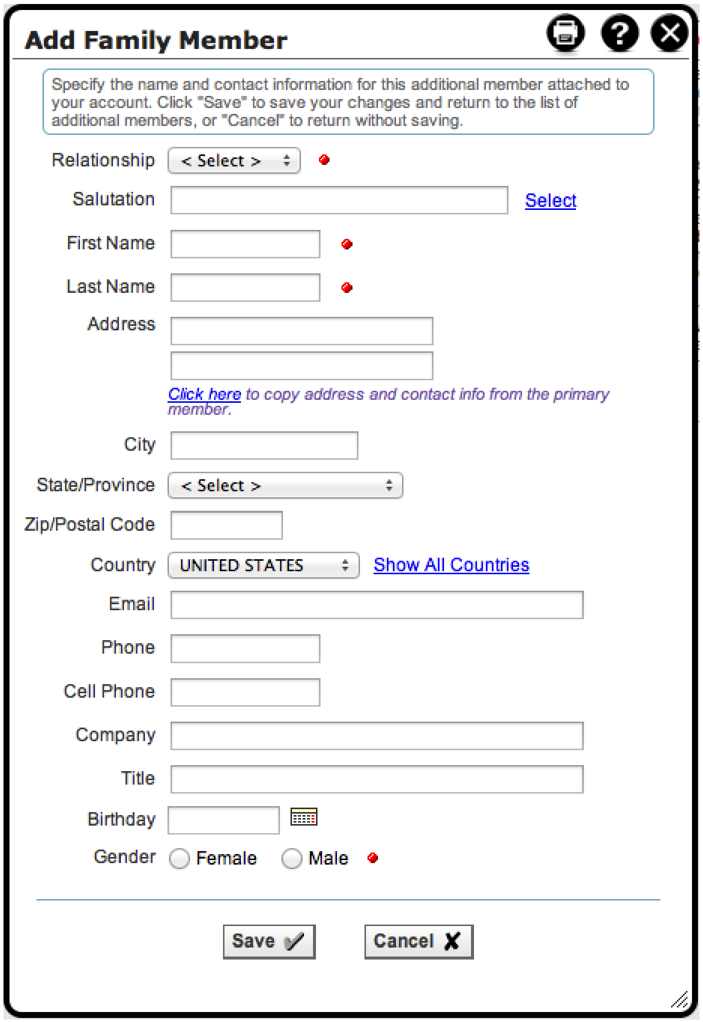
Chapters and/or Secondary and/or Tertiary Members

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.)



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.

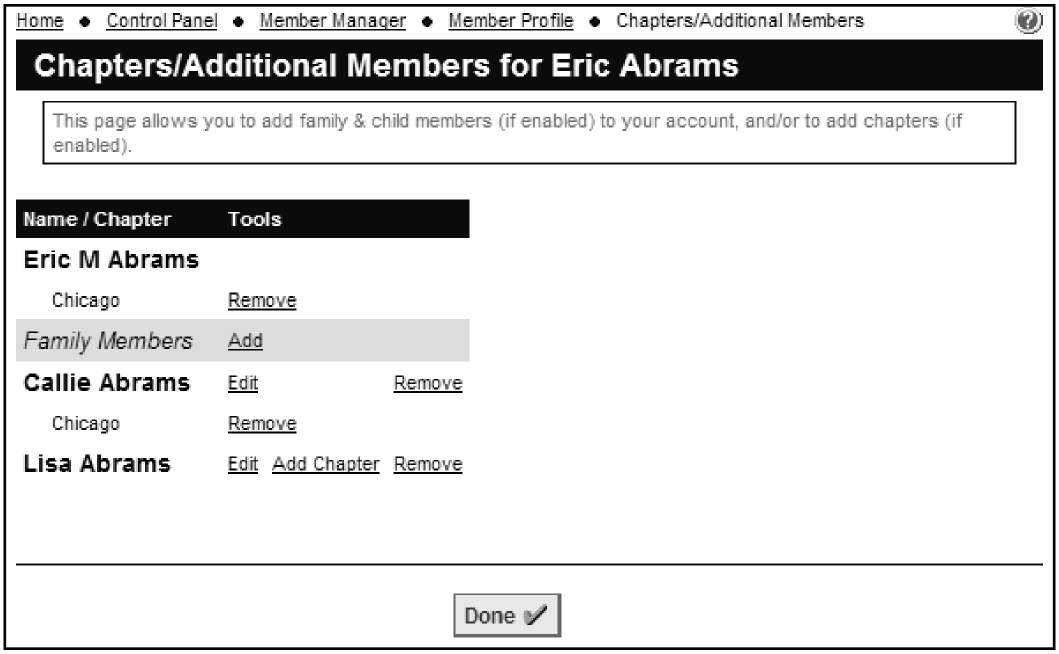




The **Add** link will disappear when the maximum number of members has been added. Use the **Remove** link to remove a secondary or tertiary member.

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.

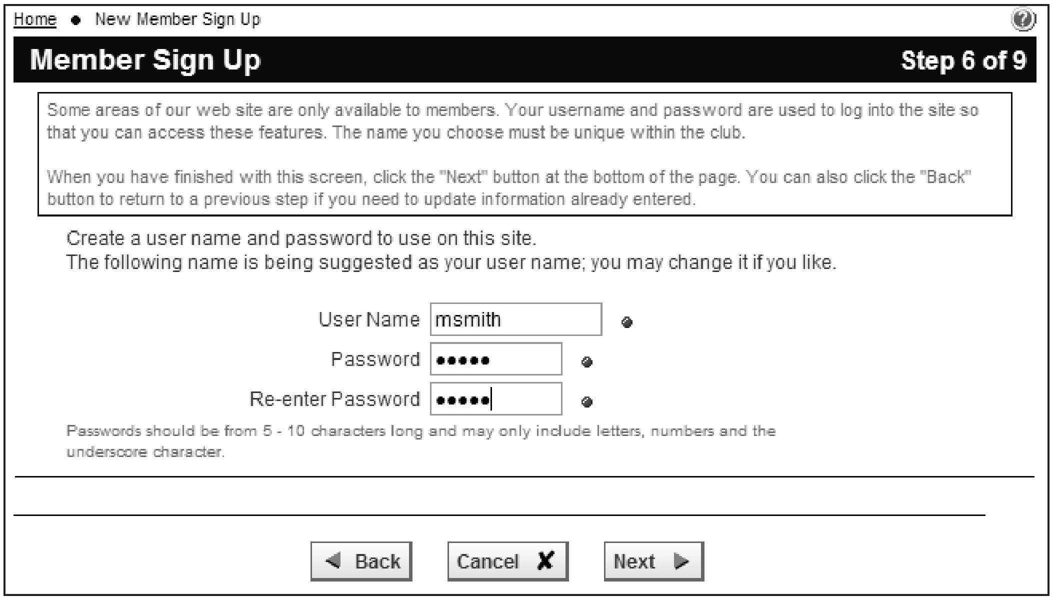


> **Note:** Chapters must be enabled for this page to appear with chapter options. The "Additional Members" selection depends on the member type.

> **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).

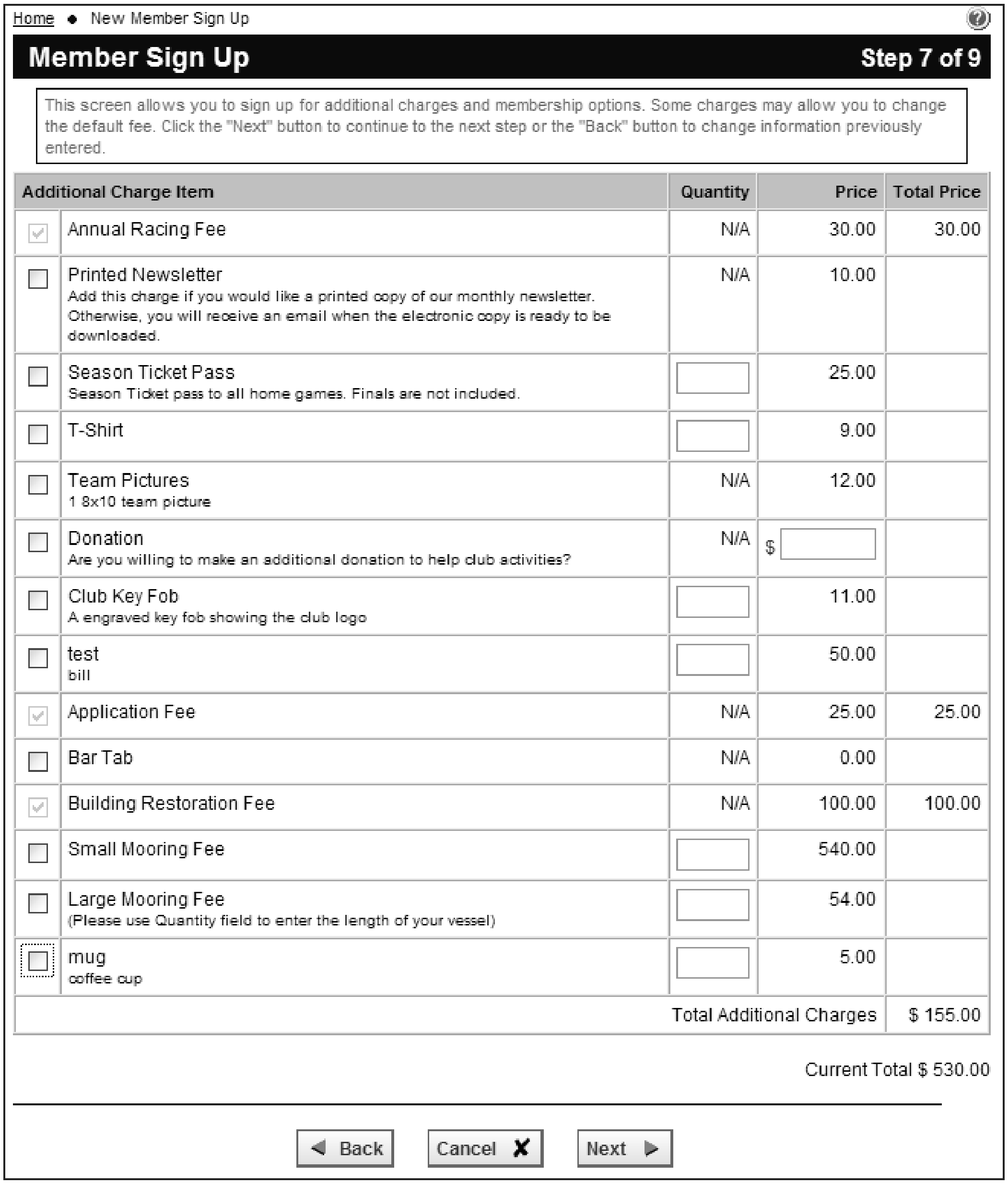


This screen is always shown in the member version of the wizard for new members.

> **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.



Home • New Member Sign Up

Member Sign Up Step 7 of 9

This screen allows you to sign up for additional charges and membership options. Some charges may allow you to change the default fee. Click the "Next" button to continue to the next step or the "Back" button to change information previously entered.

	Additional Charge Item	Quantity	Price	Total Price
☑	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	
☑	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 Additional Charges	$ 155.00

Current Total $ 530.00

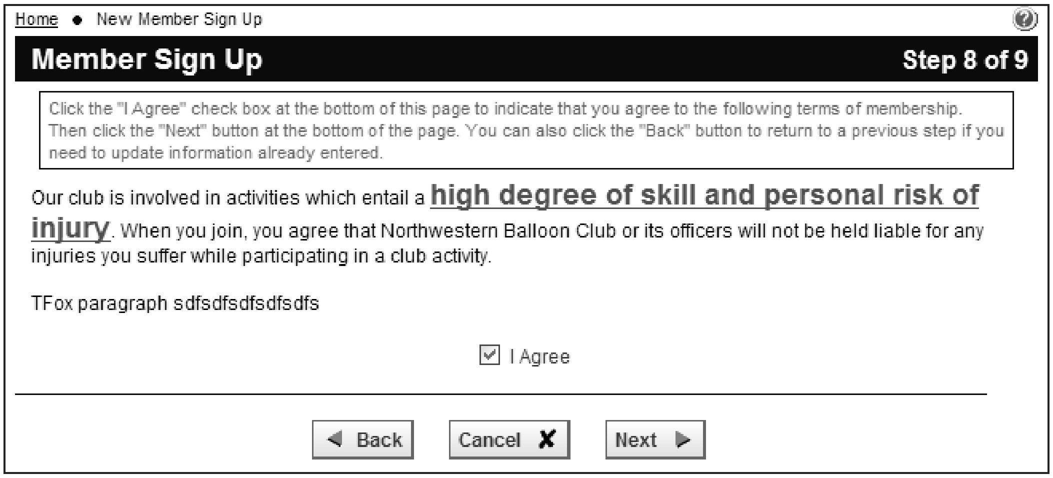
Back | Cancel | Next

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:

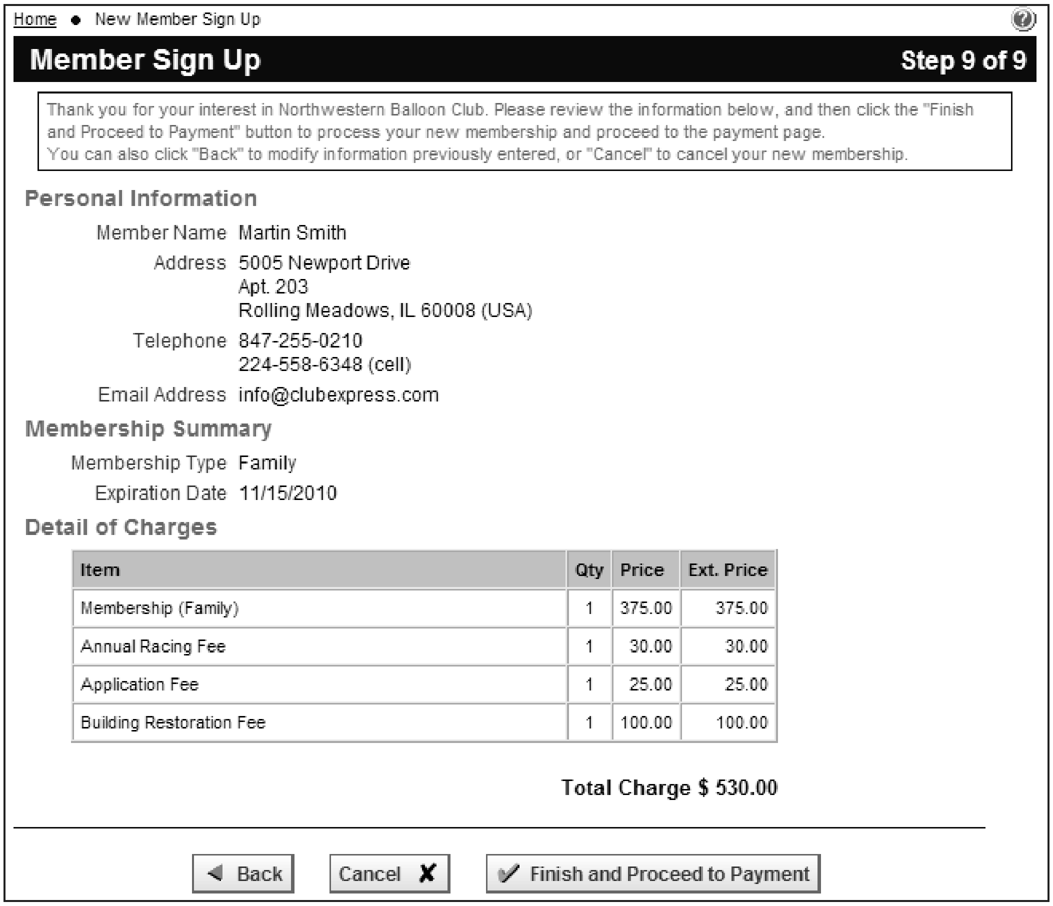
1. Login in as an Administrator;
2. Select **Control Panel** from the menu;
3. Select the **Club** tab
4. Select **Joining Agreement** from the **Setup** panel. A popup window will be displayed.
5. Enter the text from your paper sign-up form and click **Save.**

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.



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.)

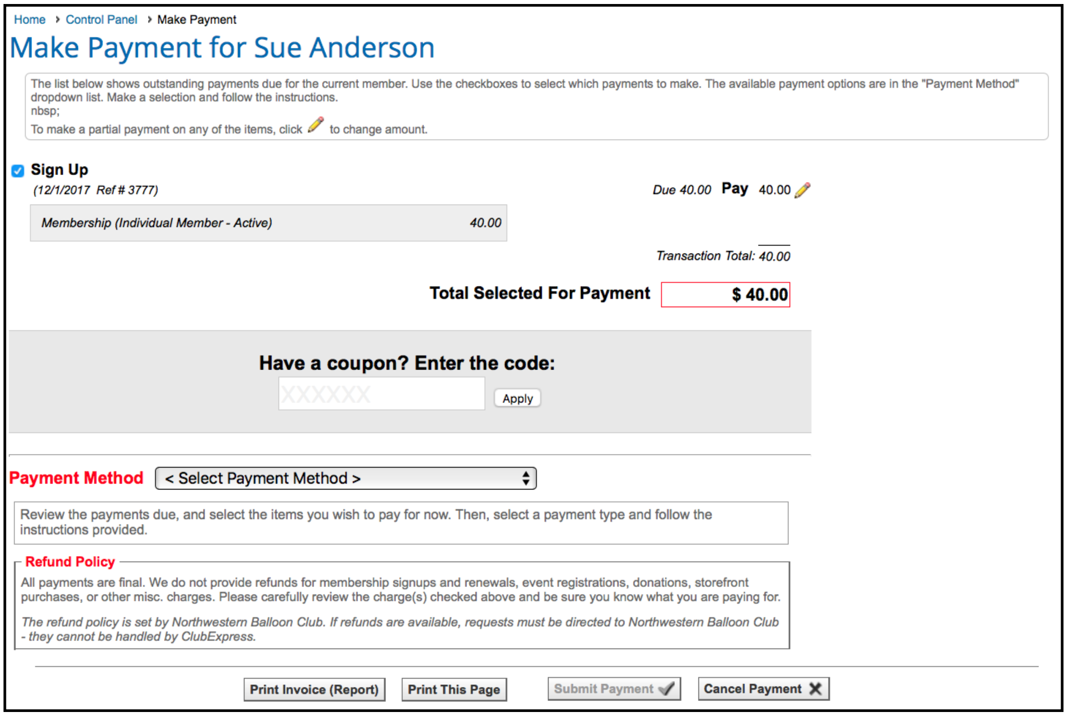
Note that if there is no charge for the membership, the **Finish and Proceed to Payment** button is replaced by a **Done** button. The member is added to the database with a membership status of “Active” and a confirmation email is sent.

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.

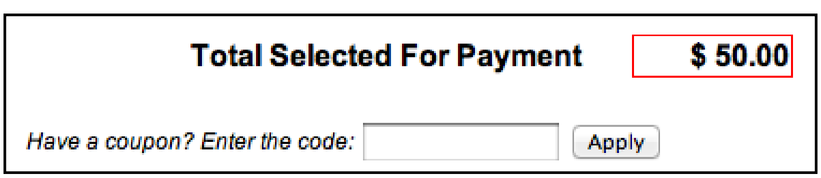


The payment options are different depending on who is displaying this screen.

- 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

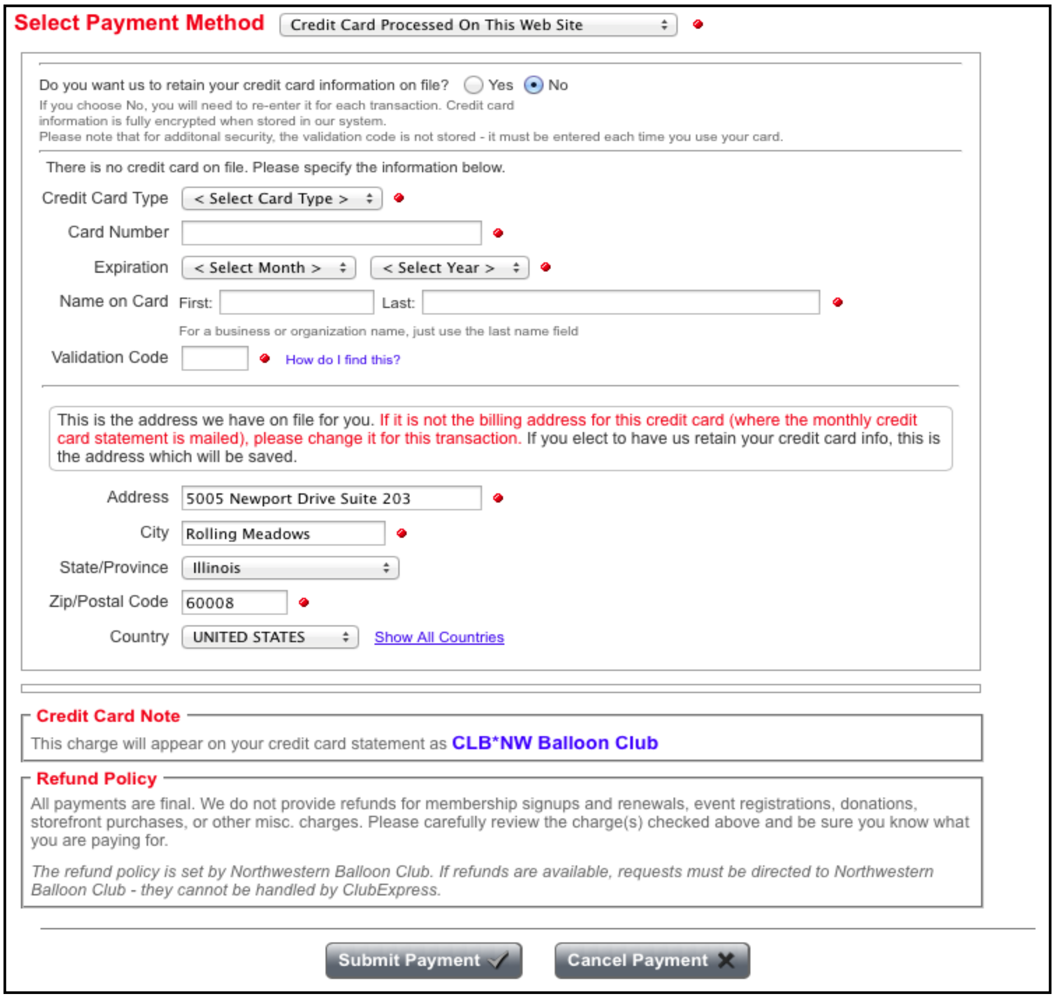
If you have a discount coupon, it can also be applied on the Payments page. If there are published coupons that apply to the transaction(s) on the page, you will see a field to enter the coupon code:



Once the code has been entered, the screen changes as follows:

Paying by Credit Card

When credit card is specified as the payment method, the screen is refreshed to show the following options:



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.

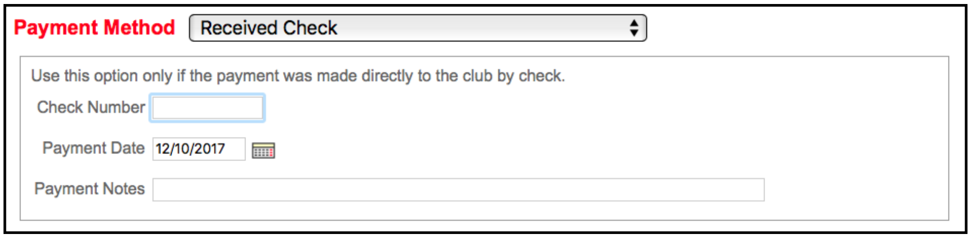
There is also a simpler **Print this Page** button to print the page in a default layout.

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:



Enter the check number, payment date (defaults to today) and any notes, and click the **Record Payment** button at the bottom of the screen.

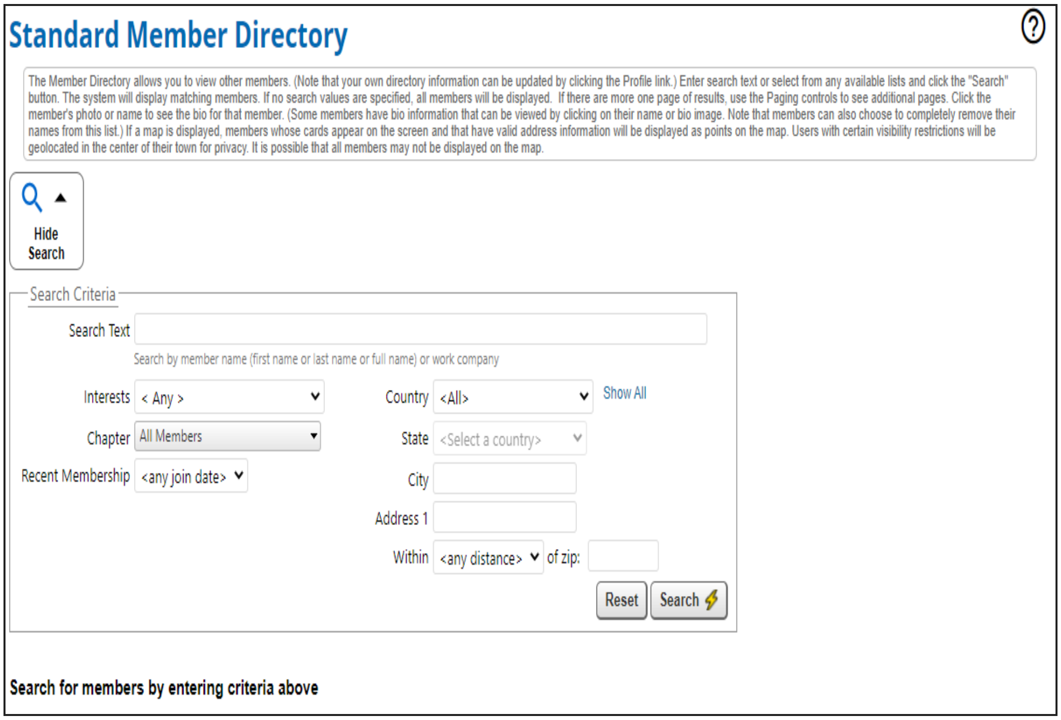
When you receive cash in the mail or at an event, and you select the appropriate payment method, you will see a similar screen to the one above, except without the Check Number field.

Membership Directory

> **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.

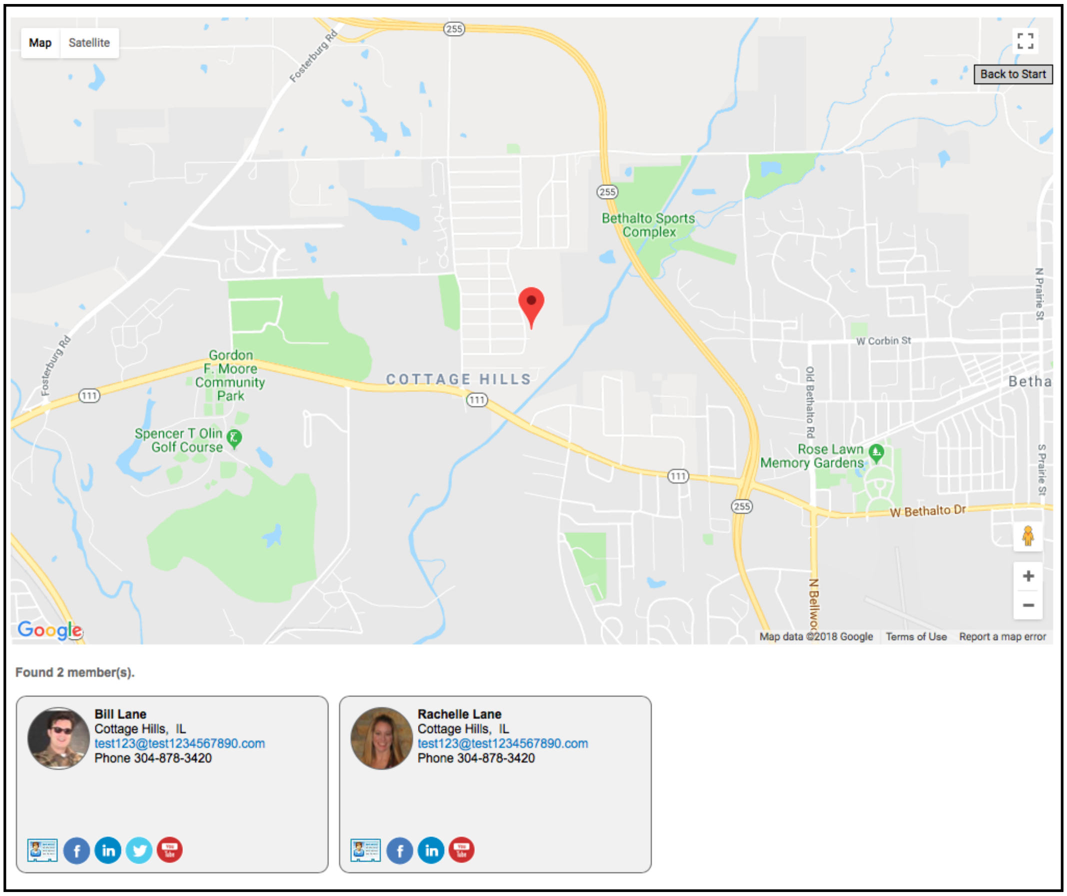
Selecting this choice from the menu displays a screen similar to the following:



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.

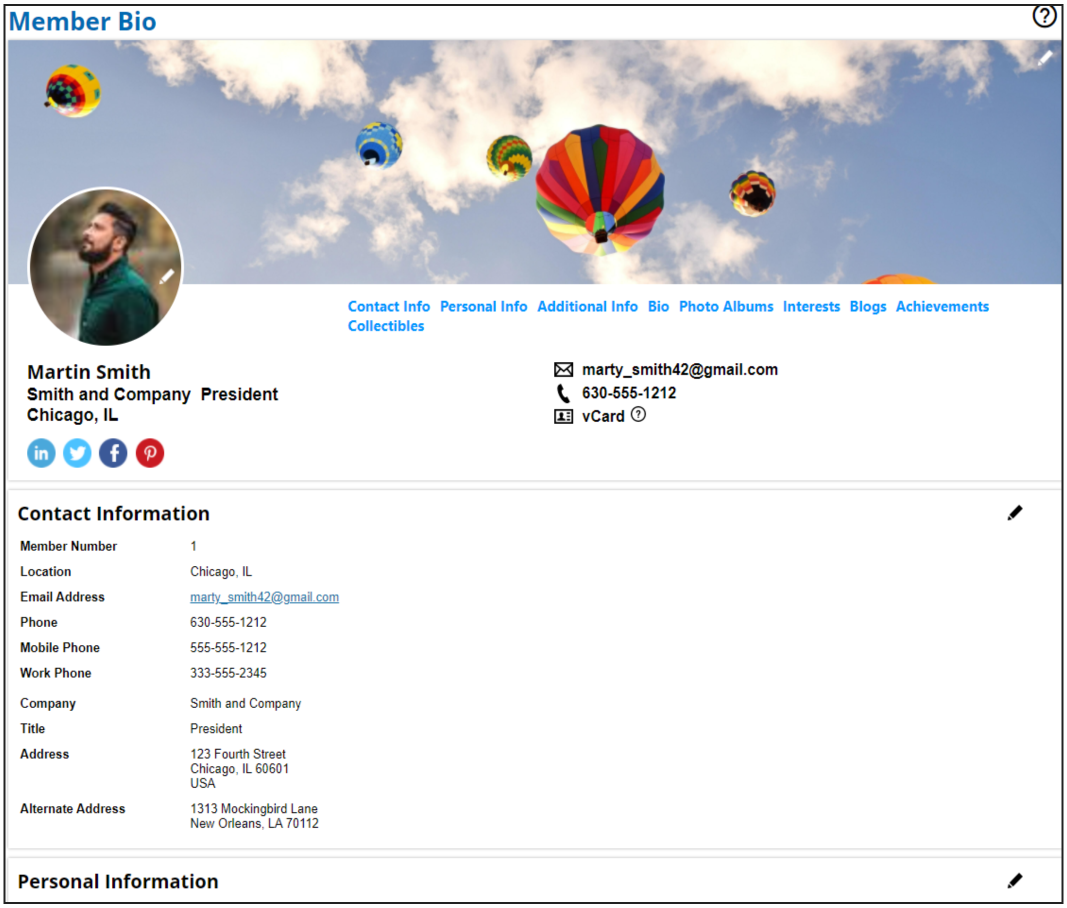


If your club or association does not support chapters, the “Organizational Tree” option will not be shown.

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.)



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:

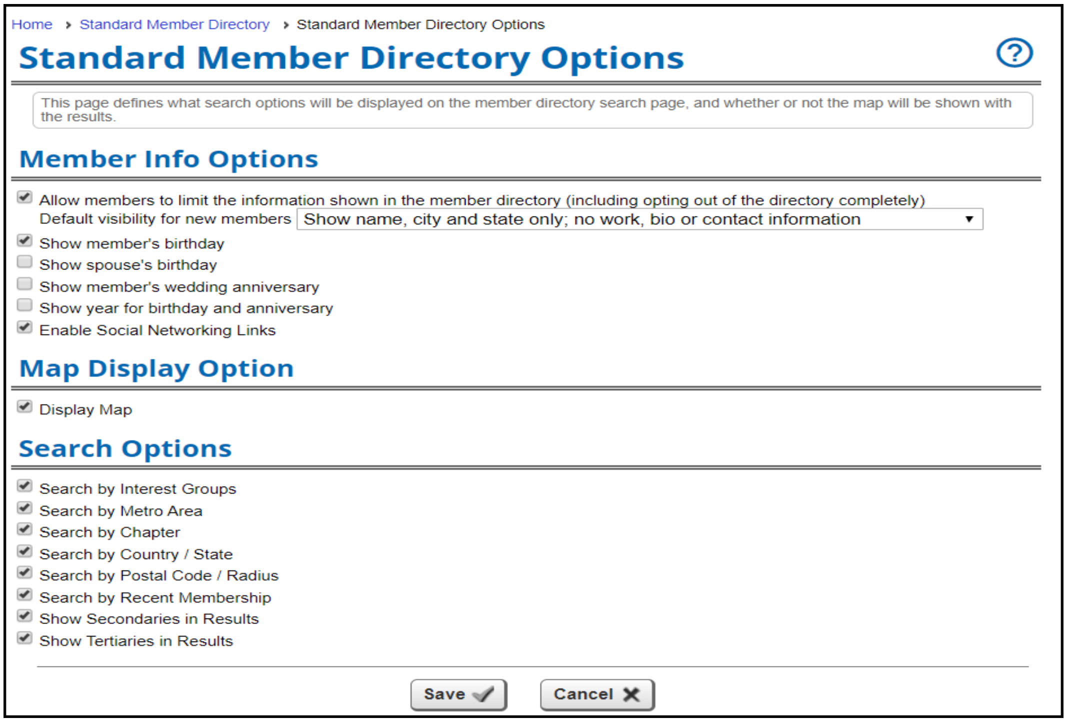
1. Administrators and Function Coordinators can select the module in the Control Panel (People tab) to access the options screen.

> **Administrators:** Don't see the module in the People Tab? Enable the module.

2. 

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:



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

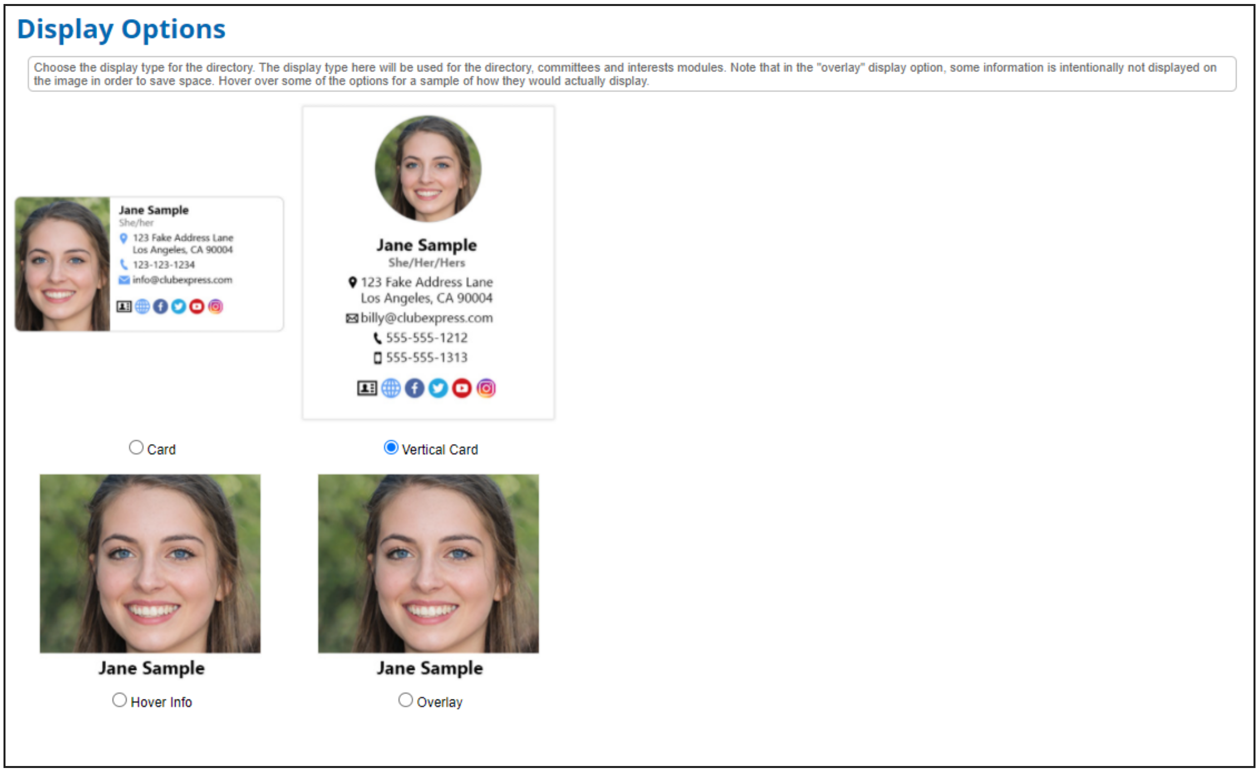
You can also enable or disable some of the fields in the Search panel.

> **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 Ids 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

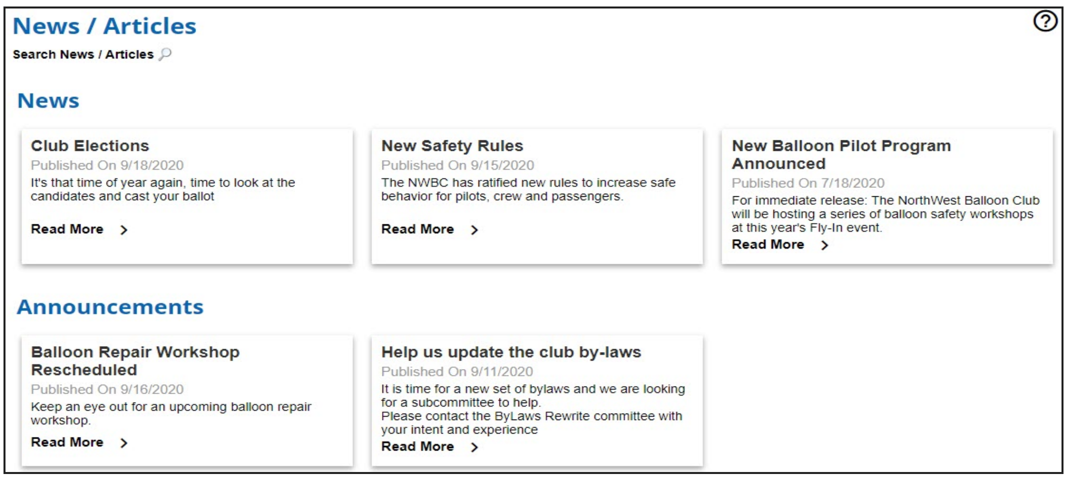
News / Articles

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

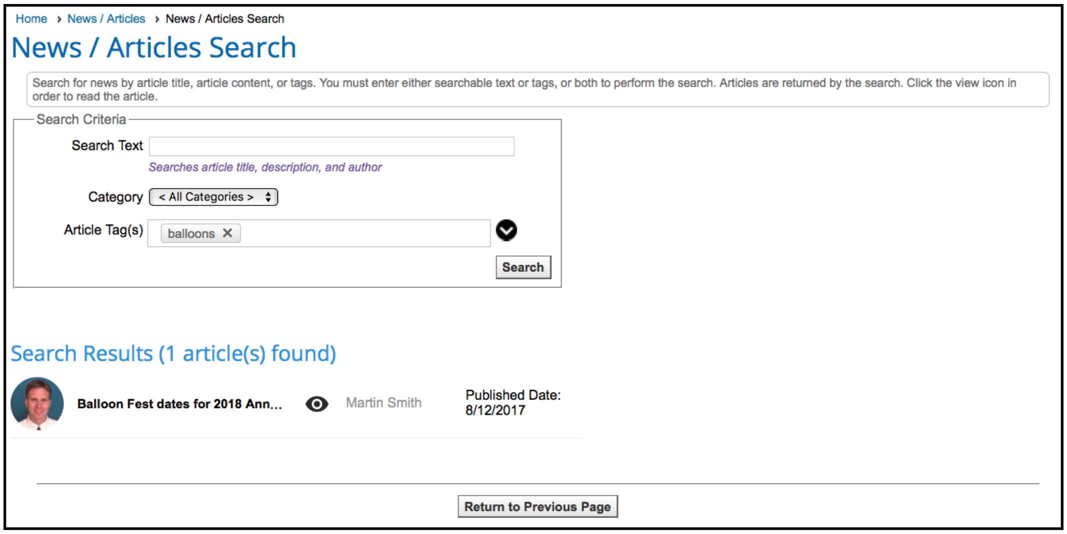
Searching News Articles

A typical news screen is shown below:



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:

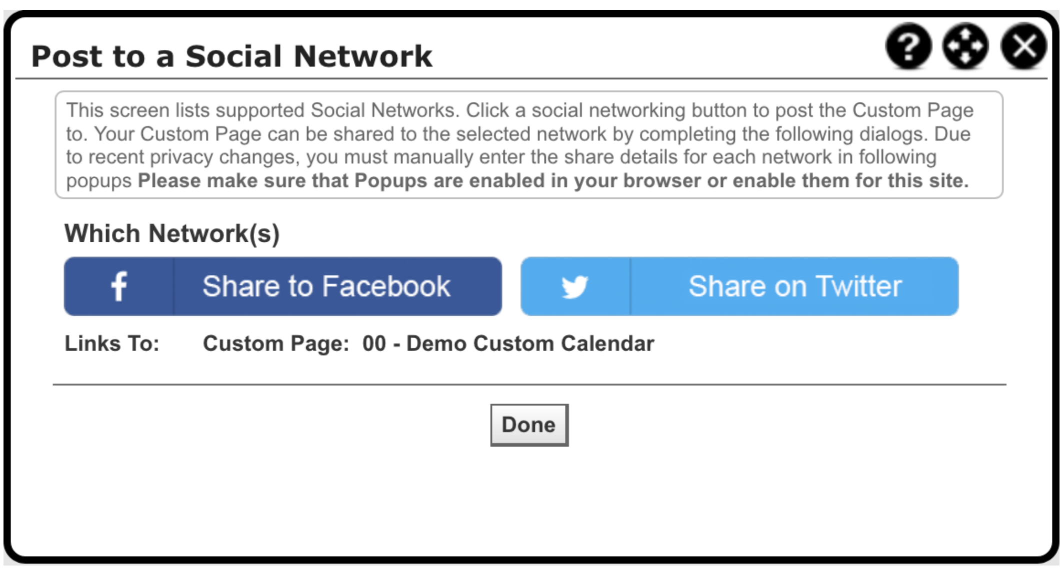


Enter text, a category, and/or one or more tags. Search text will be found anywhere in the article title, description, and author fields. Click the **Search** button to display a list of matching results. Click the **View** (eye) icon to jump to that specific news item or article.

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:



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. 

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.

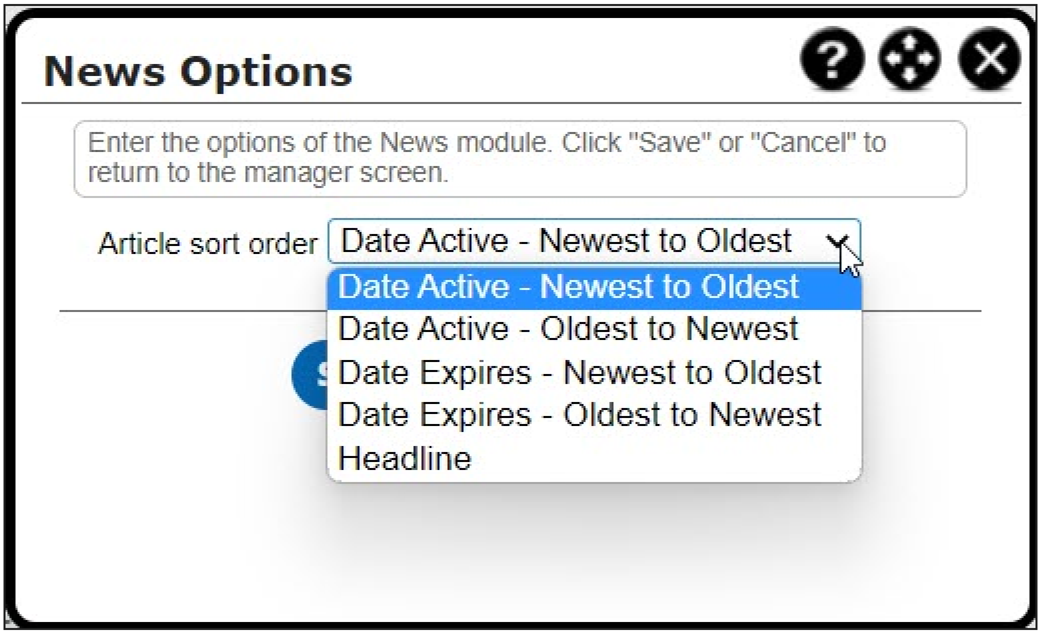
The following screen is displayed:

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:

Icon	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 Twitter. 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:

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

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.

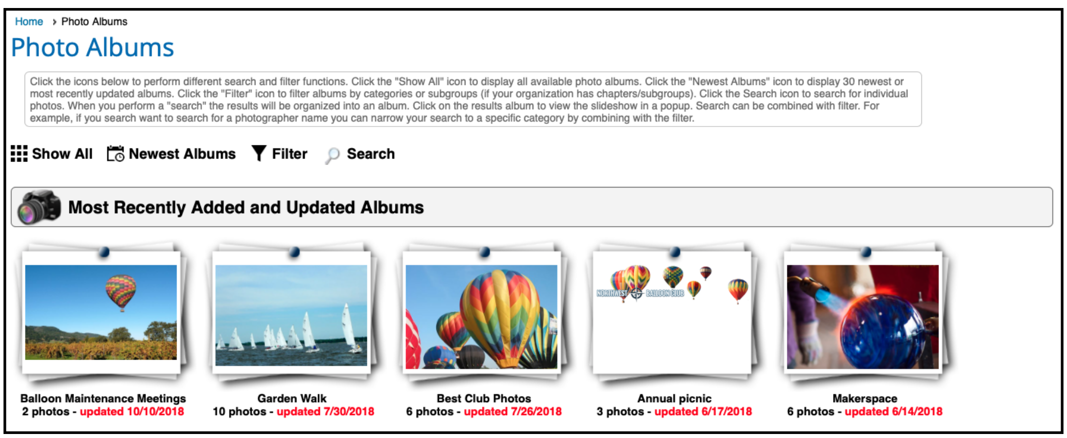
> **Note:** You may add a maximum of five (5) tags to any single photo album.

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

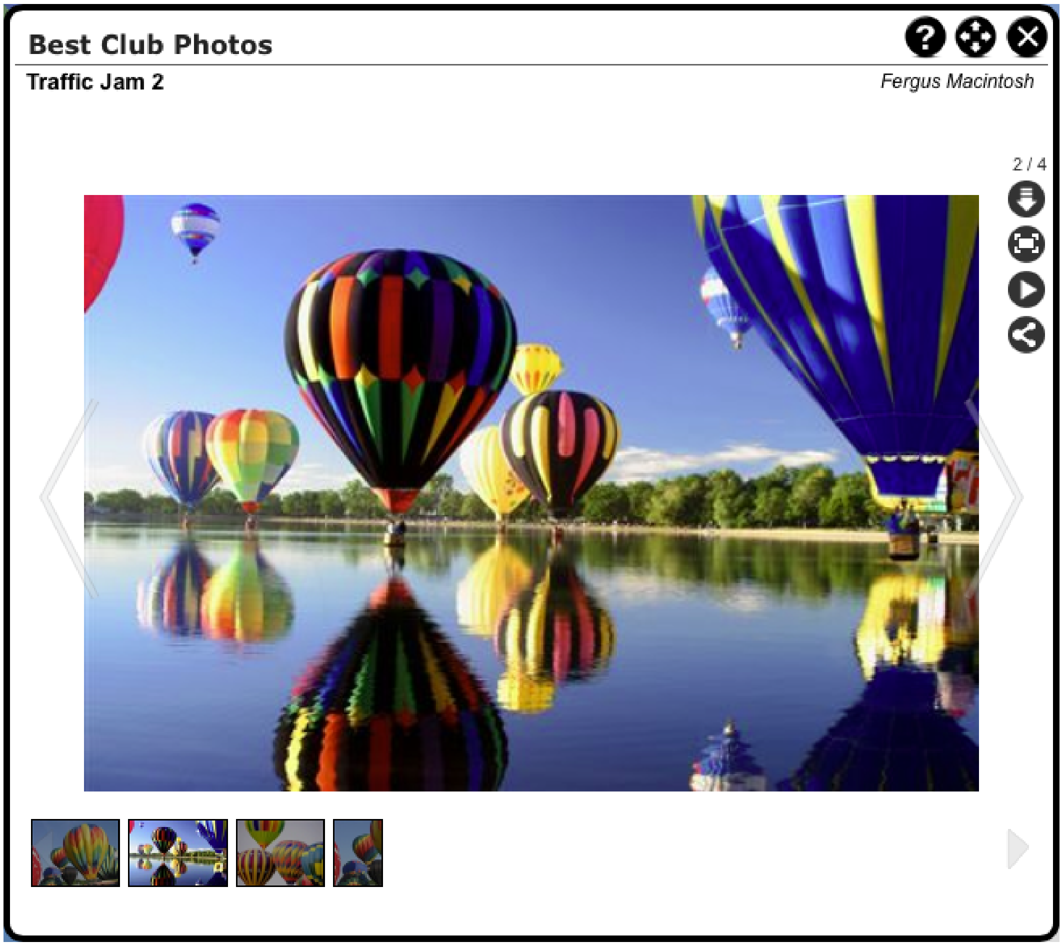
ClubExpress includes a Photo Album Index function that collects all defined photo albums onto a single screen. This function can easily be placed on the menu as a single entry point into your organization's photos.

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.

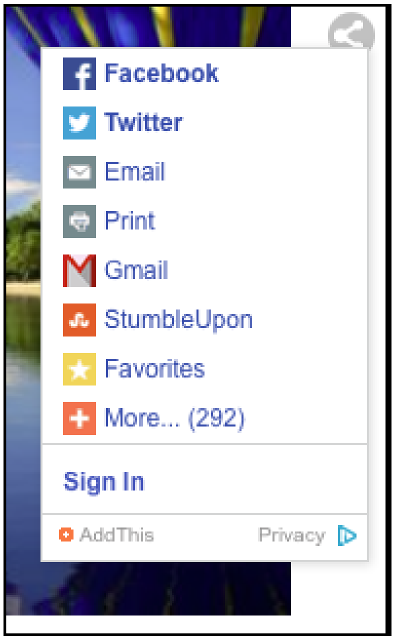
Photo Album Options

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:



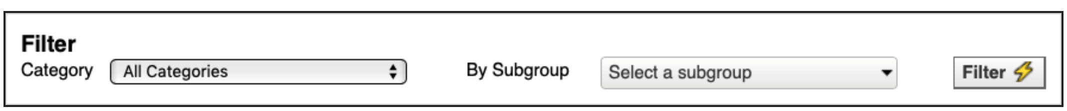
These options allow you to share a photo to your Facebook or Twitter feeds or via other services.

Top Panel Options

Click **Show All** to show all photo album categories and the albums within each category.

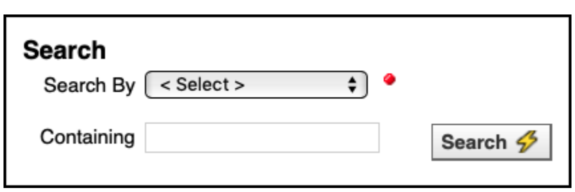
Click **Newest Albums** to see the albums added or updated in the past 30 days.

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.)



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.



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.

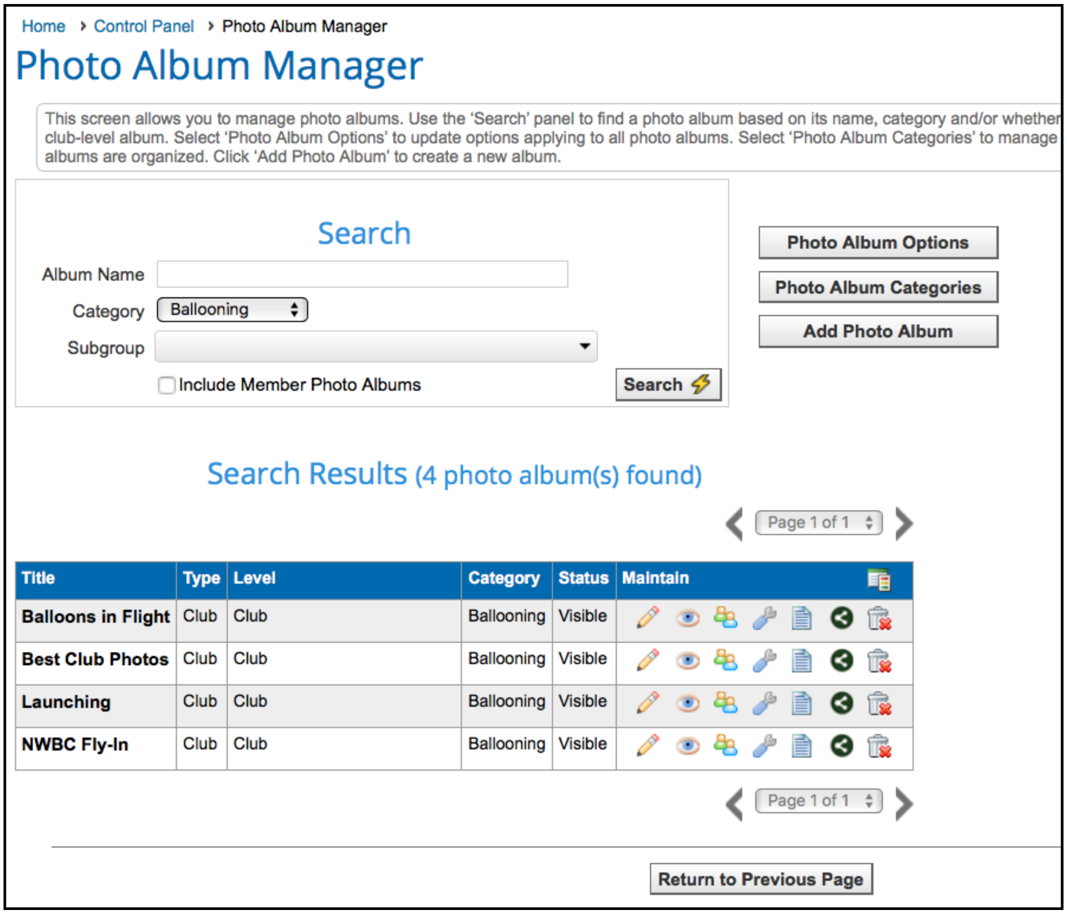
2. 

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:



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.

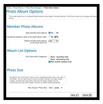
Note that the practical size limit for each photo album is 300 photos. If you have more photos you want to display, spread them across multiple albums.

> **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:



The following options can be set:

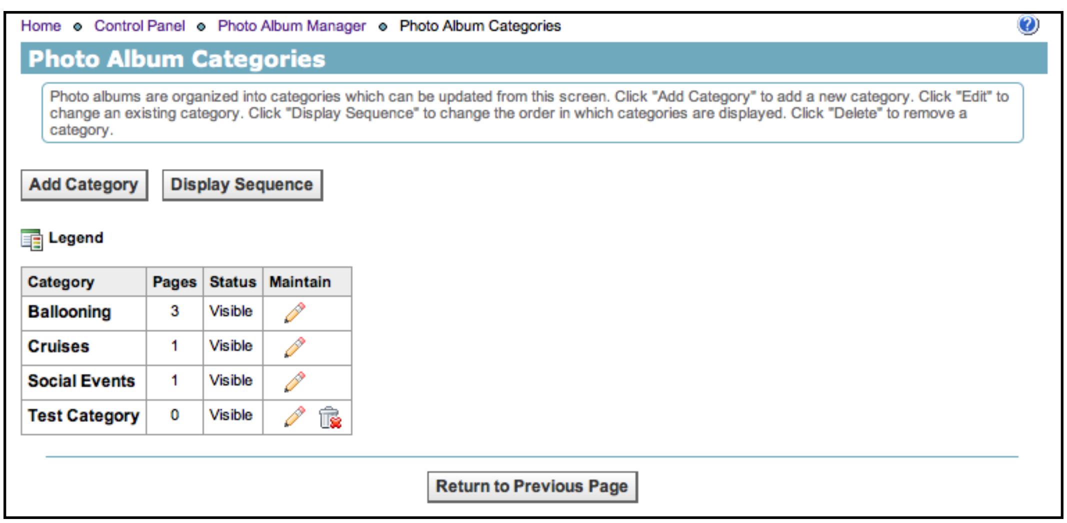
- **Allow member photo albums** controls whether members can create their own photo albums and upload photos into them. If this option is set to Yes, members will see a **Photo Albums** option in their Profile screen.
- **Include the member's name in the photo album title** – set this option to No if 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:



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.

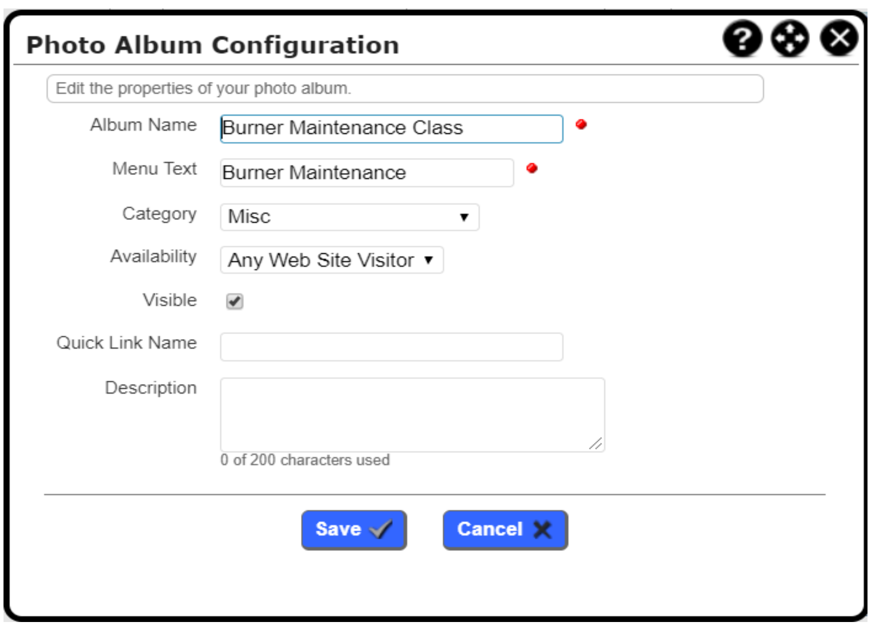
If the trash can (Delete) icon is displayed, the category has not been assigned to any photo albums, and it can be deleted.

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:



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

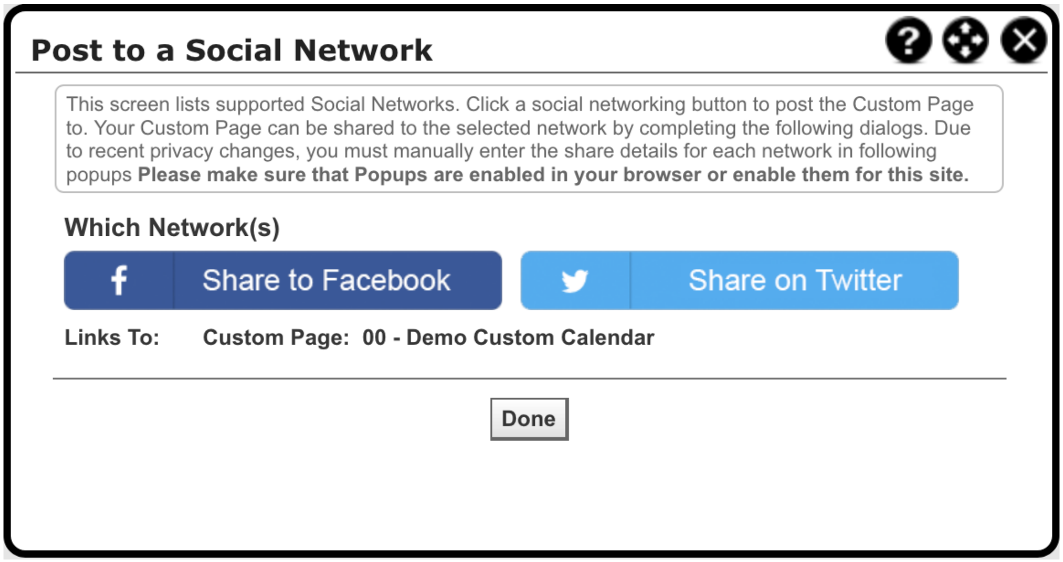
The following options are available in the Maintain column:

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 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.

Storefront

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 built-in 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 non-members, 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

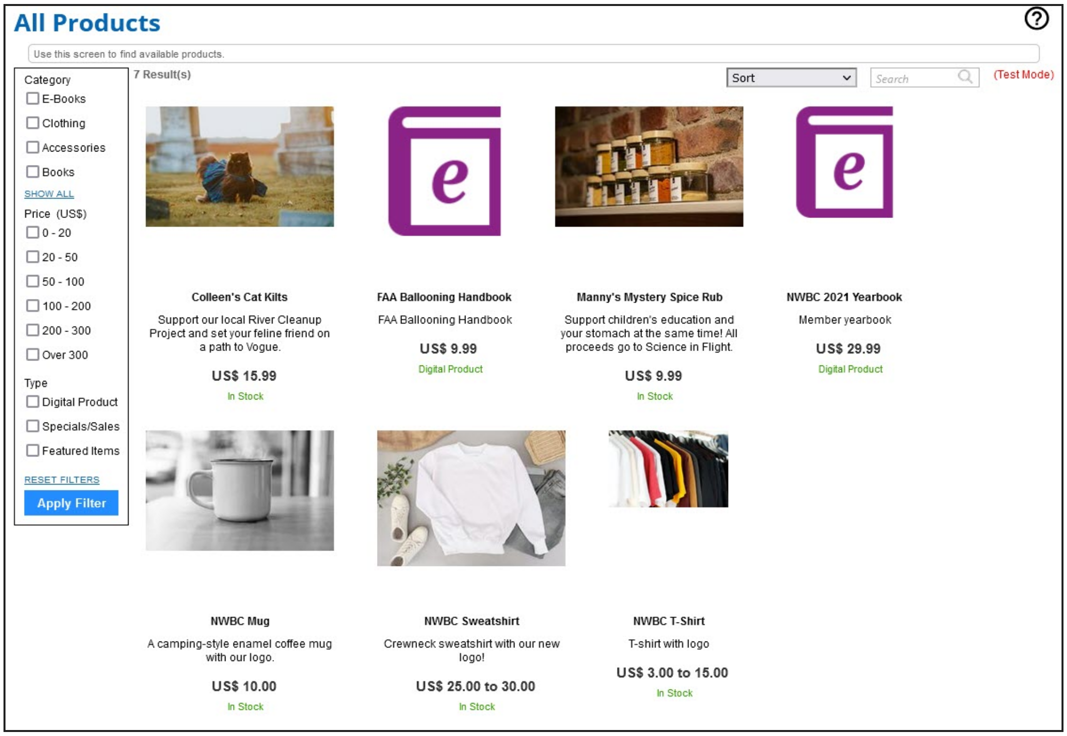
When you first activate the Storefront, it will be in “Test” mode. This mode allows you to configure the support and lookup tables, add products and inventory items, upload images, create orders with lineitems, view the shopping cart and proceed through the Checkout process to the final page before payment. 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.

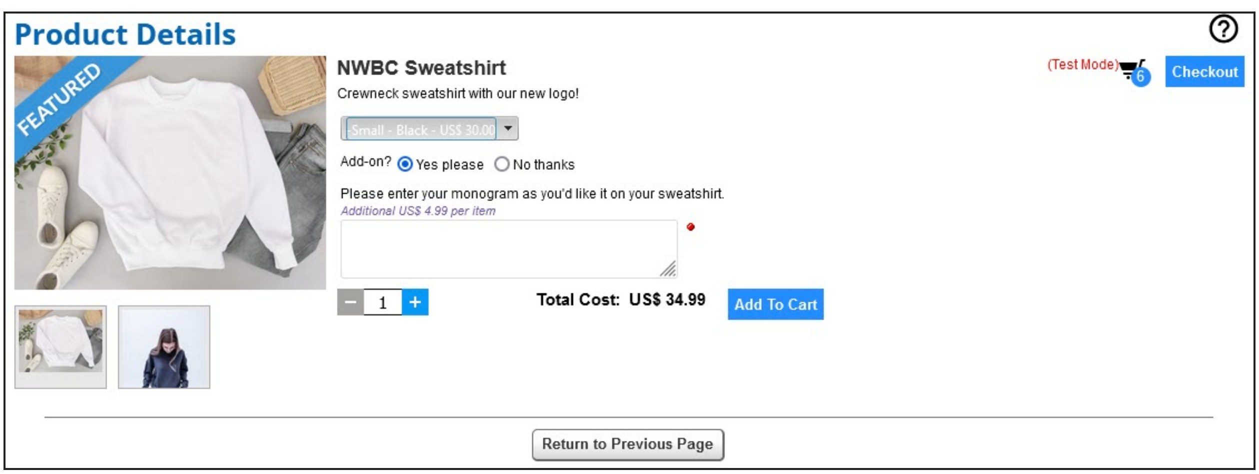
Purchase Products

When users open the storefront, they will usually see a screen similar to the following display:



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:



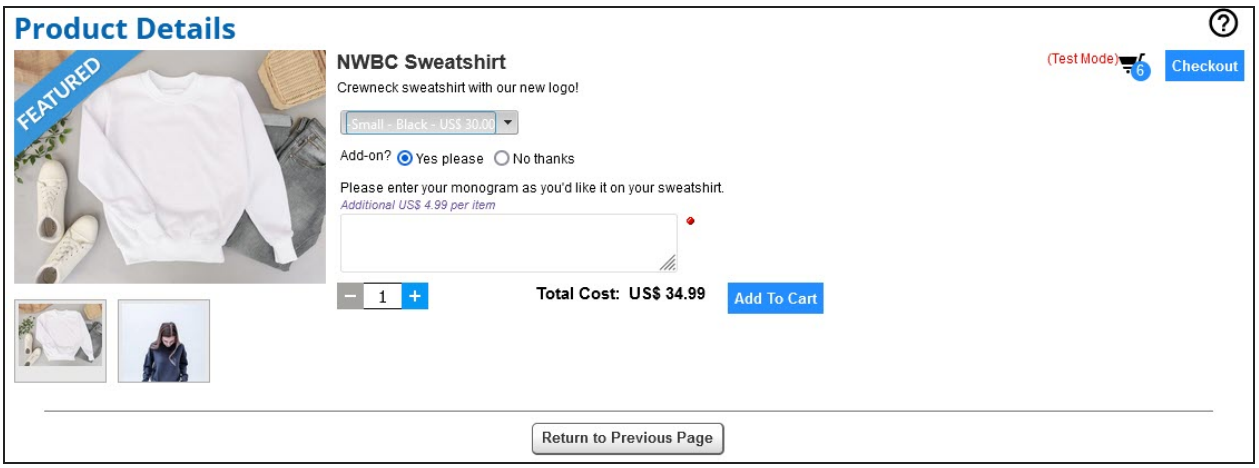
This screen displays a larger version of the main product photo. Products can have multiple photos that are shown below the main one. Clicking one of the smaller photos displays it in the larger panel.

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:



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.

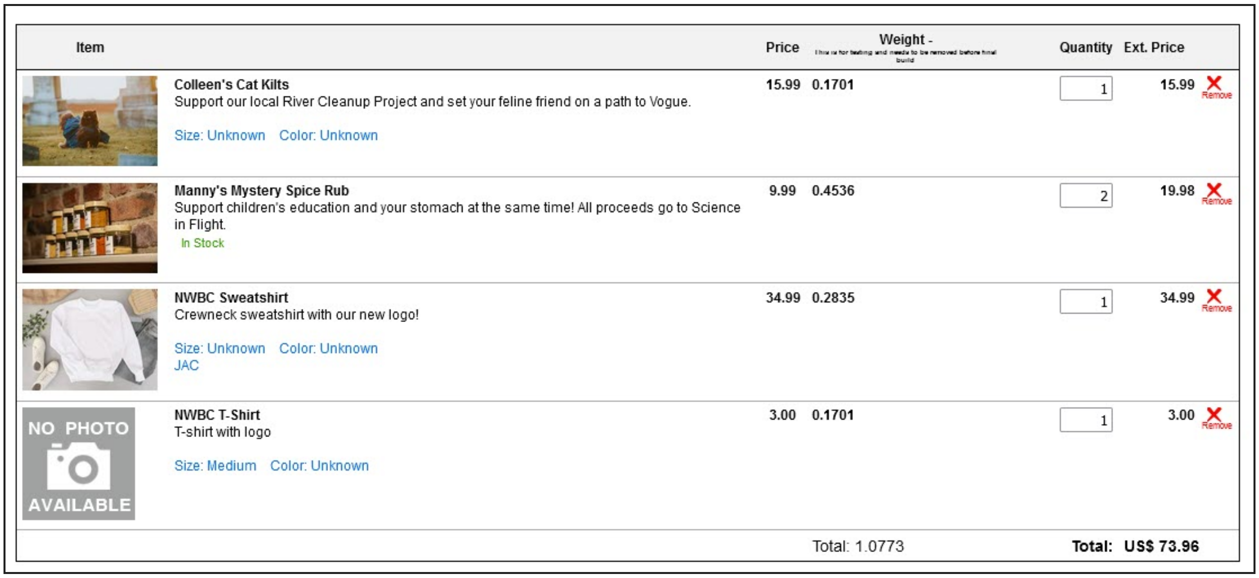
For **digital content** that is downloaded rather than shipped, the Quantity controls are grayed out; you cannot buy multiple copies of a digital product.

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

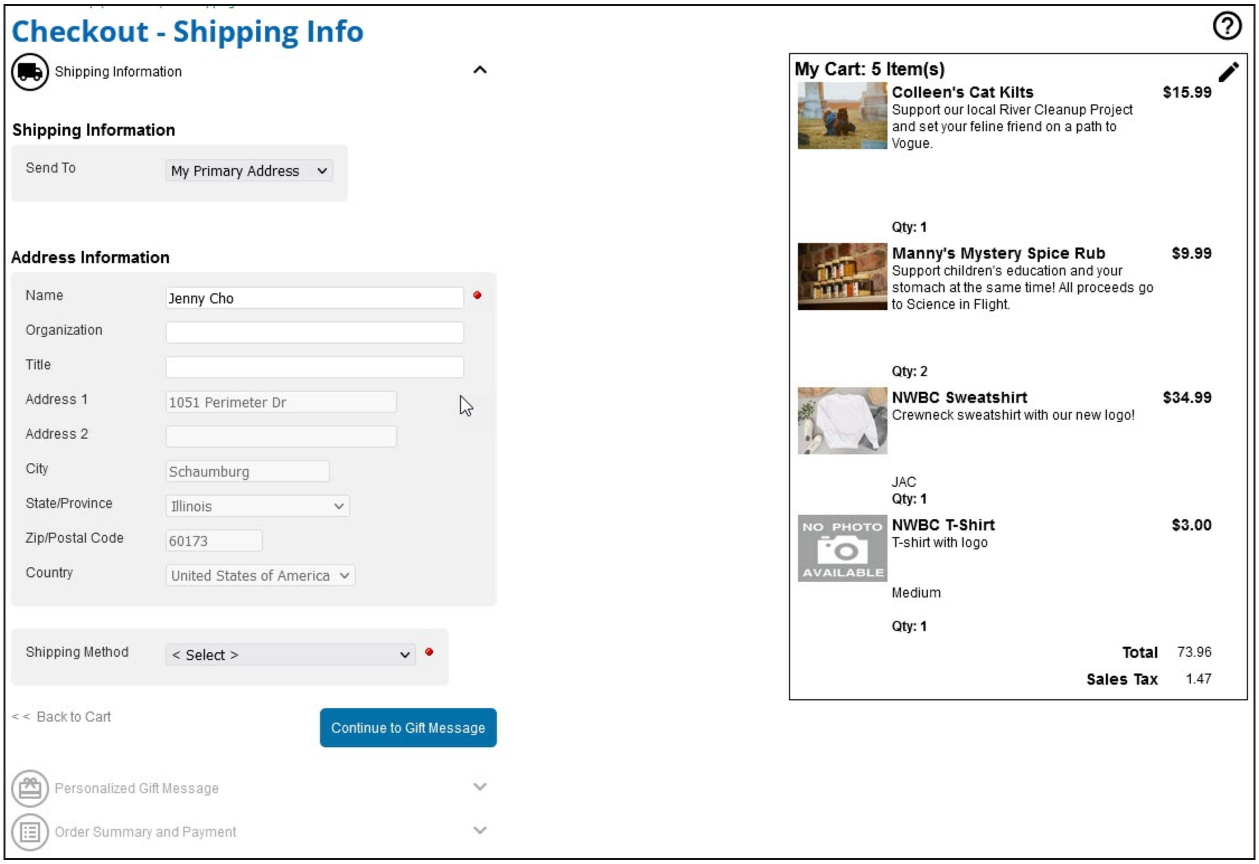
When your shopping cart has products ready to be ordered, you will see a shopping cart icon in three places:

- 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 testing and needs to be removed 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	Remove
	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	Remove
	NWBC Sweatshirt Crewneck sweatshirt with our new logo! Size: Unknown Color: Unknown JAC	34.99	0.2835	1	34.99	Remove
NO PHOTO AVAILABLE	**NWBC T-Shirt** T-shirt with logo Size: Medium Color: Unknown	3.00	0.1701	1	3.00	Remove
			Total: 1.0773	**Total:**	**US$ 73.96**	

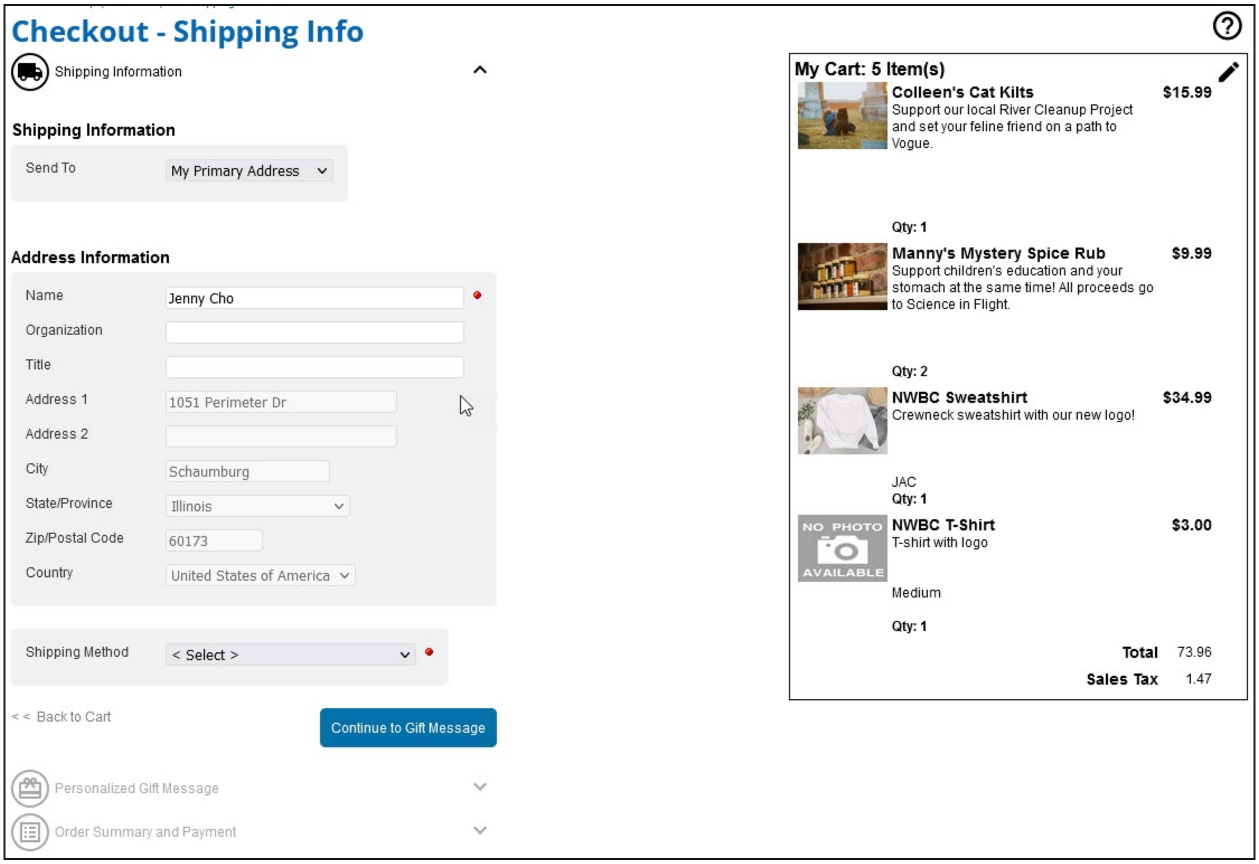
The products in your cart will be displayed in horizontal panels. To edit the quantity of a product, enter a number in the quantity field, then select the Update icon which appears. To remove a product from your cart, select the Remove icon. To checkout, select the Checkout button at the top of the screen. 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.



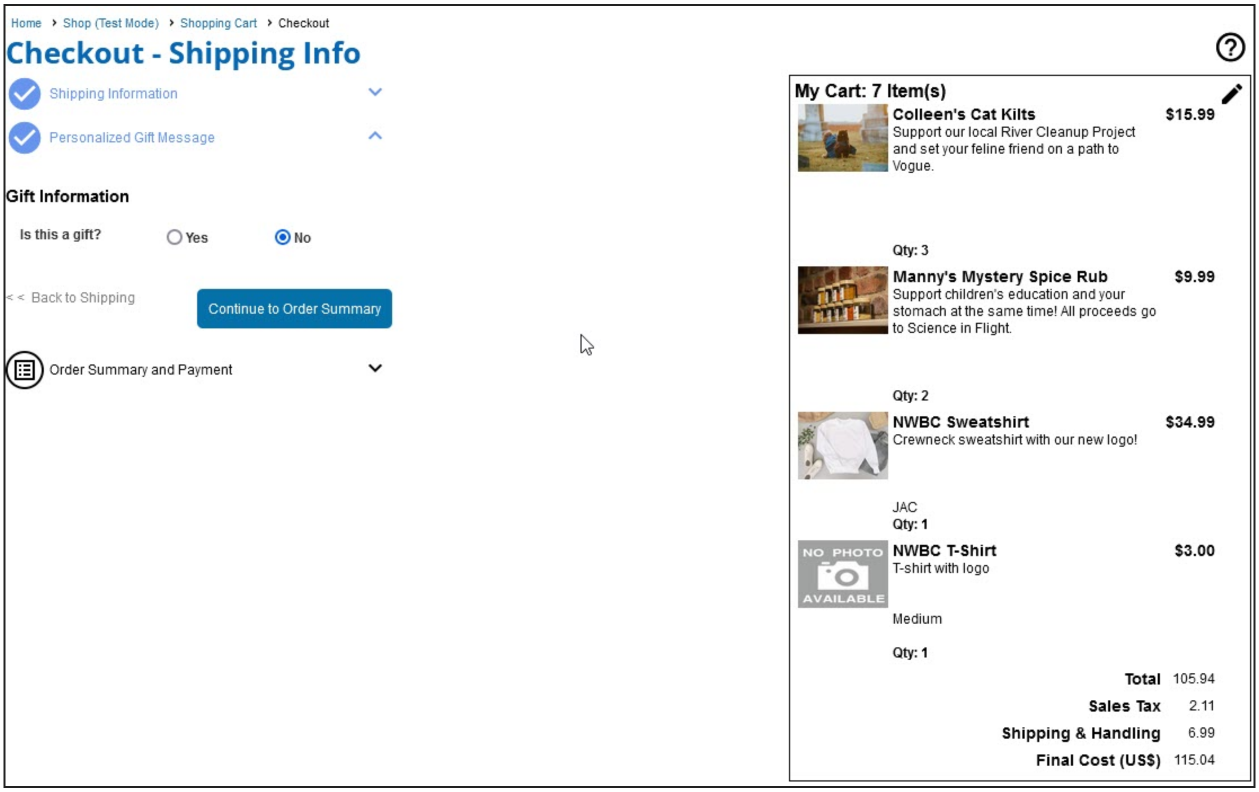
Products are listed on the right, with checkout steps on the left. To edit your shopping cart, select the edit icon above the products.

Checking Out as a Member

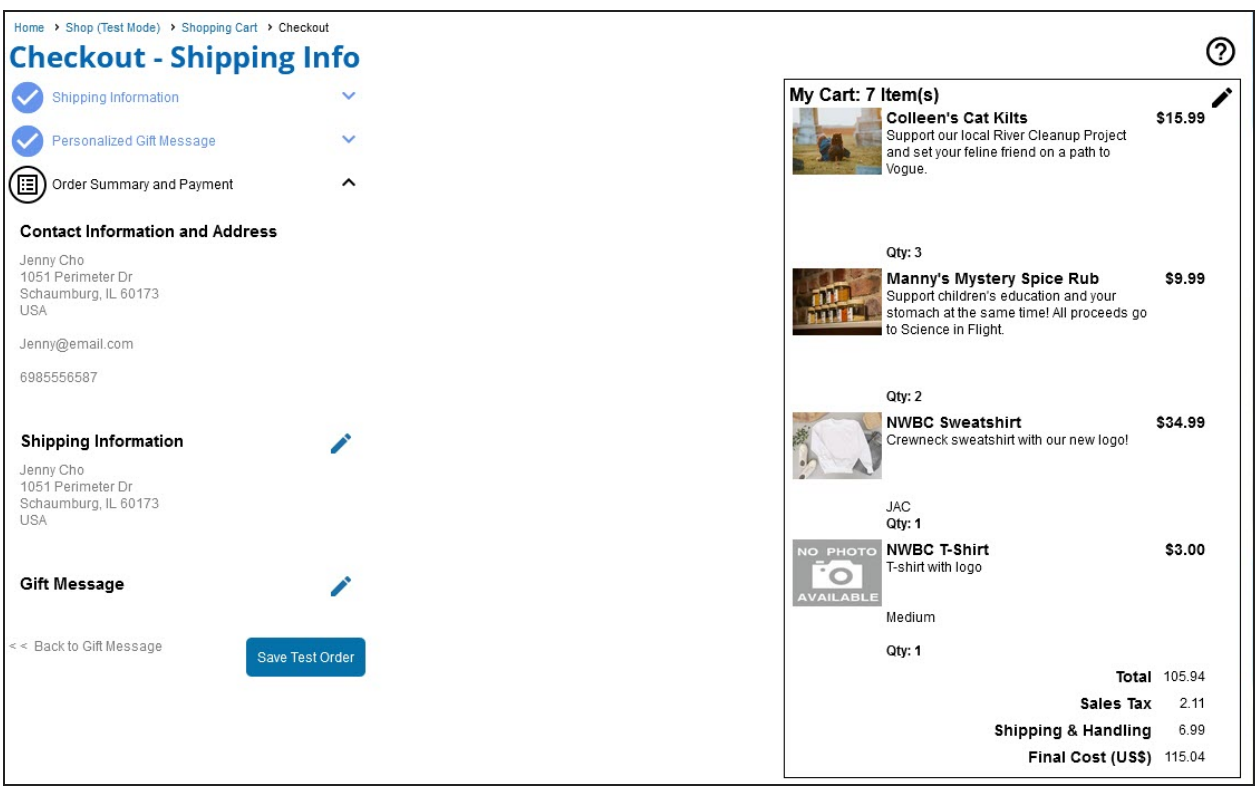
When members begin to check out, the system already knows who they are, since they logged in to receive member pricing.



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.



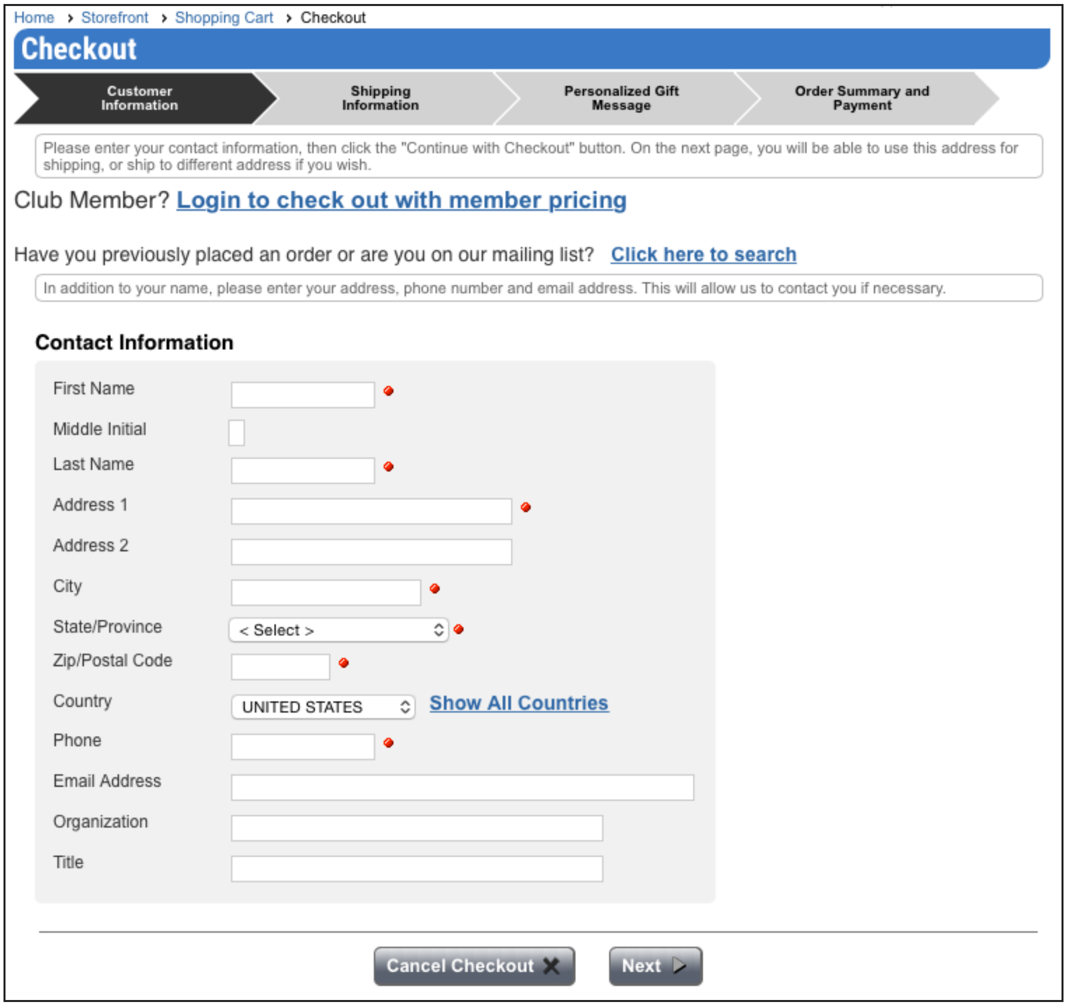
If the order is a gift, select Yes, then enter a special gift message. If the order is not a gift, select No and Continue to Order Summary. Finally, review the order and continue to payment.



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.

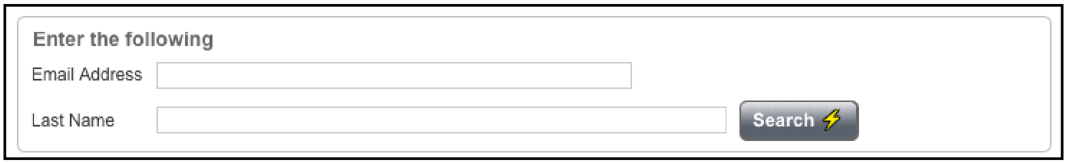
Checking Out as a Non-Member

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:



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:

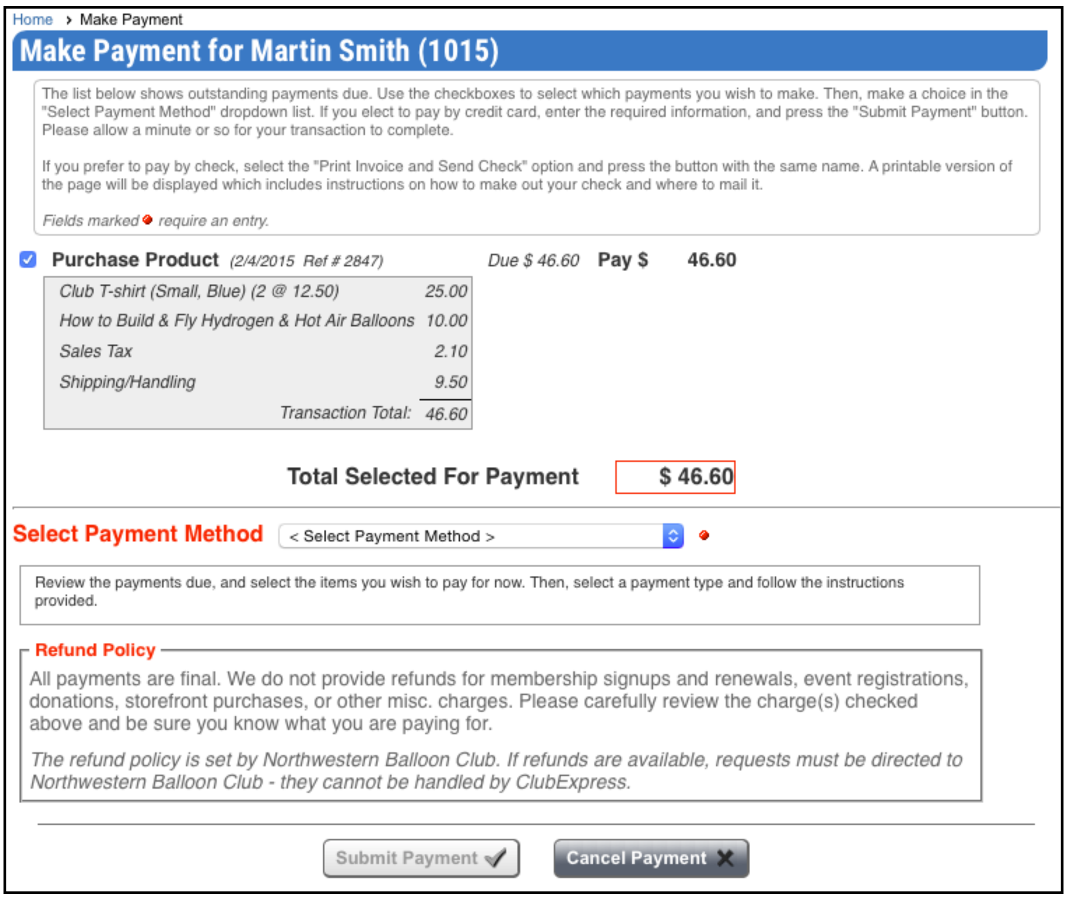


Enter your email address and last name and the system will attempt to locate you in the non-member database. If found, your contact information will be filled in.

New customers will fill in the required contact information and click **Next**and continue through the wizard.

Payment Screen

When you click **Continue to Payment**, you will see the standard ClubExpress Payment screen, similar to the following:

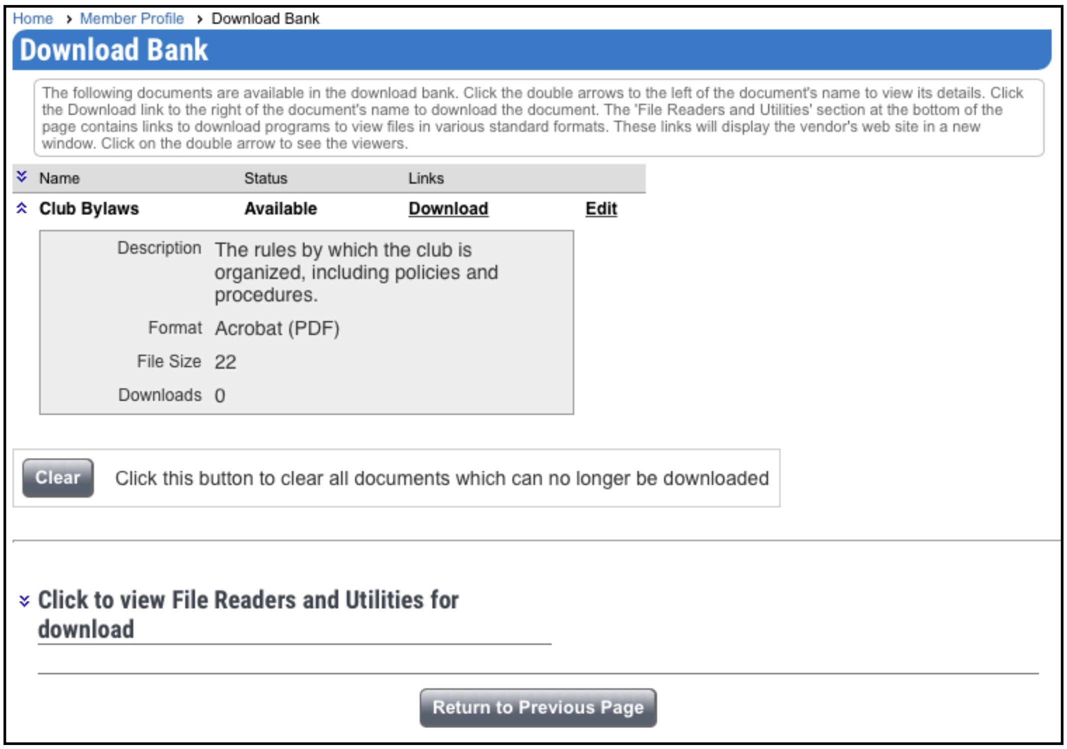


Each order is a single transaction. This transaction will have multiple line items, one for each item in the order, as well as items for shipping/handling (based on your chosen shipping method) and sales tax (if charged).

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:



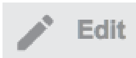
Click the **Download** link to download a document. Click the double-arrow on the left of the title to view details of a document. Click the **Clear** button to remove any document from the list that has already been downloaded at least once or which can no longer be downloaded.

Product Manager

Control Panel > Money/Website Tab> Website Modules > Storefront

There are two ways to manage Storefront Products and Orders:

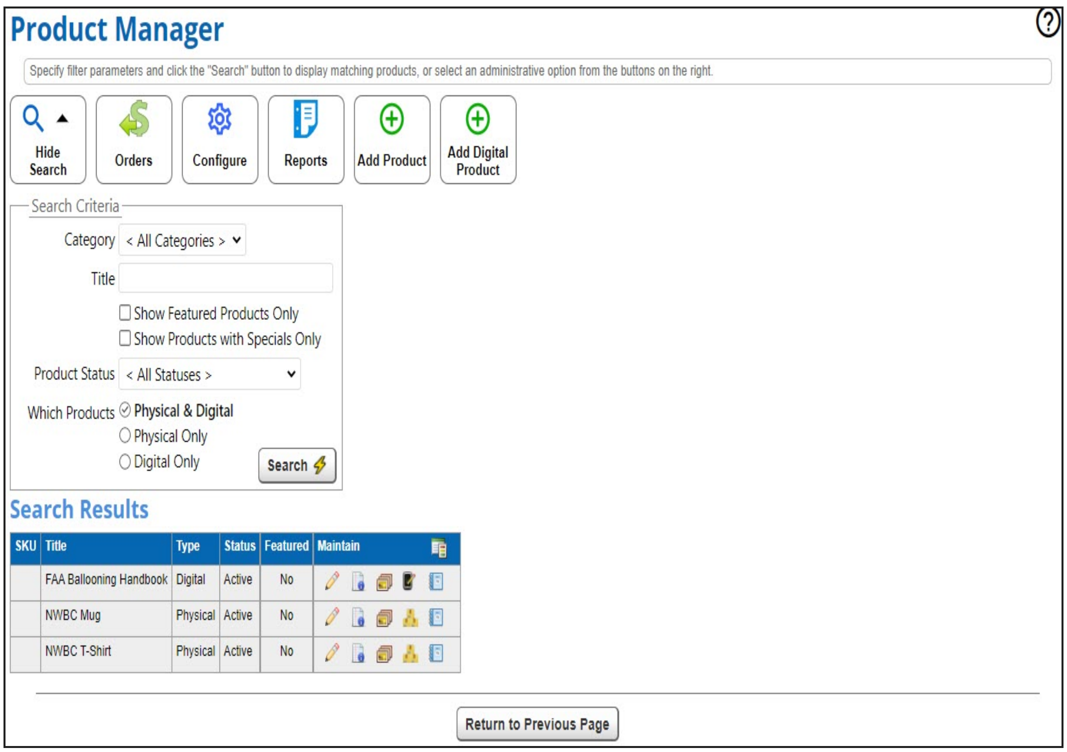
1. Administrators and Function Coordinators can select the module in the Control Panel (Money tab) to access the admin side of the function.

2. 

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.



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.

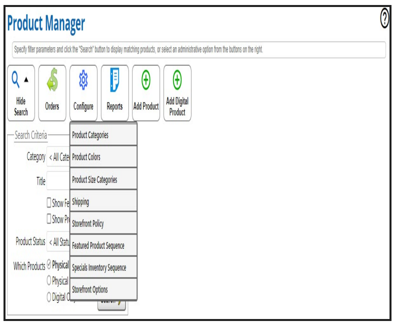
The results grid shows matching products, including the title, type, status and last update. You can also create “specials” but this is done at the Inventory level.

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

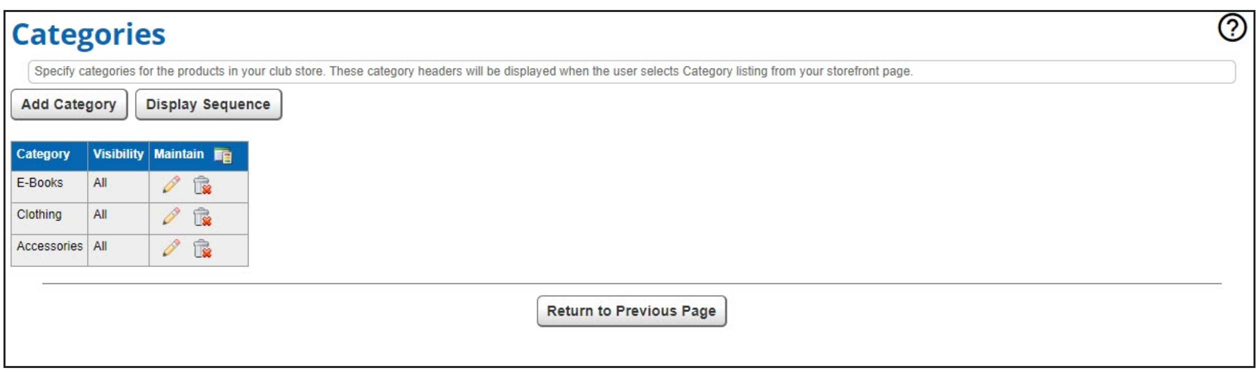
Configuring the Storefront

Clicking the **Configure** button displays a drop-down menu of configuration choices.

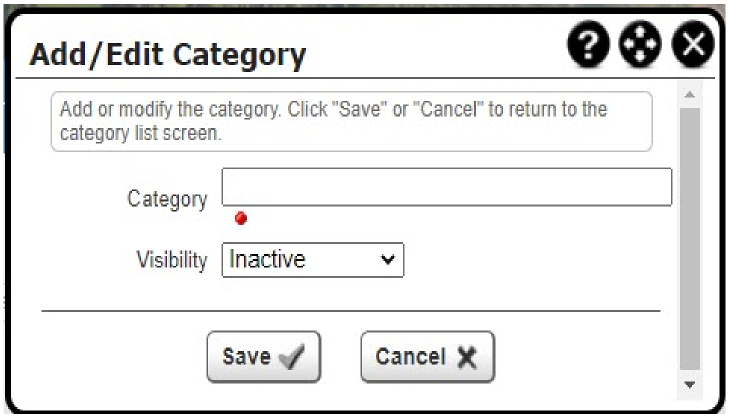


Product Categories

Product categories are used by administrators and coordinators to organize products, and by Storefront visitors to view and search for products.



Click the **Add Category** button to create a new category. The following screen is displayed:



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

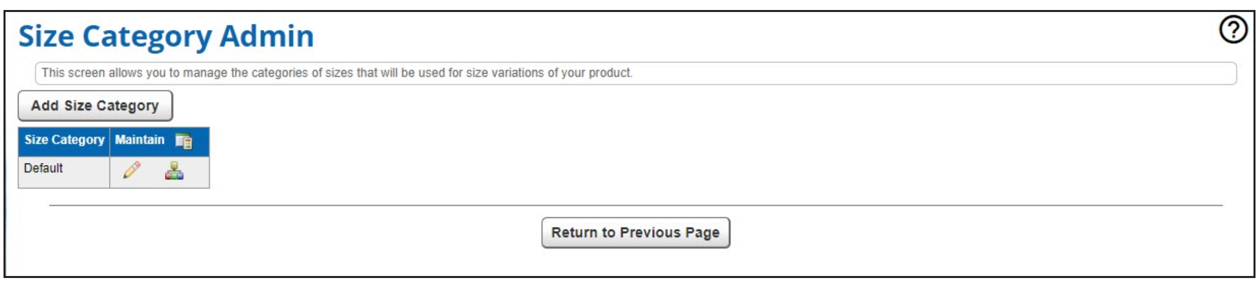
Use this screen to create and manage the list of colors you'll choose from when adding products to your Storefront.

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.

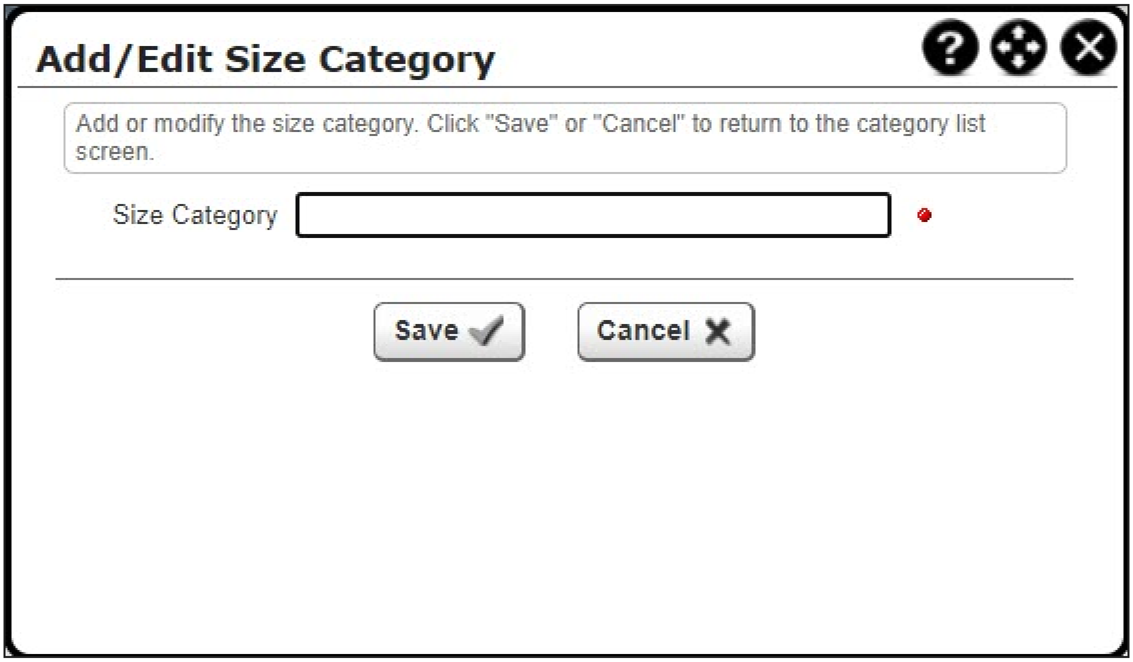
> **Note:** If you were already using the Storefront module prior to this enhancement and have selected colors for your products, those colors will automatically be added for you.

Product Size Categories

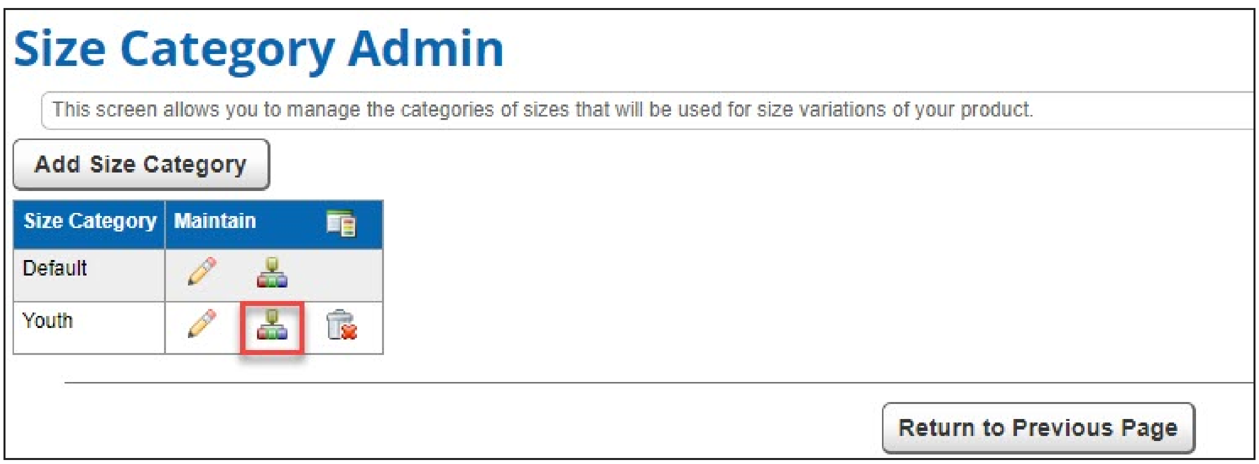
Use this screen to configure categories of sizes used to describe your products. You can create several different size categories, each with their own specific sizes. For example, you might have an Adult category, with adult sizes ranging from Small to X-Large, and a Youth category, with sizes ranging from Youth Small to Youth Large.



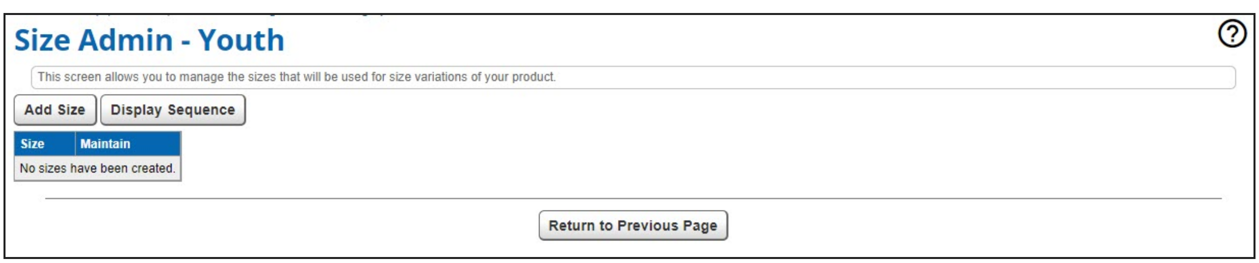
Select Add Size Category to add a new category of sizes.



Once you've added a category, select the Sizes icon to add and manage the specific sizes associated with that category.



On the Size screen for the category you selected, select Add Size to add a new size in this category.



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

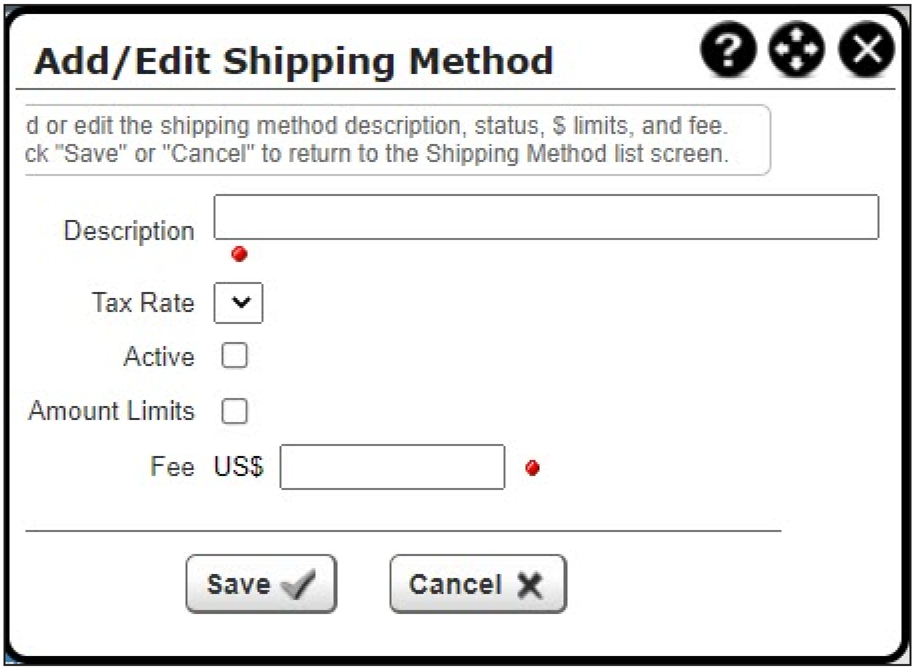
This screen will differ based on the Shipping Pricing Method selected in Storefront Options.

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.

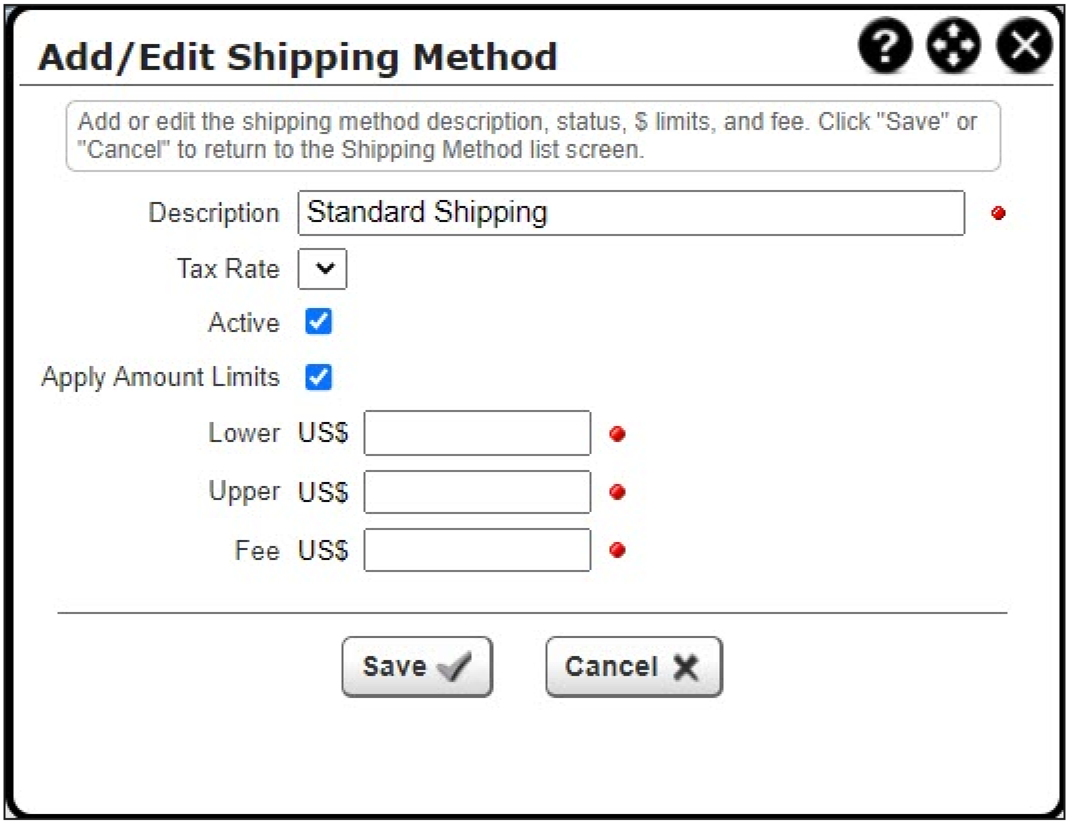
> **Note:** "Handling" can be specified as a separate fee under Storefront Options. You have the option of charging a flat fee to pick and pack the order, or for club overhead. The handling fee is added to the chosen shipping fee to arrive at a total fee for shipping and handling on user invoices.

Select **Add Shipping Method** to add a new shipping method.



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.



If you selected Advanced

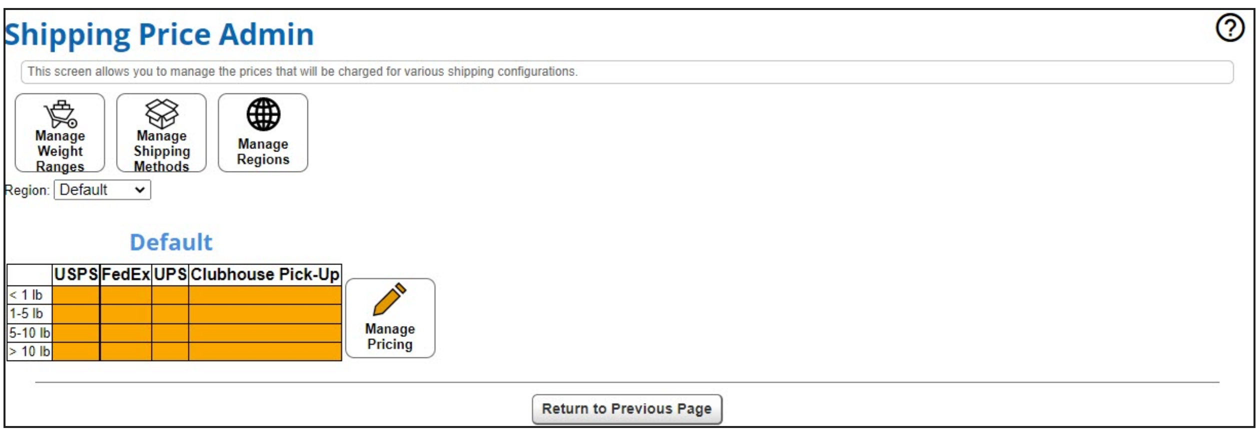
Use this screen to create and manage shipping methods used by your organization based on where the item is shipping to and the weight of the shipment. Don't forget to include methods such as "Pick Up from the club office" that don't actually involve handing a package over to a delivery service.

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.

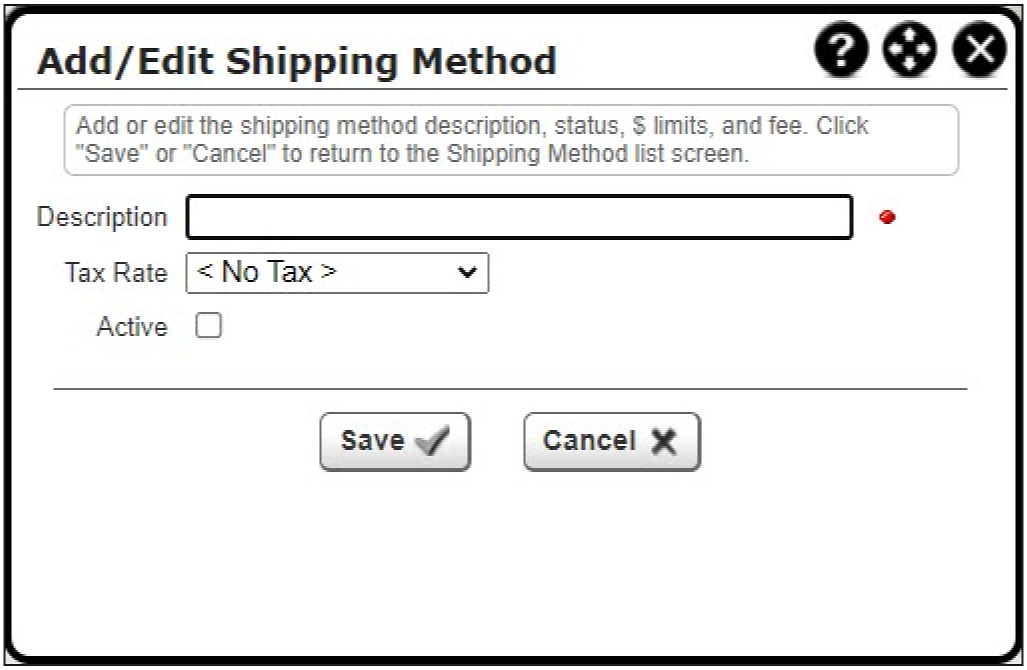
If you have more than one region defined already, your screen will include a Region drop-down list and the grid listing prices will be green. When prices for a region and weight range have not been configured, the grid will be orange.



Manage Shipping Methods

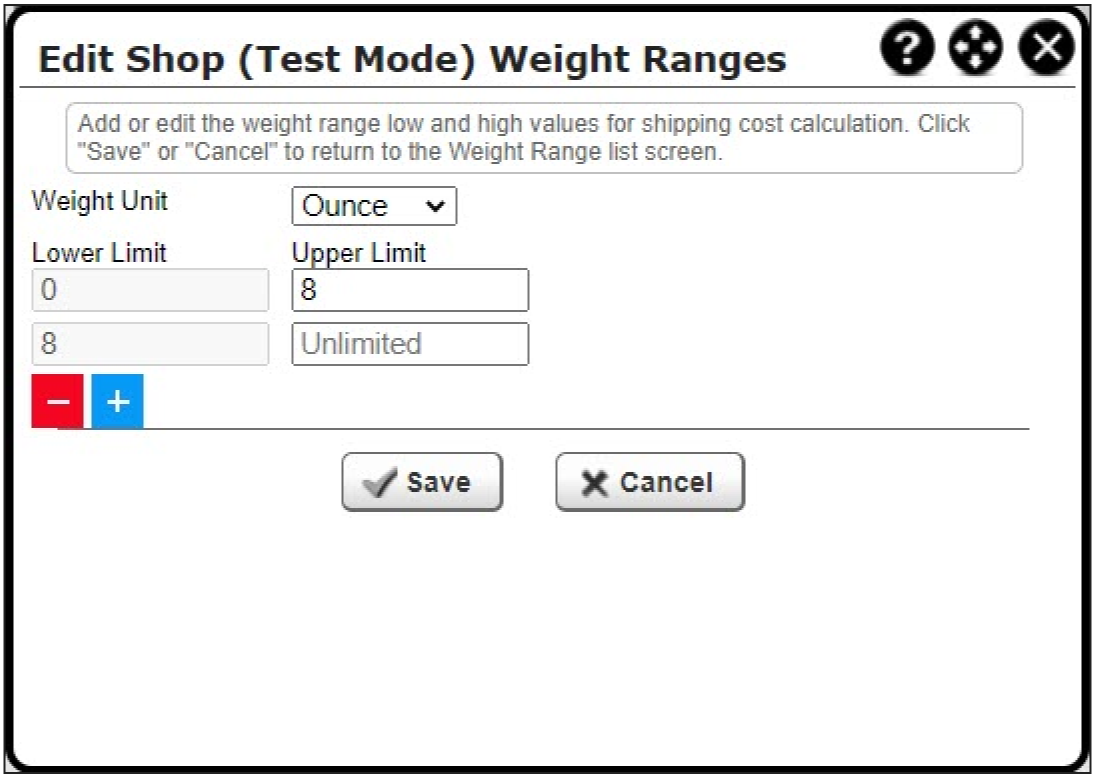
Select this option to configure the shipping methods used by your organization. These shipping methods can be based on the delivery service used, the type of packaging applied, etc.

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.



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.

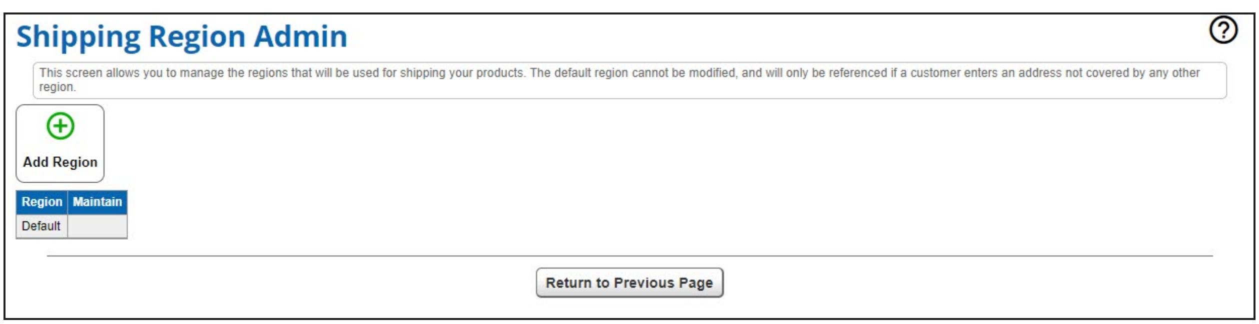


Select the unit of measurement to use (grams, kilograms, ounces or pounds), then enter in your first upper limit (the initial lower limit will always be zero). Once you've entered your first upper weight limit (for example, 10 g), the system will add a new row, using the upper limit you entered as the 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.

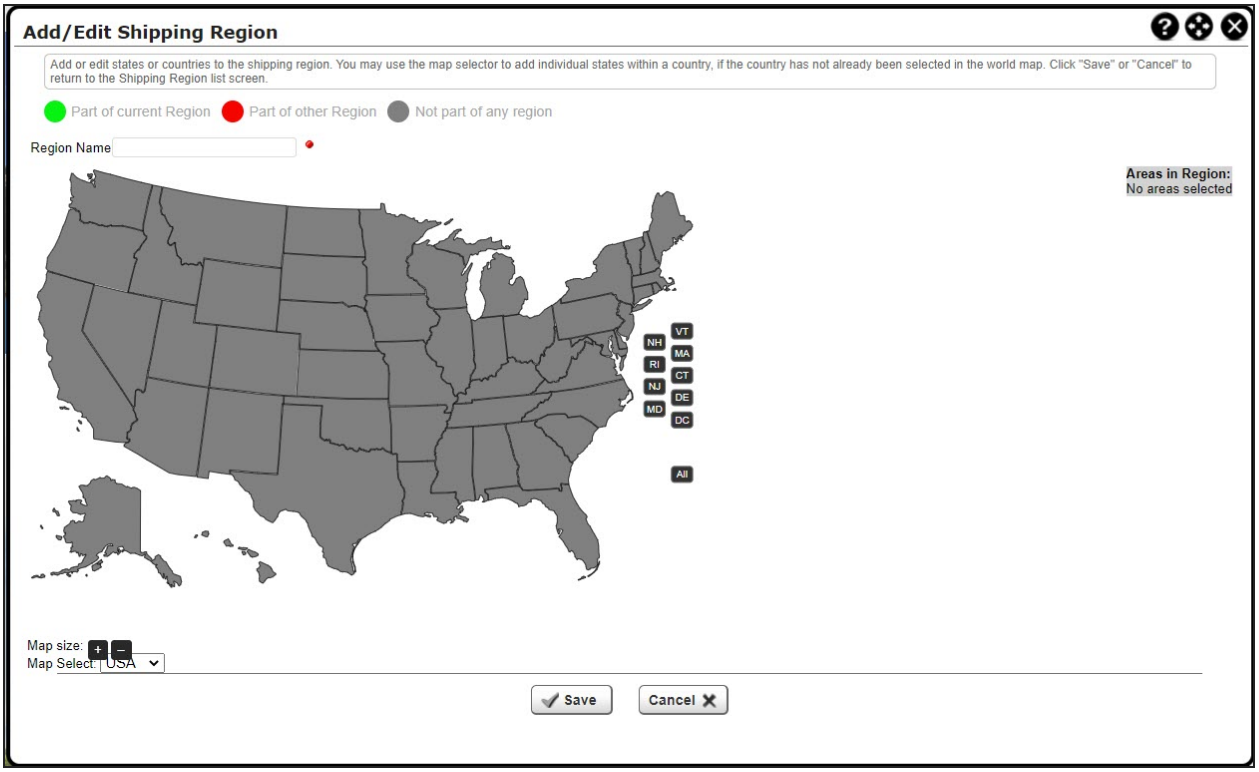
Select Save to save your changes and return to the Shipping Price Admin screen. The screen will refresh to include the weight ranges you entered. Remember, your grid will remain orange until you add pricing information.

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.

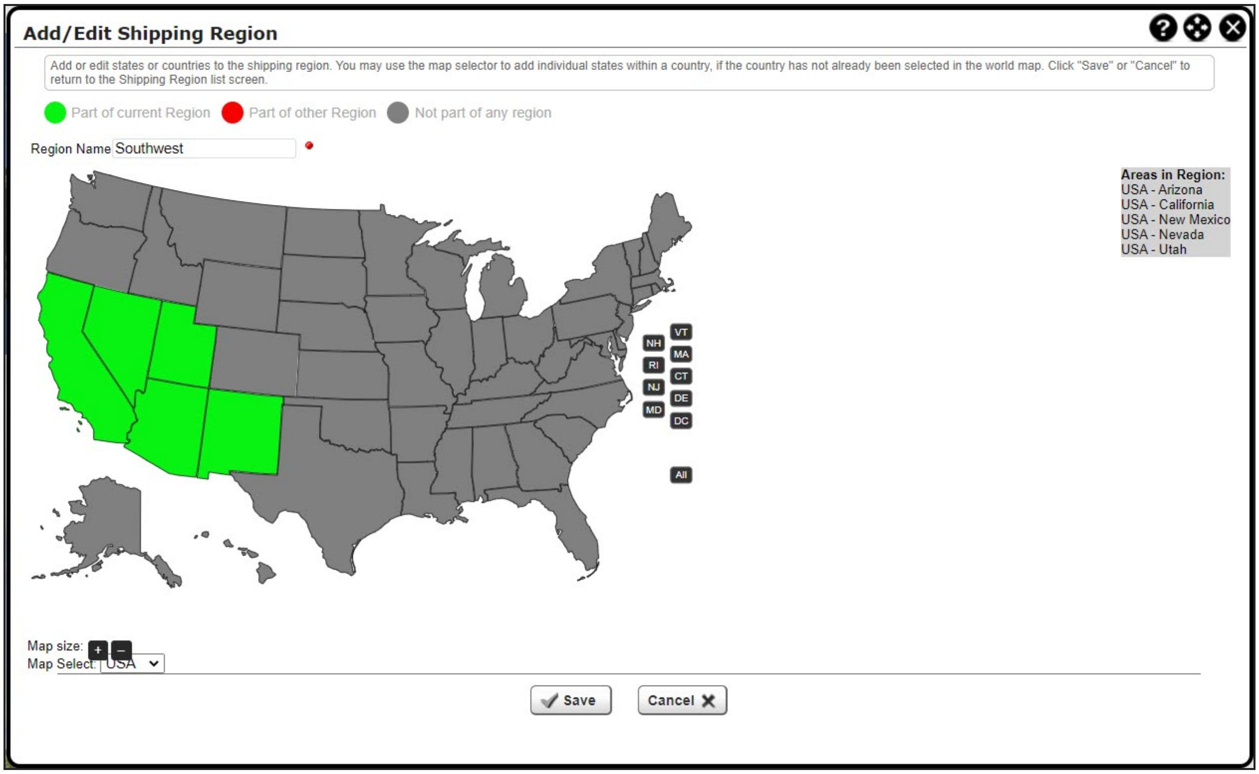


If your organization is in the United States, the default map will be the US map. To select a country outside of the United States, use the Map Selector at the bottom of the pop-up window to select World.

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.

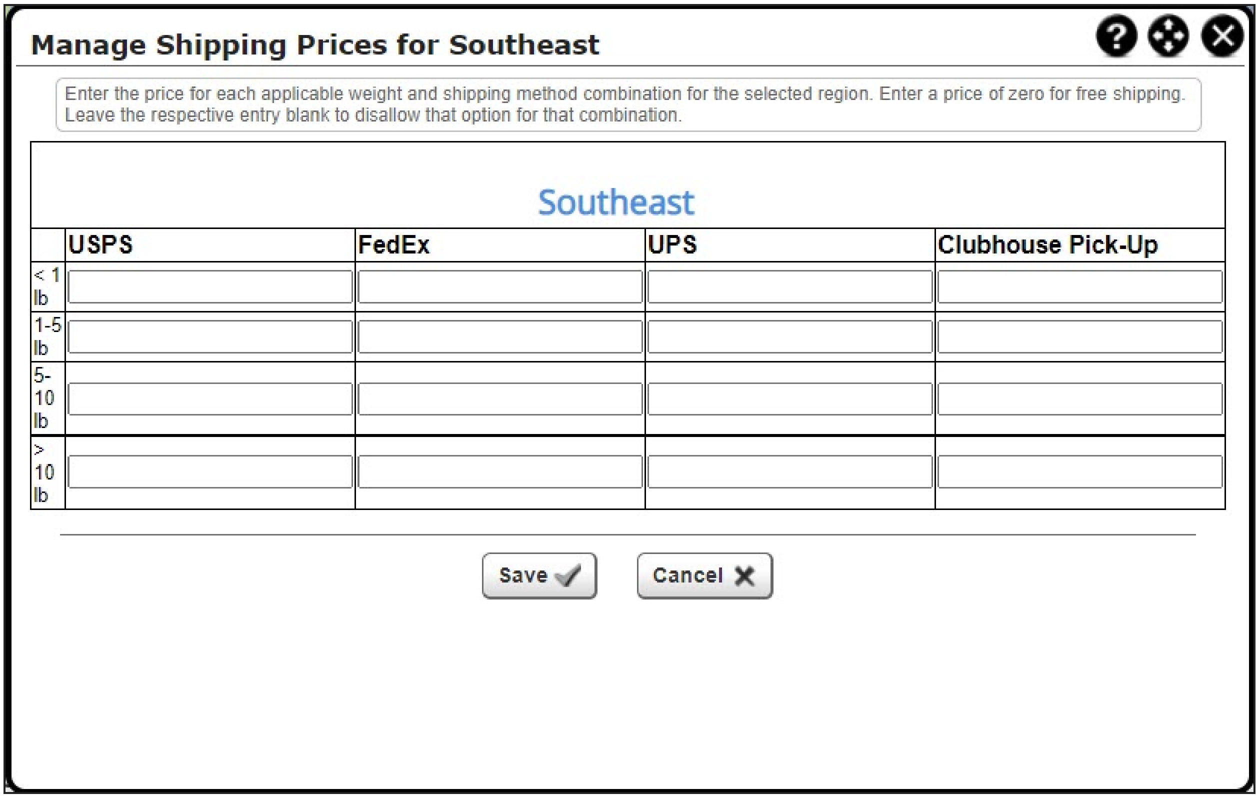
As you add states and countries to your region, the list on the right side of the pop-up window will update to include your selections.



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.

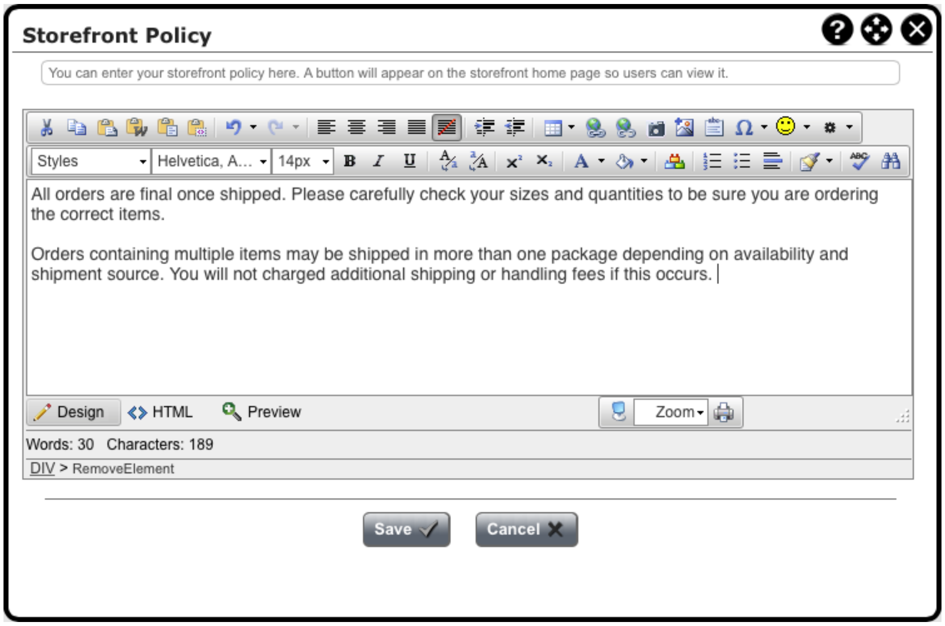


Enter the prices for each weight range and shipping method in the region.

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:



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 high-demand products, you might impose a quantity limit of 1 or 2.) Specify no limit, a limit for everyone, or a limit for non-members only.

Administration

- What is the starting view when 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.

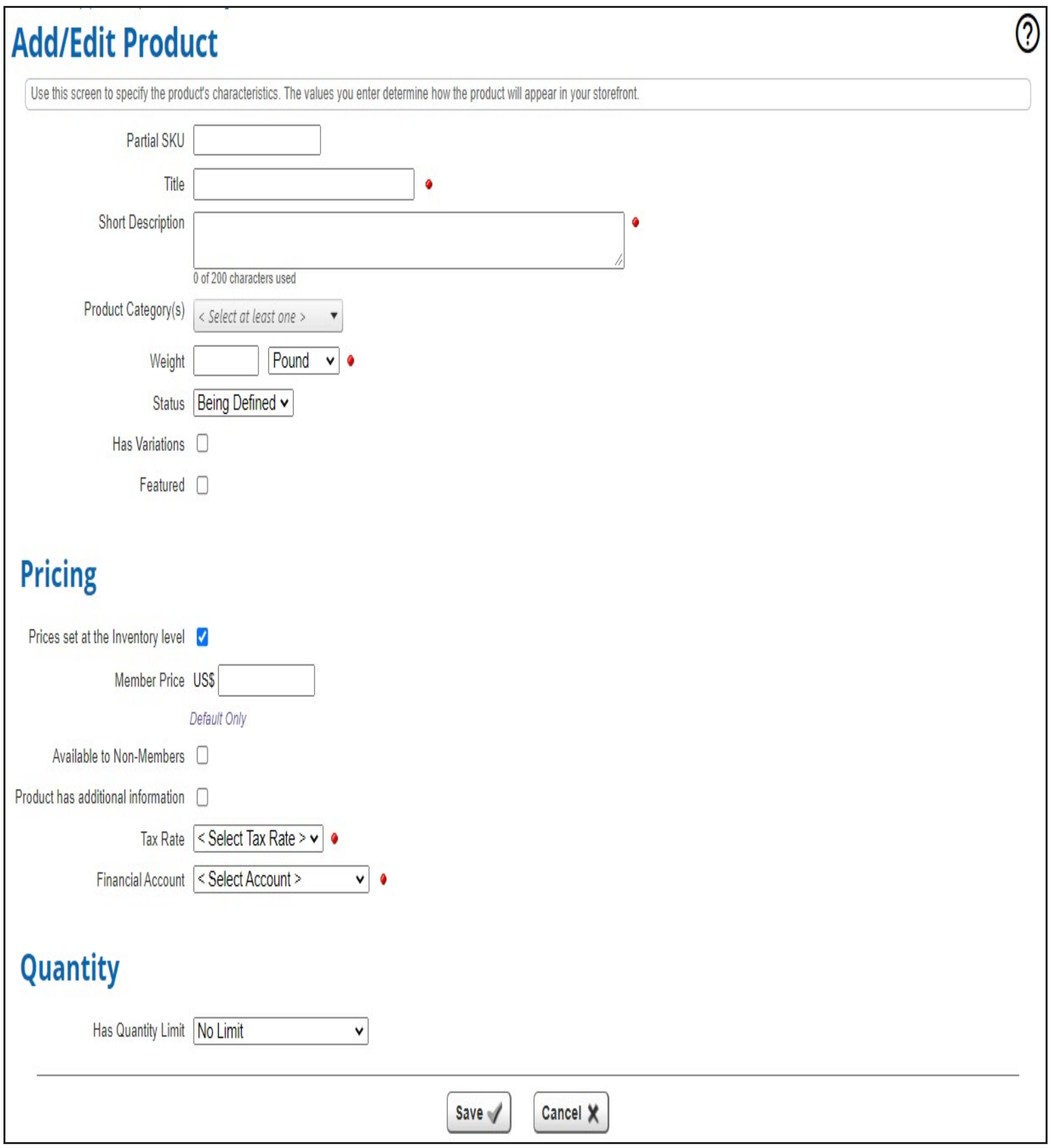
Click **Save** to save your changes and return to the Storefront Manager screen, or **Cancel** to return without saving.

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:



The following information can be entered for each product:

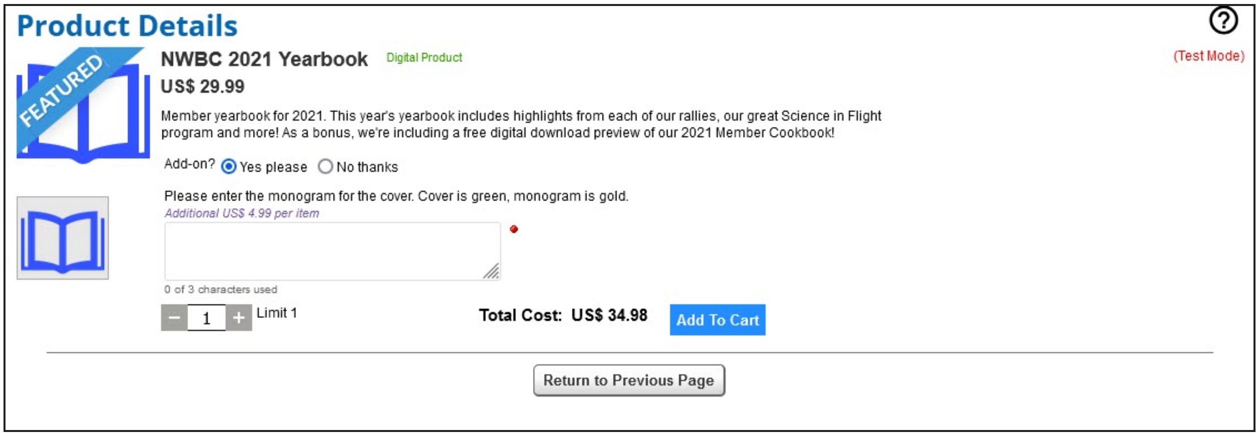
- **Partial SKU** (Stock Keeping Unit, the standard term for a product ID). If this product has inventory items, this SKU will be placed in the inventory SKU field so that you can append or modify the SKU for each inventory item. In the storefront itself, products can be displayed in SKU order so you 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.
- **Status** is one of the following values:

Status	Description
Being Defined	The product and its inventory items are still being built. It will not appear in the storefront.
Test	Active in the storefront for admins only. Use this option to review the product in the storefront before making it available to be ordered.
Active	Available to everyone to be ordered.
Admins Only	Product is active but can only be selected by administrators or Storefront module coordinators.
Inactive	Shown on the admin side of the module only. Cannot currently be ordered.
Dropped	The product is not normally shown unless the “Dropped” box is checked. This is the equivalent to a “deleted” option, except that products cannot be deleted because there may be order history.

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:



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:

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.

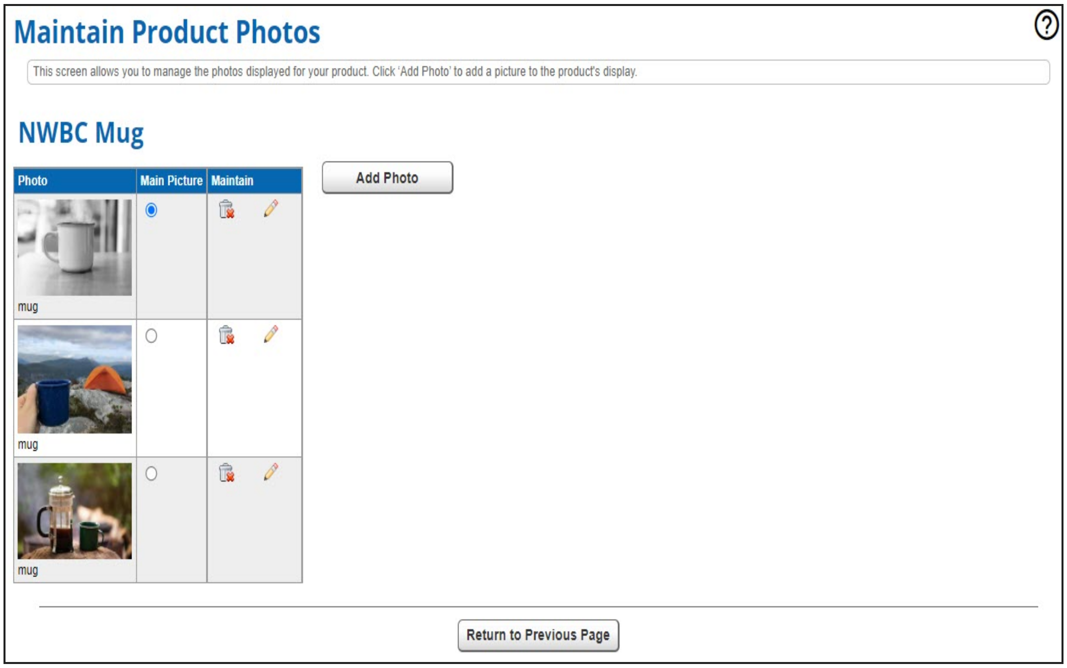
Click **Save** to save your new product and return to the Products manager screen, or **Cancel** to return without saving.

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.

Photos

Select this option to upload one or more photos of this product. You will see a screen similar to the following:



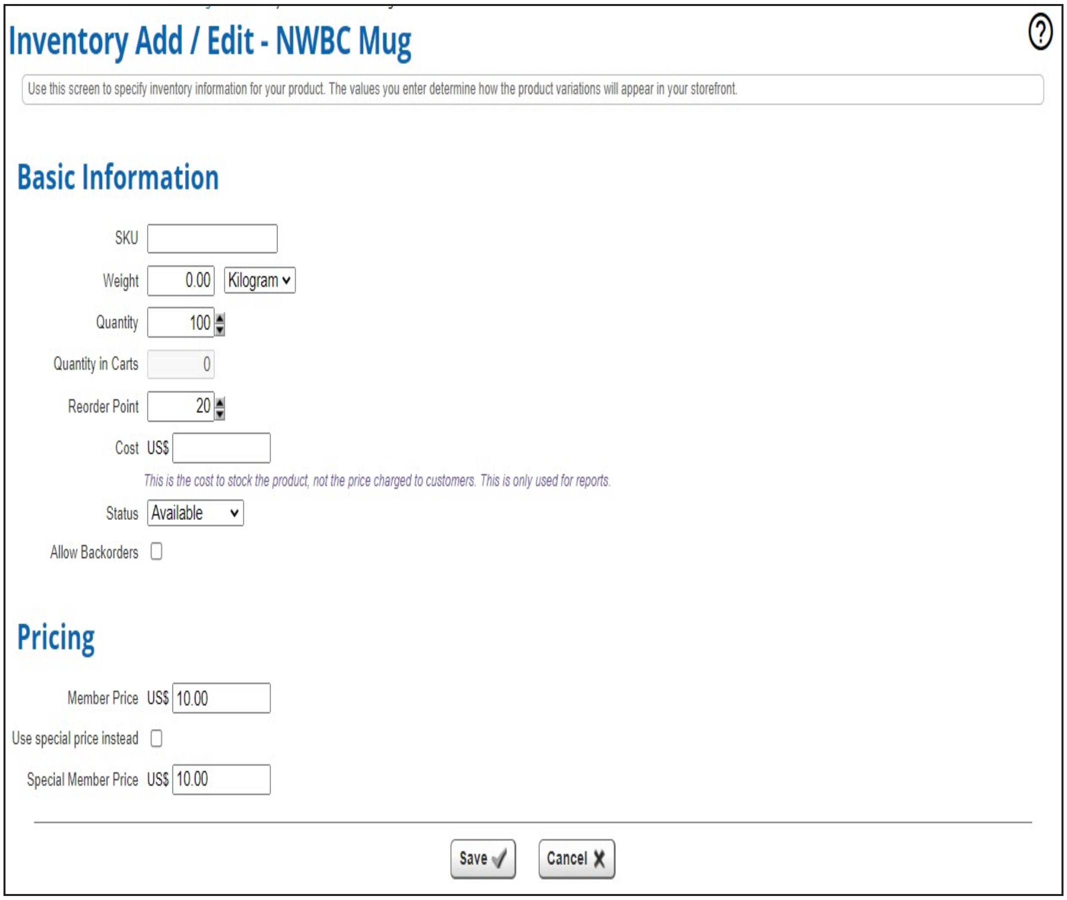
Click the **Add Photo** button to upload a photo from your local hard disk. You can also specify a title for this specific photo (for example, “Back View”.) Once you have added more than one photo, check the radio button in the Main Picture column to designate this as the main or starting picture. Click 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.

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:



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.

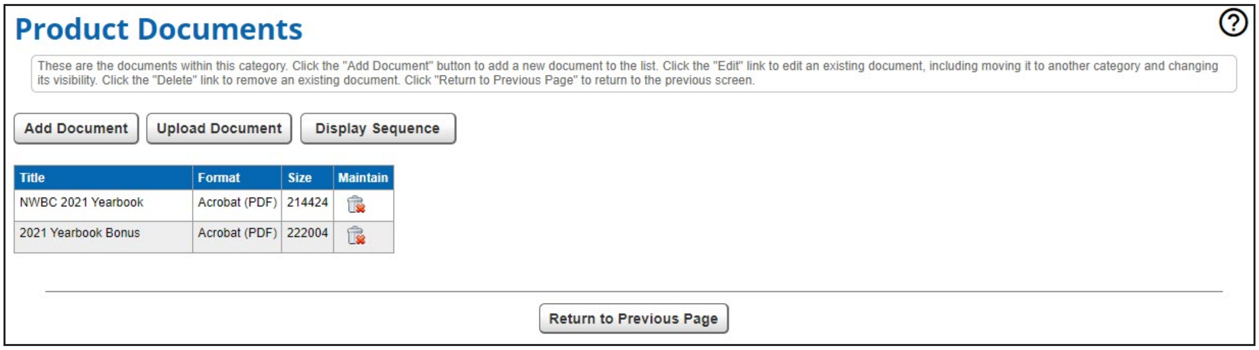
Both the small and large catalogs feature a "Specials" page where products with special inventory items are listed. When you drill into such a product, the items being sold at a special price will be listed alongside items being sold at the regular price.

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.



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:

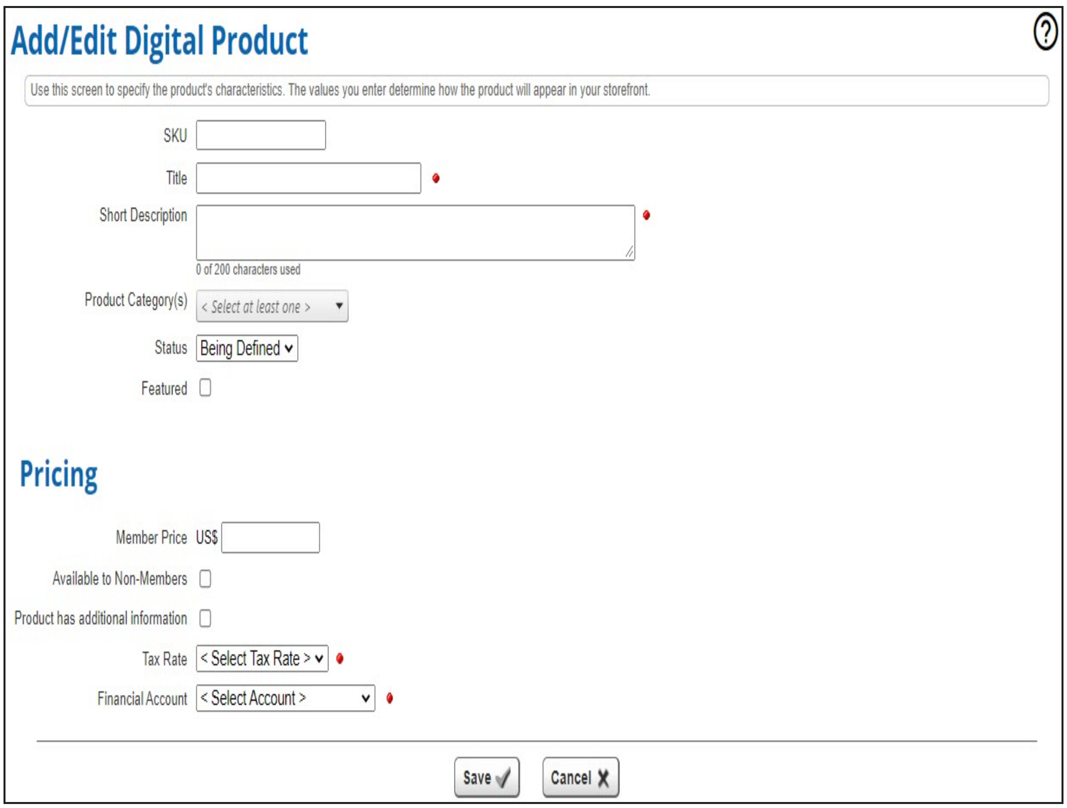
- For products without inventory variations, pricing is defined at the product level.
- For products with inventory variations, pricing can be defined at the product level and will apply to each inventory item, or you can specify pricing at the inventory level, different for each variation.
- Products 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 non-member) should be used. Special pricing is often used to clear out excess inventory if you ordered too many of a specific color, size or other variation. There is also a “Specials” page in the storefront to display products with a special price.

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:

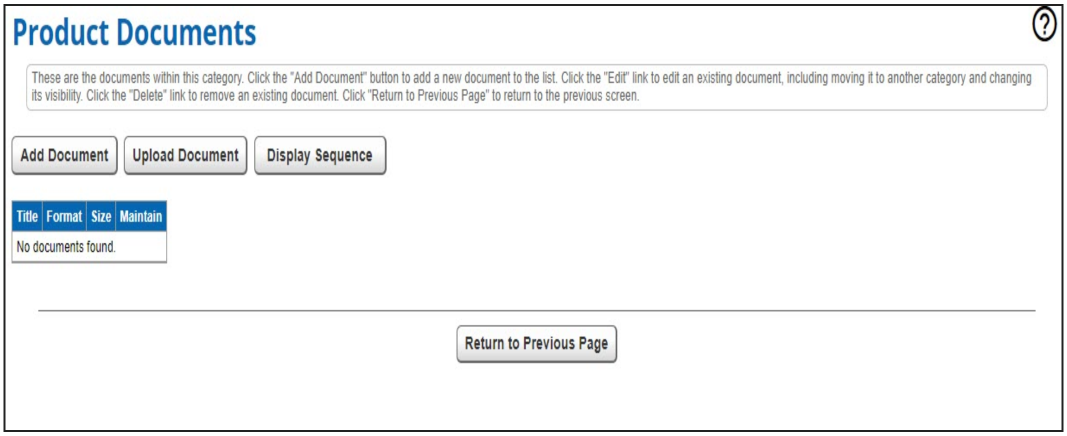


Digital products share many of the same fields as physical products, including title, descriptions, status, and price. They do not have weight or product variations with individual prices, or quantity limits. So these fields do not appear when you are defining a digital product.

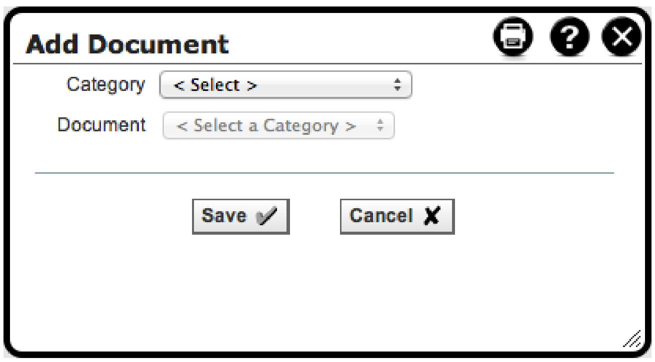
Click **Save** to save the new digital product or **Cancel** to return without saving. When you save a new digital product, you are taken to the **Product Documents** screen to link this digital product to one or more actual files already uploaded to your website (using the Documents Library function.)

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:



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:



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.

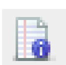
Storefront Maintain Options

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

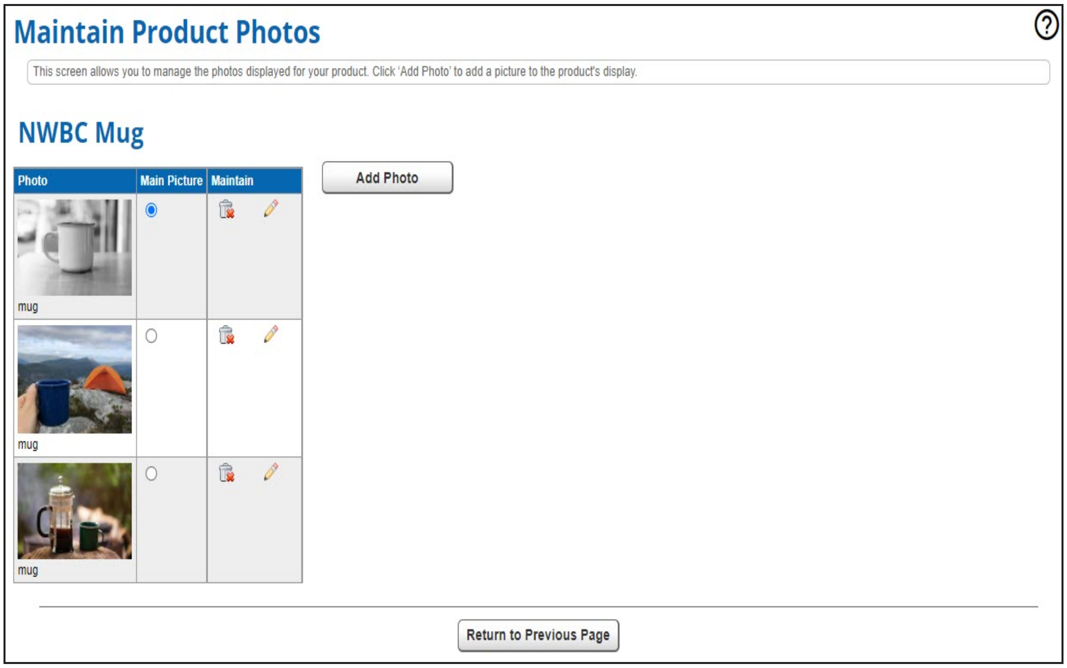
Edit properties for this product. One of the popup windows for physical or digital products is displayed.

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

Photos

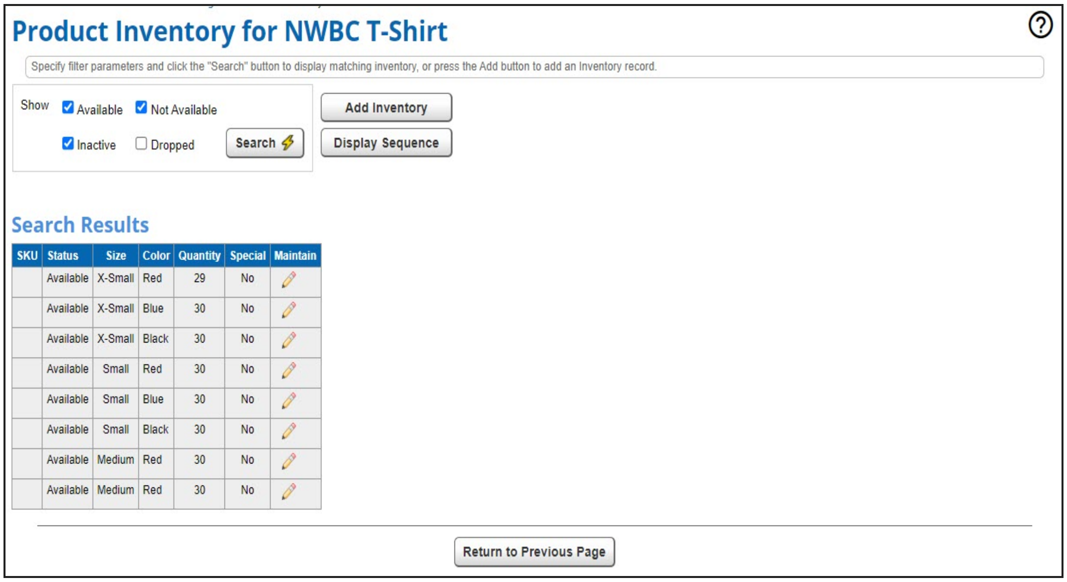
Select this option to upload one or more photos of this product. You will see a screen similar to the following:



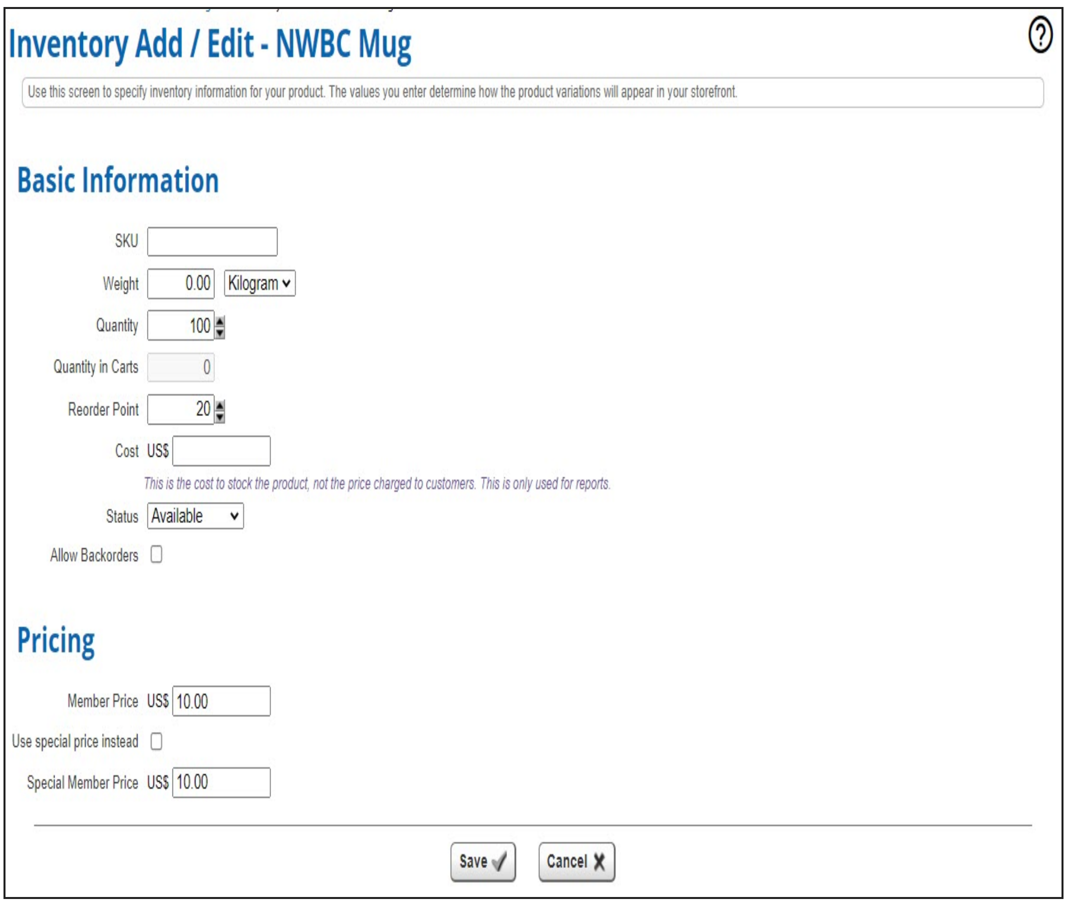
Click the **Add Photo** button to upload a photo from your local hard disk. You can also specify a title for this specific photo (for example, “Back View”.) Once you have added more than one photo, check the radio button in the Main Picture column to designate this as the main or starting picture. Click the standard **Delete** icon to remove a photo.

Physical Product – Inventory

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:



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:



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 Available	This inventory item is not currently available but you may want to show it in the storefront. It cannot be ordered.
Inactive	The inventory item is not currently available and it should not be shown in the storefront. But admins will see it.
Dropped	The inventory item is not normally shown unless the "Dropped" box is checked. This is the equivalent to a "deleted" option, except that items cannot be deleted because there may be order history.

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.

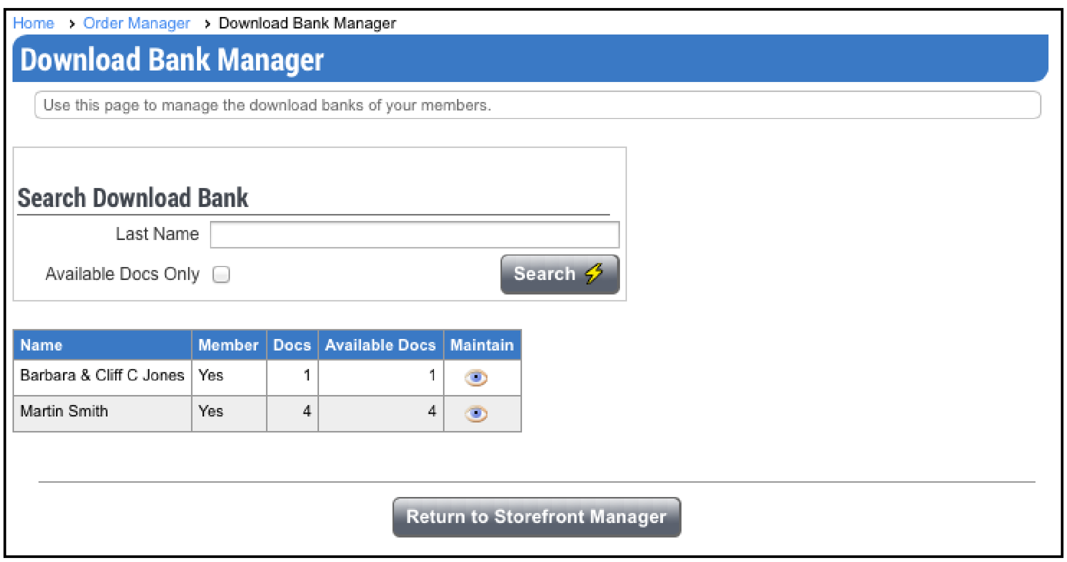
Click the **Edit** icon to modify the properties of a specific inventory item. Click **Return to Previous Page** to return to the Storefront Manager – Products page.

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:



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:

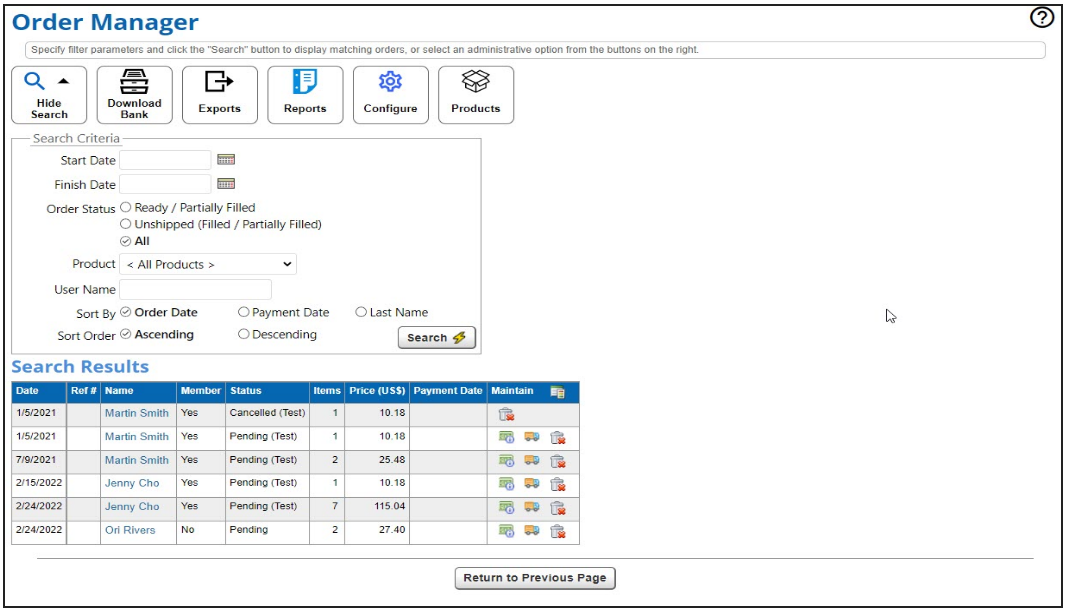
You can change the number of days remaining before the document becomes unavailable. You can also change the status to make the document available if it was not currently, or to hide it so that it’s no longer available.

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 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.

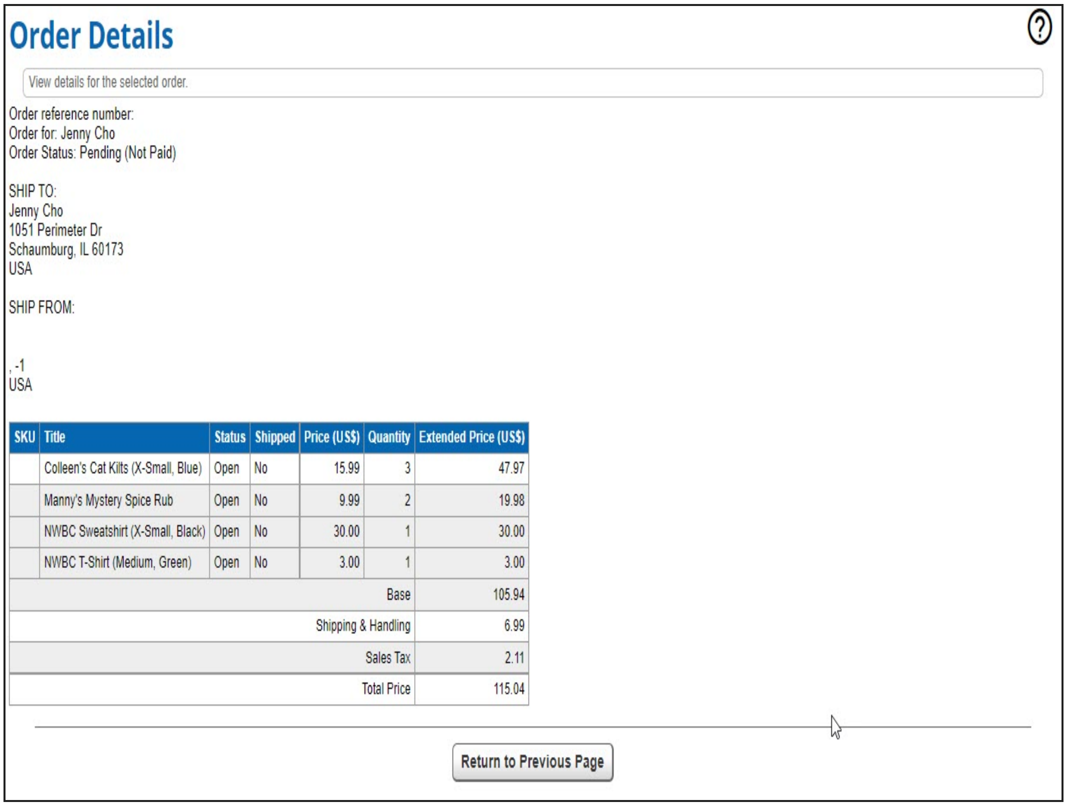
There is no “Add Order” button to create an order. Instead, admins can create orders for members and non-members by building a shopping cart then checking out, selecting a member or non-member, then completing payment.

Maintain Options

The following actions are available by clicking icons in the Maintain column of the Search Results grid:


Order Details

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

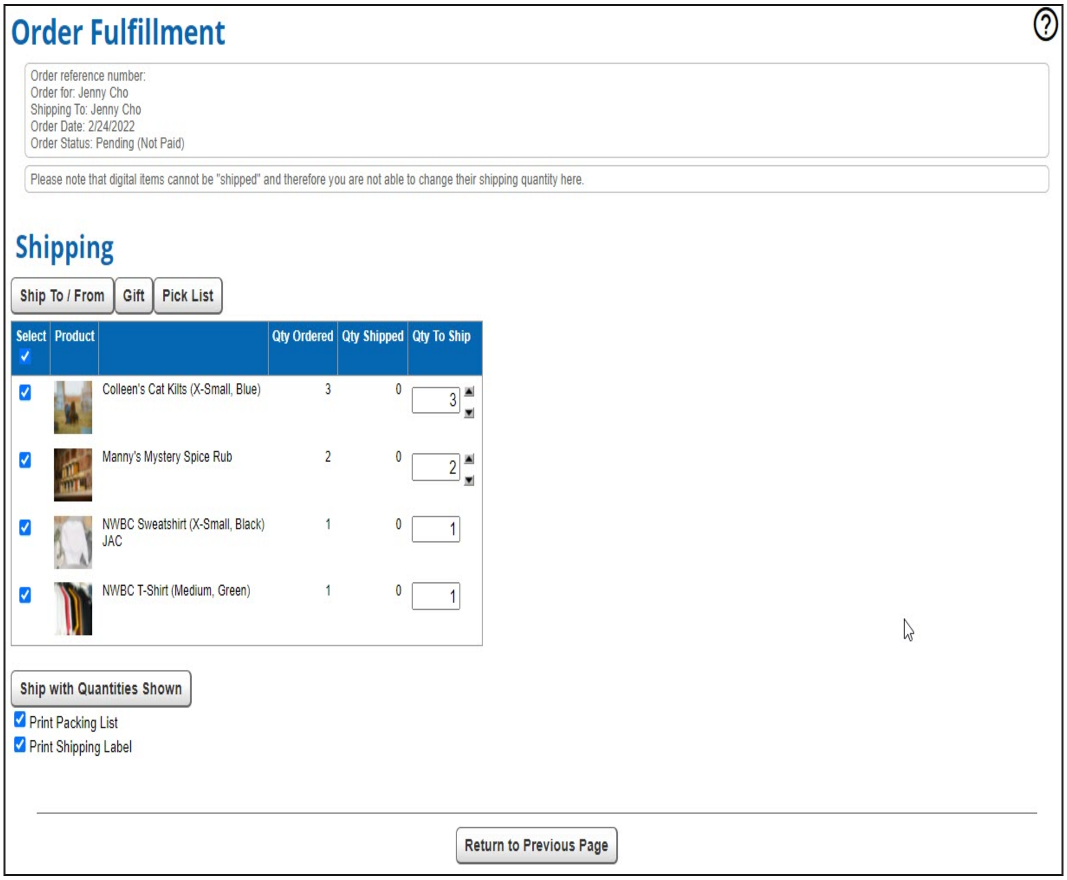
SKU	Title	Status	Shipped	Price (US$)	Quantity	Extended Price (US$)
	Colleen's Cat Kilts (X-Small, Blue)	Open	No	15.99	3	47.97
	Manny's Mystery Spice Rub	Open	No	9.99	2	19.98
	NWBC Sweatshirt (X-Small, Black)	Open	No	30.00	1	30.00
	NWBC T-Shirt (Medium, Green)	Open	No	3.00	1	3.00
					Base	105.94
					Shipping & Handling	6.99
					Sales Tax	2.11
					Total Price	115.04

Return to Previous Page

This is a read-only display. Click **Return to Previous Page** to return to the main orders screen.


Shipments

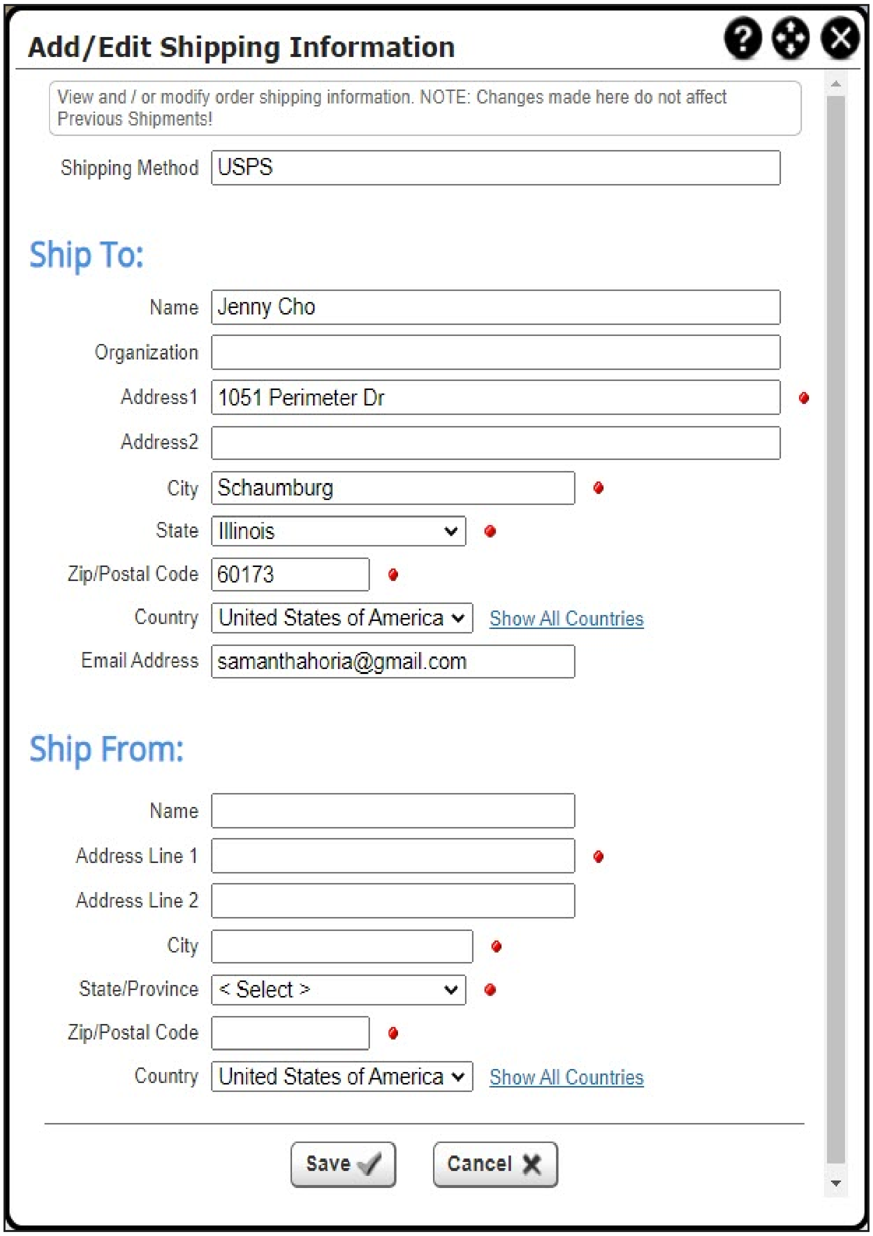
Click the **Shipments** icon to fulfill an order, or if the order has already been filled, to view previous shipments. If you are filling an order, you will be taken to a screen similar to the following:



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.)

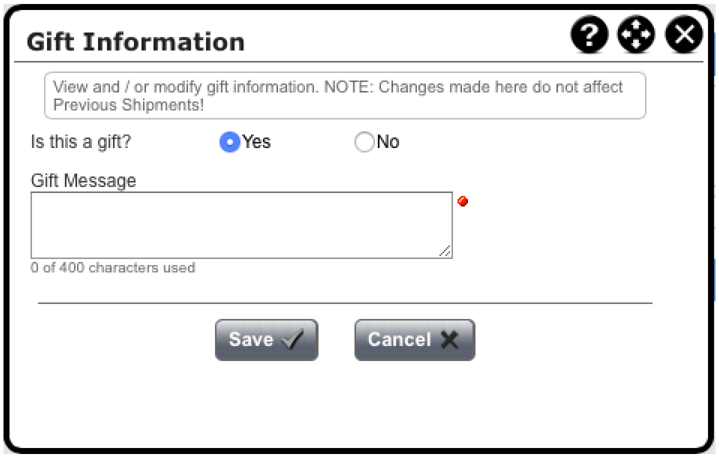
If all items have been shipped, only the bottom part of the screen is shown.

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:



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:



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.

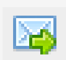
 Cancel

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.

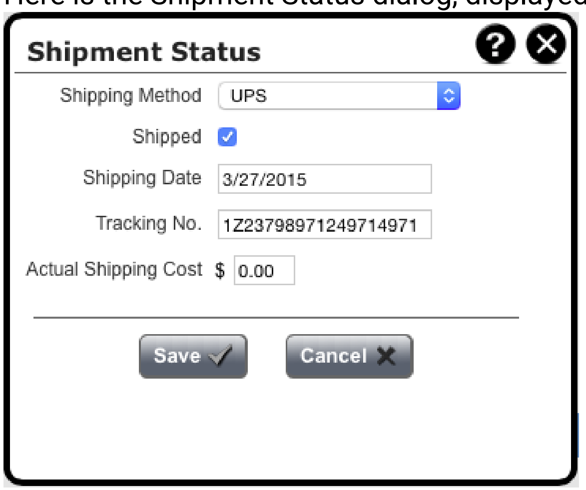
Previous Shipments

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:

Icon	Description
 (Edit)	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.



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

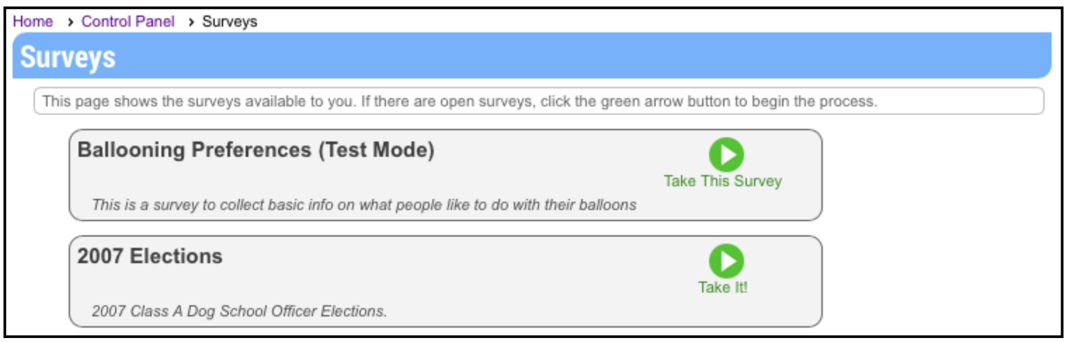
The Surveys function allows clubs to create surveys on your website, to solicit feedback from members or non-members. Surveys can be used for many purposes, including learning what types of events members want to attend and which areas of a hobby or profession members are most interested in.

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:

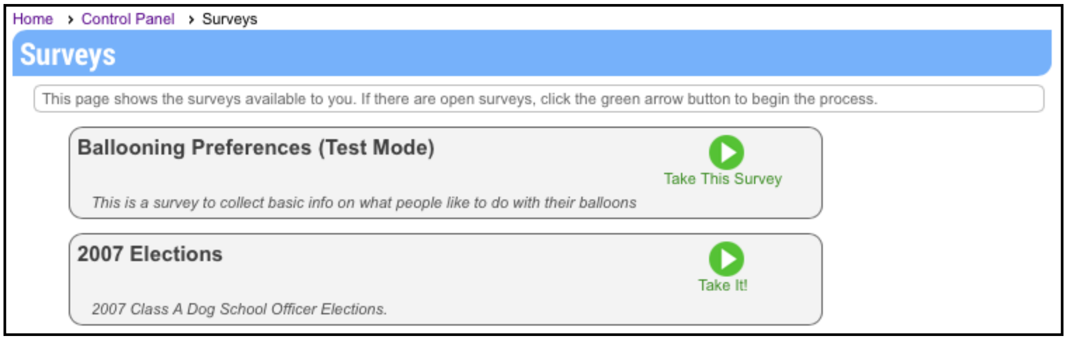


This screen shows the surveys available to the user. Clicking the **Take this Survey** button launches the survey wizard, presenting the first page of the survey (note that the button may have different text.) This screen can be placed on the public or members-only sides of your website; on the public 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:



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

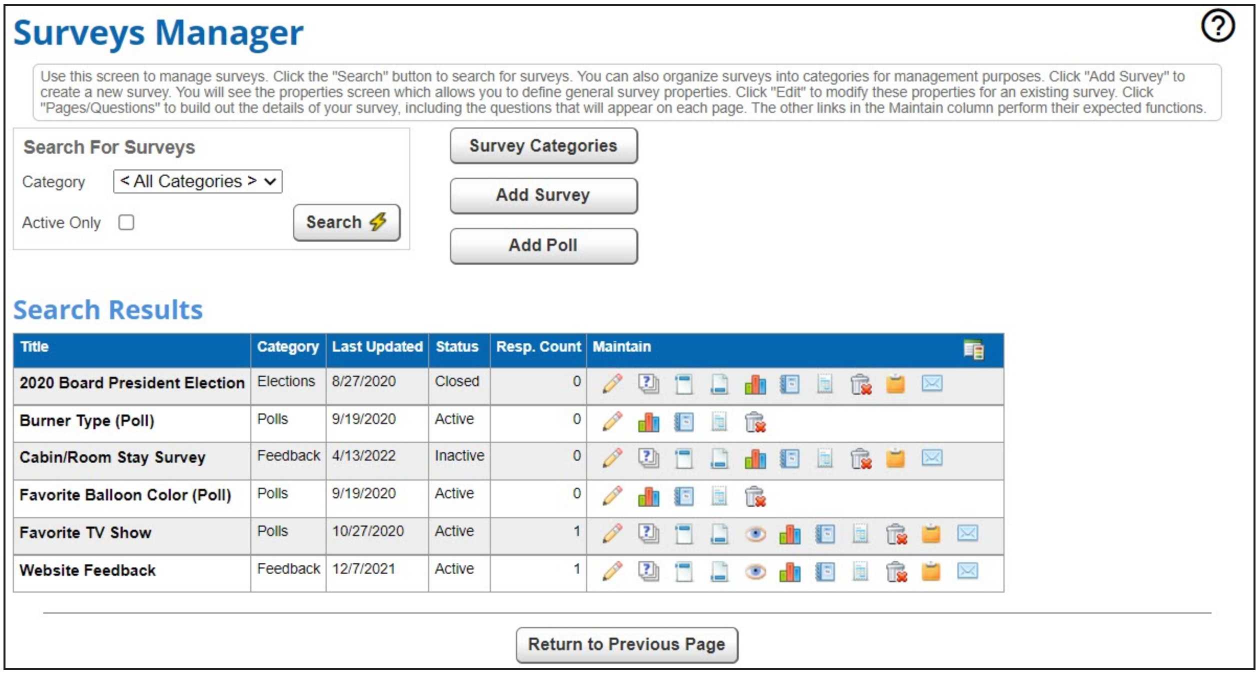
There are two ways to manage Surveys:

1. Administrators and Function Coordinators can select the module in the Control Panel (Communications tab) to access the admin side of the function.

2. 

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:



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

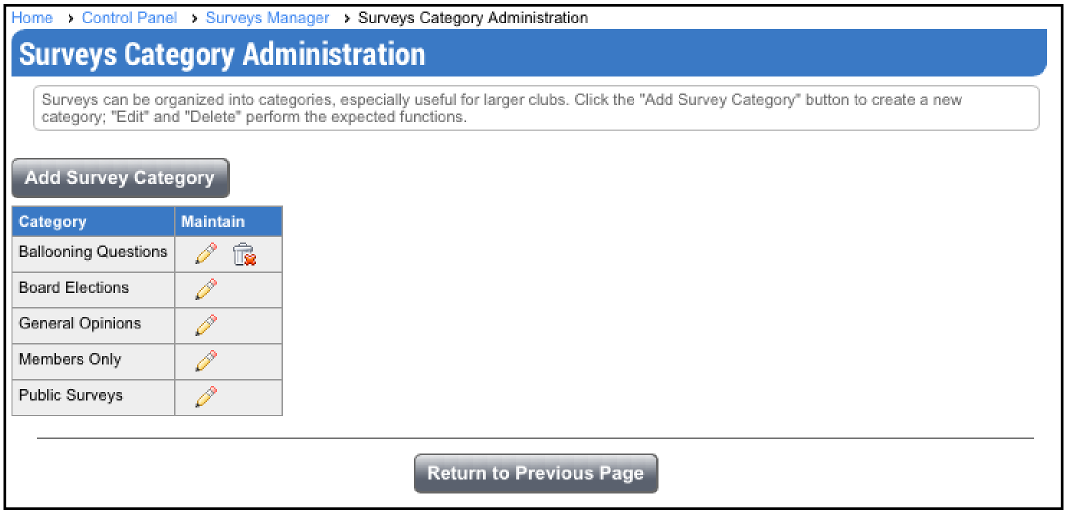
This grid will also show Polls, created via the editor or the **Add Poll** button. Polls are quick surveys, with just one radio button question. So the **Pages/Questions**, **Preamble**, and **Postamble** options are not available. Polls are automatically placed in a "Polls" system category. They do 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:



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.

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 person[1]. 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?

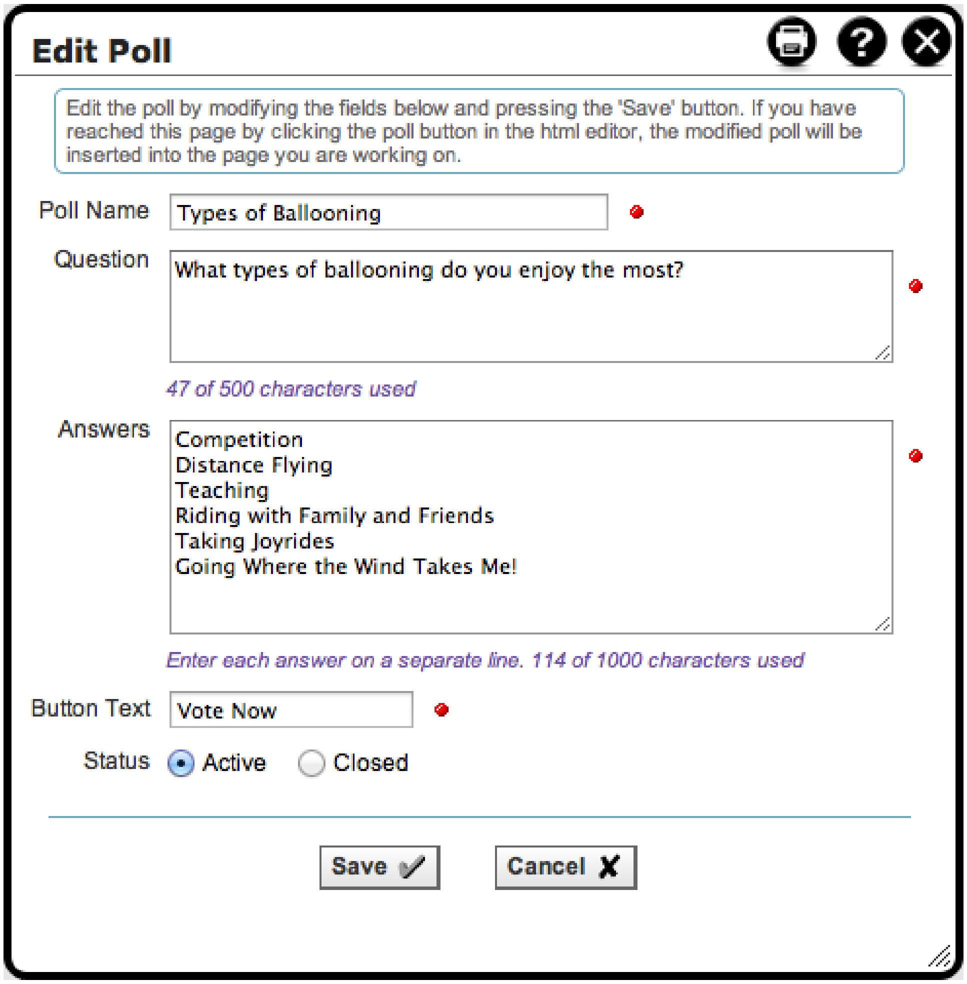
Survey links can be added to many places on your website using the Link Builder, including emails, custom pages and your home page, event descriptions, donation fund descriptions, storefront product descriptions. In each case, the link will take users to the first page of your Survey (usually the Preamble).

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:



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:

Icon	Description
 (Edit)	**Edit** properties for this survey.
 (Pages/Ques-	Select the **Pages/Questions** icon to edit the pages on which the survey is organized and displayed, and the questions shown on each page. Not available for

Icon	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.
(Copy)	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?

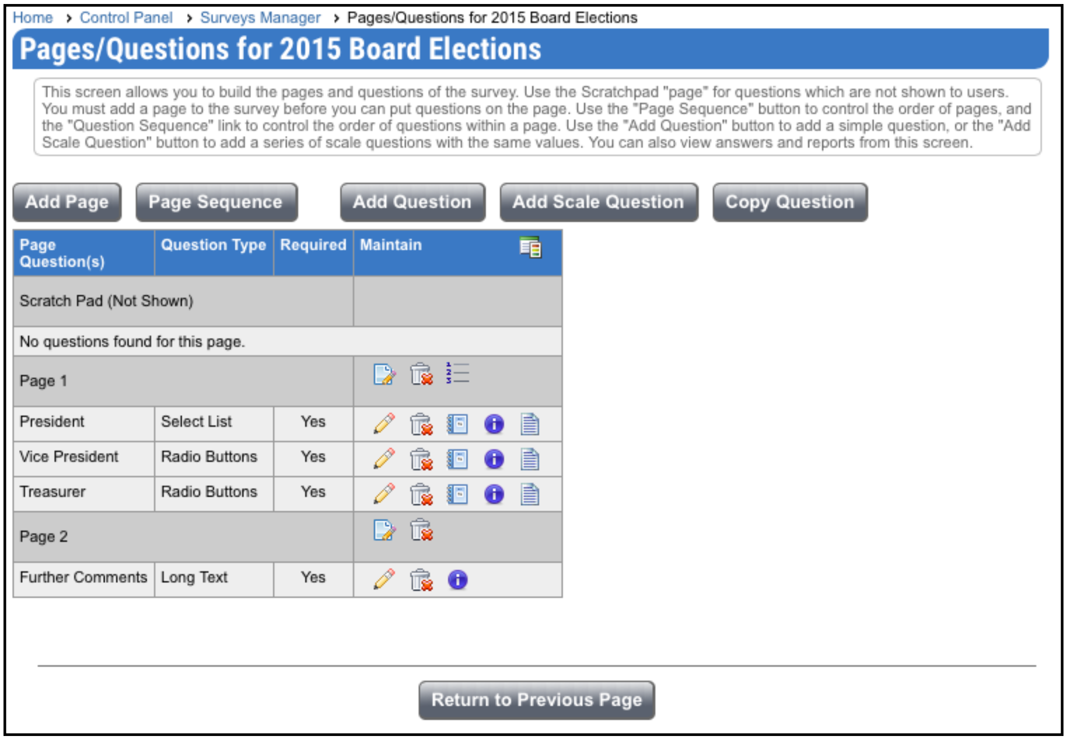
Polls can be added to custom pages, your home page, and your website template using the Poll widget in either the Page Builder or the Template Builder. In some cases, you may have the option to insert a Poll using the widget in the Advanced Content Editor. In each case, the Poll will display in full, 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):

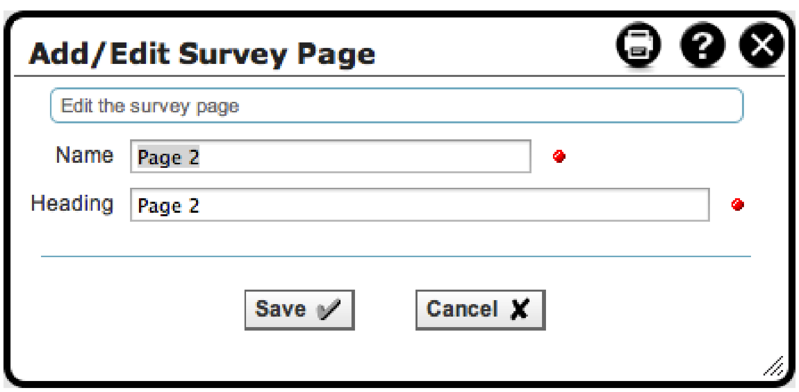
[1] If “preamble” is a word, why not “postamble”? Consider it invented!



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.



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.

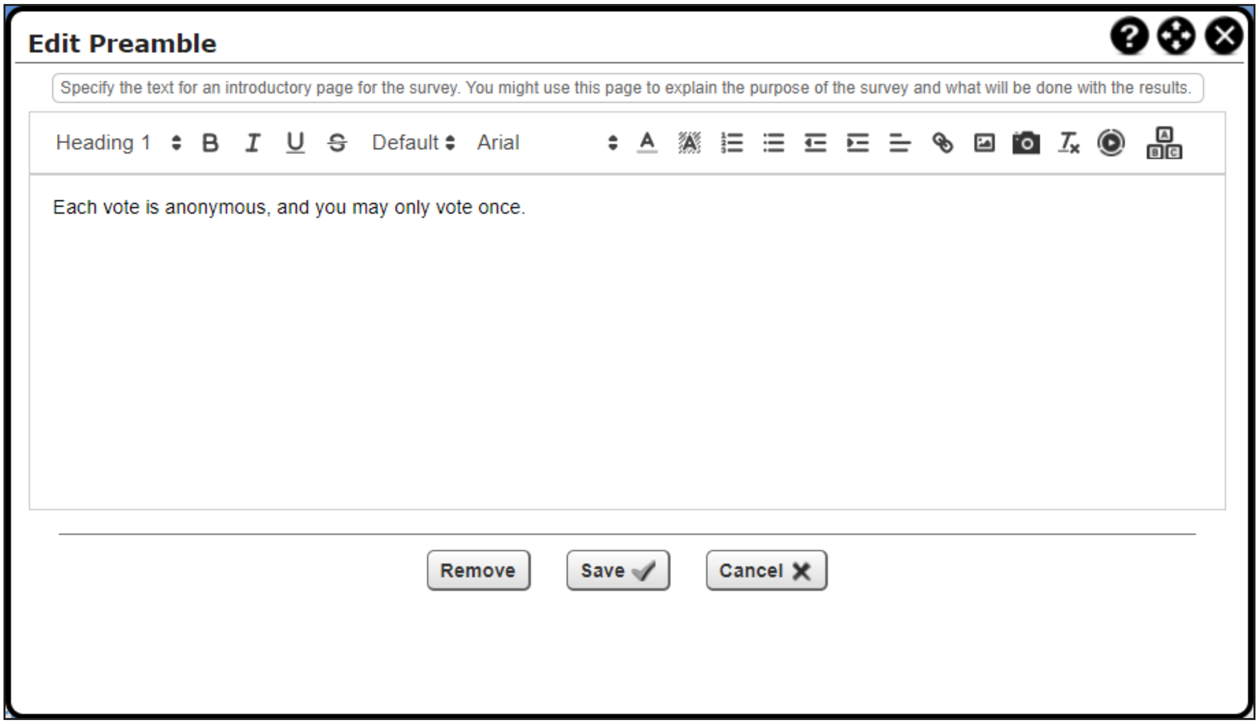
Maintain Options

Preamble and Postamble

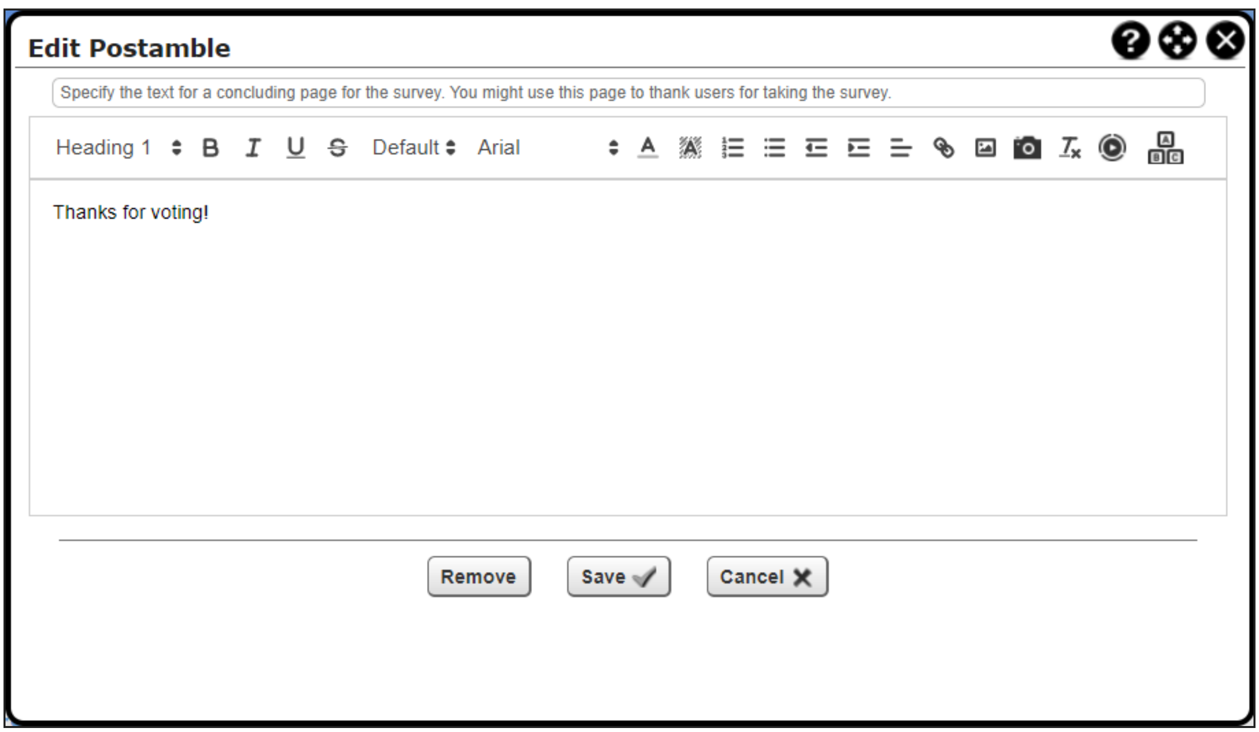
Control Panel > Communications > Website Modules > Surveys

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.



The Postamble is typically used to thank people for completing the survey and to remind them to click the **Submit Response** button!



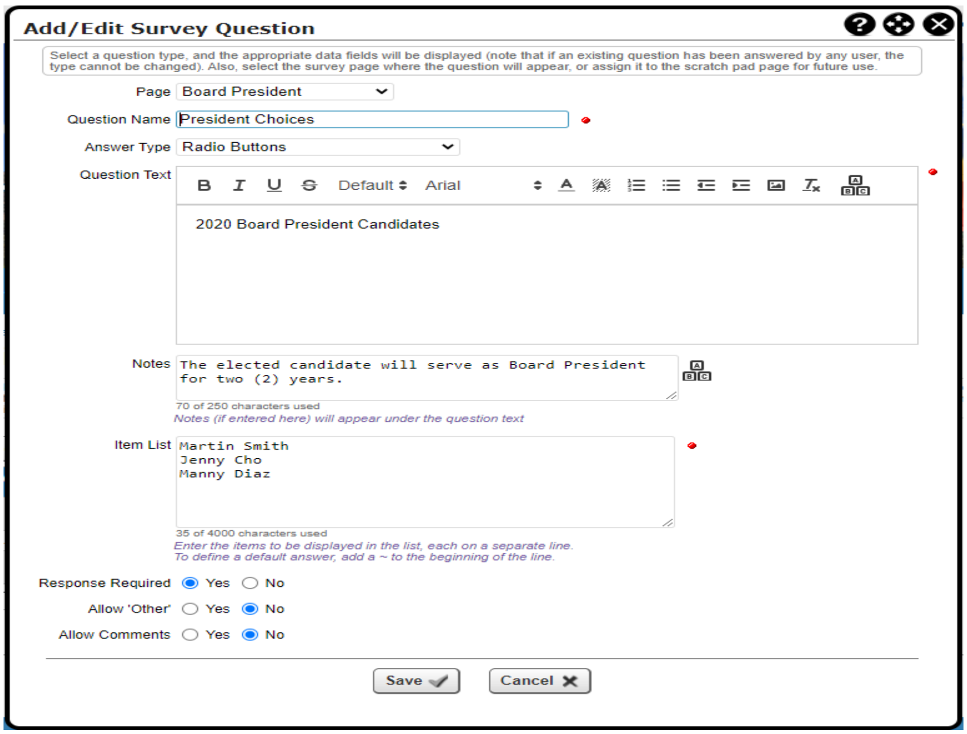
The system will place **Cancel** and **Next** buttons at the bottom of the preamble page, and **Back, Cancel** and **Finish** buttons at the bottom of the postamble page. A respondent's answers are not written to the database until the **Submit Response** button is clicked.

> **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:



- 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.

- 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.

Type	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) • Email Address • Web Address (URL) • US Phone Number • US Zip Code • Canada Post Code	Required: yes/no Allow comments: yes/no

Type	Display Format	Additional Values	Options
		• Australian Post Code • UK Post Code • Custom – Enter a Regular Expression and test the expression Regular Expressions 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, maximum 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, maximum 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

Type	Display Format	Additional Values	Options
	any and all can be selected		and maximum selections that can be made. Allow other: yes/no Allow comments: yes/no
Radio Buttons	Vertical list of radio buttons; only one can be selected	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election) **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
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; anything 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 buttons representing the "strength" of the respondent'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 minimum of two (2) items must be specified.	Required: yes/no Store numbers: yes/no (If no is specified, values 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.

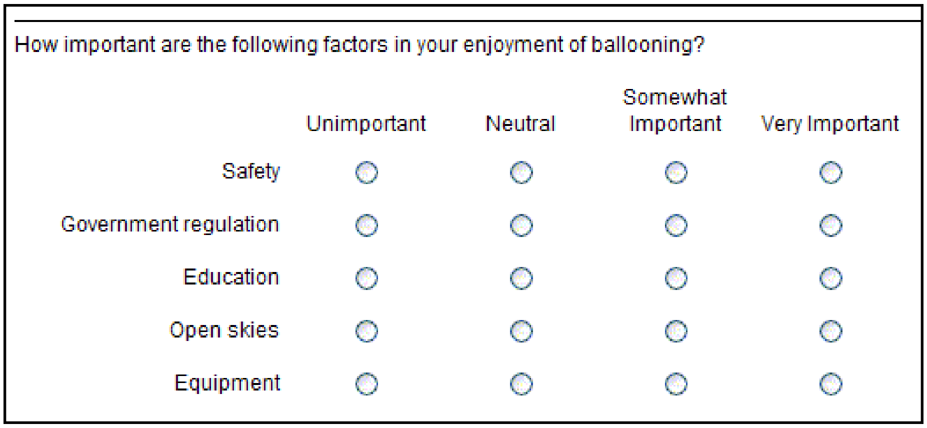
For more information about regular expressions, see the following websites:

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

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

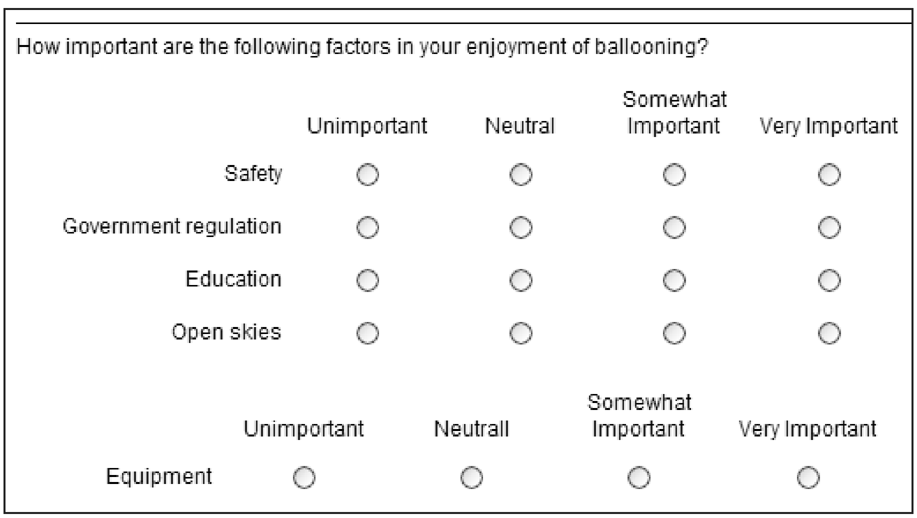
Scale Questions

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:



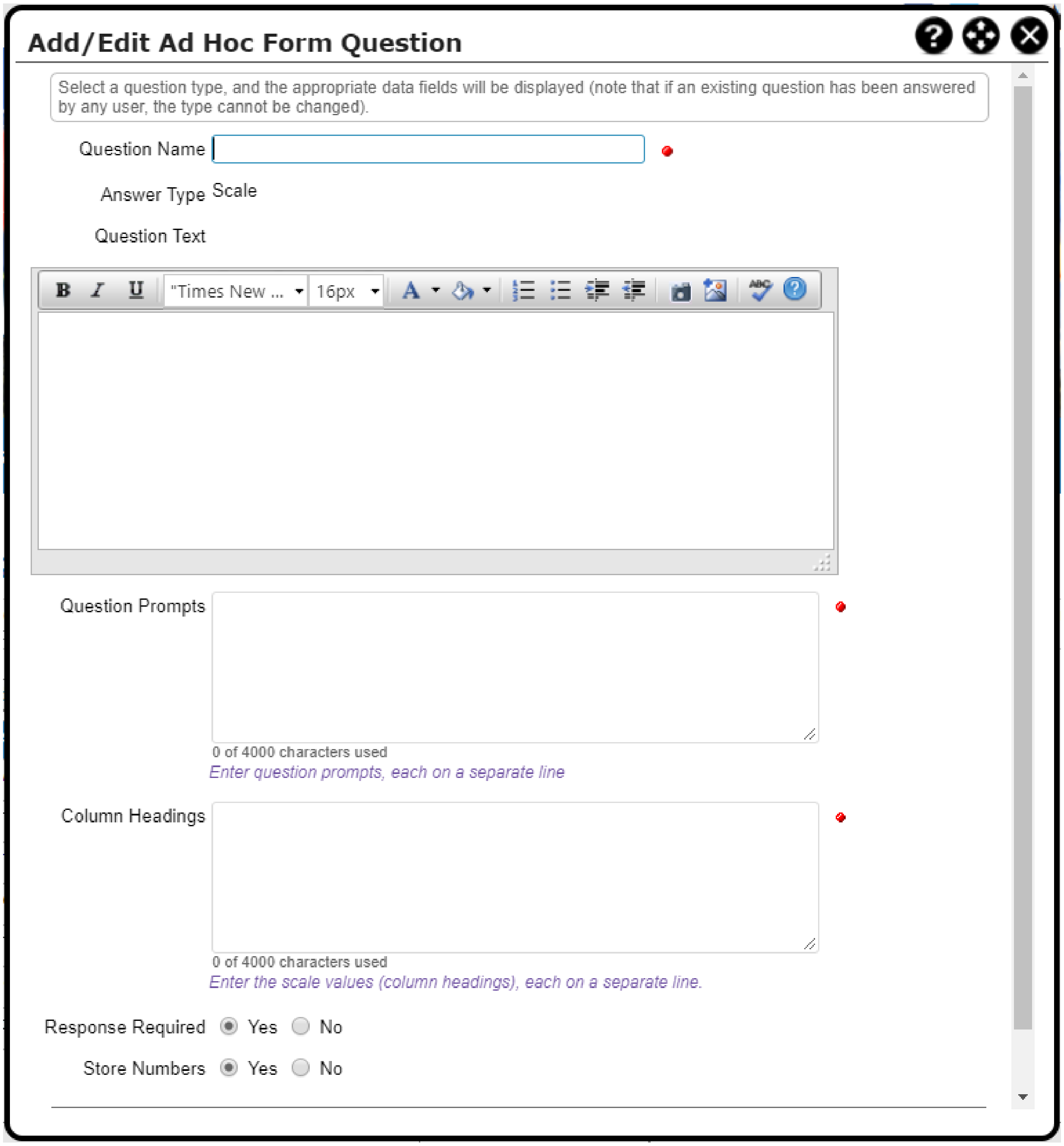
ClubExpress includes special functionality to display scale questions. If there's a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different 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.



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:



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.

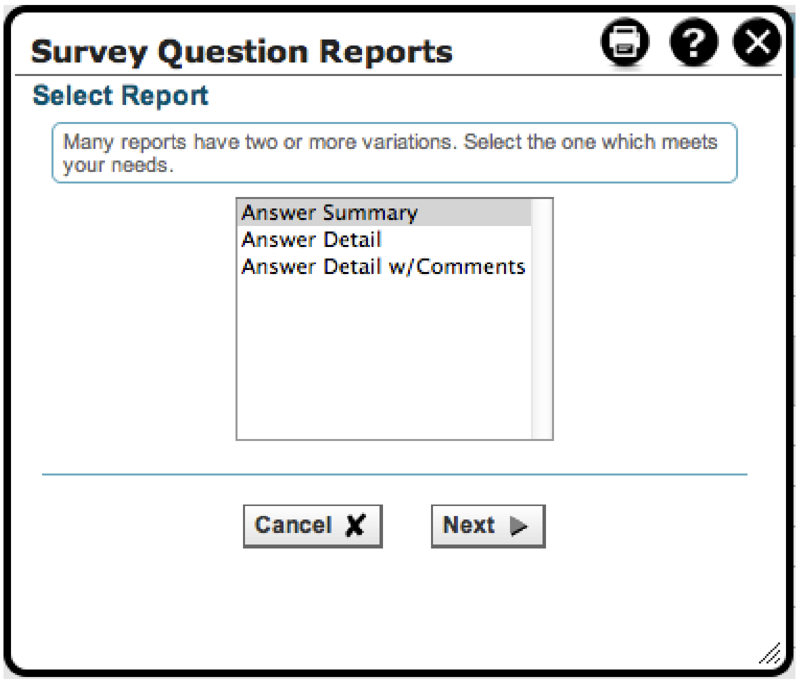
Copy Question

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:

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.

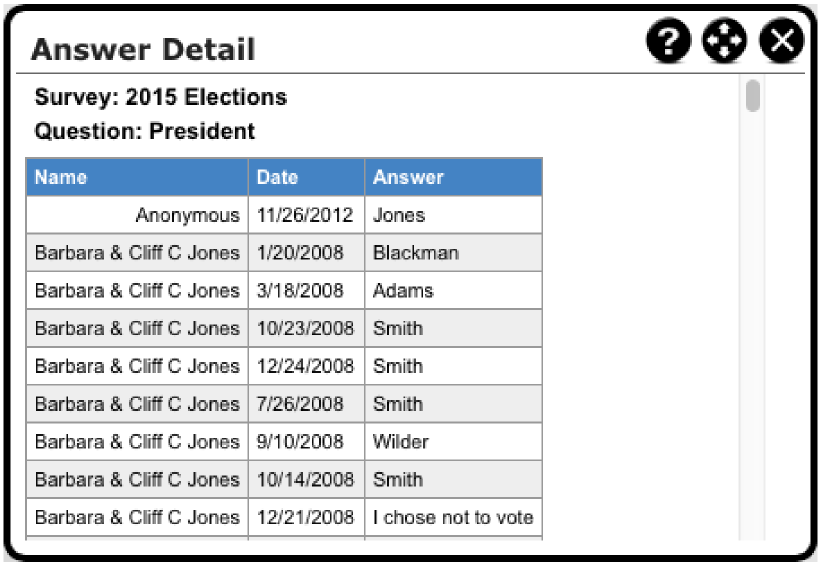
Viewing Answers

Click the **Reports** icon to see a list of available reports at the question level. You will see a dialog similar to the following:



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:



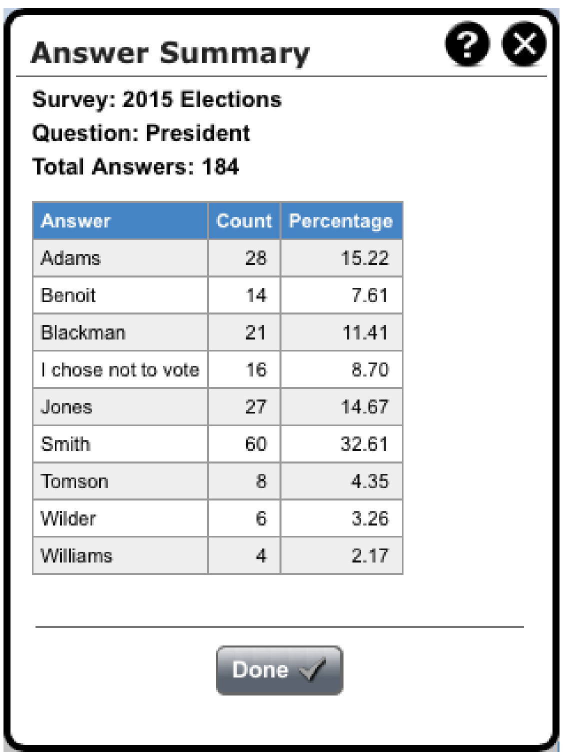
Answer Detail

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 free-form text.) You will see a dialog similar to the following:



Answer Summary

Survey: 2015 Elections

Question: President

Total Answers: 184

Answer	Count	Percentage
Adams	28	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

Done

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:

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

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.

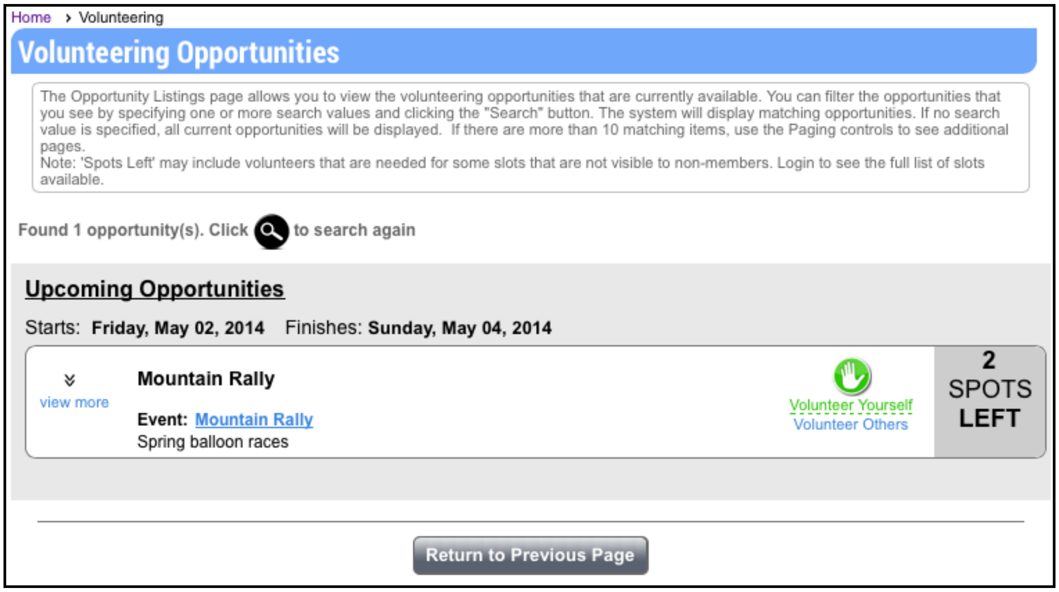
- The event title appears as a link on the Volunteering Opportunities page. Clicking this button jumps to the event that the opportunity is linked to.

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.)

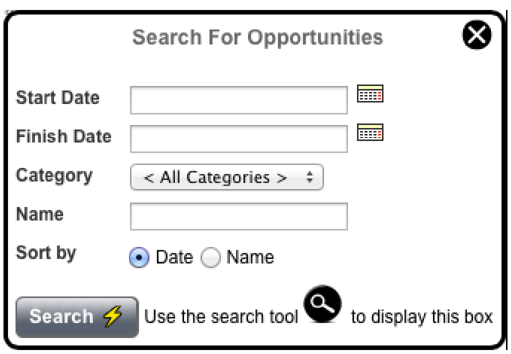
Sign Up for Volunteering Opportunities

When you click Volunteering on the menu or a link, you will see a screen similar to the following:



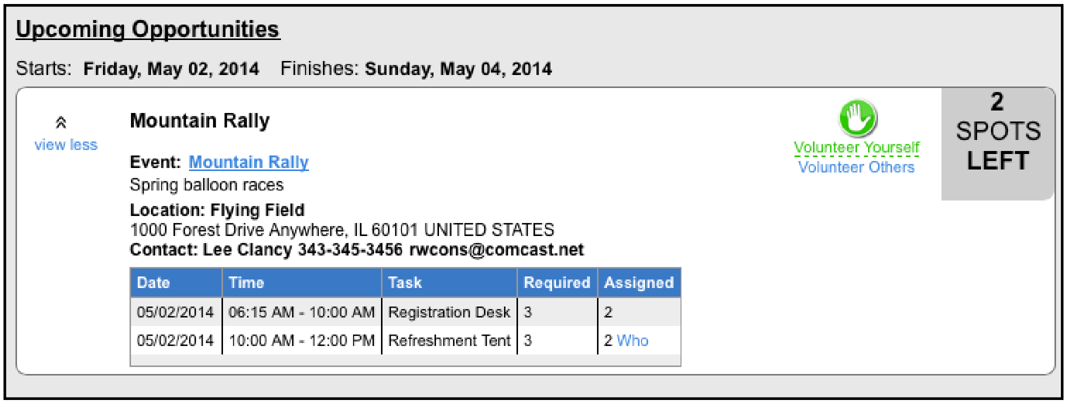
This screen shows upcoming opportunities, including the opportunity title and date, links to volunteer, and how many spots are available. Up to 10 opportunities are shown at a time; if there are more available, paging controls will be displayed. If the opportunity is linked to an event in the calendar, 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:

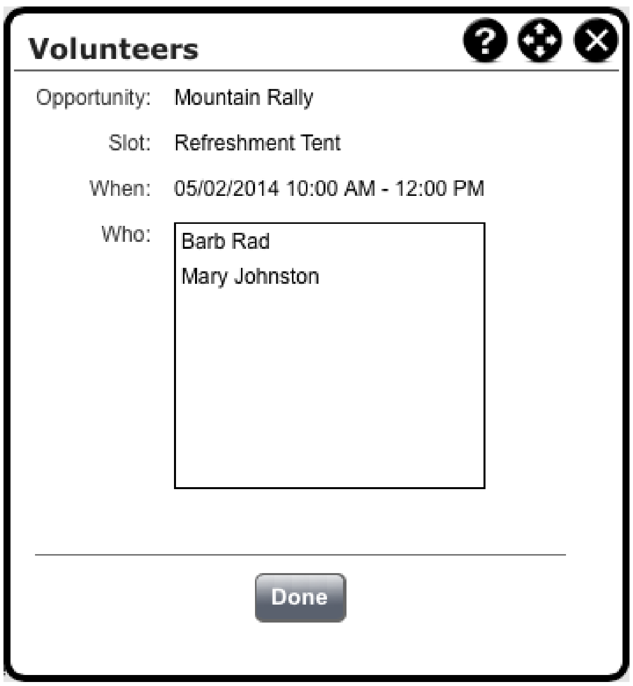


Searches can be performed by date, category, and name, and the results can be sorted by date or name.

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:

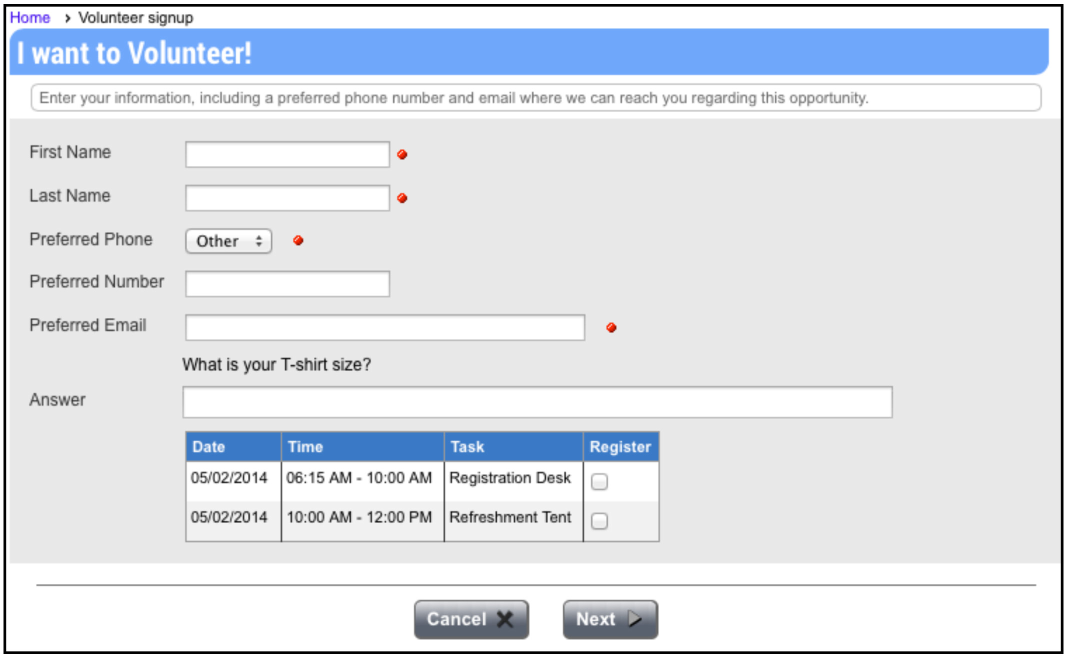


Each slot has a date and time range, the specific task that needs to be performed, how many people are required and how many people have already volunteered. Optionally, you may see a **Who** link, allowing you to popup a list of the people already assigned.



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:



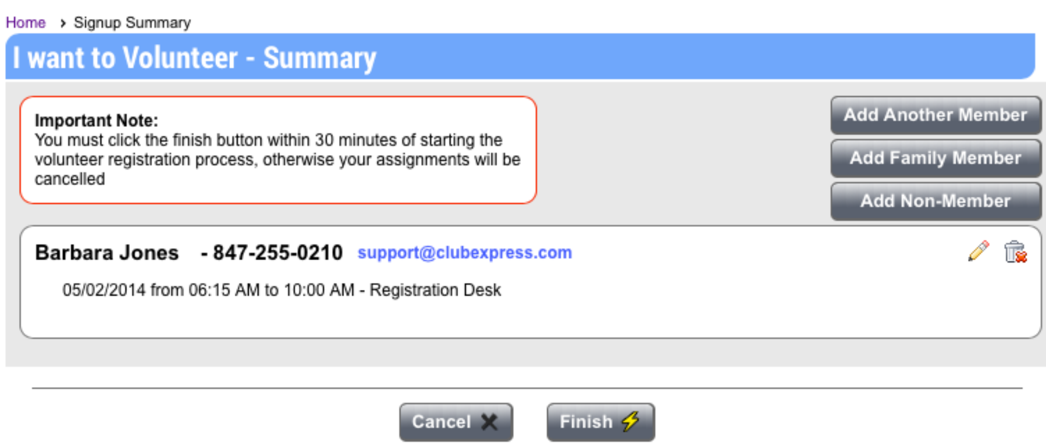
The system prompts for your first name, last name, phone and email address. It may also ask you a question that's unique to this volunteering opportunity (in this example, your T-shirt size.)

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:



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 non-member (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

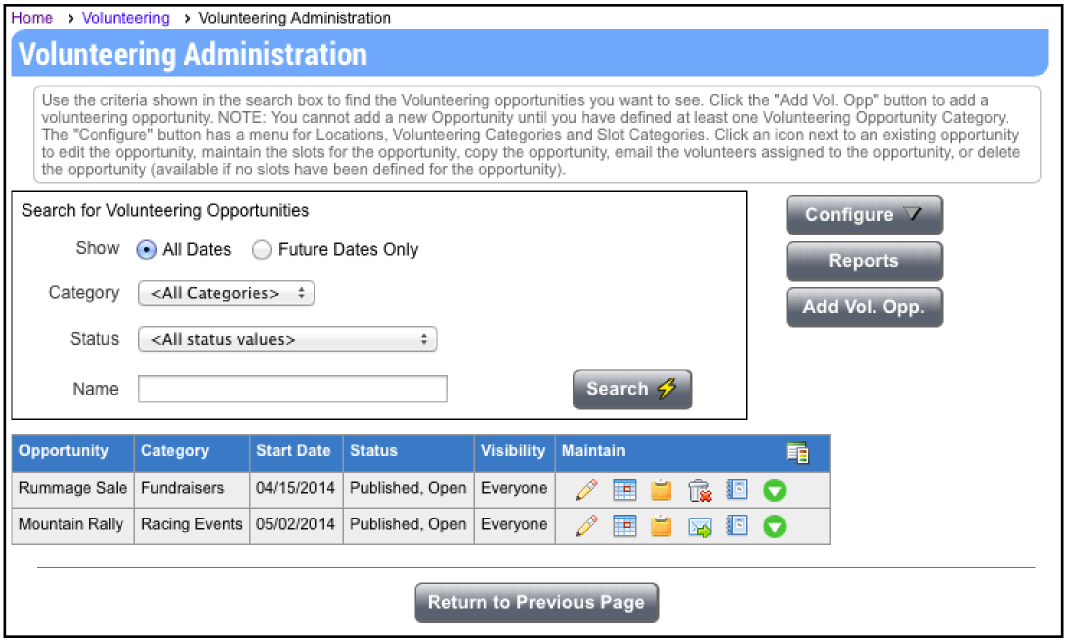
Control Panel > People > Website Modules > Volunteering

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. 

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:



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.
(Copy)	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.

Icon	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:

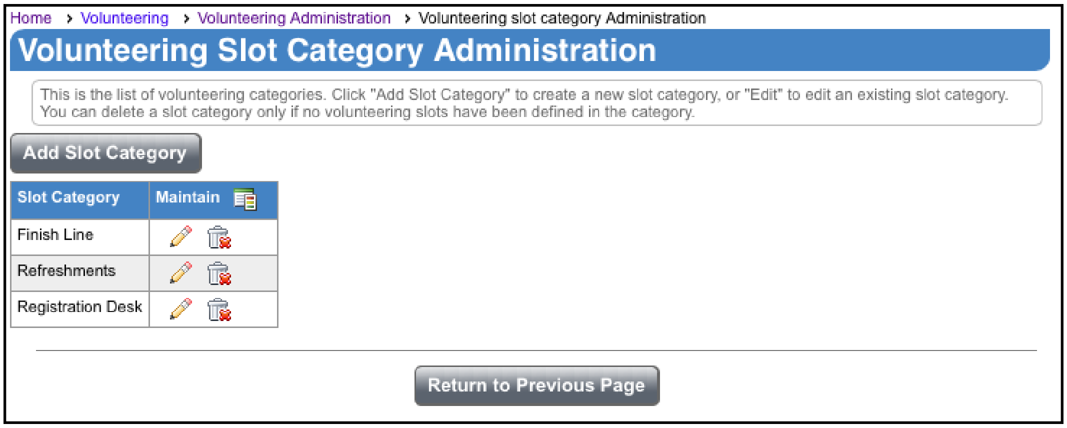
This list allows you to organize volunteering opportunities into categories.

> **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:



This list allows you to organize volunteering slots into categories. For example, the running club "Race Support" opportunity might define the following slot categories:

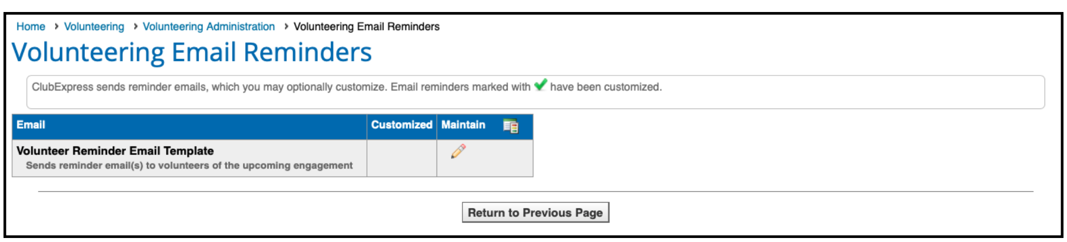
- Registration desk
- Start line
- Water stations
- Finish line
- Awards
- Etc.

These slot categories can then be used over and over again for each slot.

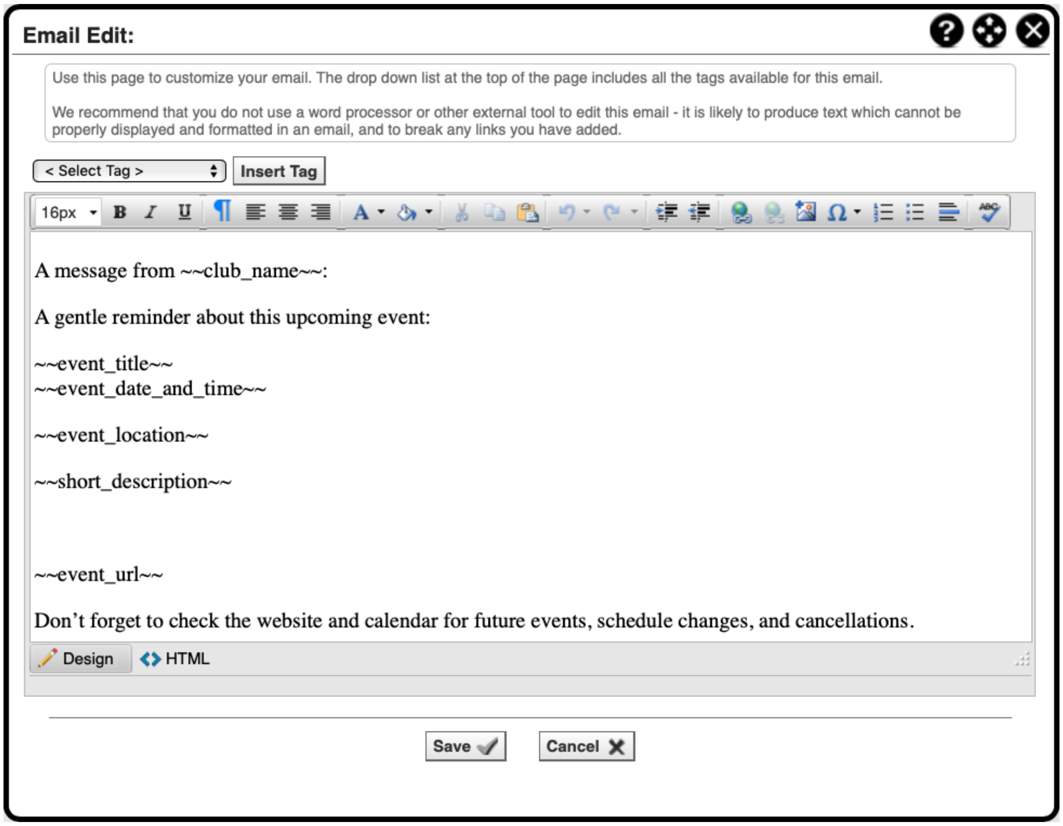
Click **Add Volunteering Slot Category** to create a new slot category. You will see a standard popup dialog. Click the **Edit** icon to edit an existing slot category or the **Delete** icon to remove a category (as long as it's not in use.)

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:



Click the Edit (pencil) icon to edit the reminder. You will see the following screen:



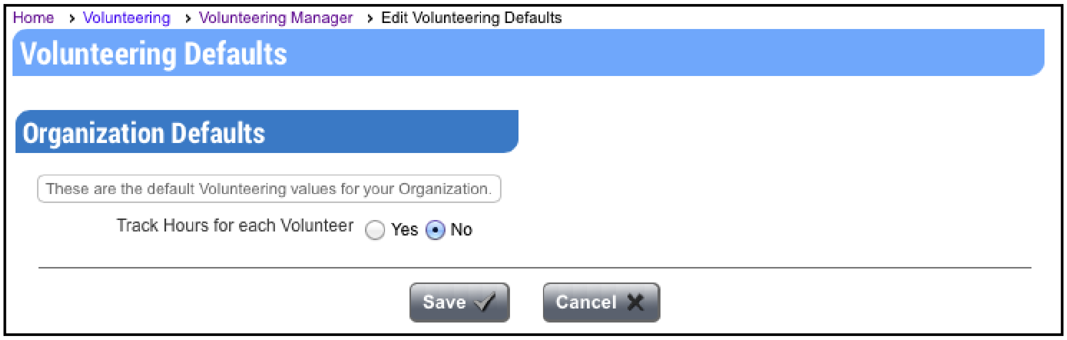
Use the editor to modify the body text of the email. Note that this is a simplified version of our standard text editor. It only includes those formatting options that most email readers will allow through; many advanced HTML and CSS settings are not typically displayed in emails for security reasons.

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):

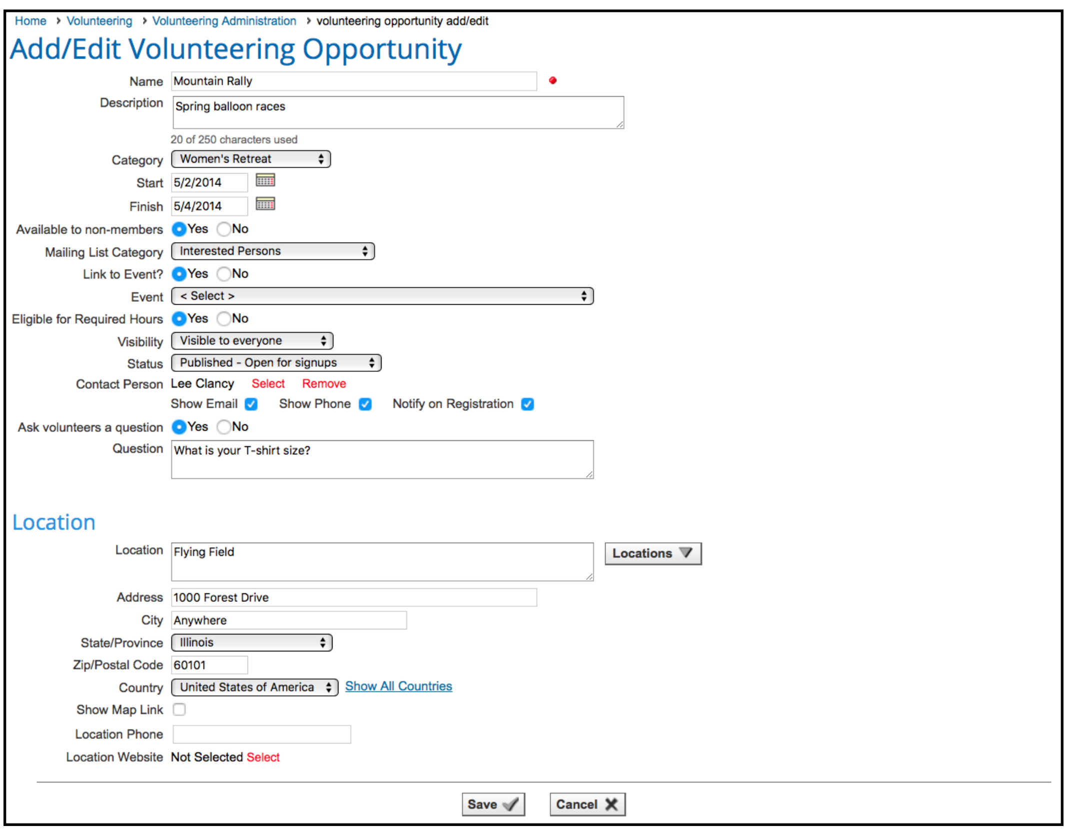


Select **Yes** to track hours **actually** worked for each volunteer. This option is for clubs where members must volunteer a fixed number of hours each year to remain in good standing. Click **Save** to save and return to the Volunteering Administration page, or **Cancel** to return without saving.

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:



- 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.

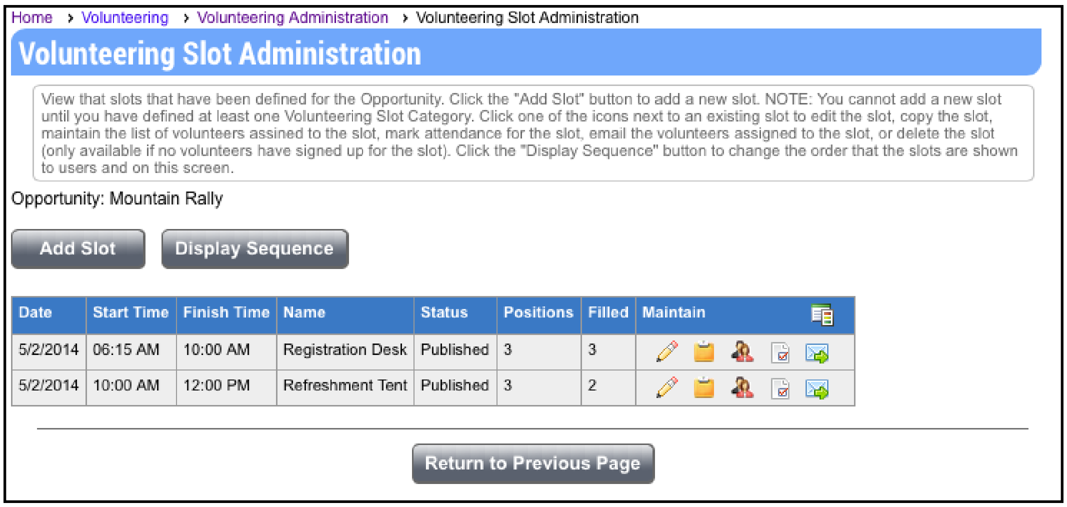
Click **Save** to save your changes and return to the Volunteering Administration, or **Cancel** to return without saving.

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:



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.
(Copy)	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.

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:

- Specify the **date**, **start time and finish time**, **number of people required**, **name** and a **brief description**.
- Select a **volunteering slot categor**y 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

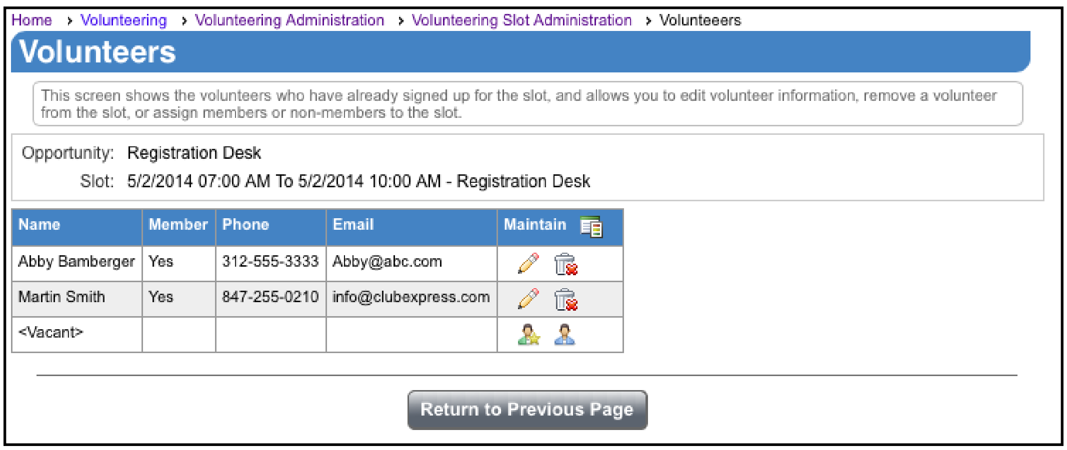
You also control who can see who else has signed up (no-one, members only, or everyone.) Many clubs find that people are more likely to sign up if they can see who they will be working with (friend? enemy? etc.)

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.

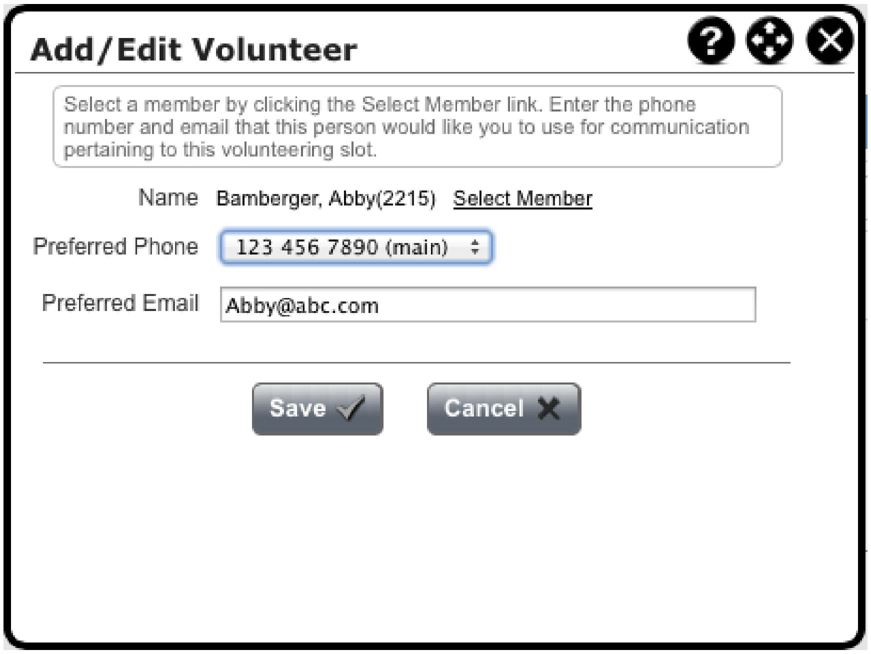
Volunteers

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:



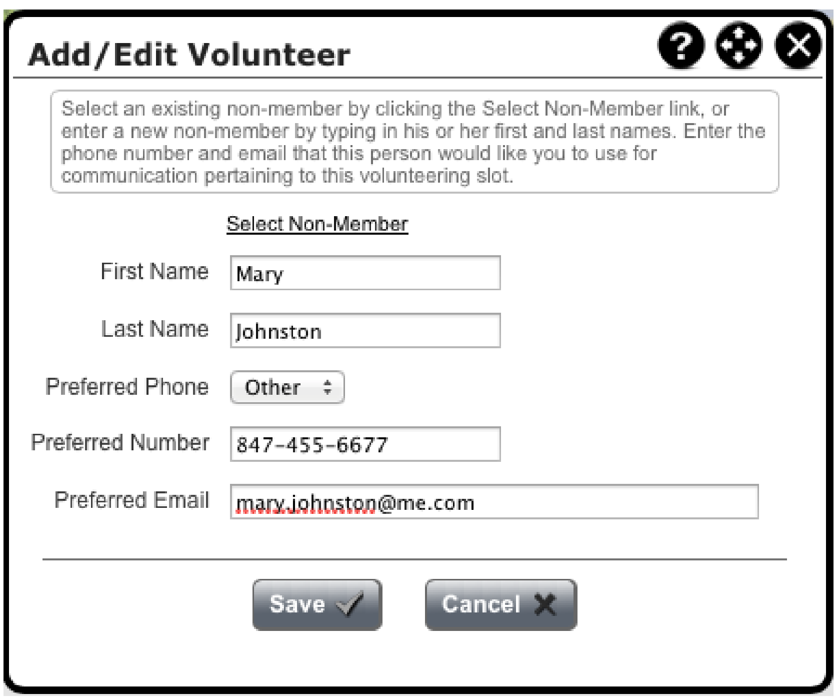
This grid has exactly the number of rows as people required. For each person, you will see their name, phone number, and email address, and whether they are a member. The **Edit** (pencil) icon allows you to modify someone's phone and email address. The **Delete** (trashcan) icon allows you to remove someone if they have canceled out.

For <Vacant> slots, click the **Assign Member** or **Assign Non-Member** icons to add a member or non-member to that slot. For members, you will see the member selector:



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.

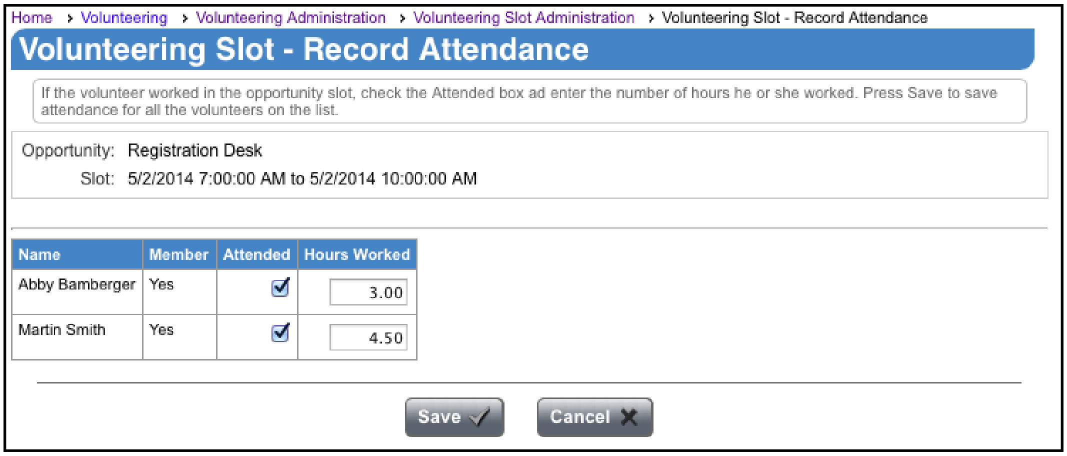
For non-members, you will see this screen instead:



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:



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!

Accessibility Toolkit - Offer dozens -

Ad Hoc Reporting - Create and run your own

Banner Advertising - Define one or more ad pan-

Classified Ads - Allow members to post ads on the we-

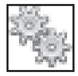
Contact Log (CRM) - Equi-

Continuing Education and Certification - Track the -

E-Learning - Define courses members

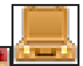
Expens-

Gift Discounts - Provide discount codes members



Group Directory - Display all chapters and interest

Guest Passes - Allow members to purchase guest p



Jobs Board - Post available jobs that members (or

Online Professional Development

Online Professional

Mobile App

H

Member Fleet

QuickBooks® Online

Connect your Qui-

Resource Scheduling

Defi-

Ride Cue Sheets (for Cycling Clubs)

Ride Log (for Cycling Clubs)

Track run statistics

Web Services - Allows outside developers to create

Trail Maps and Trail S

Two Passwor

Virtual Member

Ad Hoc Reporting

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 Enabling Ad Hoc Reports 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.

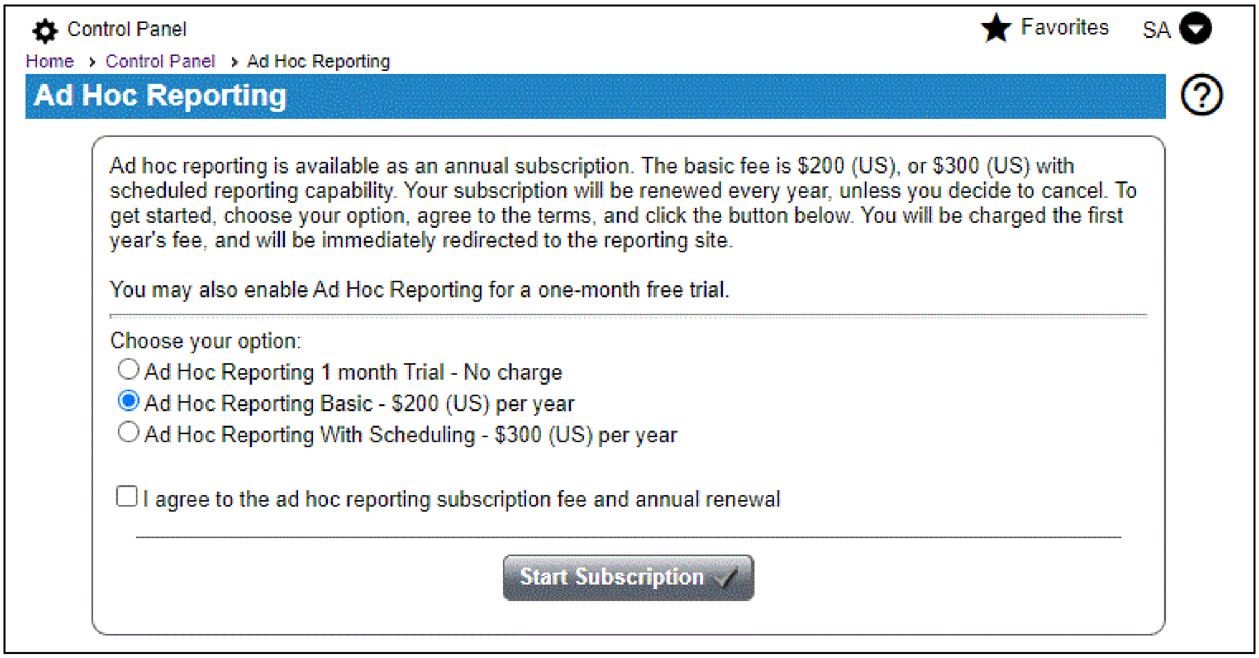
These sections will describe some of the basic capabilities of Exago, including ExpressView, creating a more complex Advanced Report from scratch, and charts. We have also created a couple of our own videos to show how Exago works within the context of your ClubExpress data.

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:

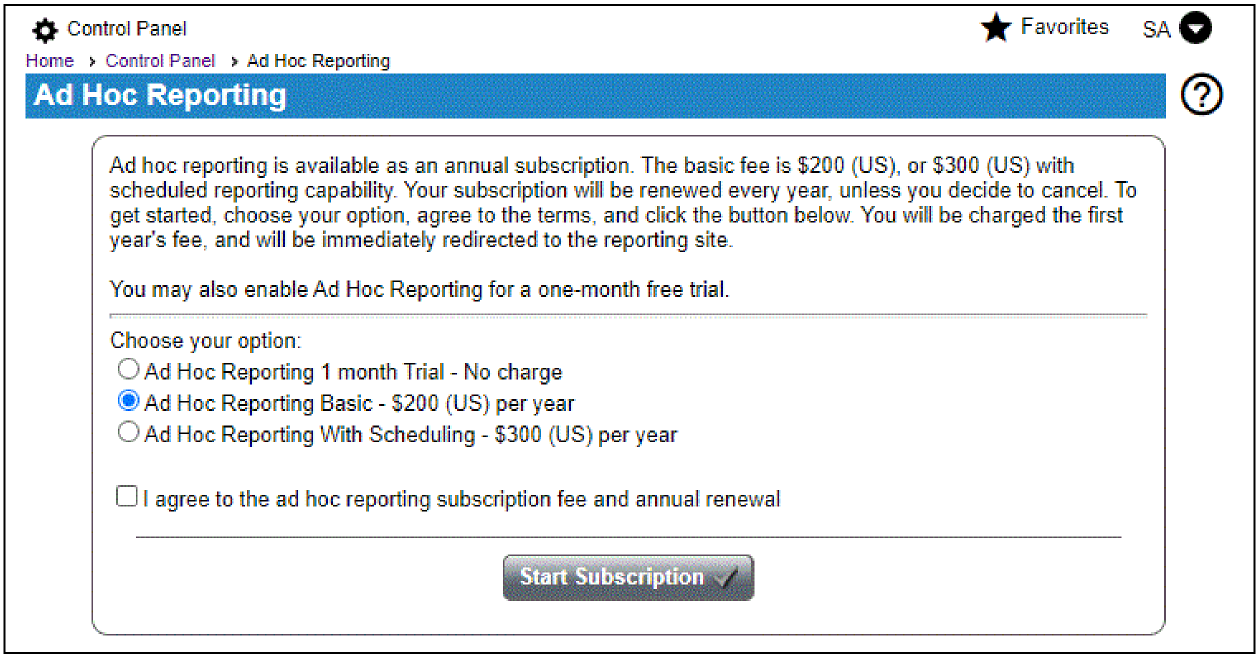


Select One Month Trial to start your free trial. The administrator activating the free trial will receive an email confirmation which includes the expiration date of the free trial.

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:



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.

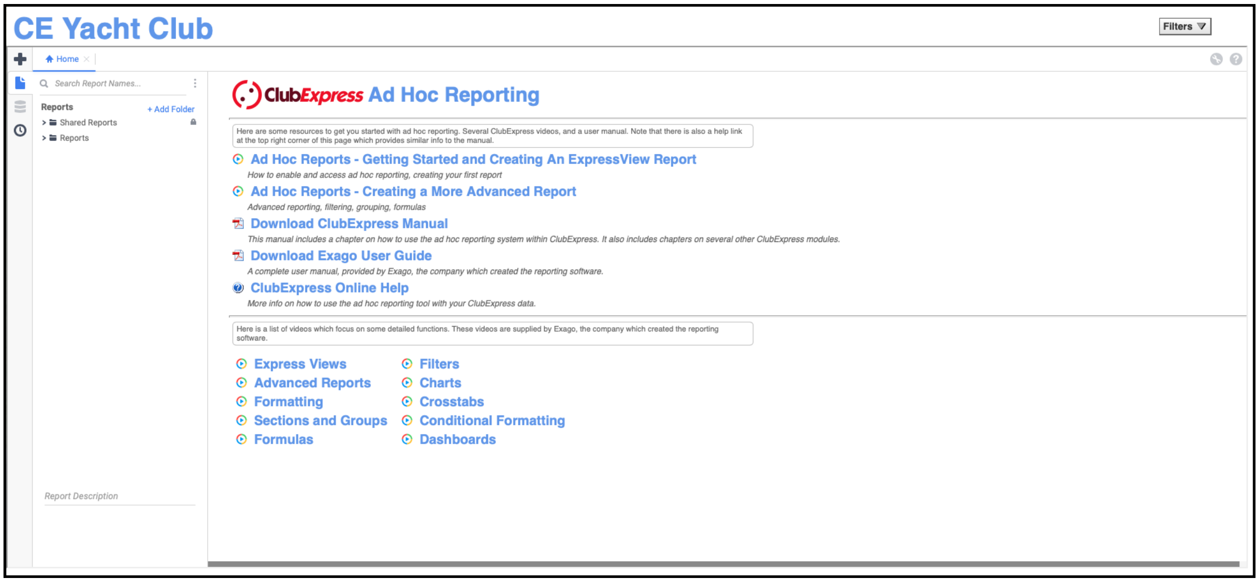
Once you are a subscriber, the screen changes to the following:

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:



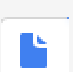
The title will be the name of your club or association.

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 Existing Reports)	View the list of existing reports, including shared reports. Also provides a search function.

Icon	Description
(Data Sources, aka Categories)	Enabled when you have an open report design. Displays data sources and individual 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.

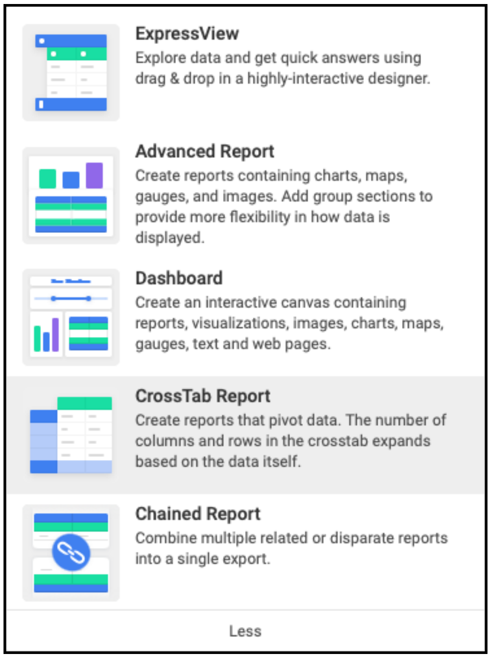
You can also drag-and-drop reports and folders around this tree to organize it any way you need. Within a folder, reports are always listed alphabetically by title.

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:

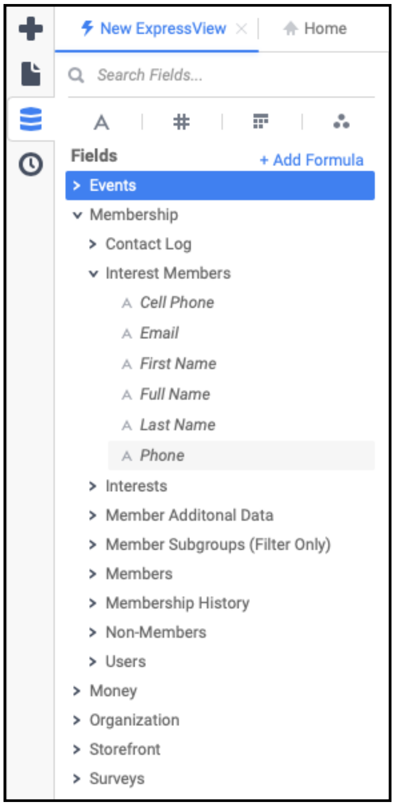


- **ExpressView** uses an interactive designer and a drag-and-drop interface to quickly create tabular reports. ExpressView is both a reporting tool and a data exploration tool; it allows you to explore your data in real time, where you can dynamically regroup, sort and get totals on an as needed (ad 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:



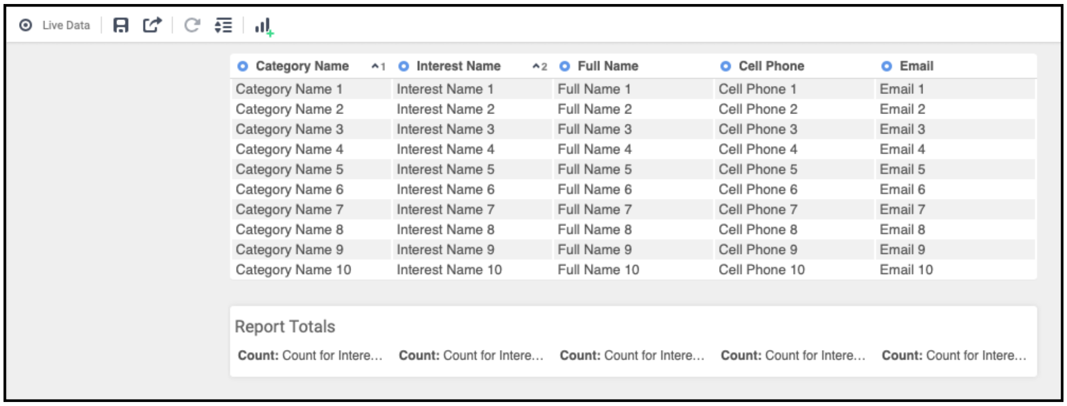
The database icon is now active. It shows a list of data sources, organized into general categories (Events, Membership, Money, etc.) The Membership category has been expanded to show various types of member data (Contact Log, Interest Members, etc.) The Interest Members sub-category has been expanded 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.

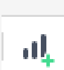
The icons at the top allow you to filter the available field list to show only alpha, number, date/time, or other fields. Each icon is a toggle. Click once to activate and highlight; click a second time to deactivate.

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:

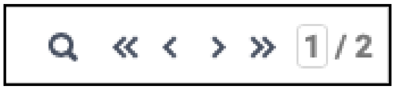


The ExpressView Designer is showing a column for each data element. It displays a Totals panel at the bottom, showing “Count” formulas only because this is text data that cannot be aggregated any other way. The following icons are available in the toolbar:

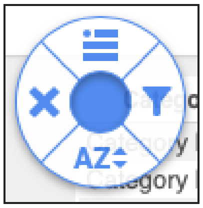
Icon	Description
(Run)	Switch to Live Data mode, where the report is designed using actual data rather than placeholders. In Live Data mode, the categories and fields panel on the left is unavailable.
 (Save – [Ctrl-S])	Save this report. A panel appears on the right side allowing you to enter and name, 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 customize settings.
 (Refresh – [Ctrl-R])	Refresh the data shown. Only active when Live Data is enabled.
 (Report Section Display Options)	Control how report sections are shown in Live Data mode.
 (Show Visualization)	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:



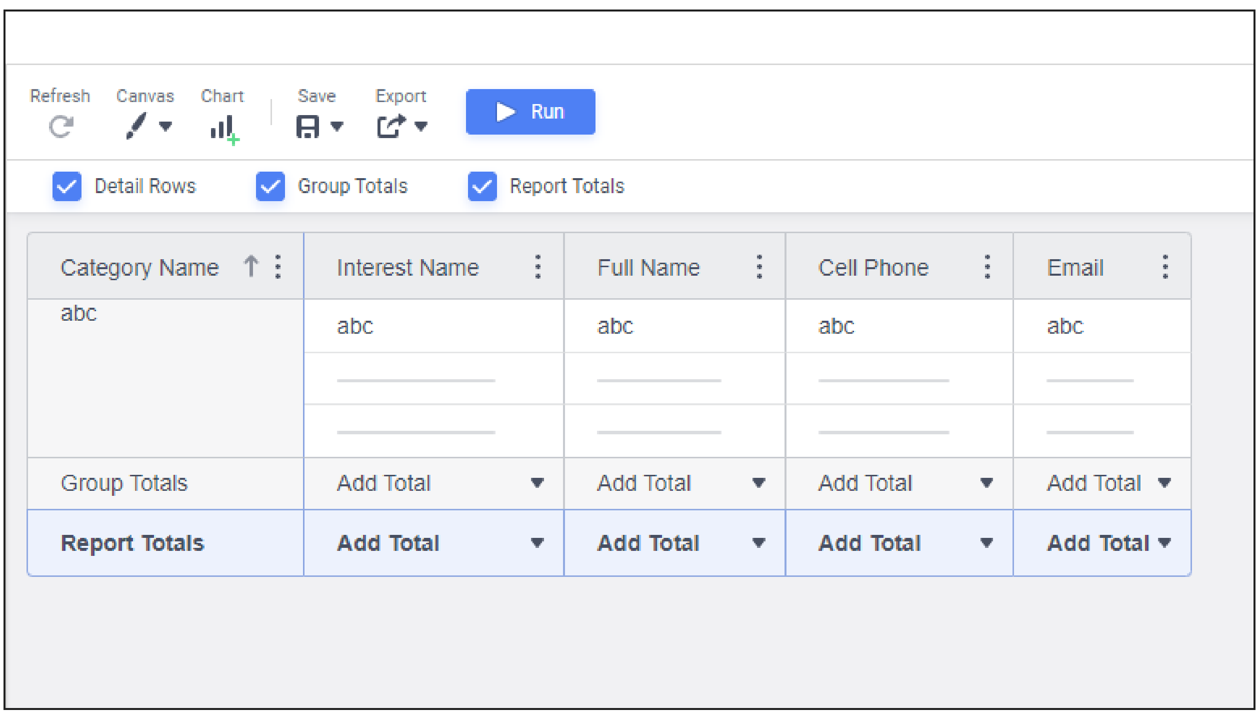
Click a heading to see options to edit the heading text or change the sort order. You will also see the Style panel on the right side of the screen, to change the appearance of this heading. (See below for more info.)



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.

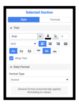


On the right side of the screen are a series of icons which, when clicked, open different configuration panels. These options may also be selected when you select a section of the report itself or one of the options in the popup wheel.

- Style the Selected Section
- Style the Overall Report
- Sorts
- Filters
- Visualizations

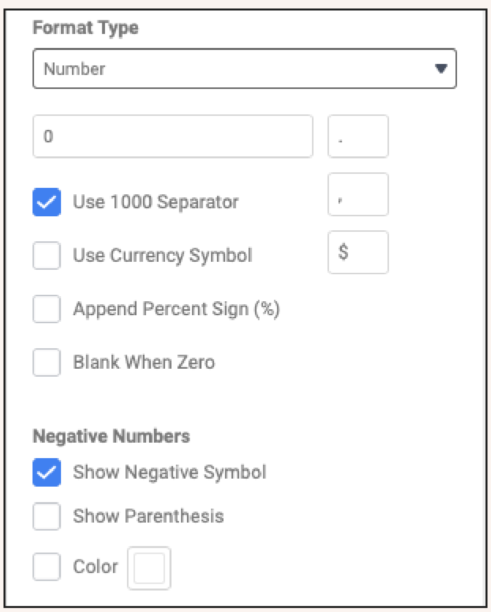
Selected Section

When you select a section, the Style panel allows you to change the appearance of that section:

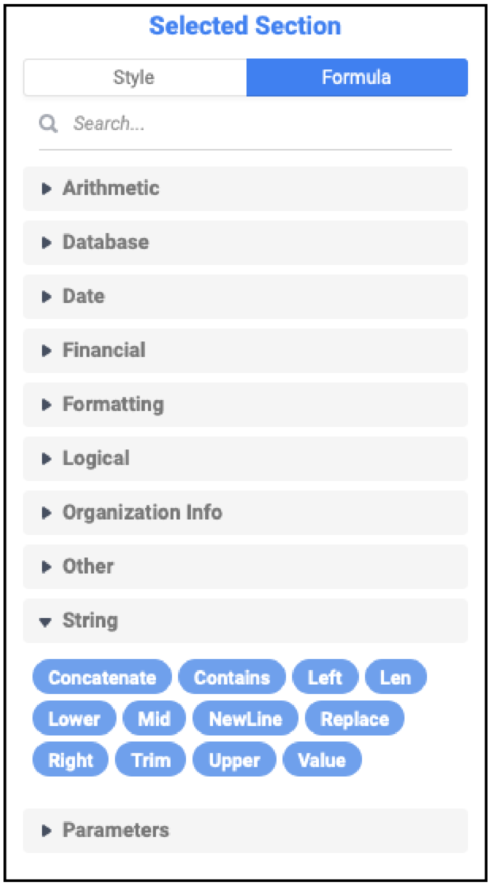


All the basic style options are available, including font, text color, background color, size, attribute, vertical and horizontal alignment, underline, and word-wrap. If you change the format type to number or date, additional options appear.

Example:



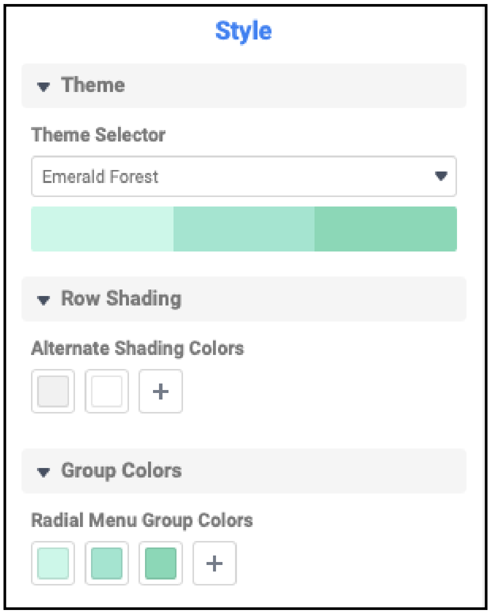
Select Formula and you can build a calculation using any of dozens of built-in functions:



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

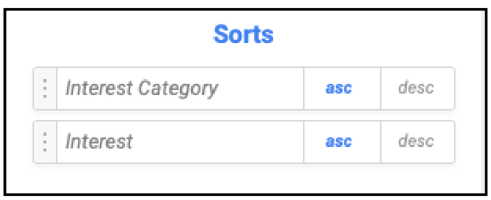
Select the Report Style icon to change the appearance of the report as a whole:



You can select from a number of built-in themes, configure row shading, and configure group colors.

Sorts

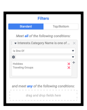
Select the Sorts icon to configure how the report will be sorted:



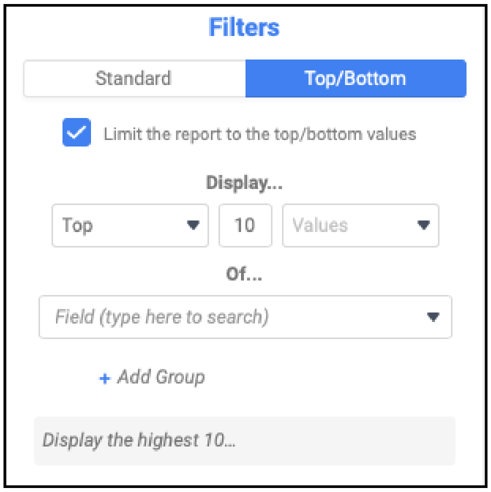
For each sort, click “asc”ending or “desc”ending. The three dots symbol on the left is a drag-and-drop handle to change the sort order.

Filters

Select the Filters icon to filter the values shown in the report.



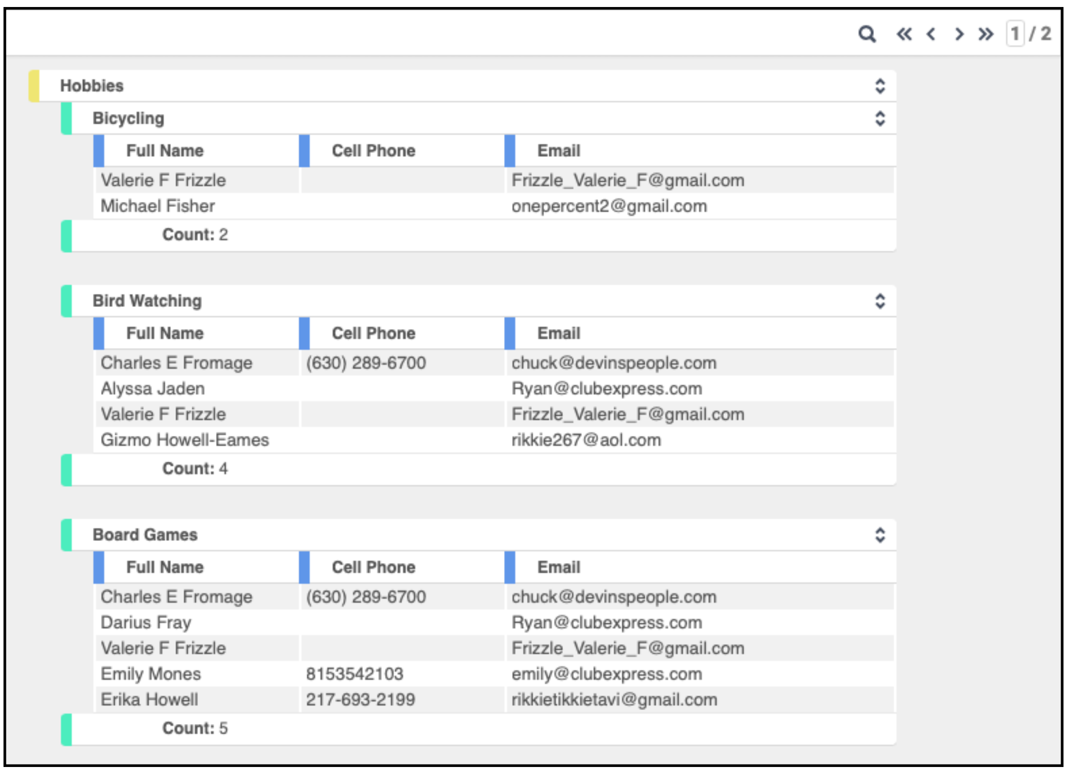
You can drag fields from the designer into the filter panel, then click the small arrow to the left of the filter title to see options, including the filter control and filter value.



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”.)

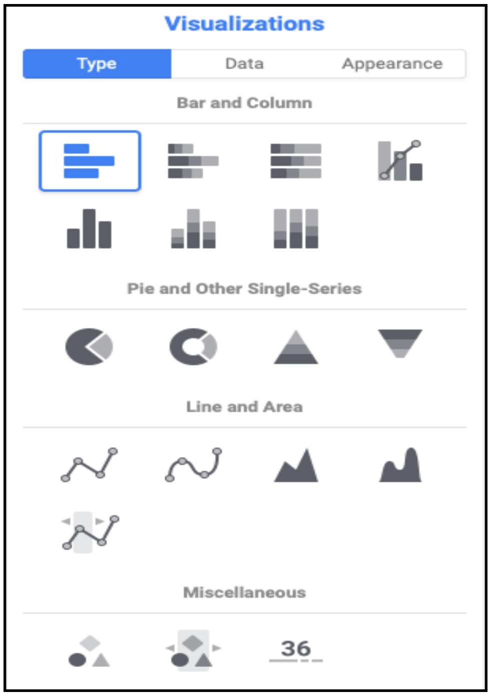
After applying some of the effects above, here is a sample of the ExpressView report now:



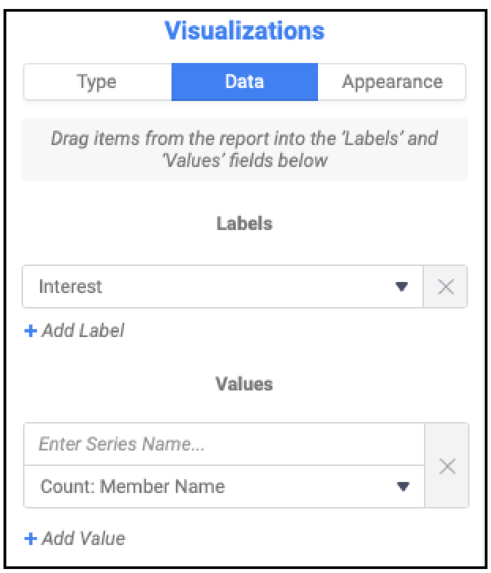
Visualizations

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:

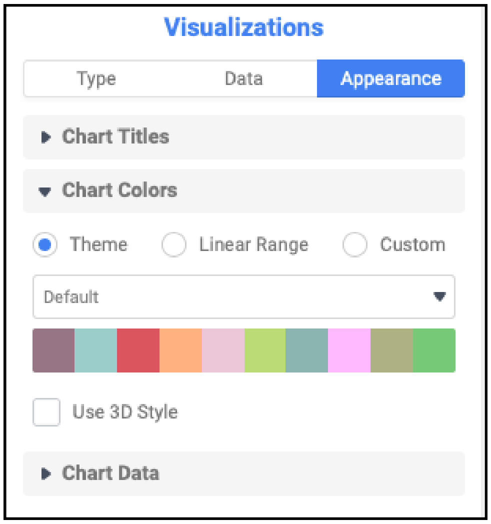


Next, specify what data should be shown in the chart:



In the above example, we count how many members are in each Interest group.

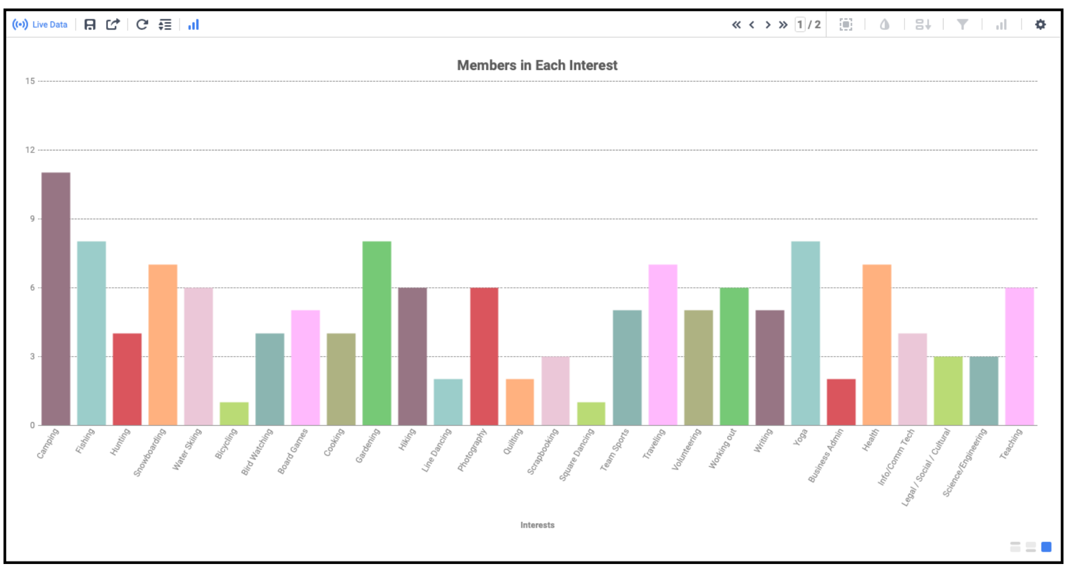
Finally configure the appearance of the various chart elements, including titles, colors, and data. Most of the options on these panels will be self-evident so they are not described separately.



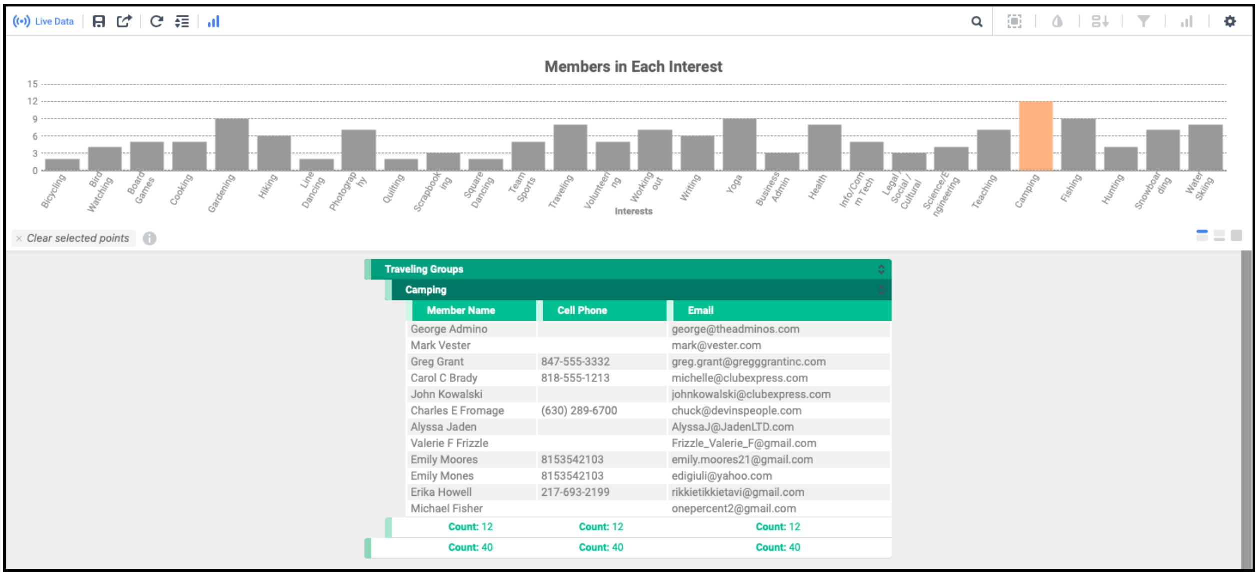
In the lower right corner of the chart panel are three icons that control where the chart appears in reference to the tabular data:

- 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.



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.

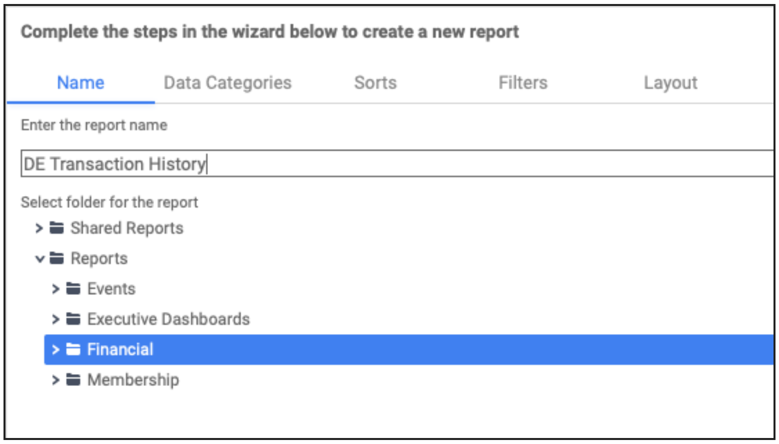
Be sure to save the ExpressView report when you are done configuring it, by clicking the Save icon in the top left corner, or the Settings icon in the top right corner and then the **Save Report Info** button.

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:

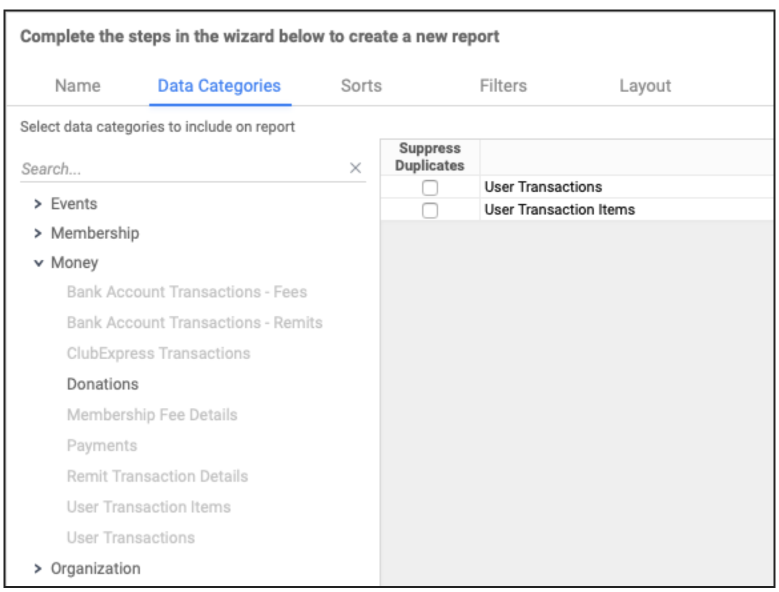


Enter the report name and the folder where it should reside. You can also enter a more detailed description (not shown.) Click the **Next** button in the lower right corner to continue.

(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.)

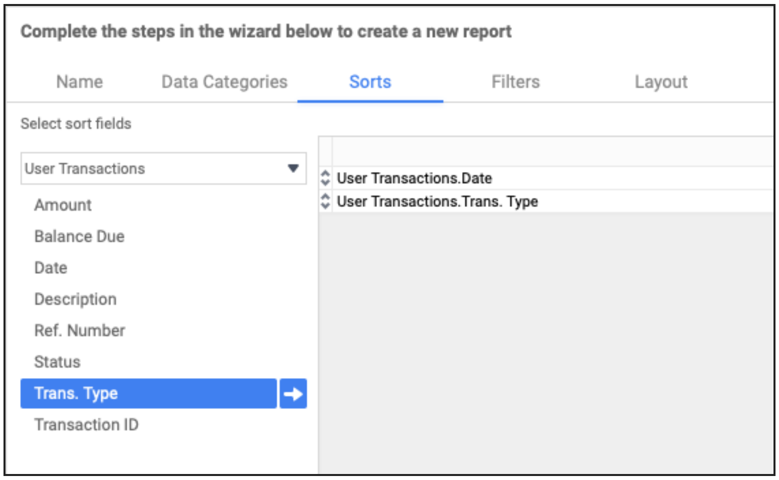
The next step is to select Data Categories to appear on the report. You will see a list of general categories. Double click a source to add it to the report. When you do so, other categories will be disabled if they are not related to the one(s) already selected.

Note that these Data Categories can be changed at any time; the wizard is simply giving you a head start on building the report.



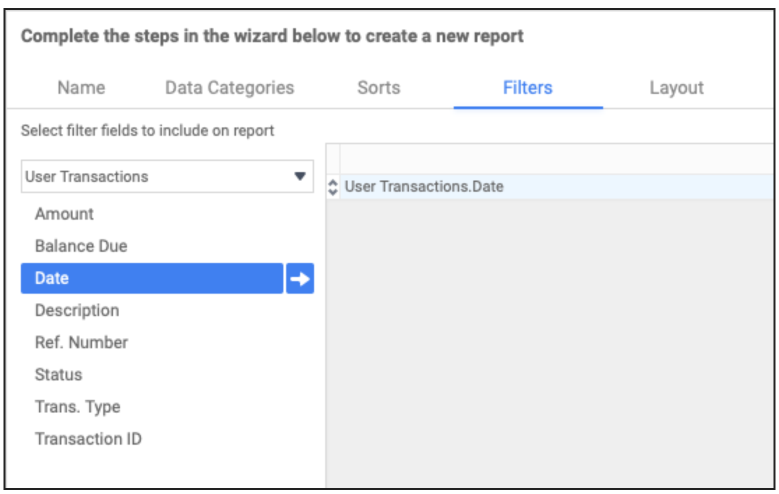
In the above example, we have added User Transactions and User Transaction Items to the report. Click **Next** in the lower right corner to continue.

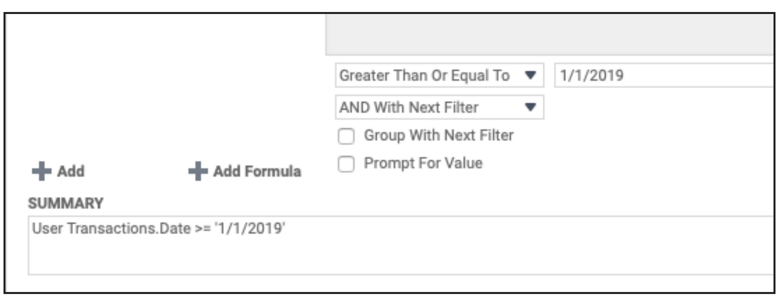
The next step is to specify the initial sorts for your advanced report.



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.





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.

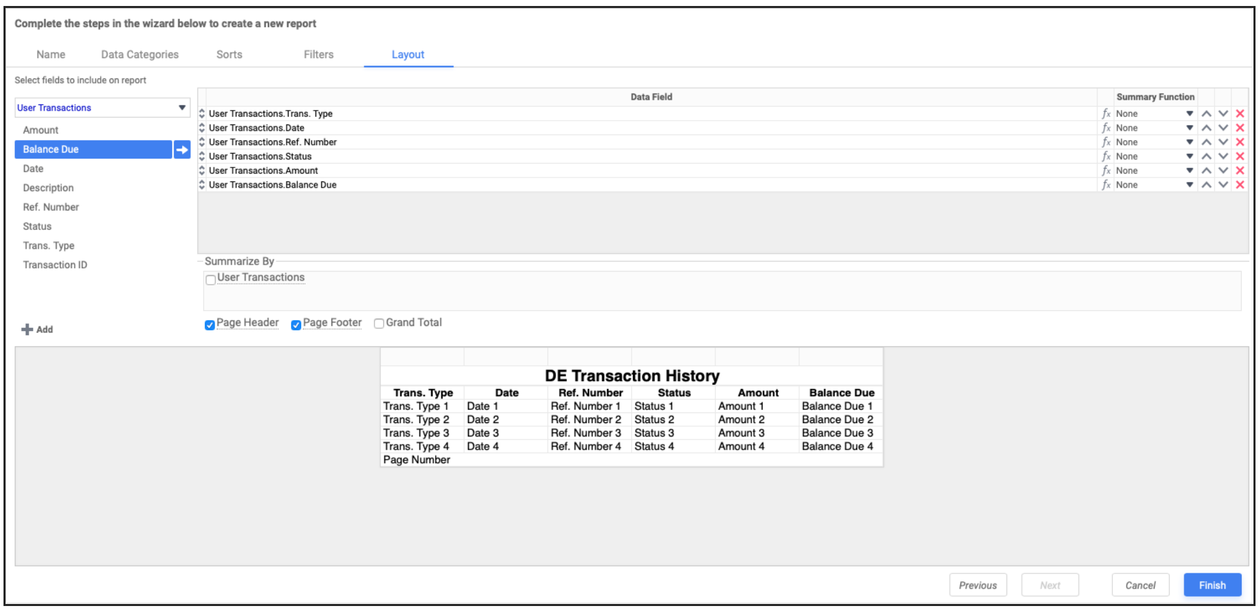
Click **Next** in the lower right corner to continue.

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.

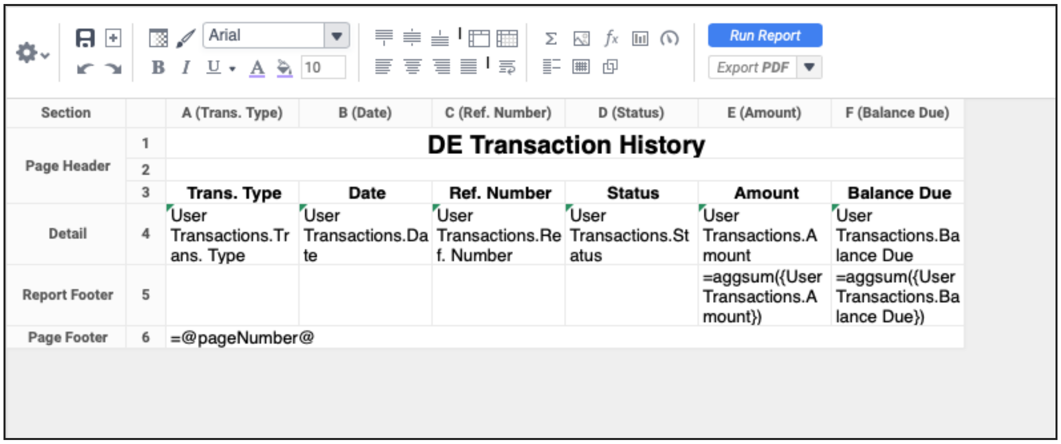
Note that at any time in the wizard, you can also click the **Previous** button to move back to an earlier panel and make changes.

Here is the full and final screen before we finish and enter the interactive designer.



Click the **Finish** button to complete the wizard.

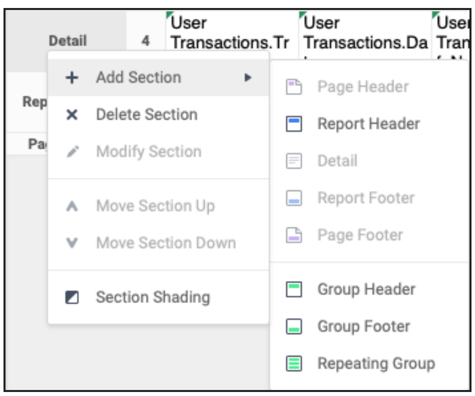
Advanced Report Designer



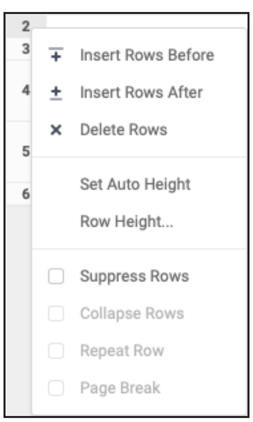
The interactive designer shows you the various report elements. Each cell, row, or column represents a portion of the report with unique properties. Row and column edges can be clicked and dragged to make them wider or narrower, taller or shorter.

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.

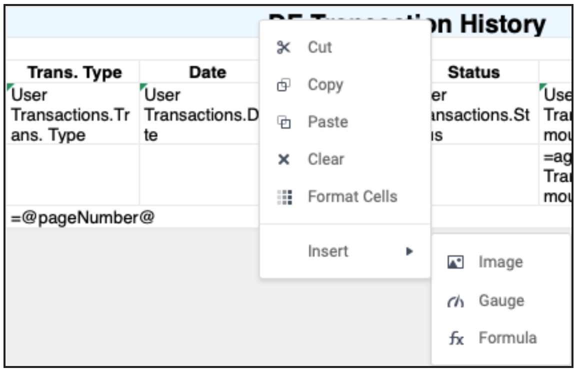
You can also right-click on any cell or section to see a list of options for that cell or section. Here are some examples:



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.



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.

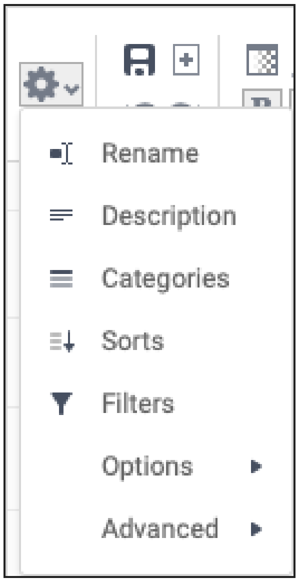
> **Example:** A Group Header can have two rows, one for the group title and one for the column headings: This layout:

Results in this output:

You can also use blank rows in any section to control spacing.

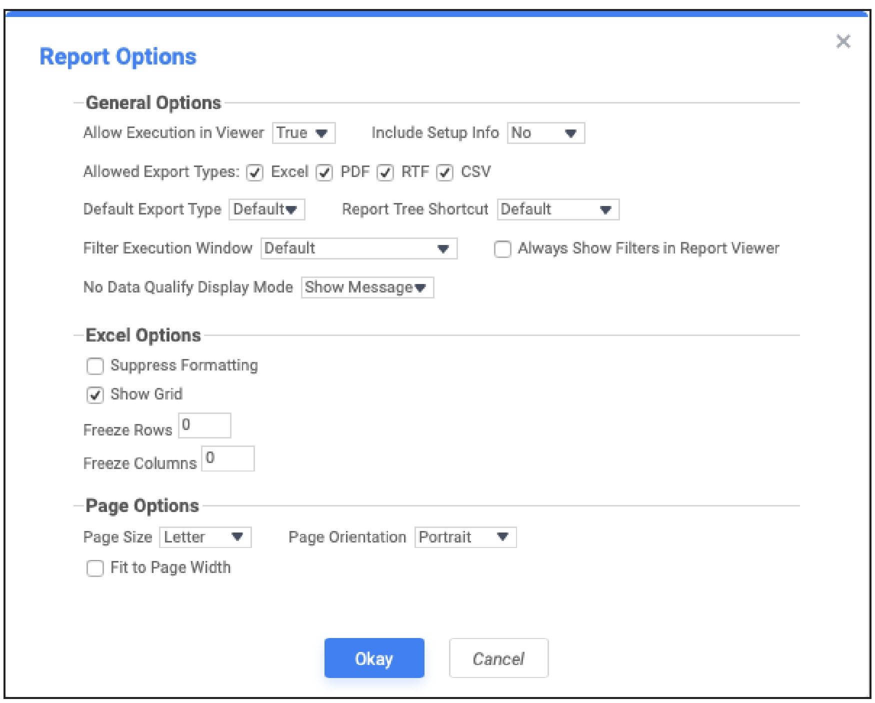
Report Options

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.

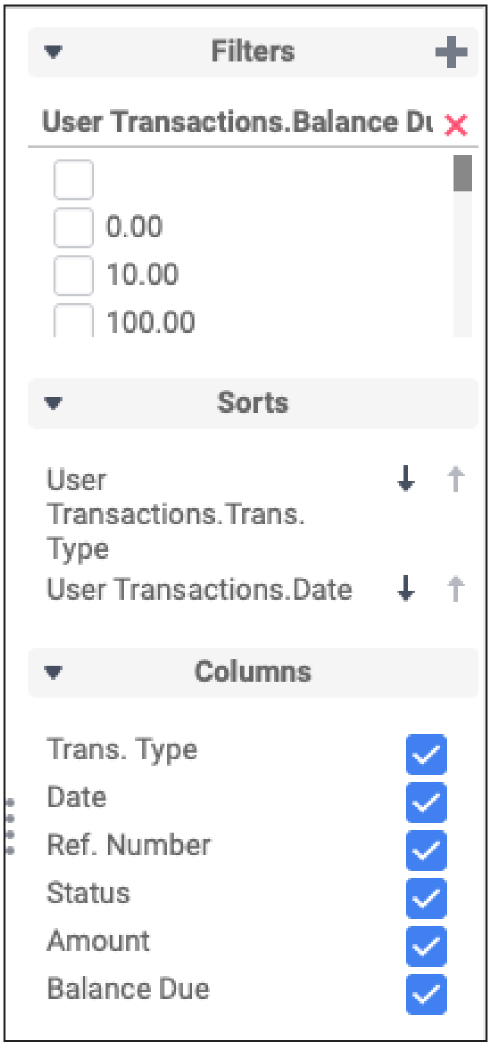
Select **Options – General** to see the following dialog:

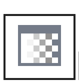


Most of these options can be left at their defaults. The Page Options section at the bottom of the dialog allow you to change page size and orientation.

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:

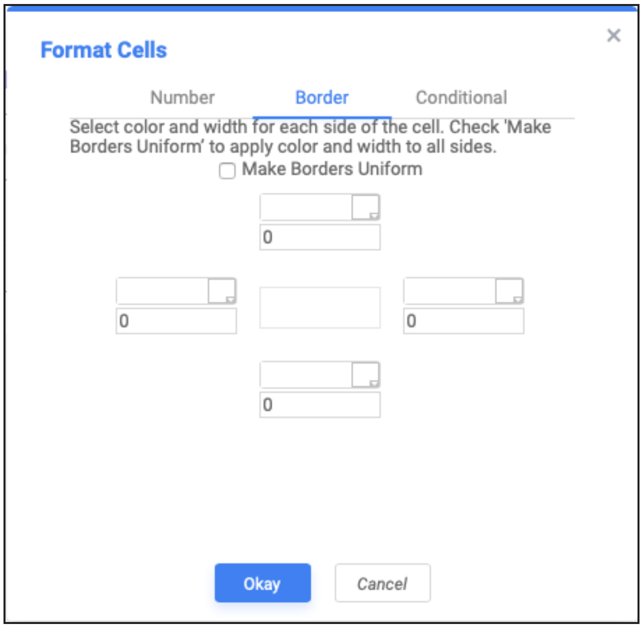


Format Cells

Select one or more cells, then click the **Format Cells** icon to control formatting for these cell(s). You will see the following dialog:

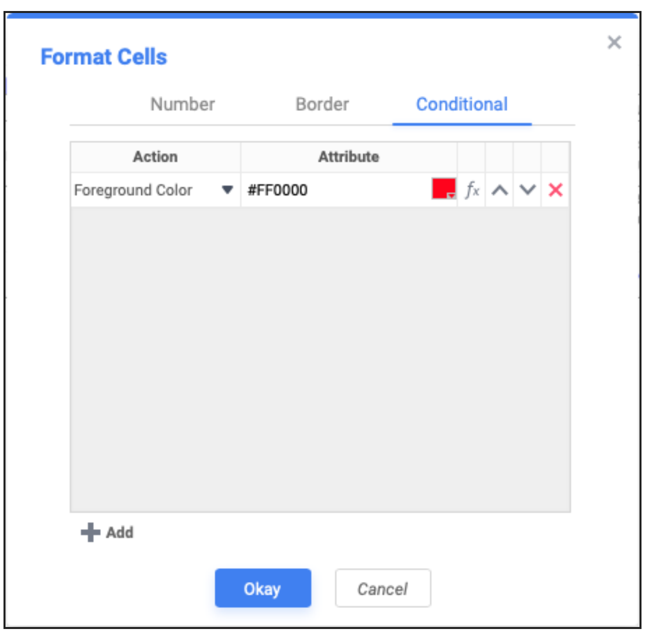
This panel allows you to control every aspect of a number or date format.

Click the **Border** tab to see the following screen:



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:

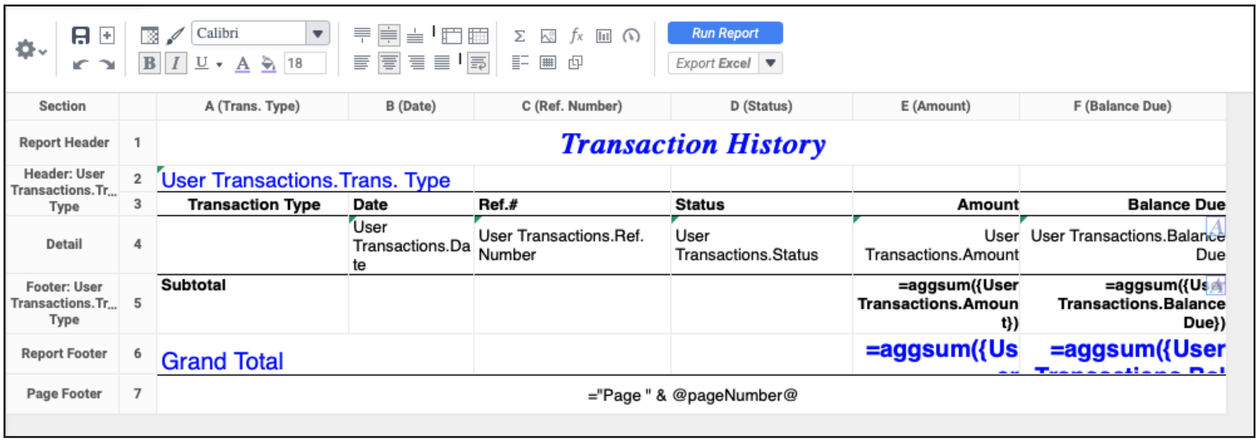


Click the **+ Add** icon to add a conditional row. Specify an Action and a value for the Attribute, which will change depending on which Action is selected.

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.

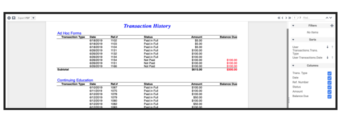
Here is what the report definition might look like before you run it:



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:



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

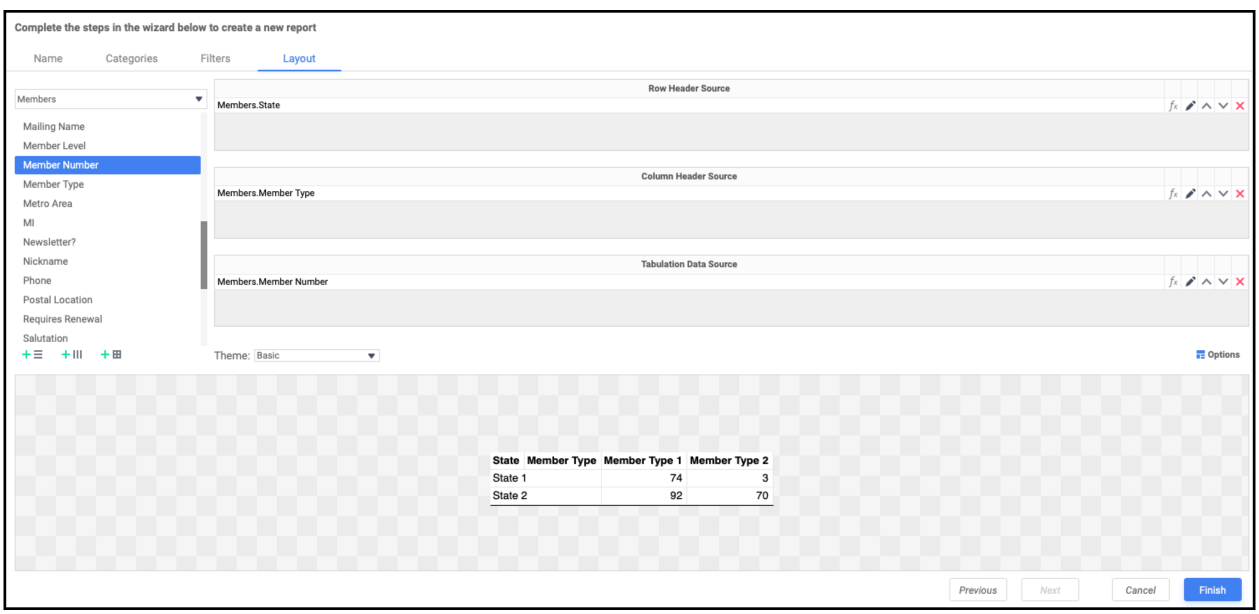
Crosstabs or Pivot Tables allow you to track two or more independent variables and see how another value aggregates based on these independent variables.

> **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.

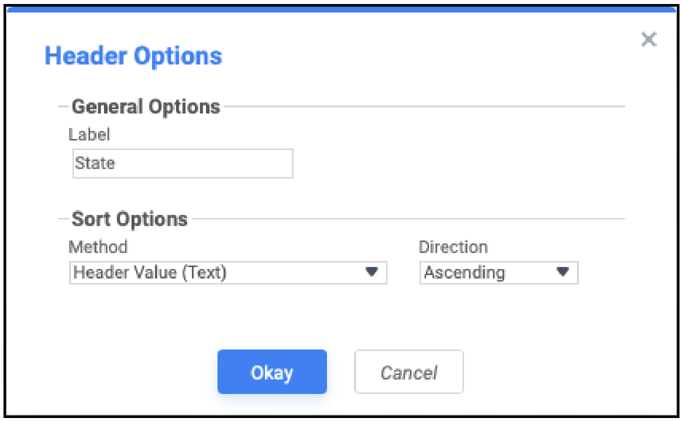
1. Start by specifying the name and folder.
2. On the Categories tab, select Membership, then Members
3. Optionally select Filters.

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:

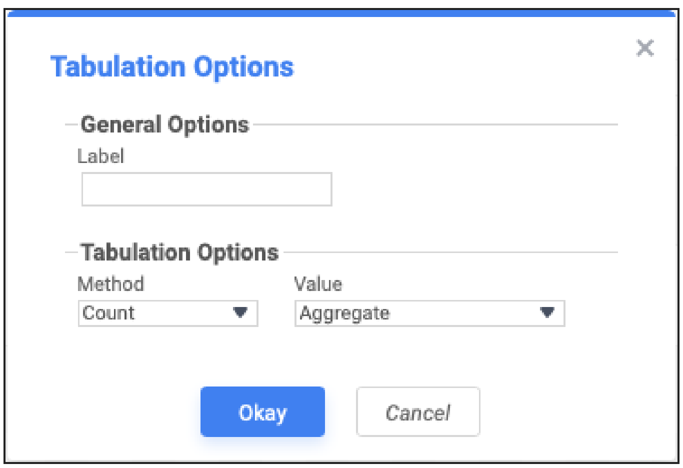


On the left is a list of columns in the selected data source. You can select a value and drag it to the Row Header Source, Column Header Source, or Tabulation Data Source sections. Each section can include more than one data source.

Click the **Edit** (pencil) icon for the Row or Column Header source to change the label and sort order:

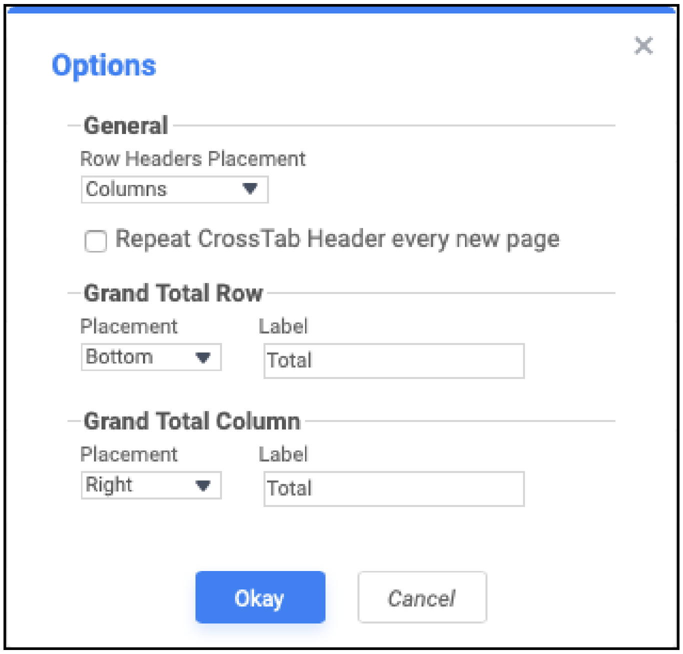


Click the **Edit** (pencil) icon for the Tabulation Data Source to change the aggregation formula and display value:



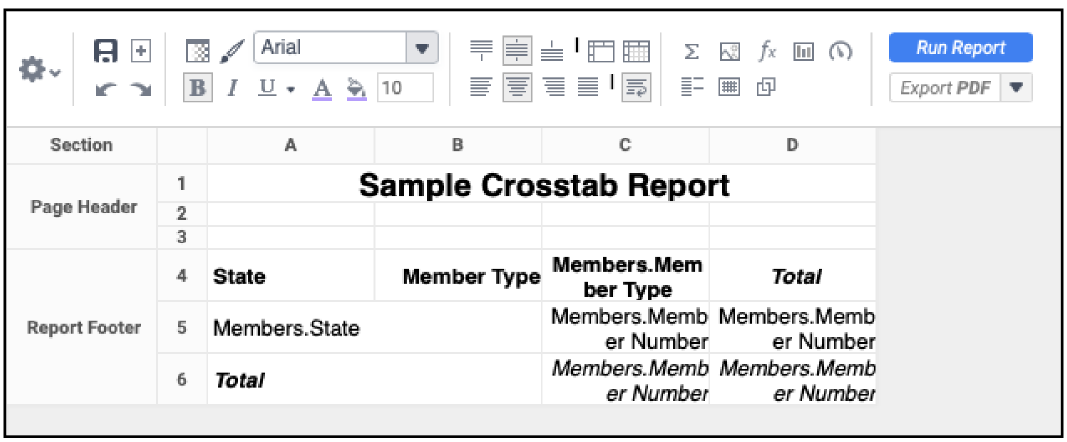
For the tabulation, a label is generally not specified. The tabulation method is one of Sum, Count, Average, Min, or Max. The value can be the aggregate value or a percentage of the row or column.

Click the **Options** button on the right side, about half-way down the screen to display the following dialog:



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:



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 Member Type by State

State	Member Type	Family	Individual	*Total*
CA		11		**11**
IA			1	**1**
IL		23	32	**55**
MI		5		**5**
TX			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:

Count of Member Type by State

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 Heights		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 Hills		4		**4**
	Marengo			2	**2**
	Northbrook		1	2	**3**
	Schaumburg		3	3	**6**
	Skokie		5	10	**15**
	Wonderlake			1	**1**
MI	Walkerville		5		**5**
TX	Irving			1	**1**
Total			***39***	***34***	***73***

Notes

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.

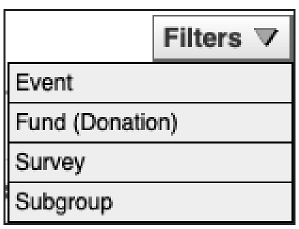
When you use the ClubExpress-provided filters, all matching items will be shown (not just the first 100) and we will show more information to help you pick the correct item. It's also more efficient behind the scenes because of how the filter list is generated.

ClubExpress provides special filters that allow you to limit

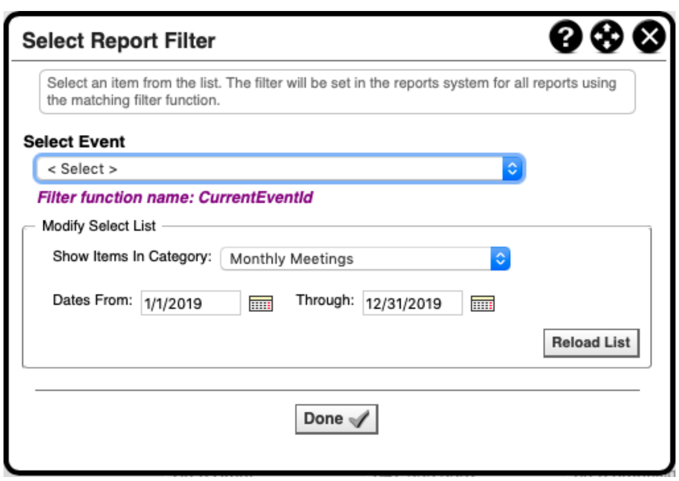
- An event report to just one event;
- A donations report to just one donation fund;
- A member report to just one chapter, district, or region; or
- A survey report to just one survey.

(Other pre-filters may be added in the future.)

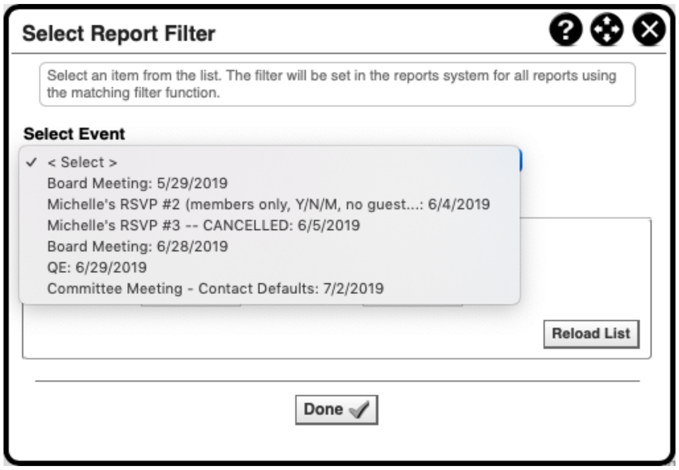
This is accomplished using the **Filter** button in the top right corner of the screen. Click it and you will see a drop-down menu like the following:



When you select an option, such as **Event,** you will see a popup dialog like the following:



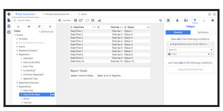
Select Event will show a list of all events. But you can use the options in the Modify Select List panel to filter the items in the list by category and a date range. Click the **Reload List** button repopulate the drop-down list. Note that we also show more information about each event to help you pick 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 drop-down list. You will see your internal ID.



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

Membership

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 data will limit the report data to members only. This is mostly useful if you need to include Member Additional Data in the report (which is not available for non-members). *Please do not include both Members and Users* (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: *Visibility Code*	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, go here. 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	*data*. 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 Additional Data	This includes the additional data you defined for your membership, beyond the basic contact info. *Linked to Members data.*
Member Addresses	This includes both the primary and secondary addresses for members (and nothing else). This is *different from the regular member data*, 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 Members	**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. *Linked to Users data to get details.*
Contact Log	Includes fields for contact category, type, description, etc. > **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 – *it should not be used with registrations or registrants*.
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 *Registration* and *Event data* categories. Can also link to *Users* data to get more detailed personal and contact info.
Registrant Activities	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 Registrants	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, Registrant Answers, Activity Registrant Answers	Contains answers to questions set up at the registration, registrant, and activity registrant levels. These are linked to the corresponding data categories *(Registrations, Registrants, and Activity Registrants)*.
Event Coordinator	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
ClubExpress Transactions	Includes info on *transactions with ClubExpress* – fee collection, credit card fees, logistics, etc. **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 *ClubExpress fees*: monthly membership, credit card processing, logistics, etc. Linked to ClubExpress Transactions for detailed info.
Bank Account Transactions – Remits	Includes *deposits to your bank account(s)* for money collected from credit card transactions 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 Transaction Details	Details for bank account deposits: transactions, payments, and financial account.
Remit Payments With CC Fees	Details on credit card fees for bank account deposits.
ClubExpress Billing	Includes ClubExpress *fee transactions* 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 Transactions	Includes all transactions from members and non-members: date, amount, description, status, etc. Linked to Users data.
User Transaction Items	Items list for *User Transaction* data.
User Transactions By Account	A different view of transactions, including item details and financial account. *Linked to Users data.*
User Payments	A different view of user payments, including financial account. *Linked to Users data.*
User Payments By Account	Another view of user payments, linked with the related transactions. *Linked to Users data.*
Payments with Transactions	Another view of user payments, linked with the related transactions. *Linked to Users data.*
User Credits	Includes all credits issued to members and non-members: date, amount, description, etc. *Linked to Users data.*
User Credit Usage	Details on how user credits were applied to other transactions, or otherwise resolved. *Linked to User Credits data.*
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 Members	Includes data on committee and members. *Linked to Users data for detailed info on members.*
Officers	List of organization officers (president, treasurer, etc). *Linked to Users data for detailed info.*
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 Questions	List of surveys and questions, including survey name, question name, question type, 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. *Linked to Users data*. **Note:** If a survey response is anonymous, no user data will be found.
Survey Answer Summary	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.

Survey Categories

Blogs

Category	Description
Blogs	Includes a list of all blogs define on your site with their interesting properties. *Linked to Blog Posts and Users (for blog author info)*. **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. *Links to Blogs, Tags, Comments, and Users (for author info).* **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. *Links to Posts.* **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 Comments	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. *Links to Posts and Users (for comment author data, when available).*

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. *Links to Document Folders, Comments, Ratings, Tags, and Users (for detailed info on the member who uploaded the file).*
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. *Links to Documents.*
Document Folder Structure	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. *Links to Document Folders.* **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. *Links to Documents and Users (for comment author data, when available).*
Document Ratings	Includes detailed ratings entered by members for each document. Links to Documents and Users. **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. *Links to Documents.* **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. *Linked to Users data.* **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 comments. 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). *Linked to User Responses.*
Answer Summary	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. *Linked to Forms data.*
Answer Summary 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. *Linked to Users data.* **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. *Linked to Collectible Items.*

Collectibles Categories

Continuing Education

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 certificates. *Linked to Certificates.*
Course	The courses available to users to take and earn points. Includes name, description, location, provider, etc.
Point Type and Point Type Category	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. *Linked to Users, Course, and Point Type.*
Applicant Certificate	The certificate applied for and earned (or declined) for users. Include certificate name, dates, certificate number, etc. *Linked to Certificate and Users.*

Continuing Education Categories

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 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.
Resource Categories	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. *Linked to Users data and Reservation Items.*

Category	Description
Reservation Items	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: • 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. *Linked to Users data and Reservation Items.*

Resource Scheduler Categories

Category	Description
Reservations	Includes dates, fees, registrants, etc. for resource reservations. Each reservation may contain one or more items. *Linked to Users data and Reservation Items.*
Reservation Items	Includes the inividual items within reservations, the resource, time period, and fee. *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

Villages

Category	Description
Services	Available services, including name, category, notes, etc.
Service Providers	Service providers, including contact info, provider type, vetting status, etc. *Linked to Users data for detailed contact data.*
Service Provider Vettings	Vettings done for each service provider. *Linked to Service Providers data.*
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 *Members data* for detailed info on the requesting member. Linked to *Services data* 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. *Linked to Events data, for opportunities that are tied to an event.*
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. *Linked to Users data to get more detailed info.*
Slot Volunteers	Volunteers attached to a specific slot within an opportunity. Includes name, contact info, hours, etc. *Linked to Users data to get more detailed info.*

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.

Model One

Category	Description
Member Subgroups (Filter Only)	You can include this data category in a report to enable you to filter results by a specific 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, *members may belong to multiple chapters*. This can sometimes 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). *Linked to Subgroups and Organization Hierarchy data.* 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 hierarchy 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 Subgroup 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. *Linked to Subgroups and Organization Hierarchy data.*

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 trans-actions, 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 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.

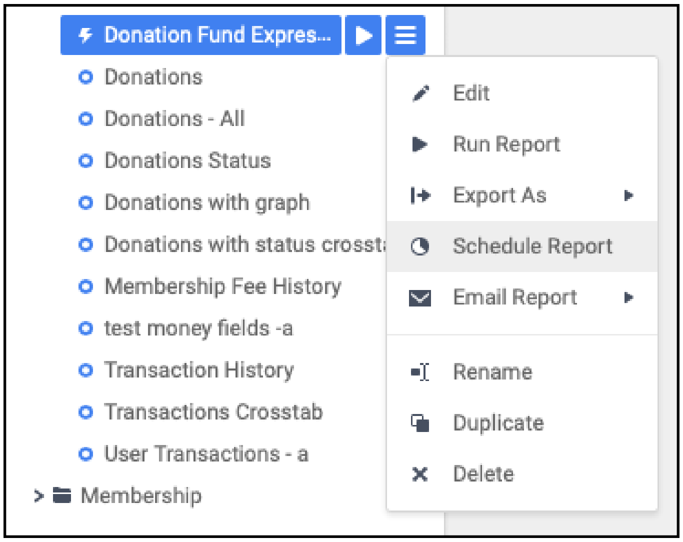
Model Two Categories

- 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

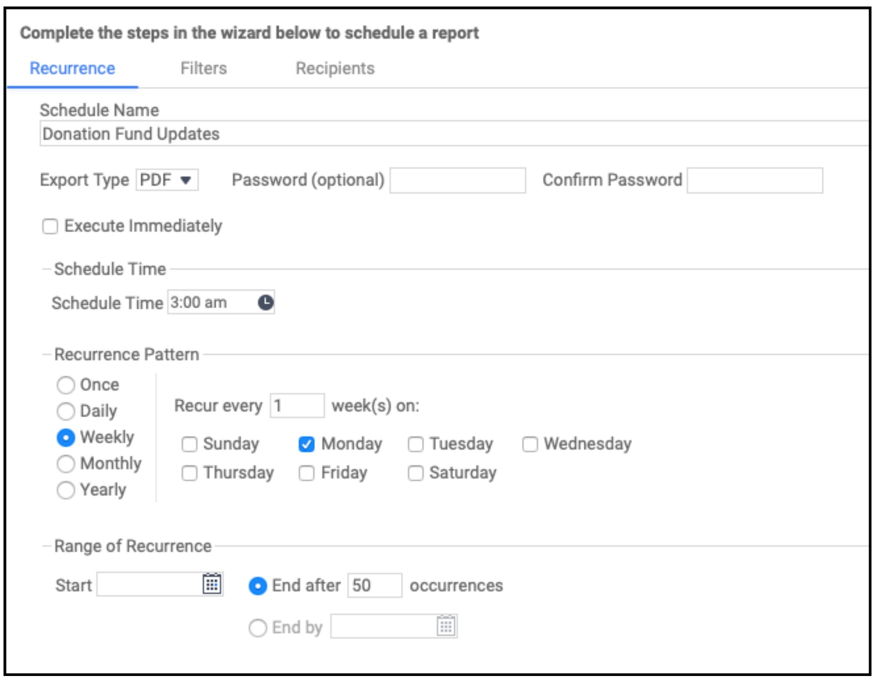
Scheduling Reports

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:



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:

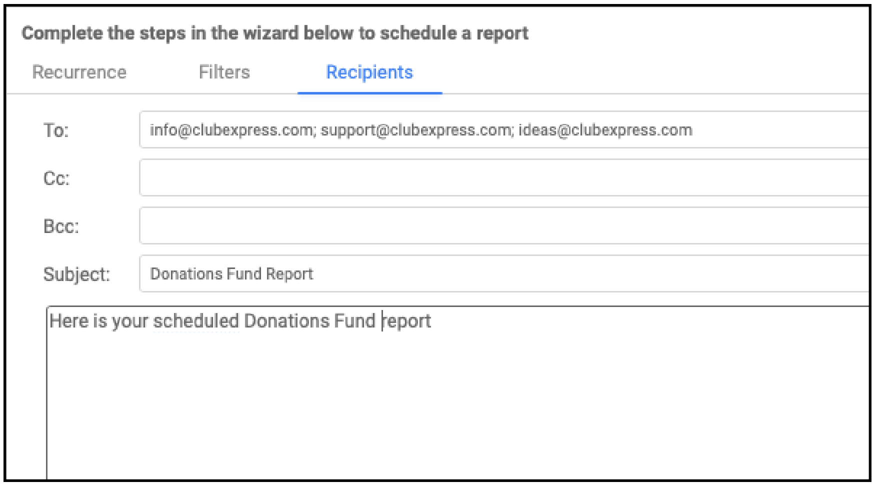
- Once, on a specified date in the future
- On a Daily basis (for example, every other day, or every weekday)

- 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.



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.

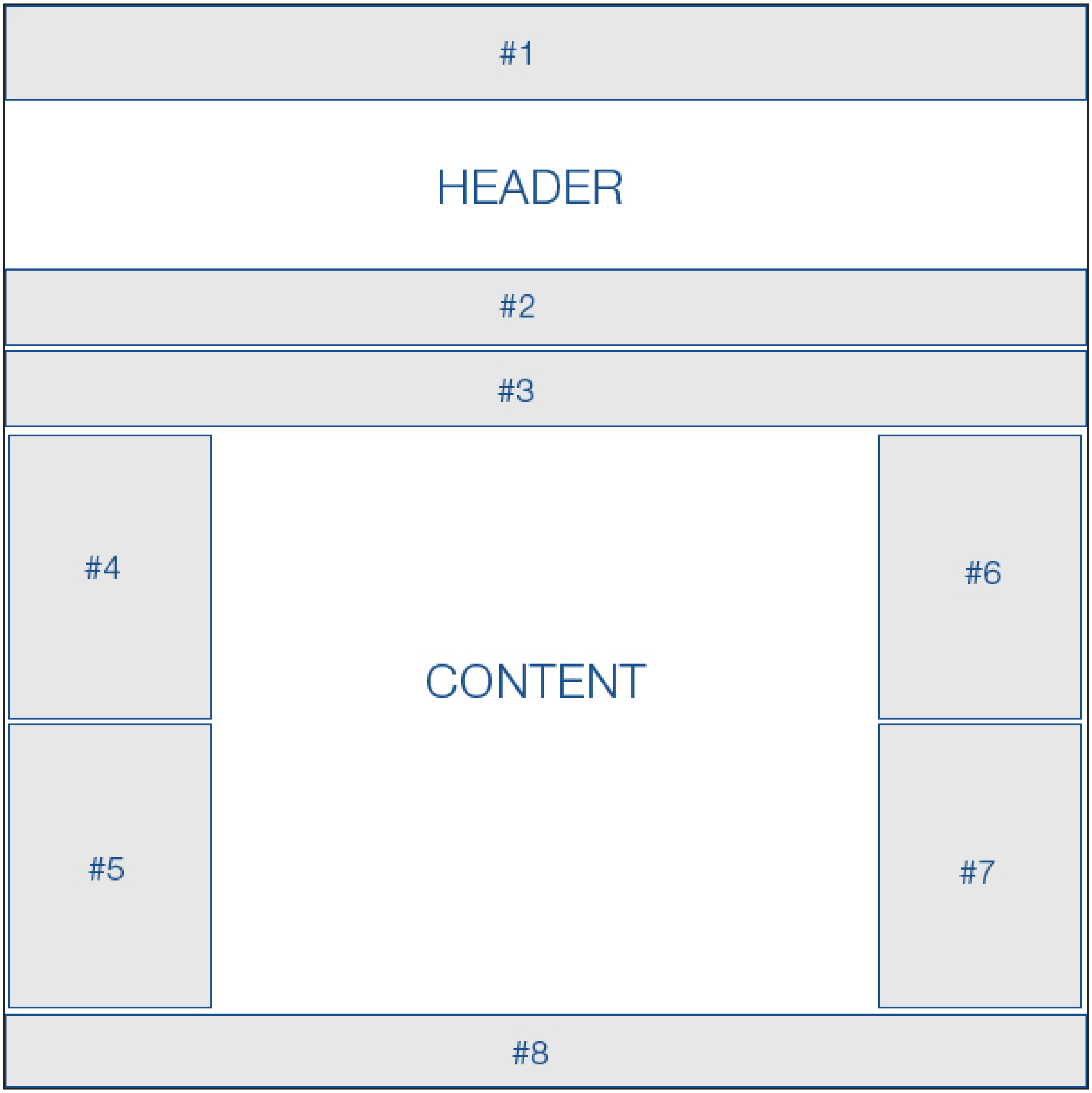
Advertisers then provide a banner ad in a pre-defined size that is then installed in the system and will then display in the designated panel as pages are viewed.

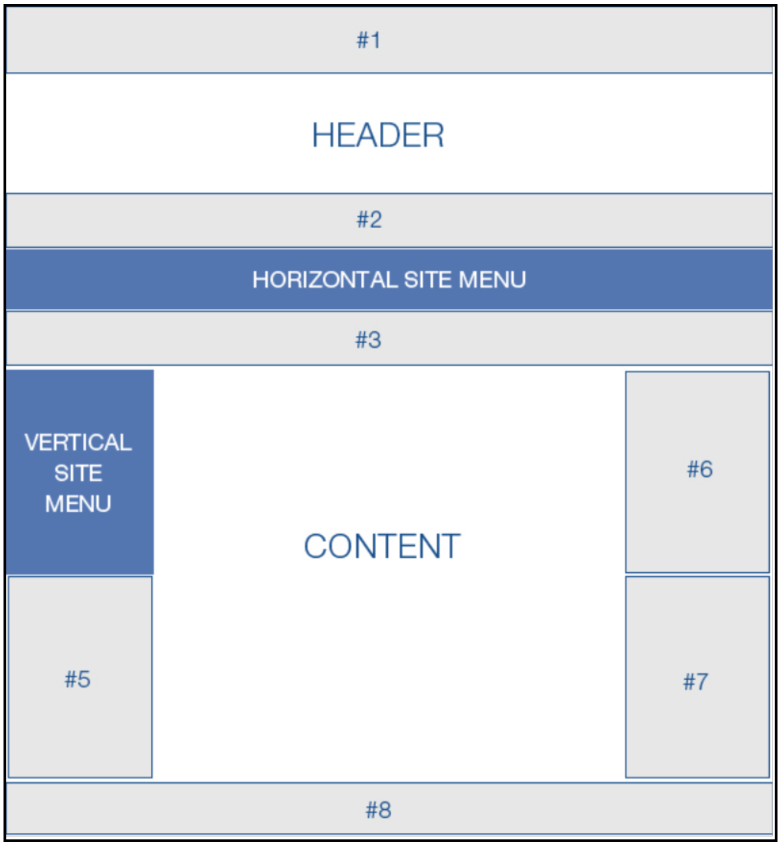
> **Activation:** The one-time fee to activate this module for your website is $300.

> **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.

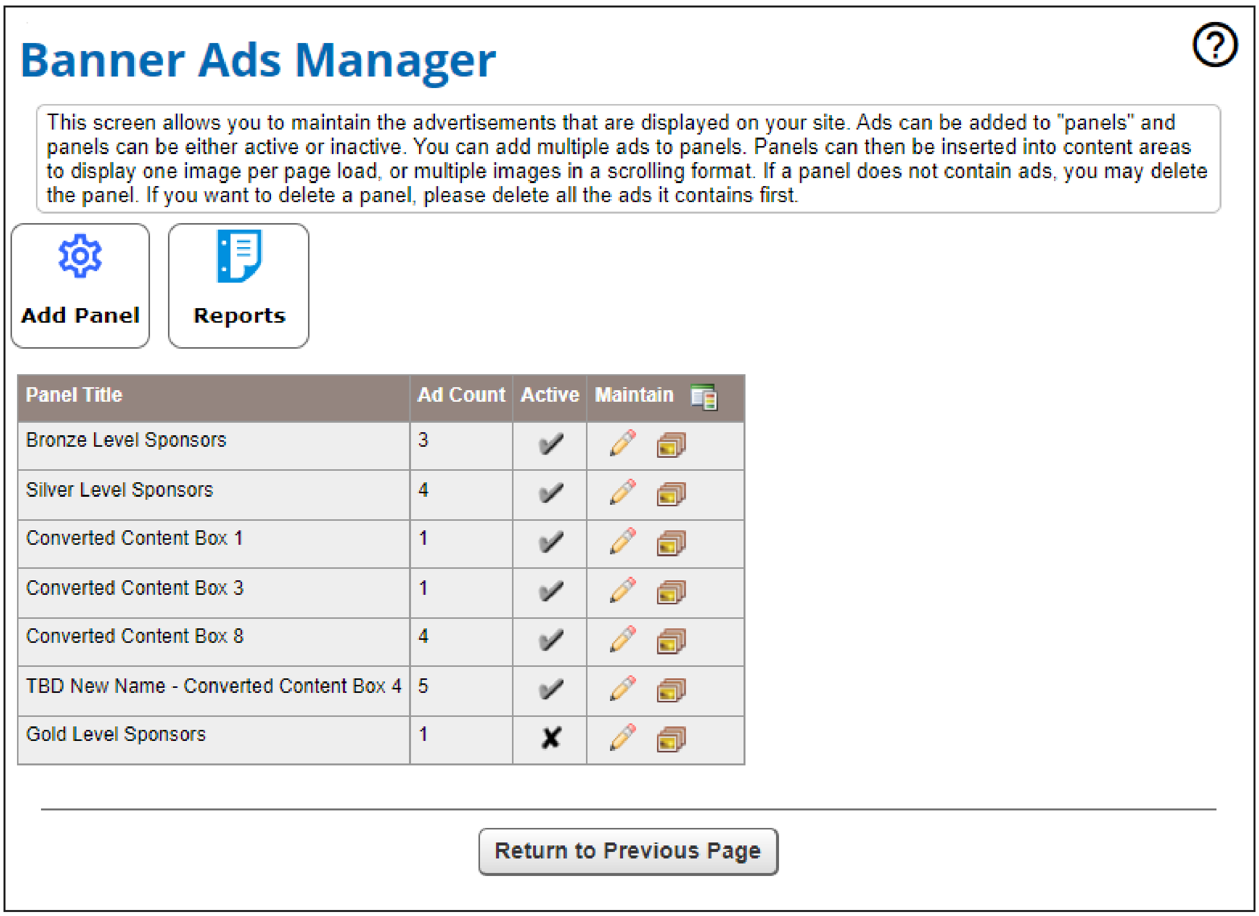
Ads are displayed at random based on the number of ads uploaded to an ad panel. One way to control display frequency is to have more than one ad panel. The first panel could have a small number of ads so each one is displayed more often; let’s call these the “gold” sponsors. The second panel could have 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.



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 Advertisements 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:

Icon	Description
 (Edit)	Select the Edit icon to edit the name of a panel and change the status (Active or Inactive).
 (Manage Advertisements)	Select the Manage Advertisements icon to manage the individual ads displayed within the panels.

Maintain Options

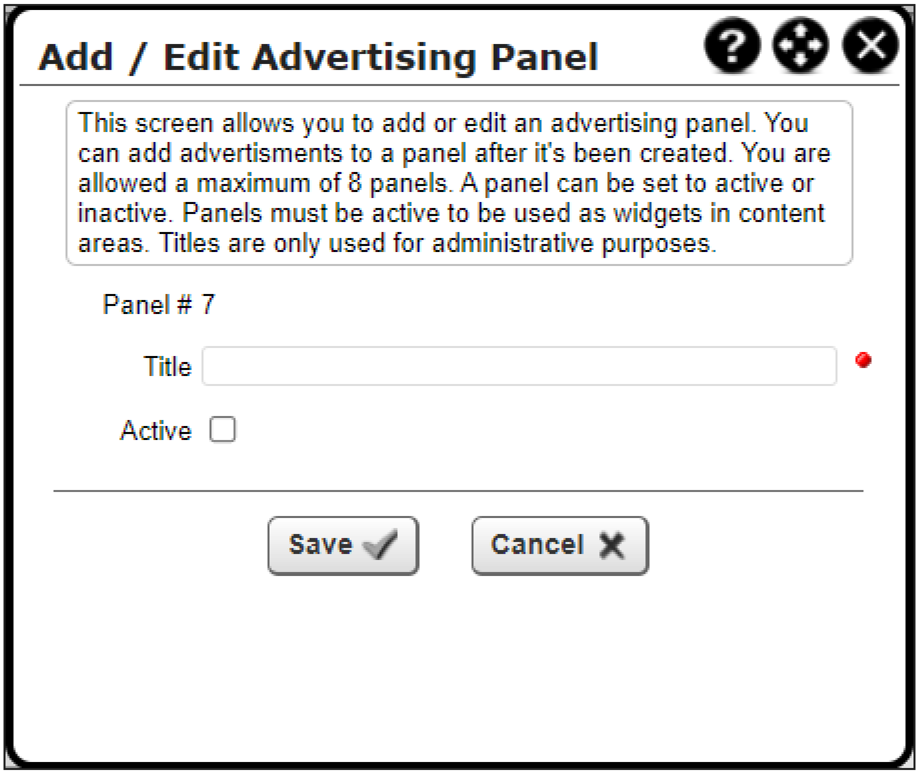
> **Note:** To delete a panel, you must delete all ads within the panel first.

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.

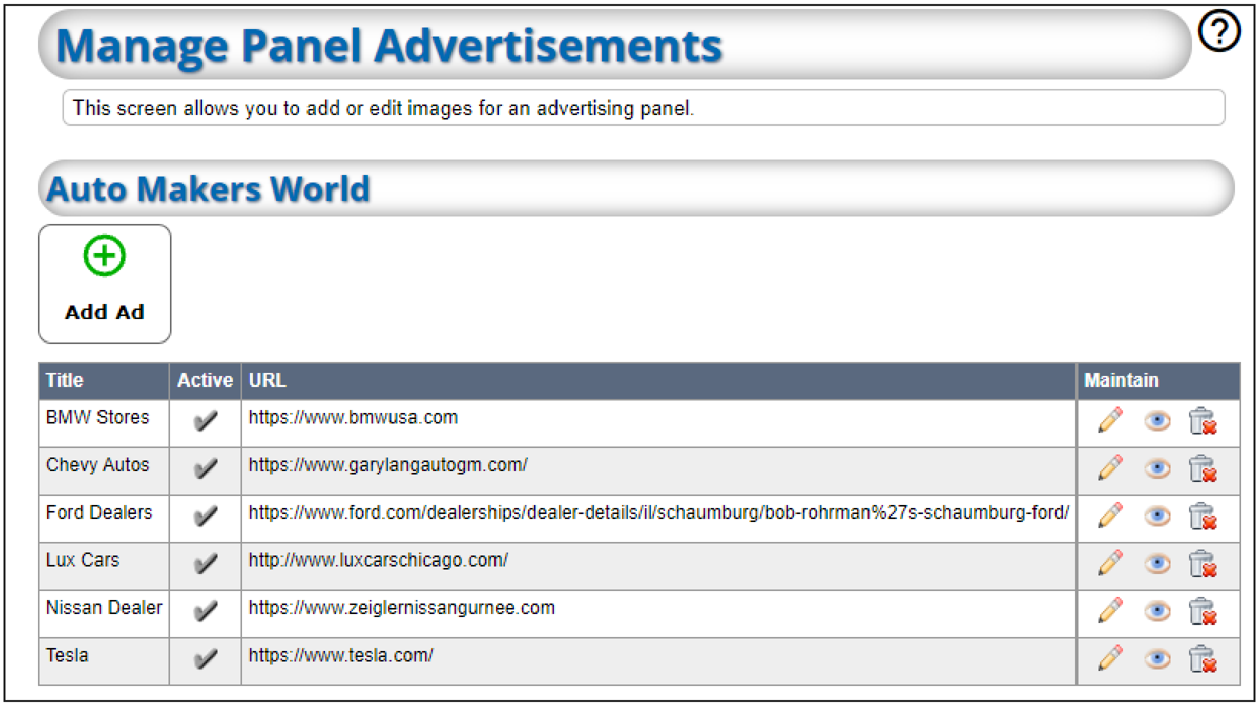


> **Example:** If you currently are using ad panels 1, 2, 4 and 7, the next new panel will be #3.

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.



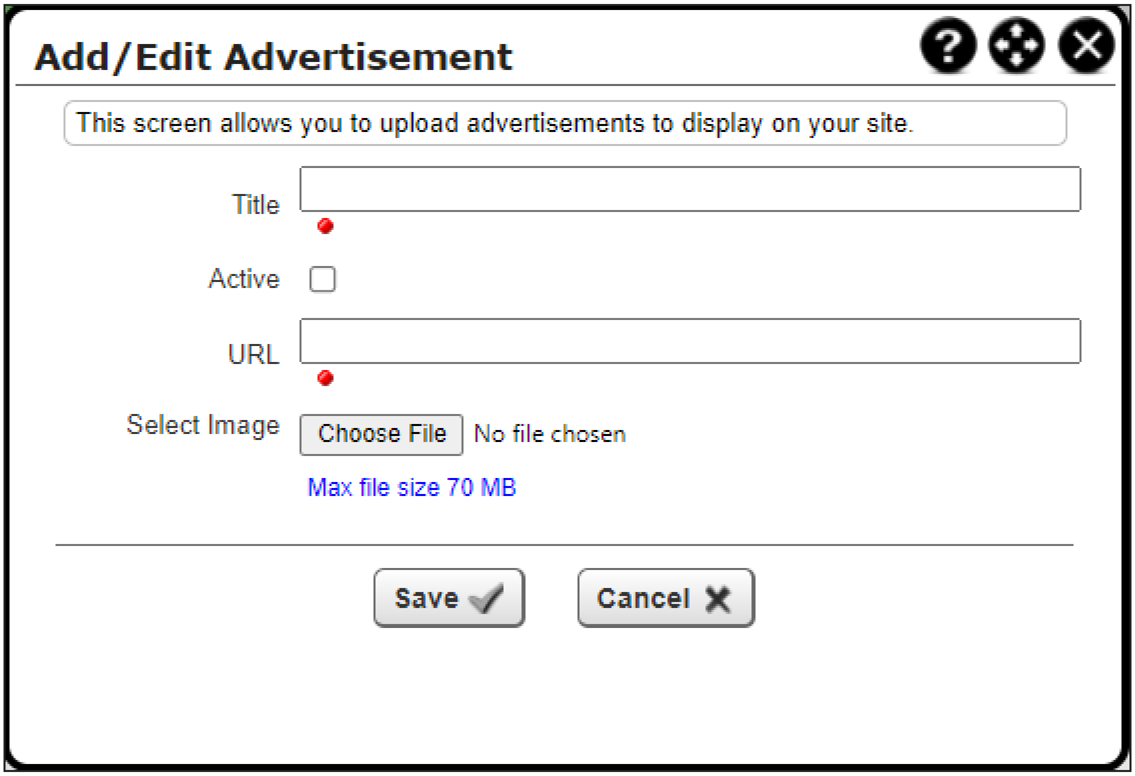
The screen contains a grid listing all advertisements in the panel, whether or not the ads are active. The grid includes the:

- **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:

Icon	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.



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

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.

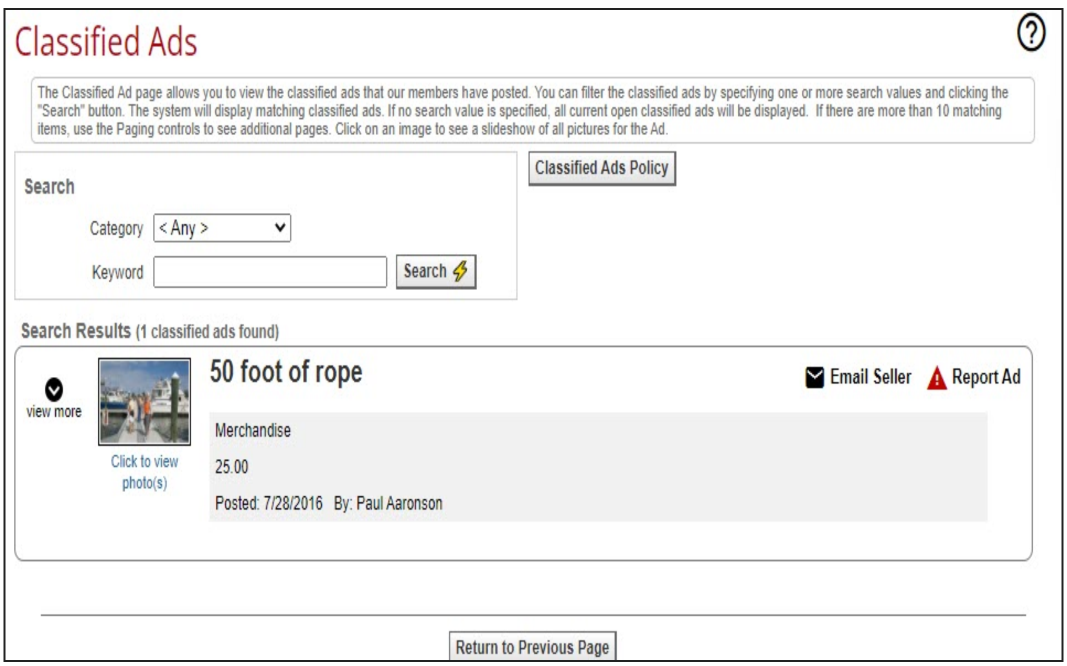
This module has three components:

- 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:



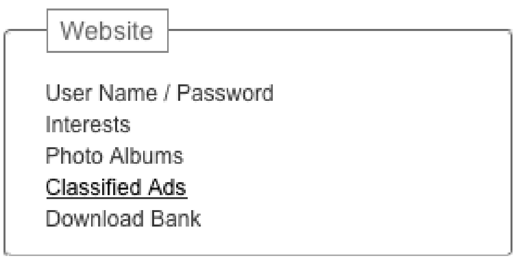
A small search panel at the top allows users to filter the ad list by category and keyword. There is also a button to view the club's policies regarding classified ads posted by members.

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.

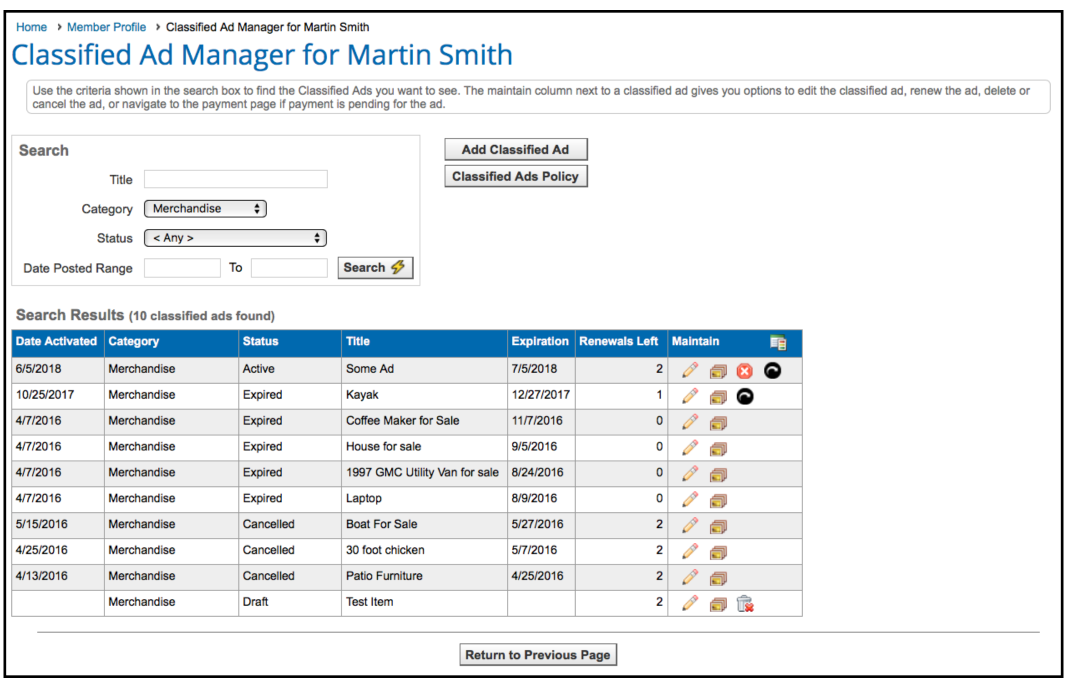
Click the **View More** button/icon to view more detailed information. Select the **Email Seller** option to send the seller a message. Select **Report Ad** to report the ad for content or policy violations.

In the Member Profile

When the Classified Ads module is enabled, members will see a new option on their personal Profile screen:



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:



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

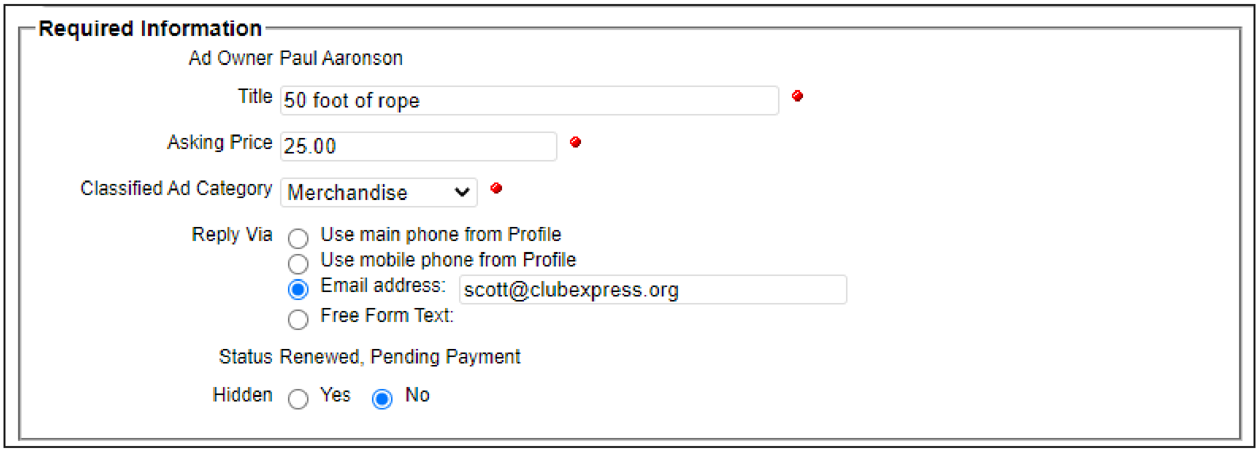
The following options can be found in the Maintain column:

Icon	Description
(Edit)	Edit the ad, including its title, description, pricing, etc. Note that for Cancelled and Expired Ads, the resulting screen is read-only.
(Pictures)	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 Payment ads.
(Cancel)	Cancel the ad so that it's no longer shown. This icon is only shown for Active and Renewed, Pending Payment ads.
(Make Payment)	This icon is only shown for ads that require payment before they can be activated. Clicking 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.

Maintain Options

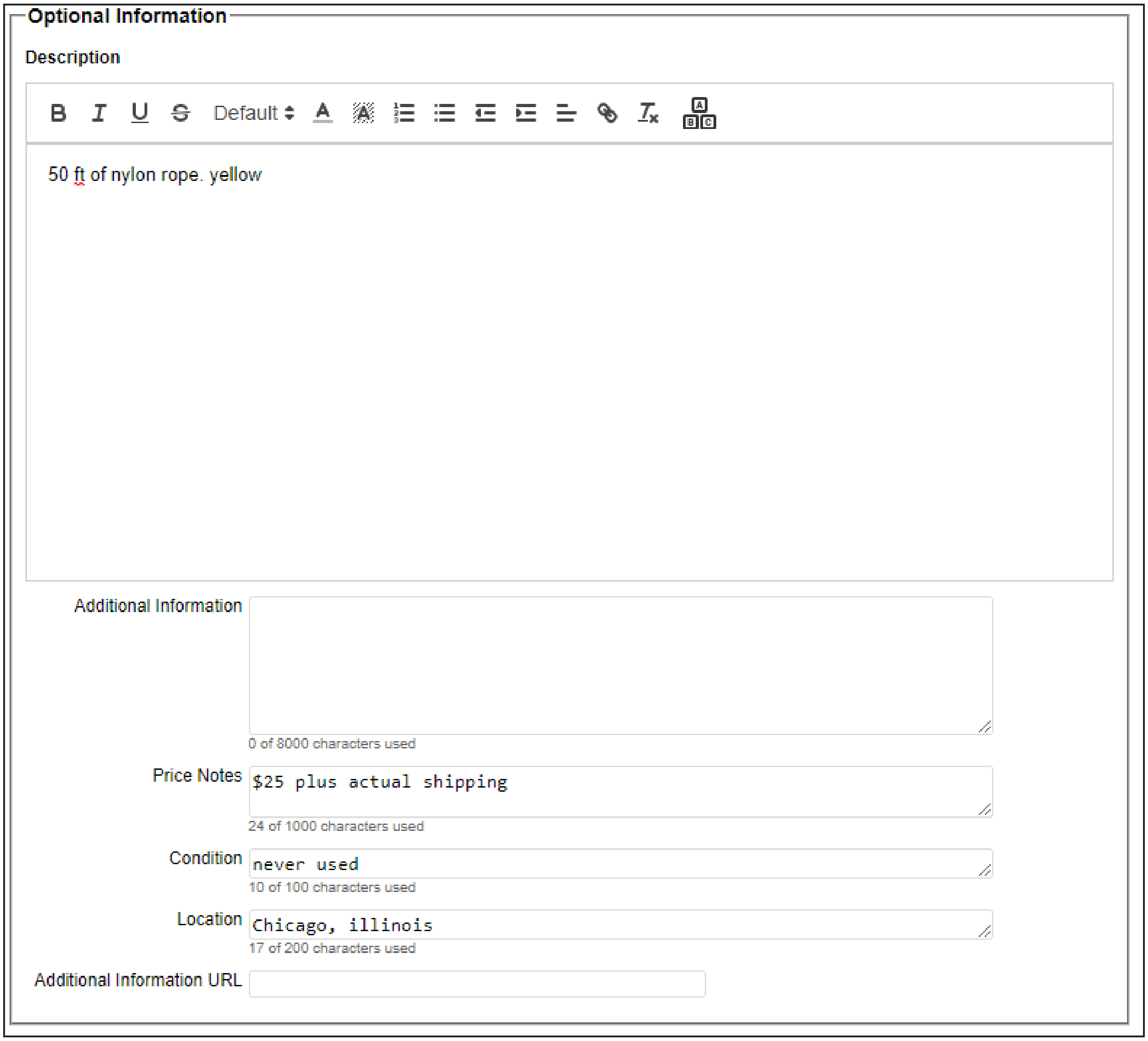
Add Classified Ad

Click the **Add Classified Ad** button displays the following screen:



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.



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.

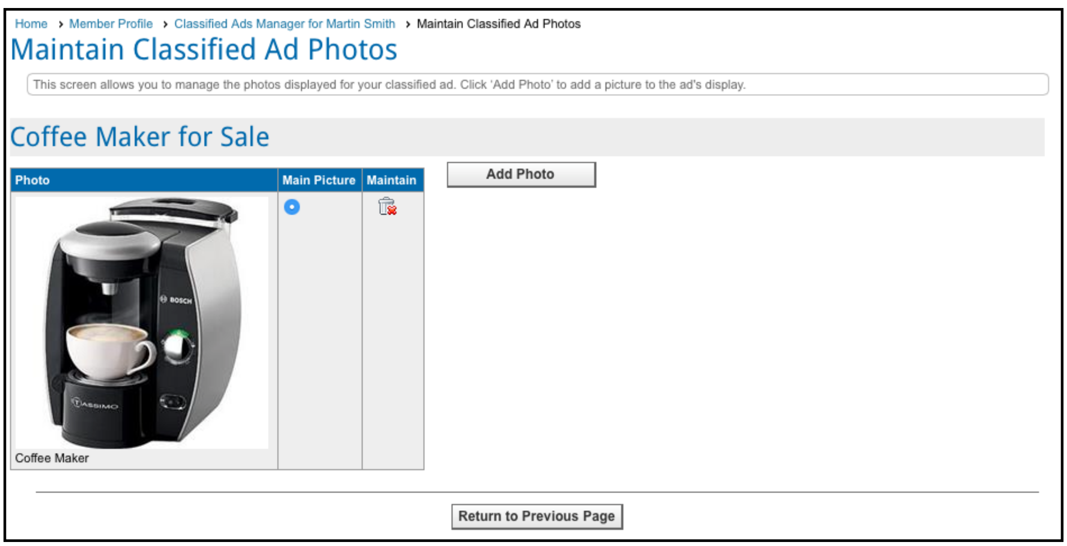
Ads can optionally require approval and/or payment.

- 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.

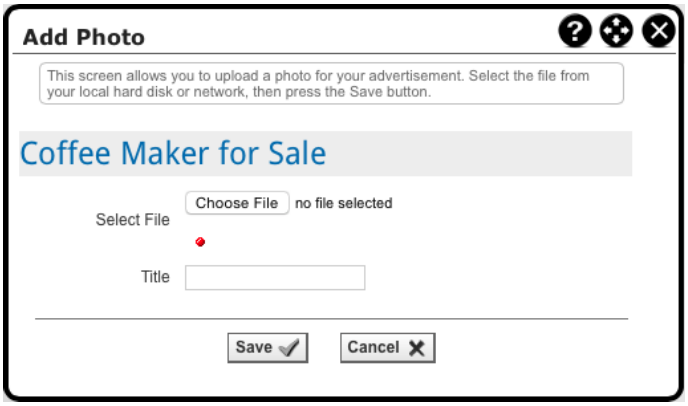
Ads have a defined posting period (for example, 30 days.) Clubs can also define whether an ad can be renewed and for how many times. Renewals may require another payment. The above screen shows the current expiration date for each ad and also how many renewals are left.

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:



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.

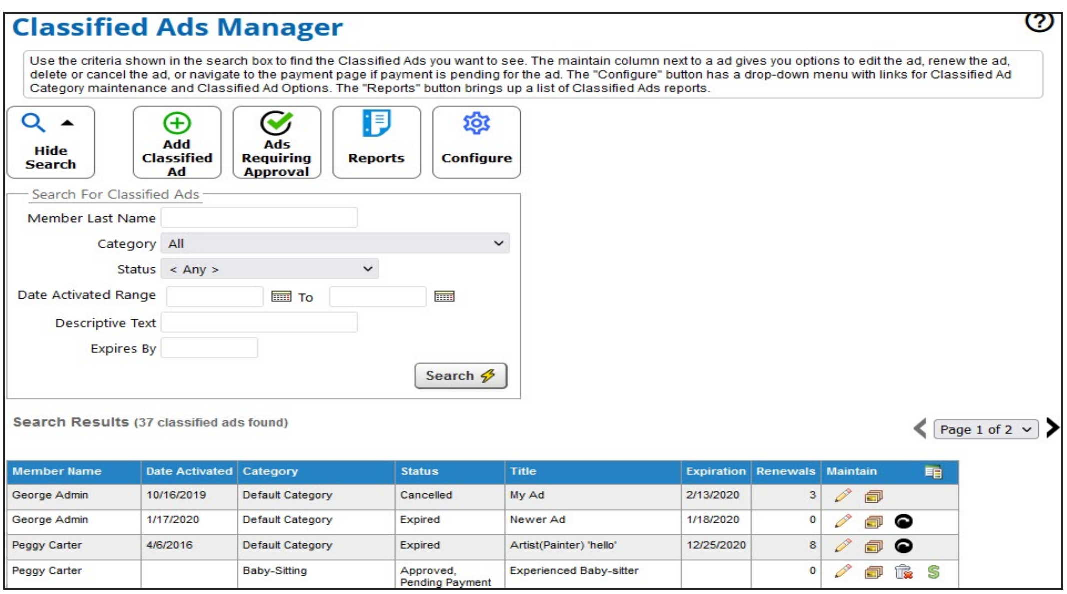
Click **Return to Previous Page** to return to your main Classified Ads screen.

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:



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.

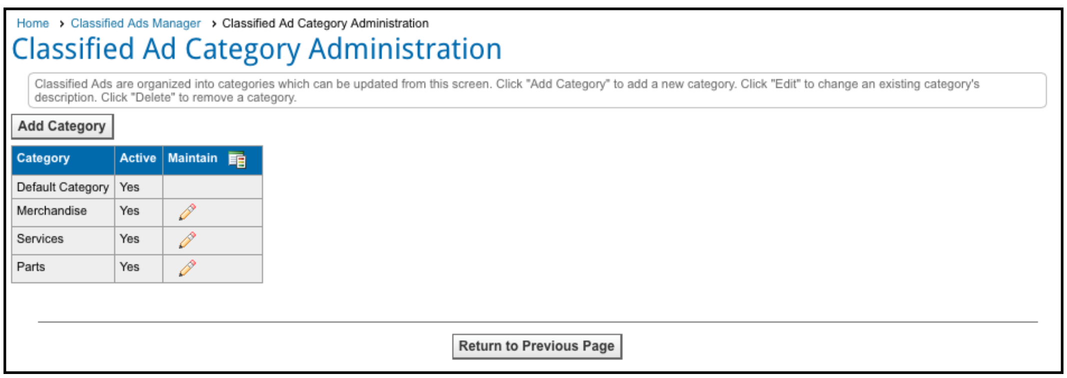
The Search Results grid is similar to the one shown for each member on his or her Profile screen, with the addition of a Member Name column on the left. The icons are also the same. As with the member screen, ad status is fully managed by the system.

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:

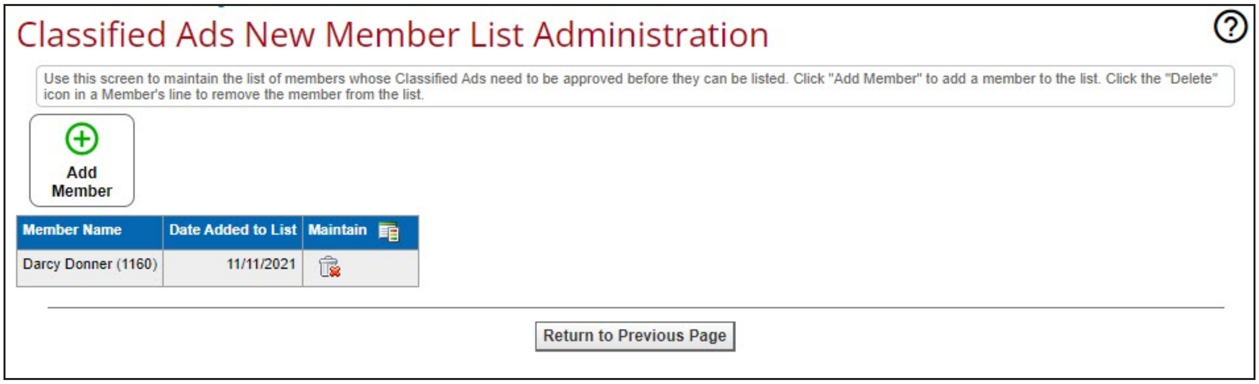


This is a standard ClubExpress category screen. Click **Add Category** to create a new category. Click the **Edit** (pencil) icon to edit a category, including the ability to deactivate a category permanently or temporarily. A **Delete** icon will appear if there are no ads assigned to a category.

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



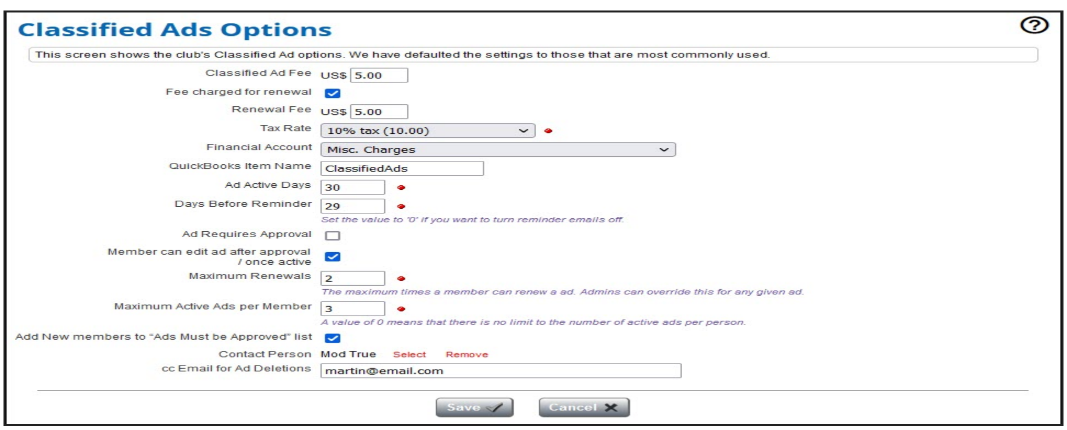
> **Note:** This option will only appear if you have selected Add New Members to "Ads Must Be Approved" list in Options.

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:



The following options can be configured:

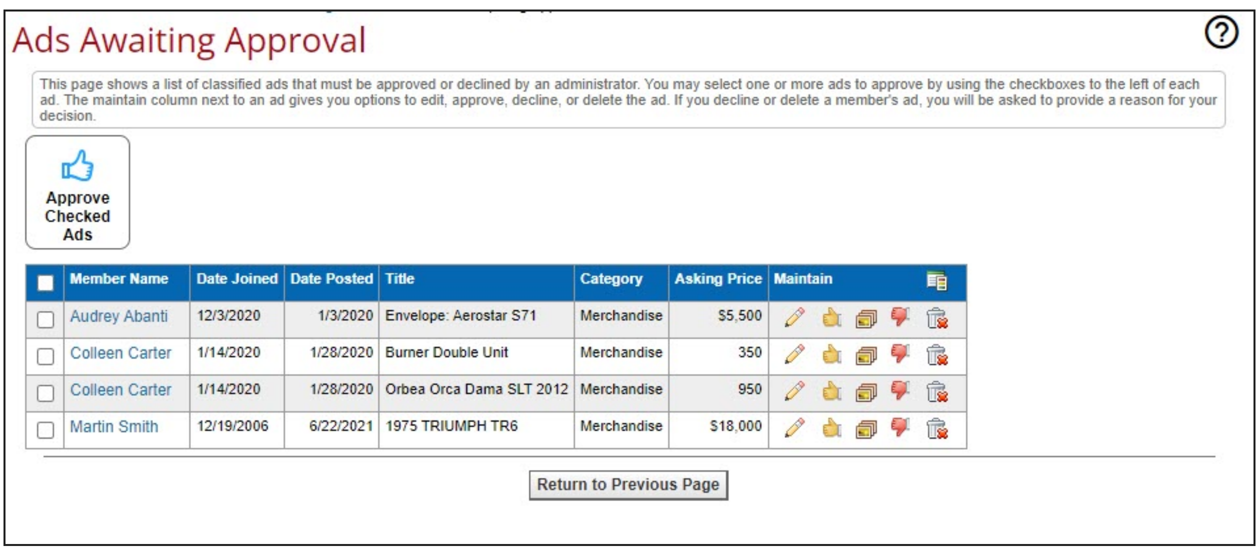
- The initial fee to post an ad.
- Whether renewals are allowed and the fee to renew an ad (which can be different than the initial posting fee.)
- The tax rate to be used (if general sales tax is enabled.)

- 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.



Ads Awaiting Approval

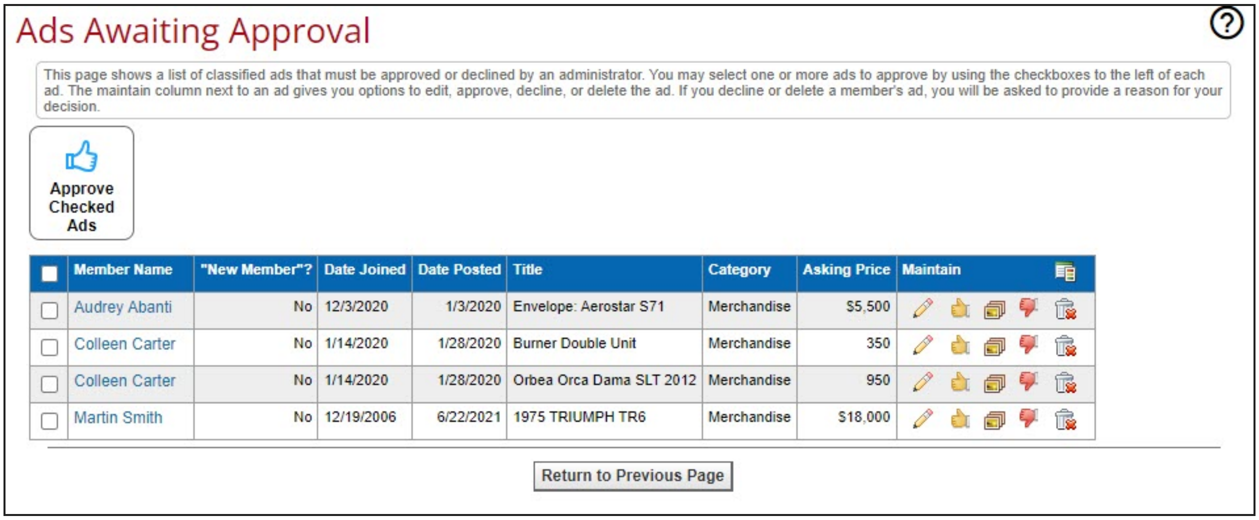
This page shows a list of classified ads that must be approved or declined by an administrator. You may select one or more ads to approve by using the checkboxes to the left of each ad. The maintain column next to an ad gives you options to edit, approve, decline, or delete the ad. If you decline or delete a member's ad, you will be asked to provide a reason for your decision.

Approve Checked Ads

	Member Name	Date Joined	Date Posted	Title	Category	Asking Price	Maintain
	Audrey Abanti	12/3/2020	1/3/2020	Envelope: Aerostar S71	Merchandise	$5,500	
	Colleen Carter	1/14/2020	1/28/2020	Burner Double Unit	Merchandise	350	
	Colleen Carter	1/14/2020	1/28/2020	Orbea Orca Dama SLT 2012	Merchandise	950	
	Martin Smith	12/19/2006	6/22/2021	1975 TRIUMPH TR6	Merchandise	$18,000	

Return to Previous Page

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.



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:

Icon	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.

Maintain Options

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.

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)

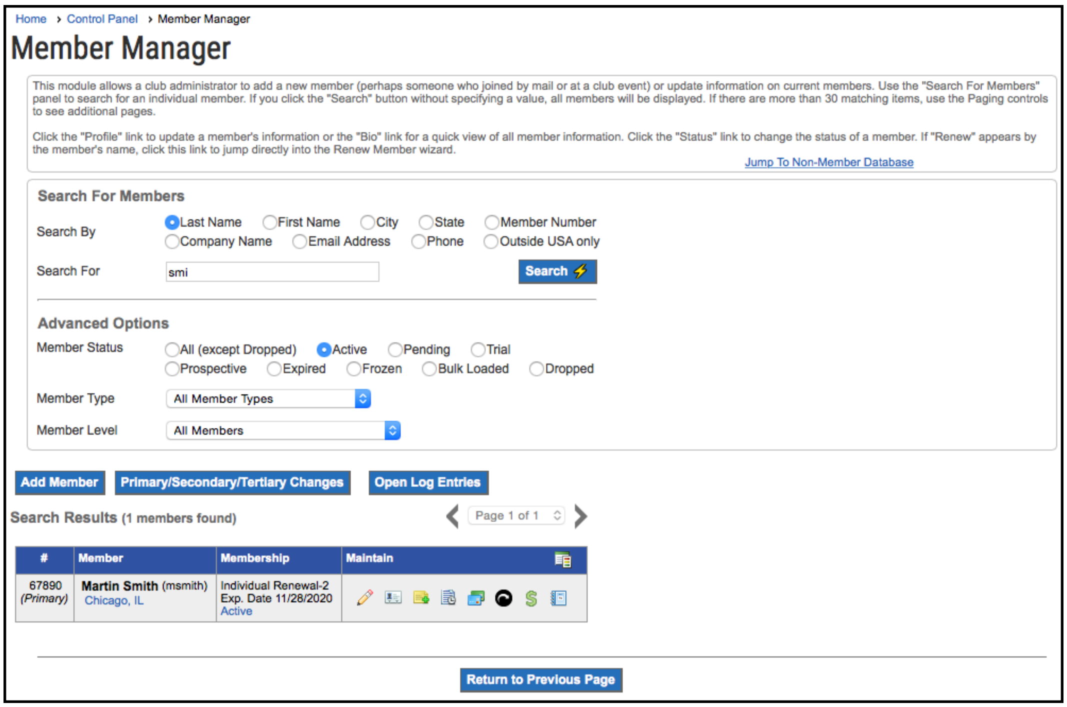
This section describes the Contact Log function, which allows club or association administrators to manage every contact with members and non-members. It provides the equivalent functionality of a Customer Relationship Management (CRM) system.

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**.

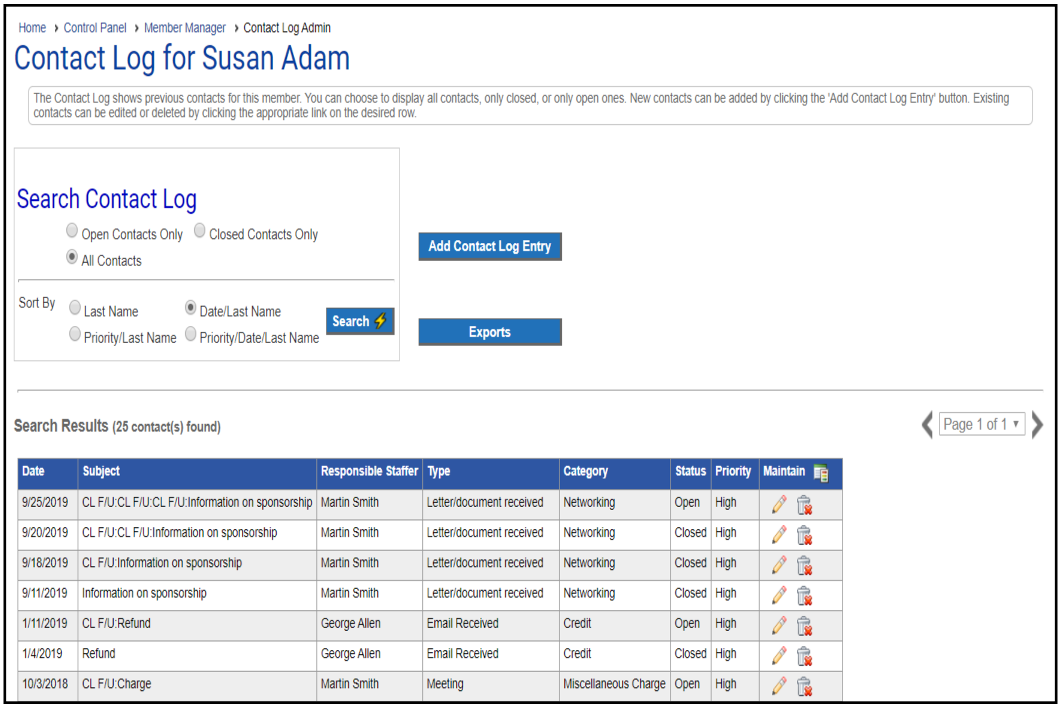
> **Activation:** The one-time fee to activate this module for your website is $1000.

Member Contact Log

When you search for a member in the People Manager, you will see a screen similar to the following:



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:



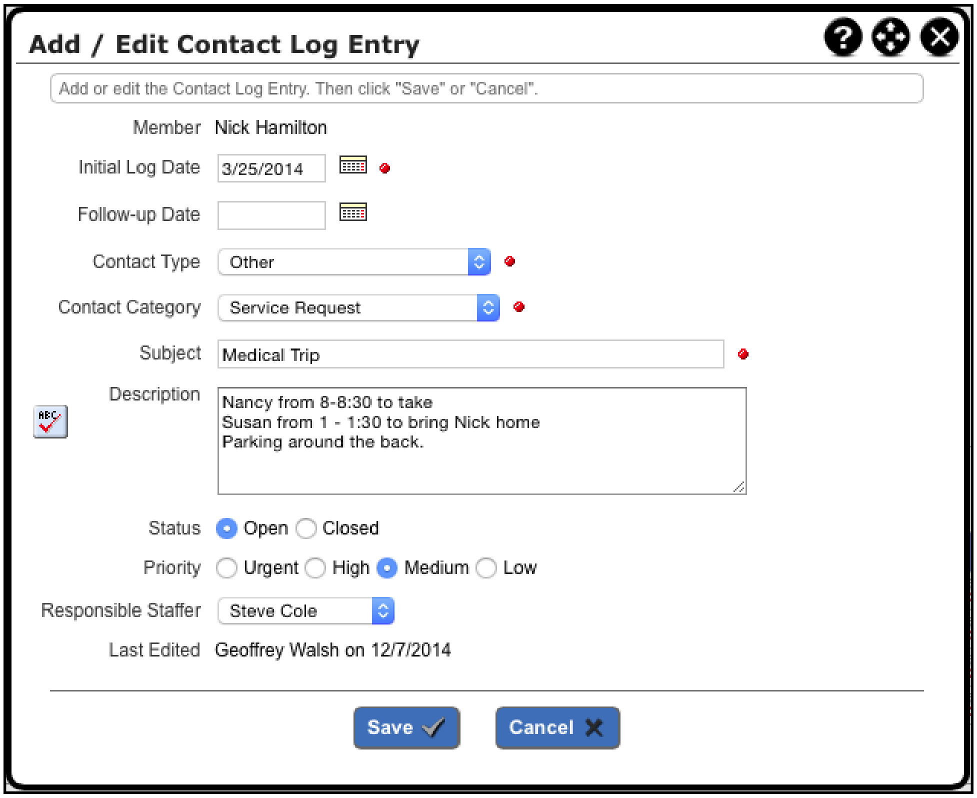
Use the Search options at the top to filter the list by Open Contacts Only, Closed Contacts Only or All Contacts. You can also control the sort order from among four options. Click the **Search** button to refresh the list.

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:



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.

Search Results (7 contact(s) found)   Prev   Page 1 of 1   Next

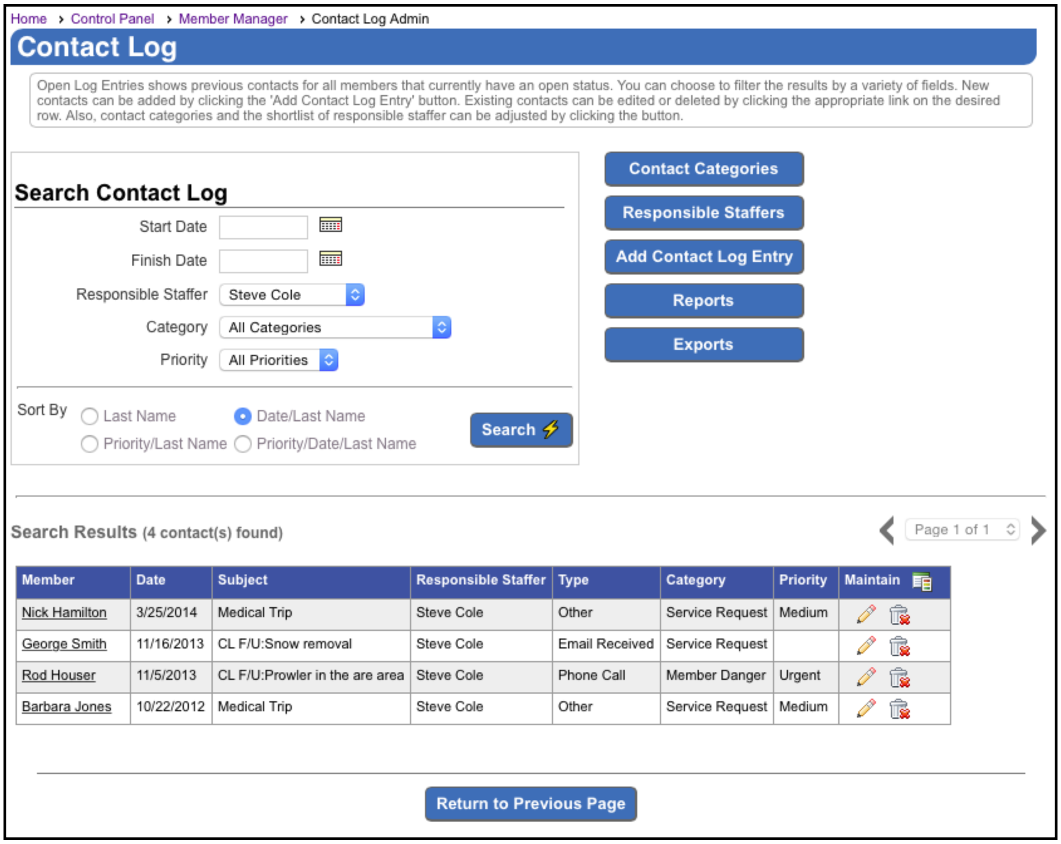
Date	Subject	Responsible Member	Type	Category	Status	Priority	Maintain
11/5/2013	CL F/U:Prowler in the are area	Steve Cole	Phone Call	Member Danger	Open	Urgent	
10/30/2013	Prowler in the are area	Steve Cole	Phone Call	Member Danger	Closed	Urgent	
9/28/2013	SR F/U:Plumber	Martin Smith	Other	Service Request	Closed	Medium	
9/25/2013	Plumber	Martin Smith	Other	Service Request	Closed	Medium	
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	

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:



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.

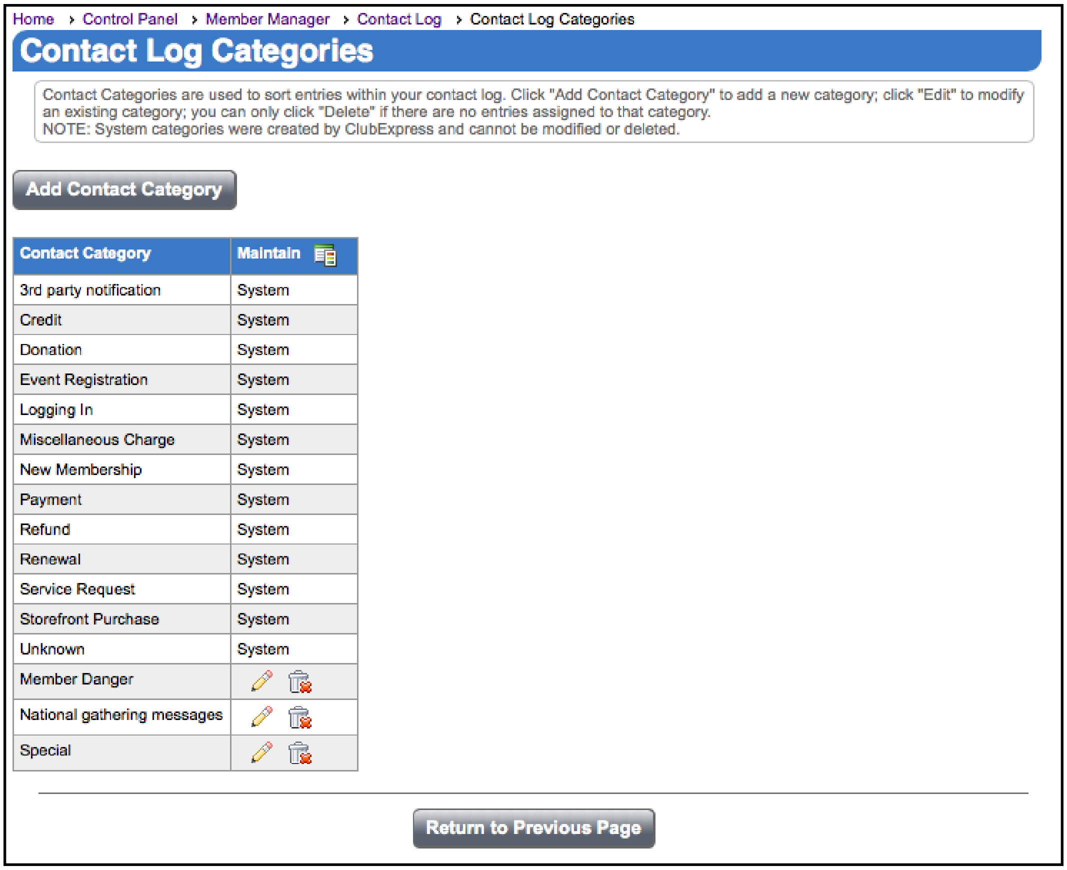
Note that only open contact log entries are shown. In the above example, an email received from George Smith, the original log entry is not shown because it has been closed; only the open followup entry is shown.

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 › Member Manager › Contact Log › Contact Log Categories

Contact Log 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.

Add Contact Category

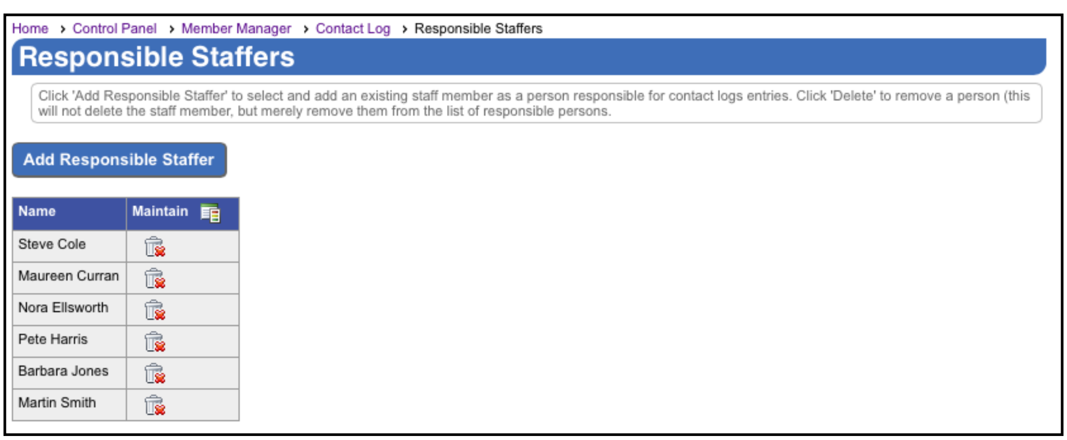
Contact Category	Maintain
3rd party notification	System
Credit	System
Donation	System
Event Registration	System
Logging In	System
Miscellaneous Charge	System
New Membership	System
Payment	System
Refund	System
Renewal	System
Service Request	System
Storefront Purchase	System
Unknown	System
Member Danger	
National gathering messages	
Special	

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:


Home › Control Panel › Member Manager › Contact Log › Responsible Staffers

Responsible Staffers

Click 'Add Responsible Staffer' to select and add an existing staff member as a person responsible for contact logs entries. Click 'Delete' to remove a person (this will not delete the staff member, but merely remove them from the list of responsible persons.

Add Responsible Staffer

Name	Maintain
Steve Cole	
Maureen Curran	
Nora Ellsworth	
Pete Harris	
Barbara Jones	
Martin Smith	

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

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 configure events 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.

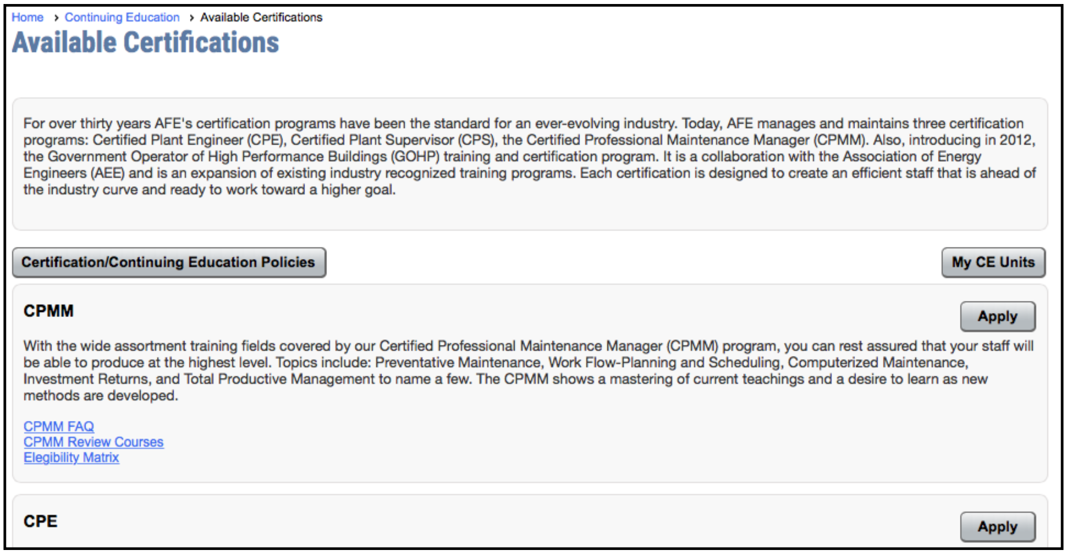
Note that the system allows you to change the keyword used by your association for continuing education credits, units, or points. We will use “credits” in these instructions.

> **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.**

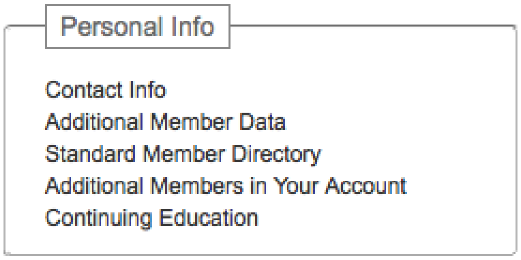
The description of each certificate is defined by selecting **Configure – Certificates**, then clicking the **Description** icon for that certificate.

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.

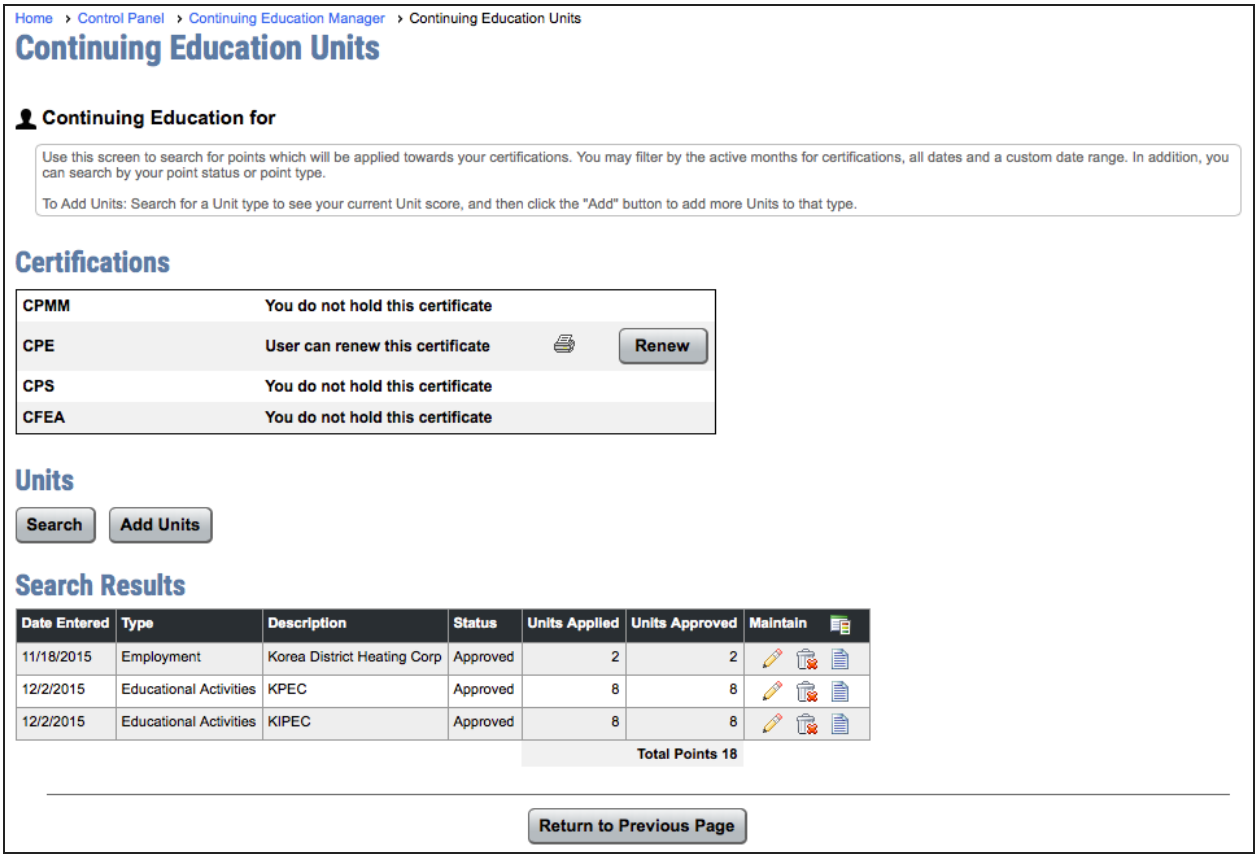
Also for logged in members, the system will detect the status of each certificate for that member. If the member does not hold a certificate, an **Apply** button is displayed. If the member does hold a certificate, or it's up for renewal, or it has expired, this will also be indicated.

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.



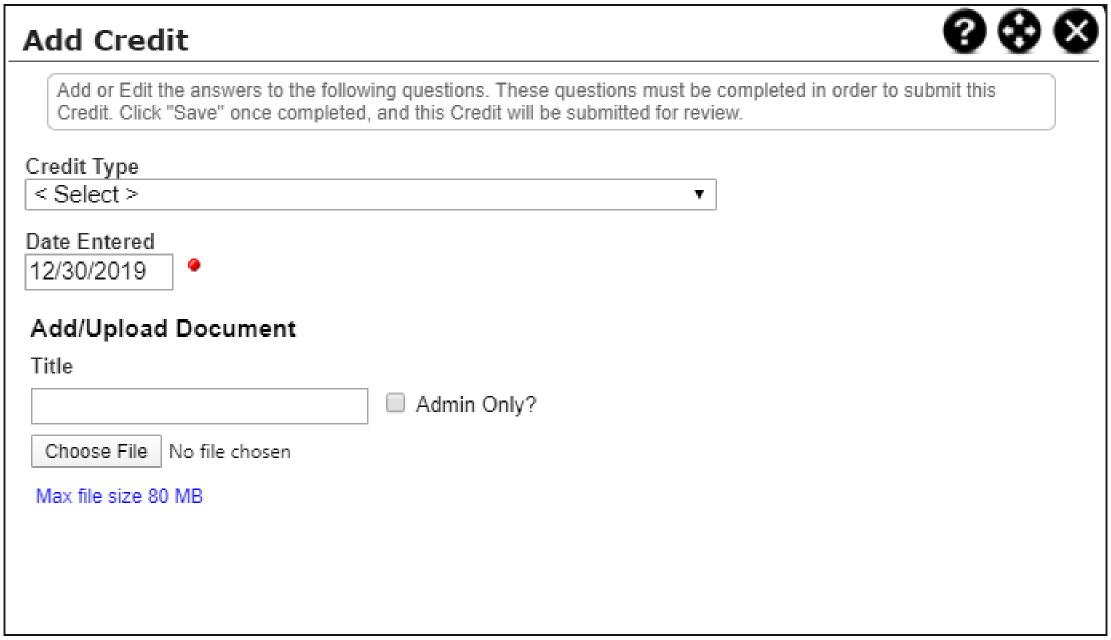
Selecting this option displays a screen similar to the figure below, showing the available certification(s), the member's status for each one, and credits.



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.

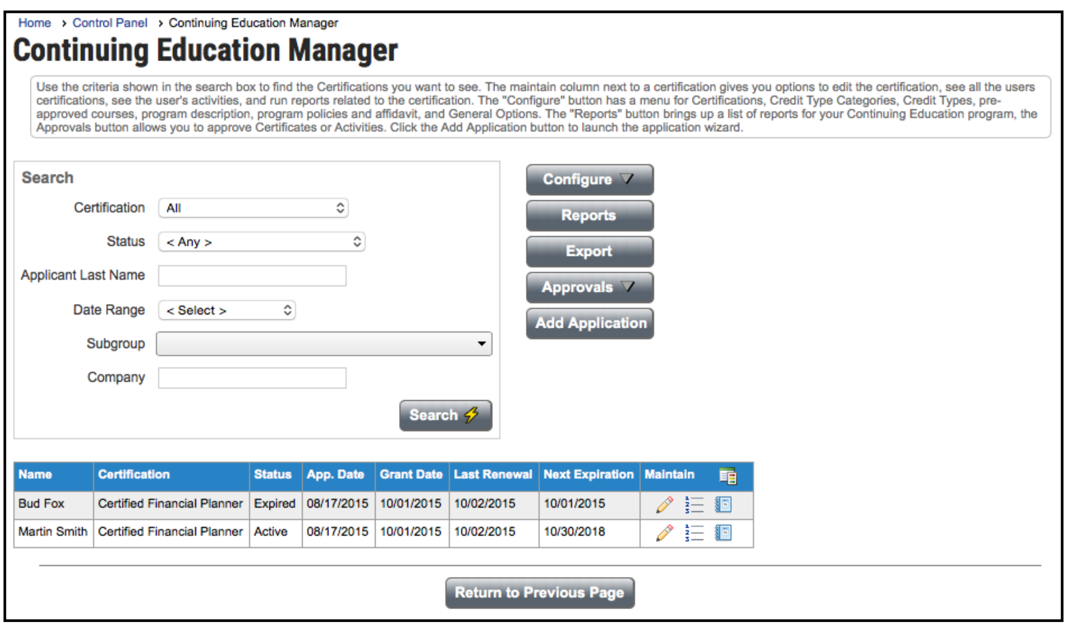
Clicking Add Credit will display the following screen:



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:



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

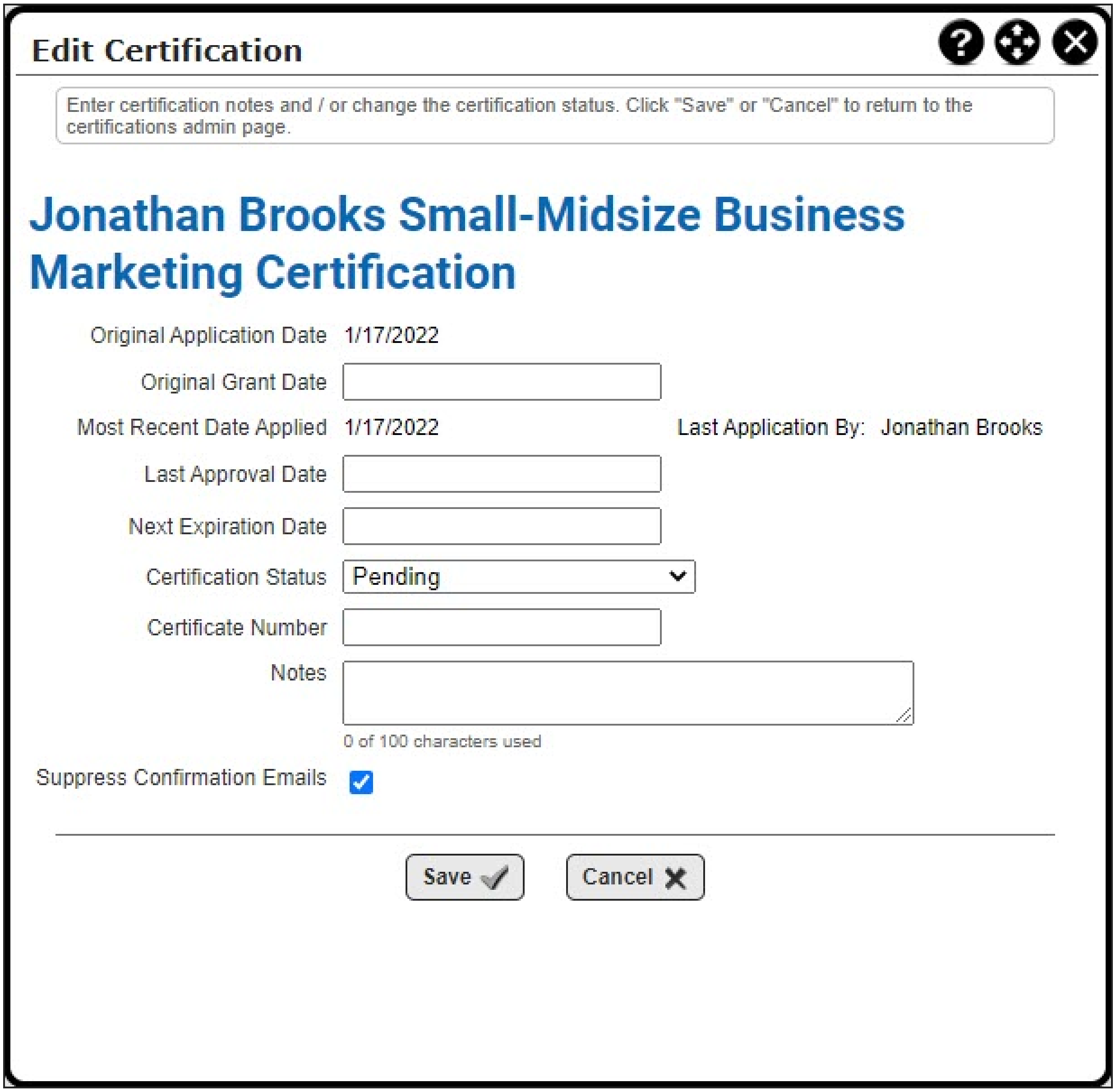
The following options can be found in the Maintain column:

Icon	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.

Maintain Options

Editing Certification Status

Select the Edit icon to edit the status of any user's certificate.



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.

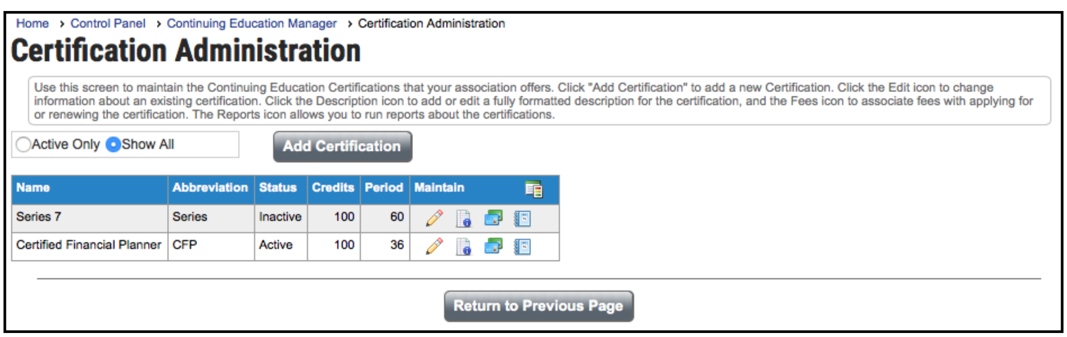
- Active - The member or non-member has applied and paid and has been approved by an administrator.
- Active - Renewal Applied - The member or non-member has applied to have his or her certificate renewed but has not yet paid the defined renewal fees. He or she may also not yet have entered the necessary 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. Non-members 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".)

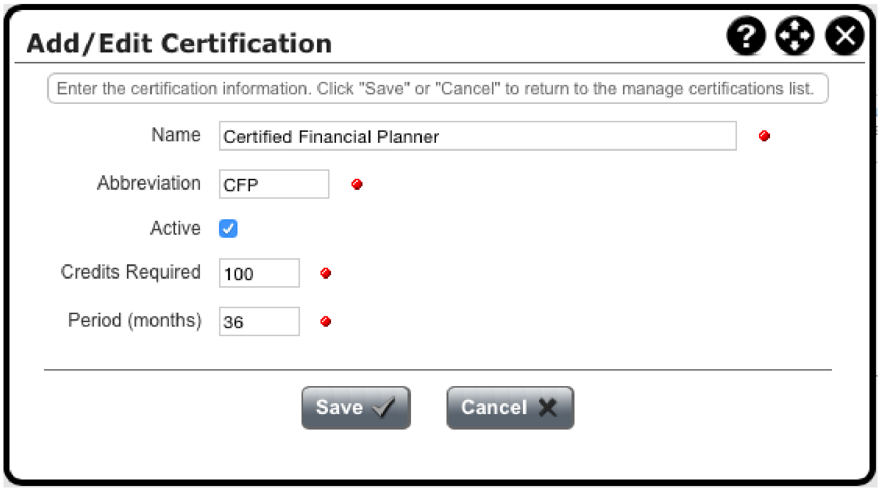
Certifications

Select this option to define the Certification(s) offered by your association. You will see a screen similar to the following:



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:



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:

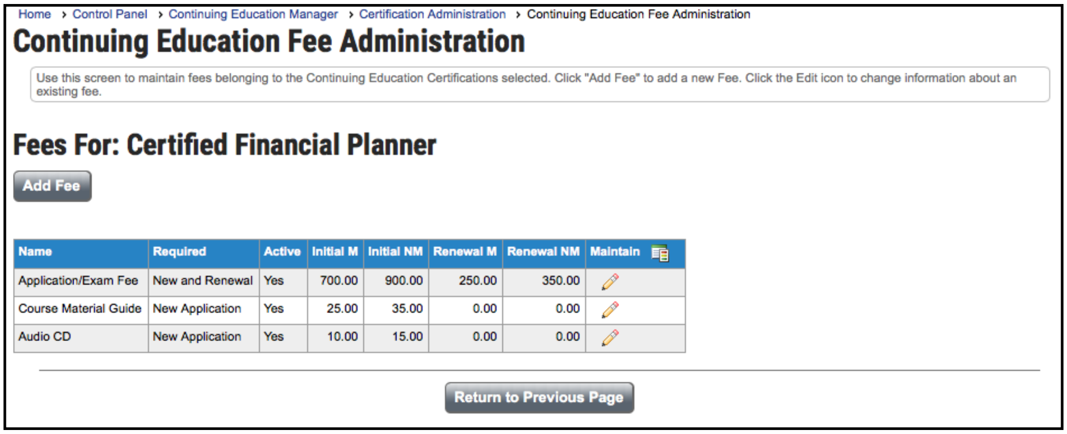
Icon	Description
(Edit)	**Edit** this certification. You will see the same screen shown above.
(Description)	Create a detailed **Description** for this certification. You will see a popup dialog with our advanced content editor, allowing you to create a fully formatted description, including links, images, etc. This description is shown on the public side of Certification 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

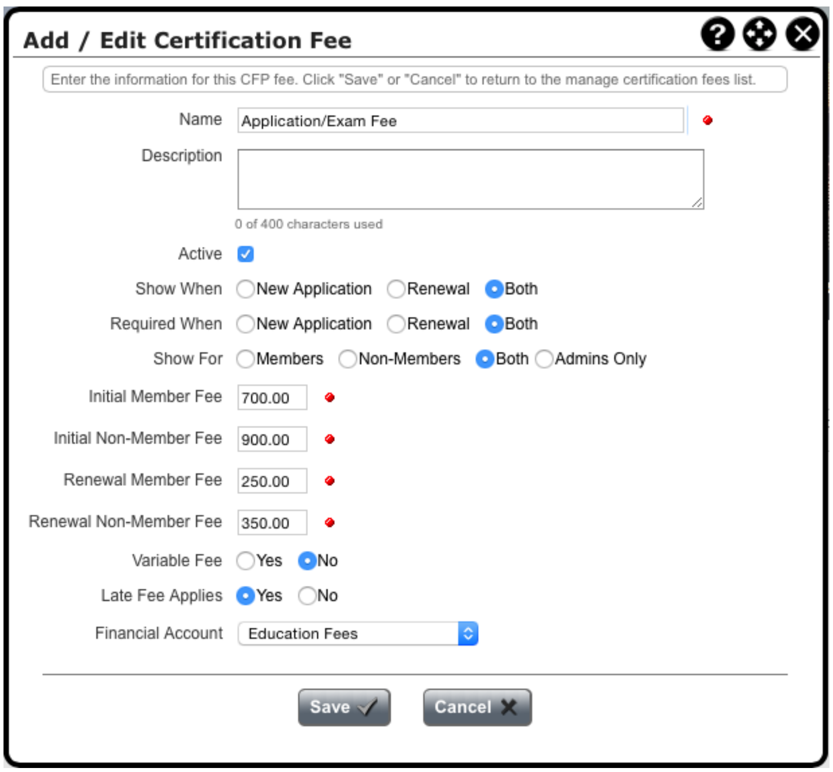
Certifications – Fees

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:



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:



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.

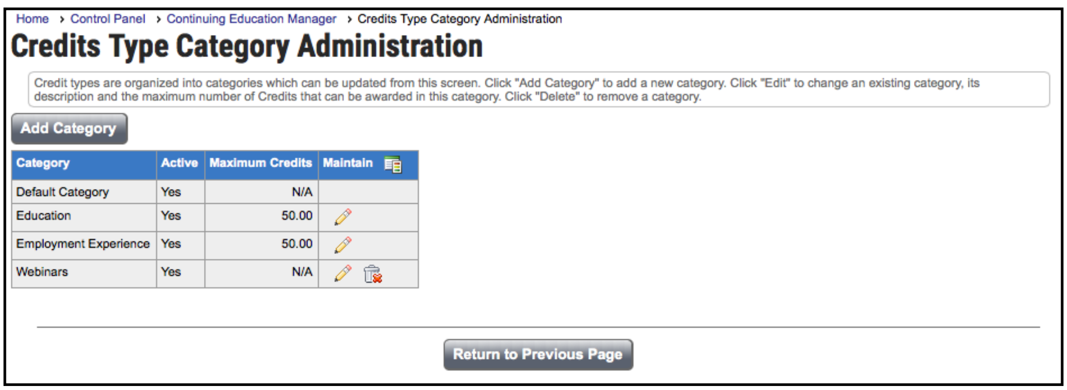
The **Financial Account** setting allows you to define the financial account into which these fees will be aggregated.

Click **Save** to save your changes and return to the Certificate Fee Manager screen, or **Cancel** to close the dialog without saving.

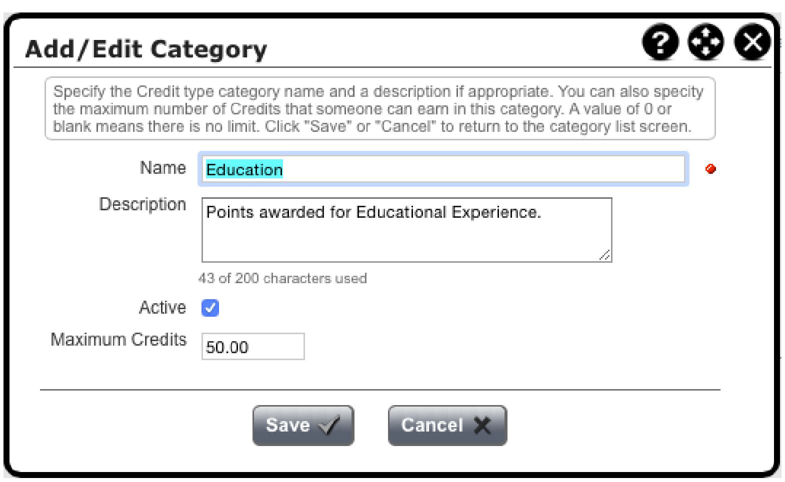
Credit Type Categories

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:



This is a standard ClubExpress admin grid. Click **Add Category** to create a new category. You will see the following screen:



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

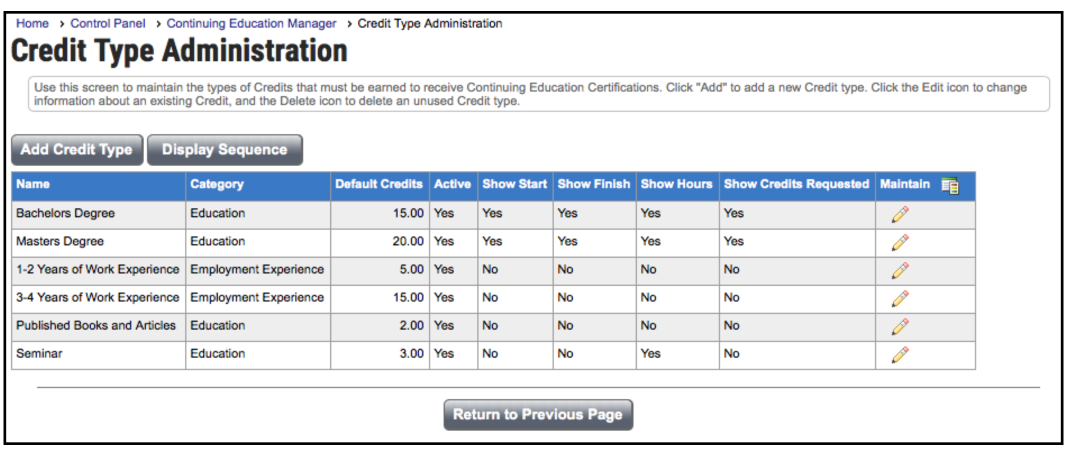
Select this option to define the individual ways in which members can earn credits.

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.

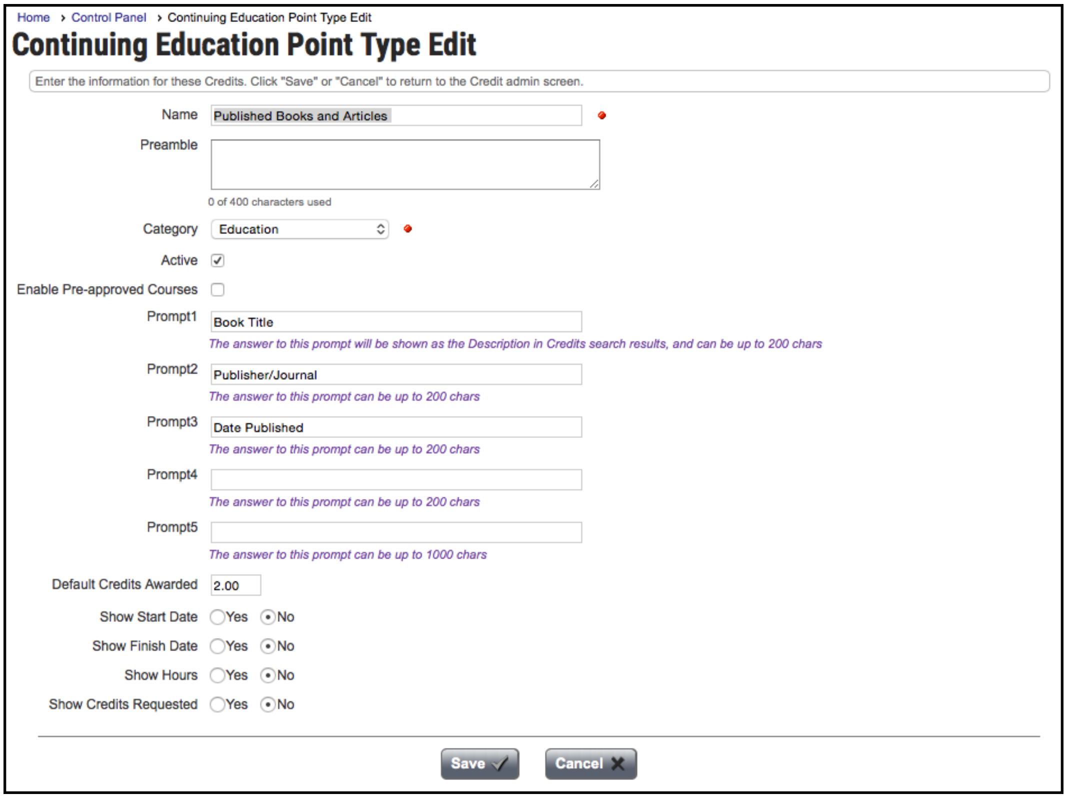
All requests need to be approved (see below for an explanation of this process) and associations are free to reject outlandish or unjustified requests.

You will see a screen similar to the following:



Name	Category	Default Credits	Active	Show Start	Show Finish	Show Hours	Show Credits Requested	Maintain
Bachelors Degree	Education	15.00	Yes	Yes	Yes	Yes	Yes	
Masters Degree	Education	20.00	Yes	Yes	Yes	Yes	Yes	
1-2 Years of Work Experience	Employment Experience	5.00	Yes	No	No	No	No	
3-4 Years of Work Experience	Employment Experience	15.00	Yes	No	No	No	No	
Published Books and Articles	Education	2.00	Yes	No	No	No	No	
Seminar	Education	3.00	Yes	No	No	Yes	No	

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:



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 event 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.

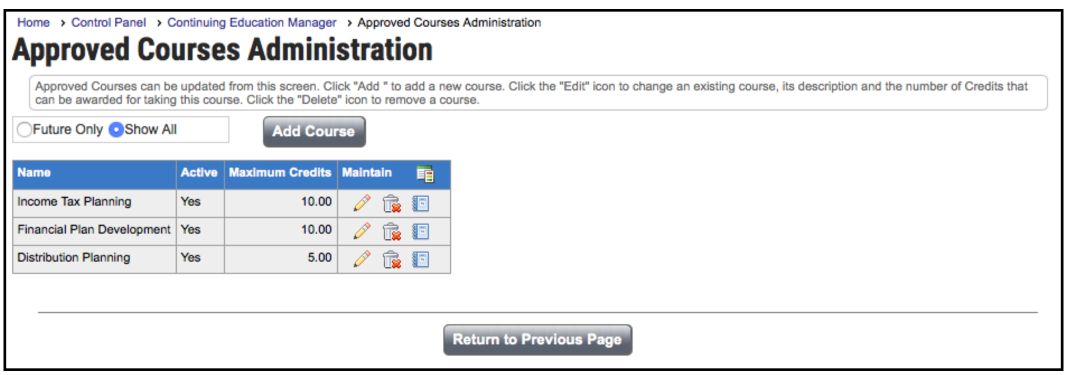
The **Display Sequence** button allows you to control the order in which credit types are shown.

The **Edit** icon in the Maintain column allows you to update a credit type.

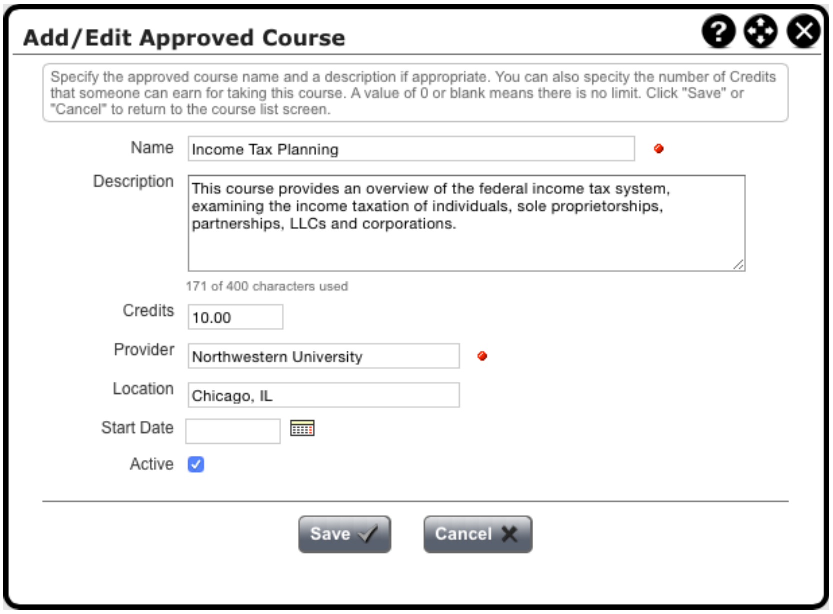
Pre-Approved Courses

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:



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:



Enter the requested information and click **Save** to save the course or **Cancel** to close the dialog without saving.

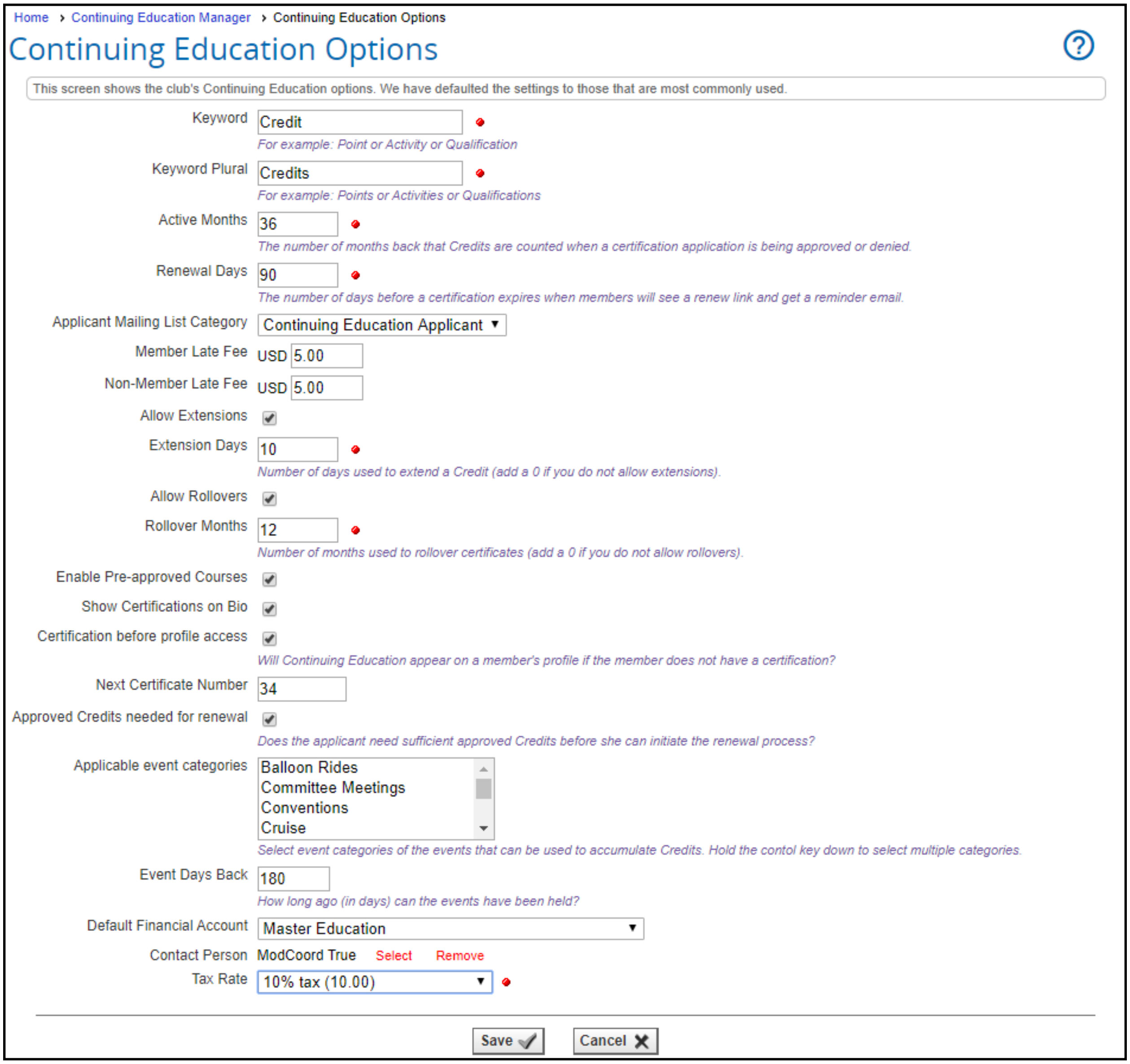
Program Description, Policies, Affadavit

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:



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.

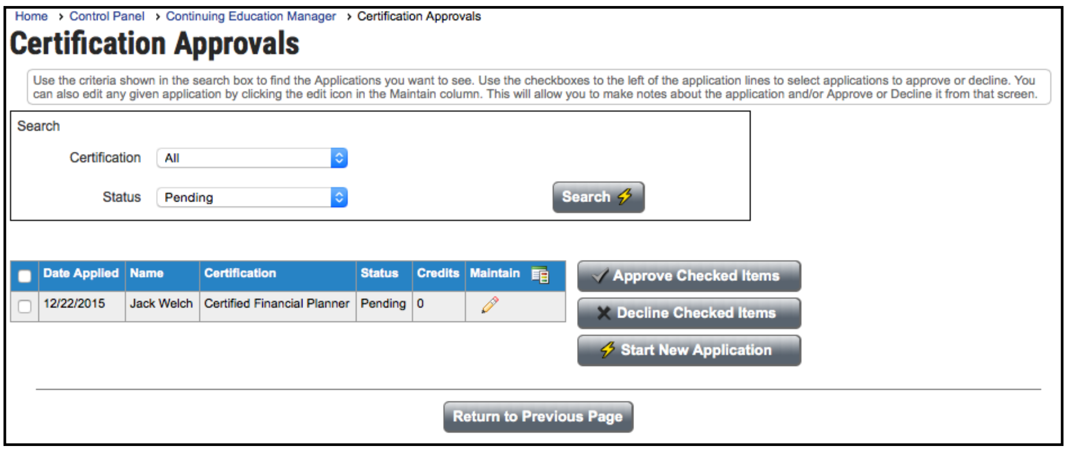
Certification Approvals

Certificates with the following status values need to be approved by an administrator:

- Pending
- Active-Renewal Pending
- Expired-Renewal Pending

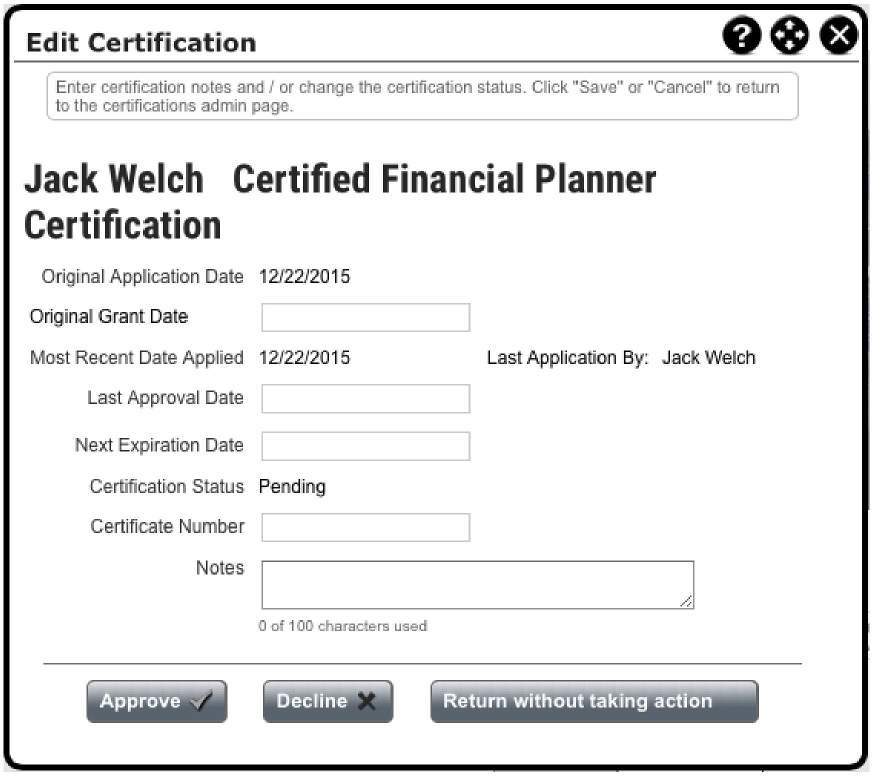
In each case, the member (or non-member) has applied for a new certificate or to renew an existing certificate, and has paid any necessary fees. It's up to the administrator to review the appropriate criteria (whether these are test scores, classes taken, or other professional accomplishments) to determine 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:



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!

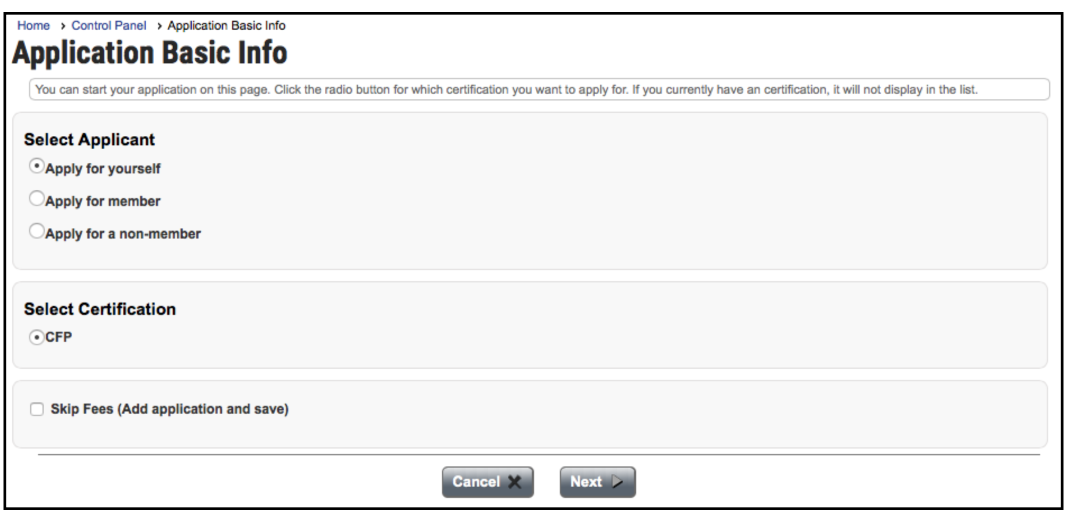
You can also click the **Edit** icon in the Maintain column to manually approve one certification, including making changes to other fields. You will see the following screen:



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:

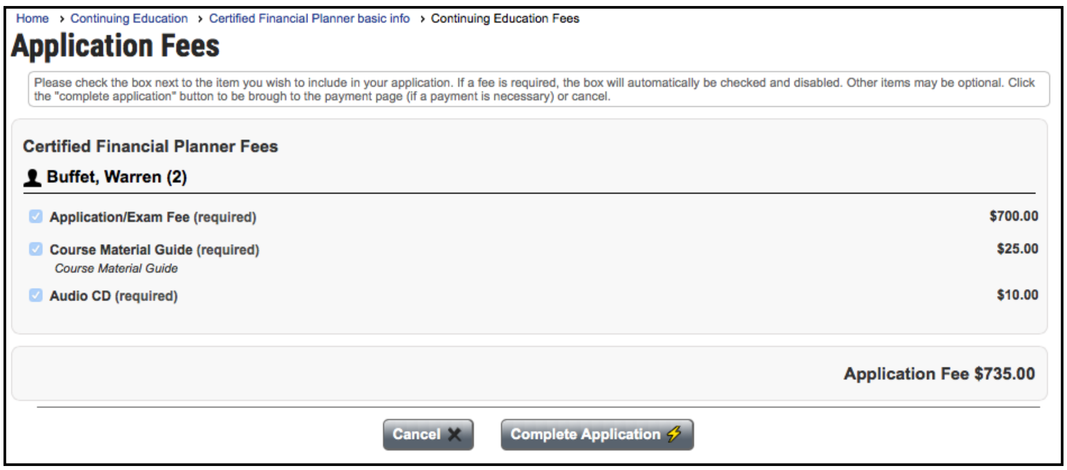


The **Select Applicant** panel allows administrators to apply for themselves, for another member, or for a non-member. When the member option is selected, a link will appear to select a member. When the non-member option is selected, the standard panel to select a non-member from the database or enter 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:



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.

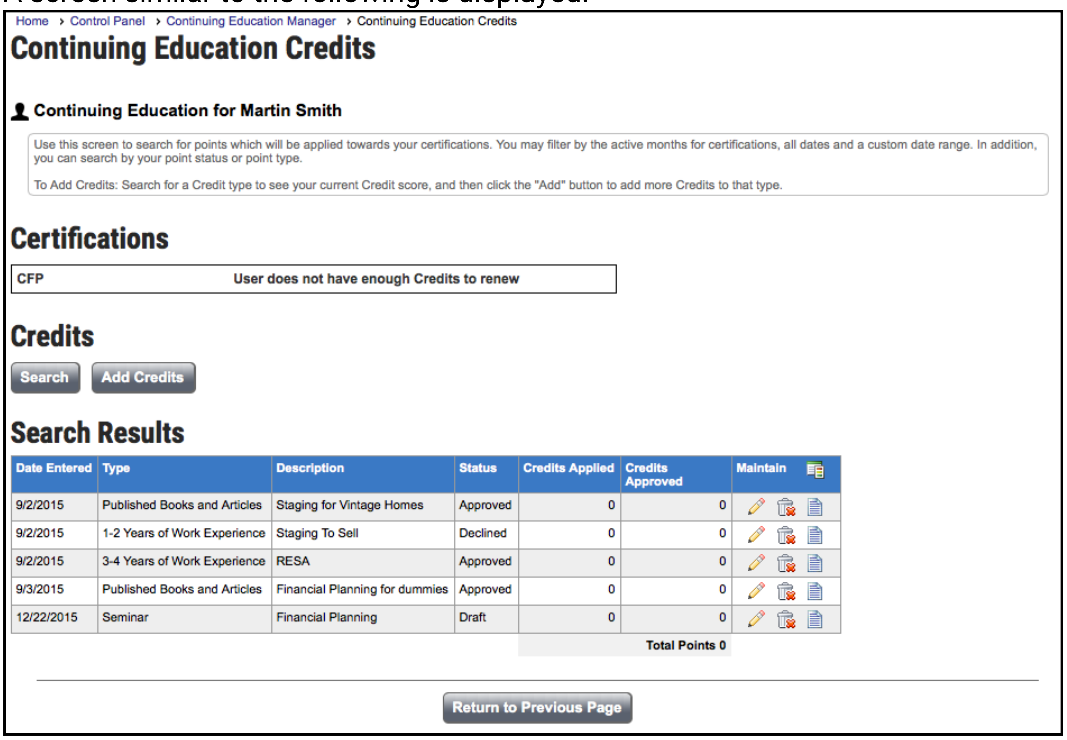
Credits will have one of the following status values:

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.

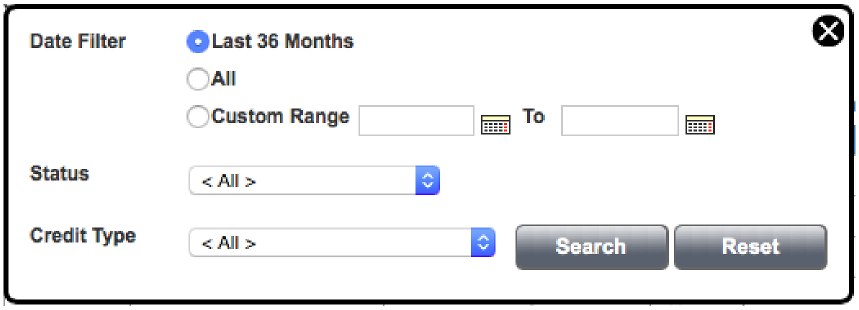
A screen similar to the following is displayed:



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.

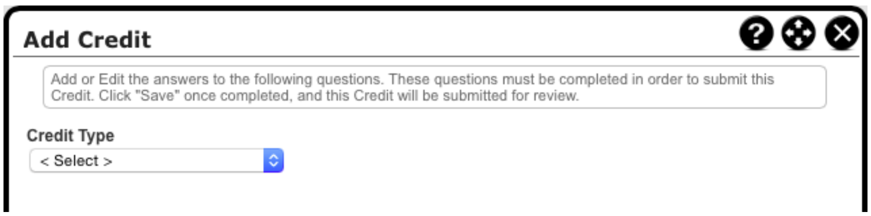
In the Credits section, the system lists credits requested by the member, including the type and description, and the status of each one.

Click the **Search** button to filter the list. The following search panel appears:



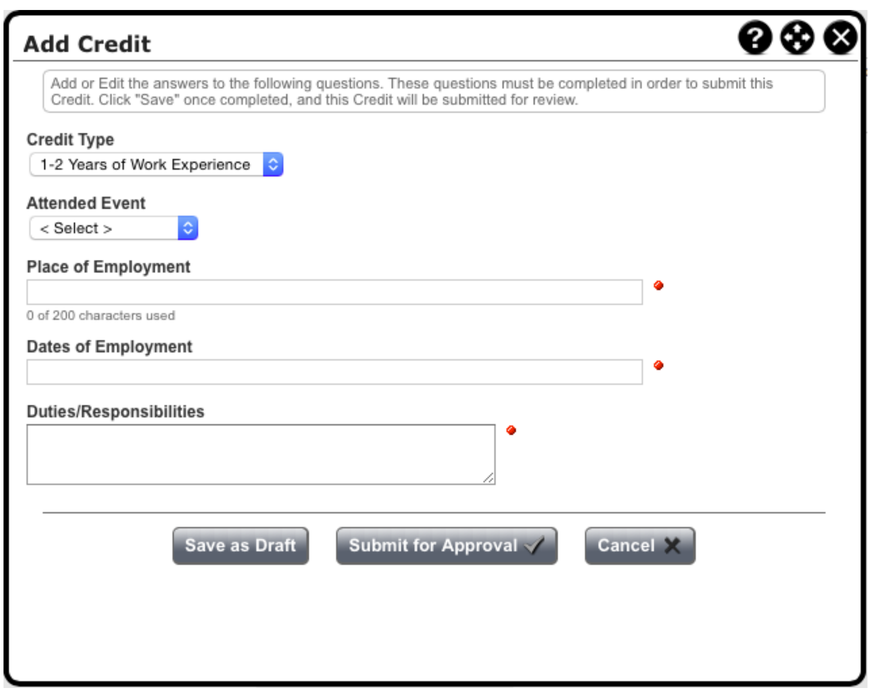
In the Date Filter section, the first radio button (“Last 36 Months” in the example above) will adjust based on how long certificates are valid as configured on the Options page. You can also filter by status and type of credit. Click the **Search** button to filter the results list or **Reset** to clear settings.

Click the **Add Credits** button to create a new credit entry. The following dialog is displayed:



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:



Credits can be saved as drafts or submitted for approval, or click **Cancel** to close the dialog without completing an entry.

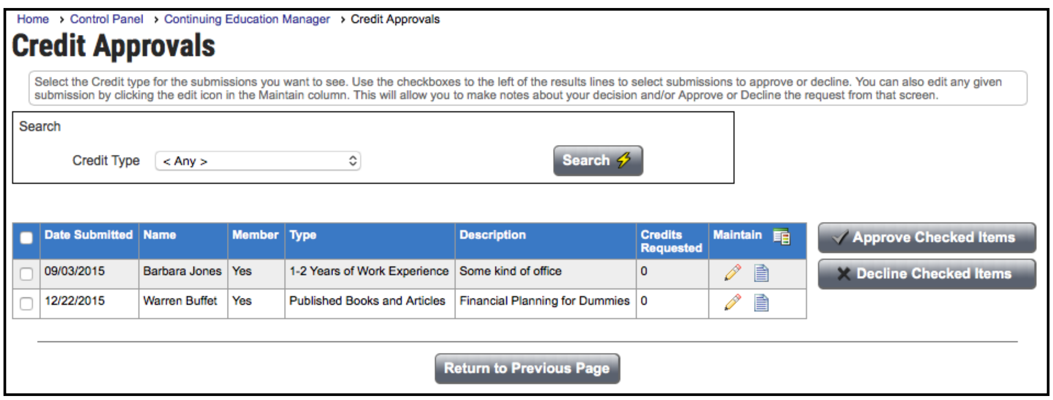
On the same screen, upload any documentation required for the selected credit type. You may upload one or more supporting documents, but only one document at a time. Specify a title and a file from your local hard disk, then click **Save** to upload the file. Any previous uploads will be listed at the 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:



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

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 Ad Hoc Forms module. Once a quiz has been created, it can be linked to a video from the Video Add/Edit screen.

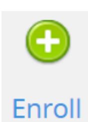
> **Activation:** The one-time fee to activate this module for your website is $200.

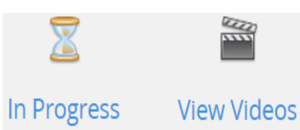
Courses

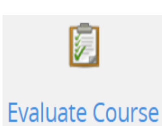
Each course is shown with a course code and title, along with a course description.

If a course has not been paid for, a *Purchase* icon is displayed.

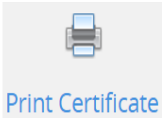
If you are assigned to a "Seat", courses will be shown as if they were purchased.

- 

Click the **Enroll** link to enroll for a course.
- 

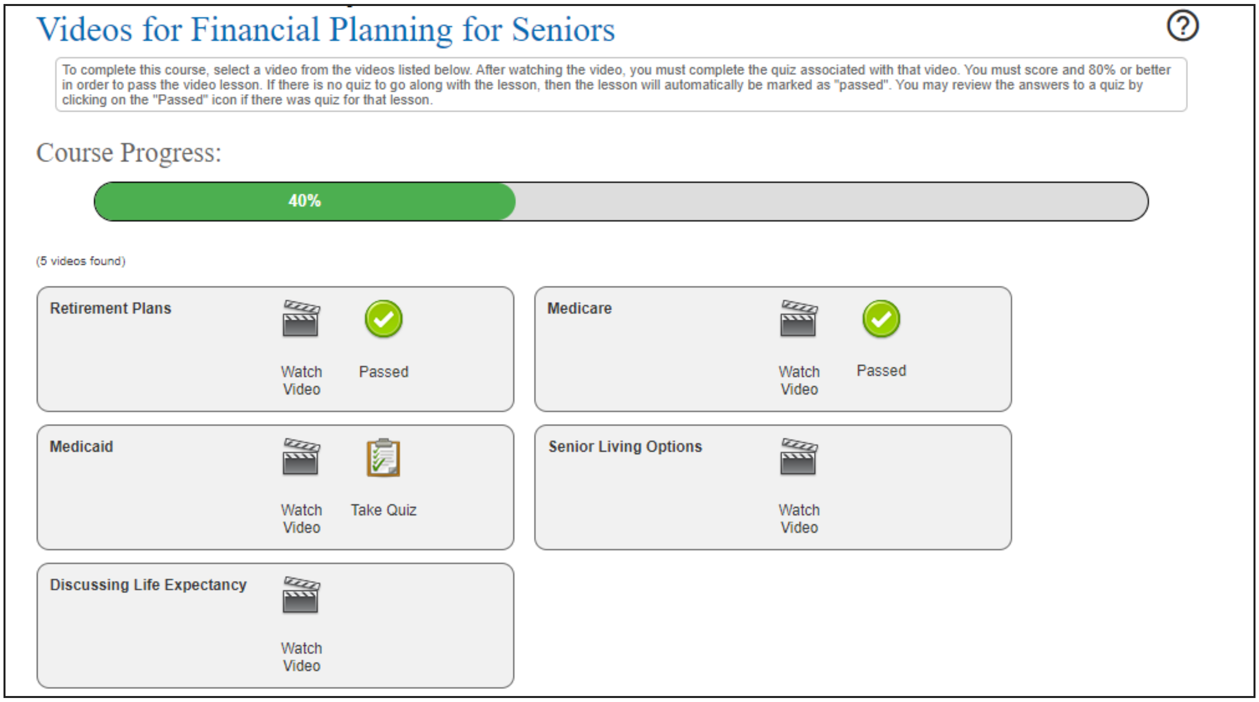
After someone has enrolled in a class, **In Progress** and **View Videos** links will appear.
    - Click the **View Videos** link to view the videos for a course. You may watch videos as soon as a course has been paid for, and even once the quiz has been taken.
- 

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.

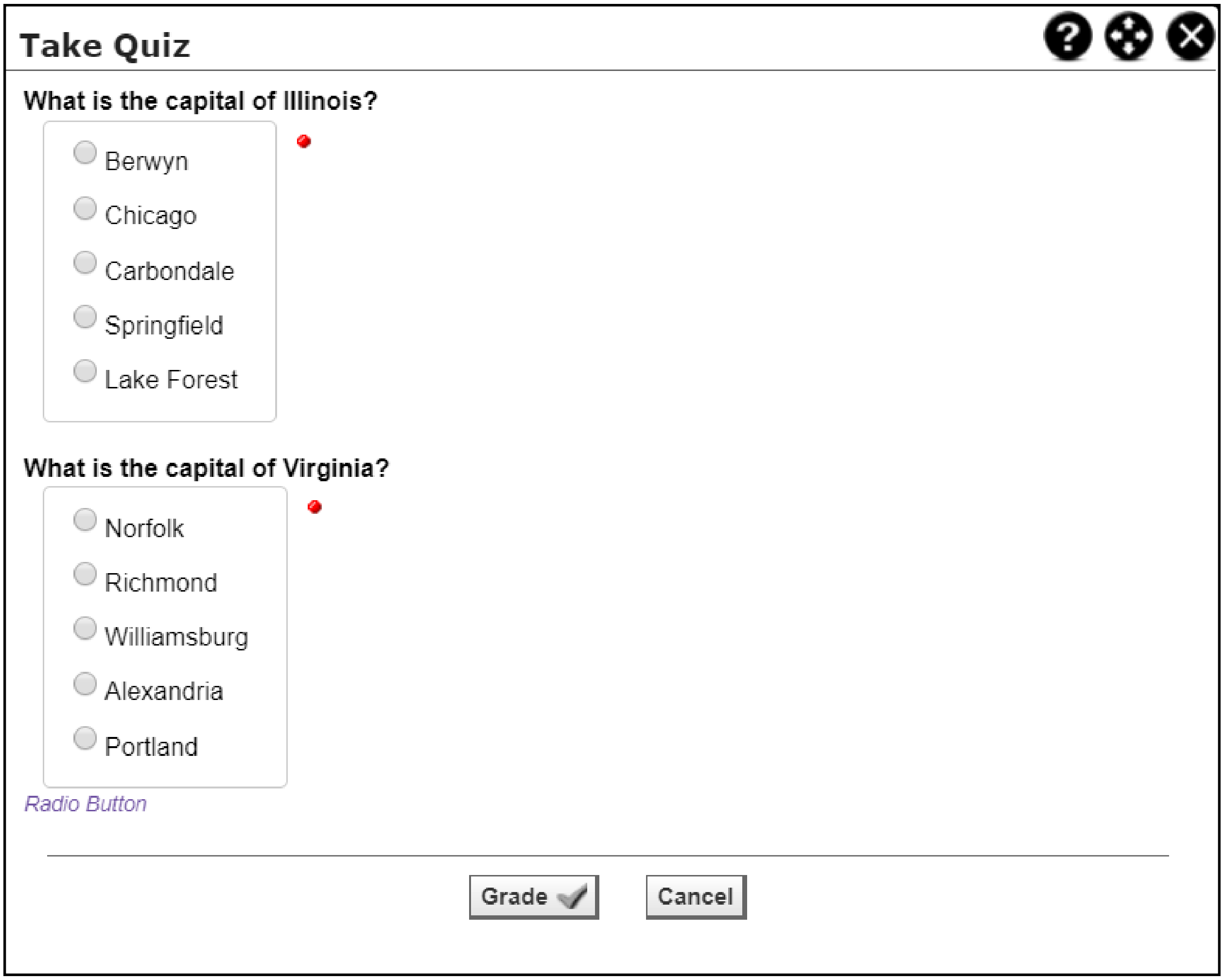
Videos for Course



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".

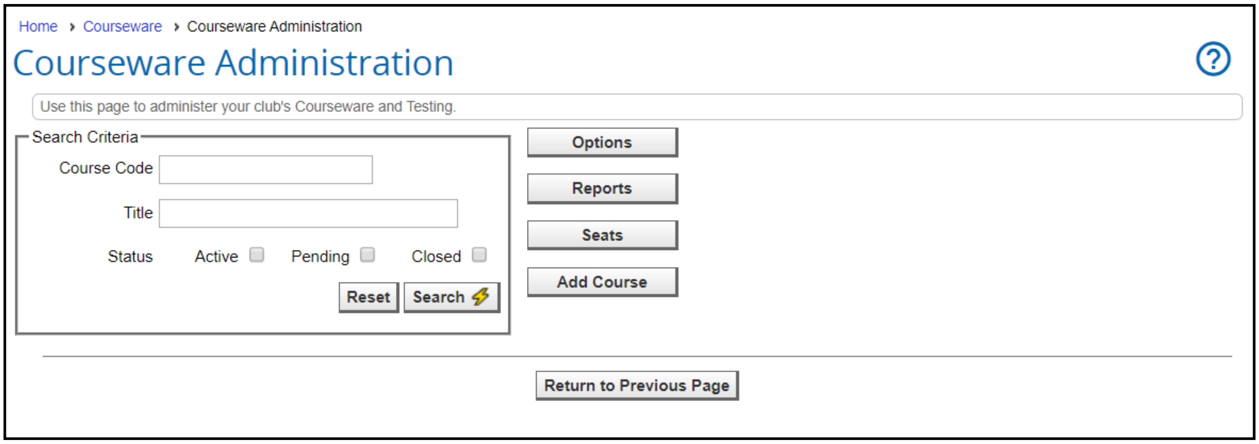


- Click **Take Quiz** to take the quiz.
- Answer the questions pertaining to the video.
- Click the **Grade** button to submit the quiz or the Cancel button to exit without submitting the quiz. A score of 80% is necessary to pass a quiz.

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



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).

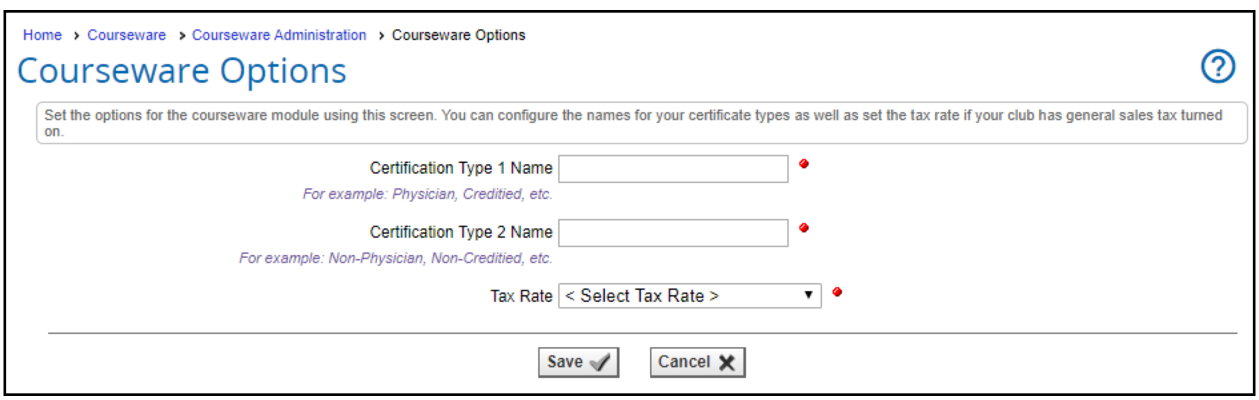
Click the **Reset** button to clear all search criteria. Click the Reports button to run module reports.

Click the **Seats** button to add organizations and the seats they purchase.

Click the **Add Course** button to add courses.

Options

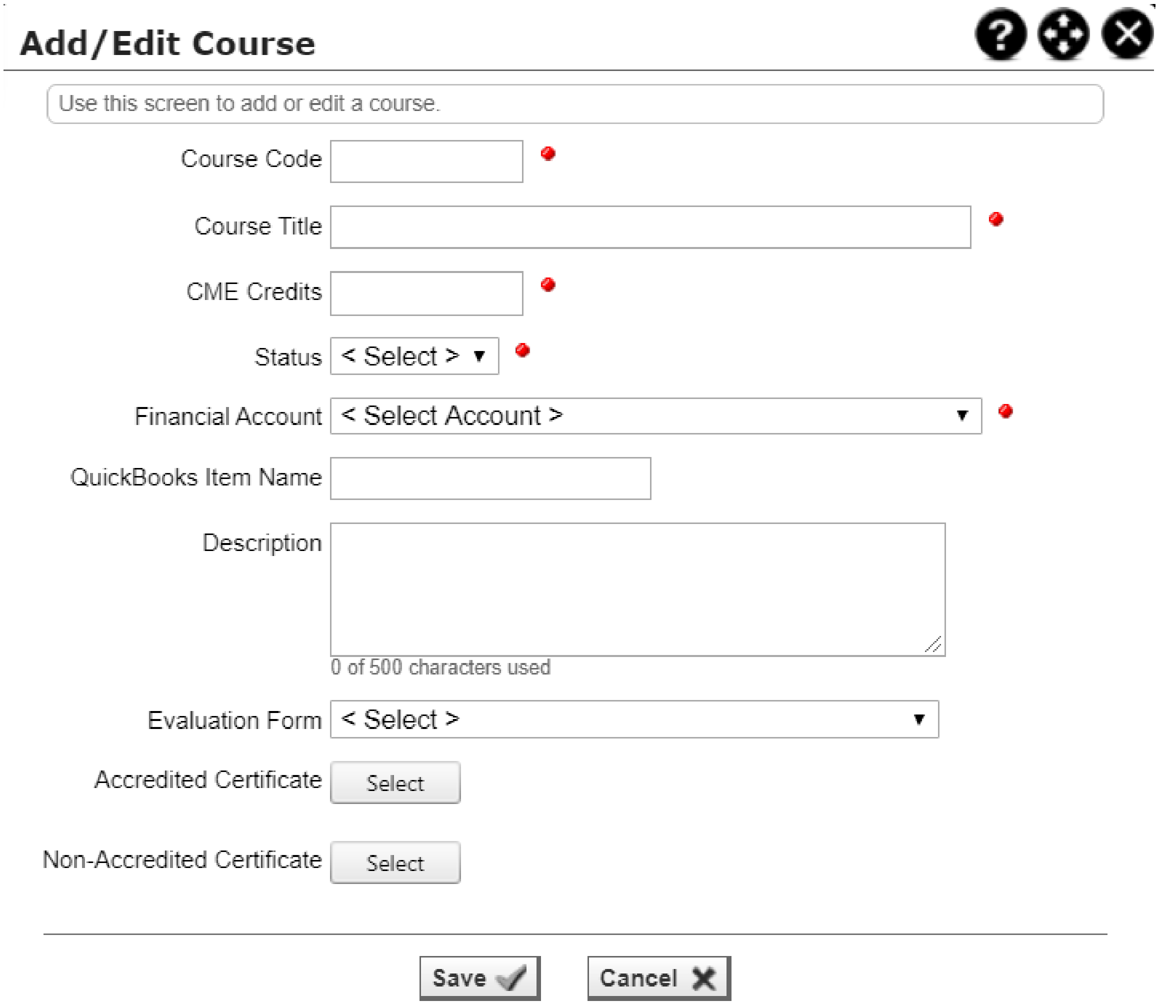
Use this page to set the options for the E-Learning module.



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

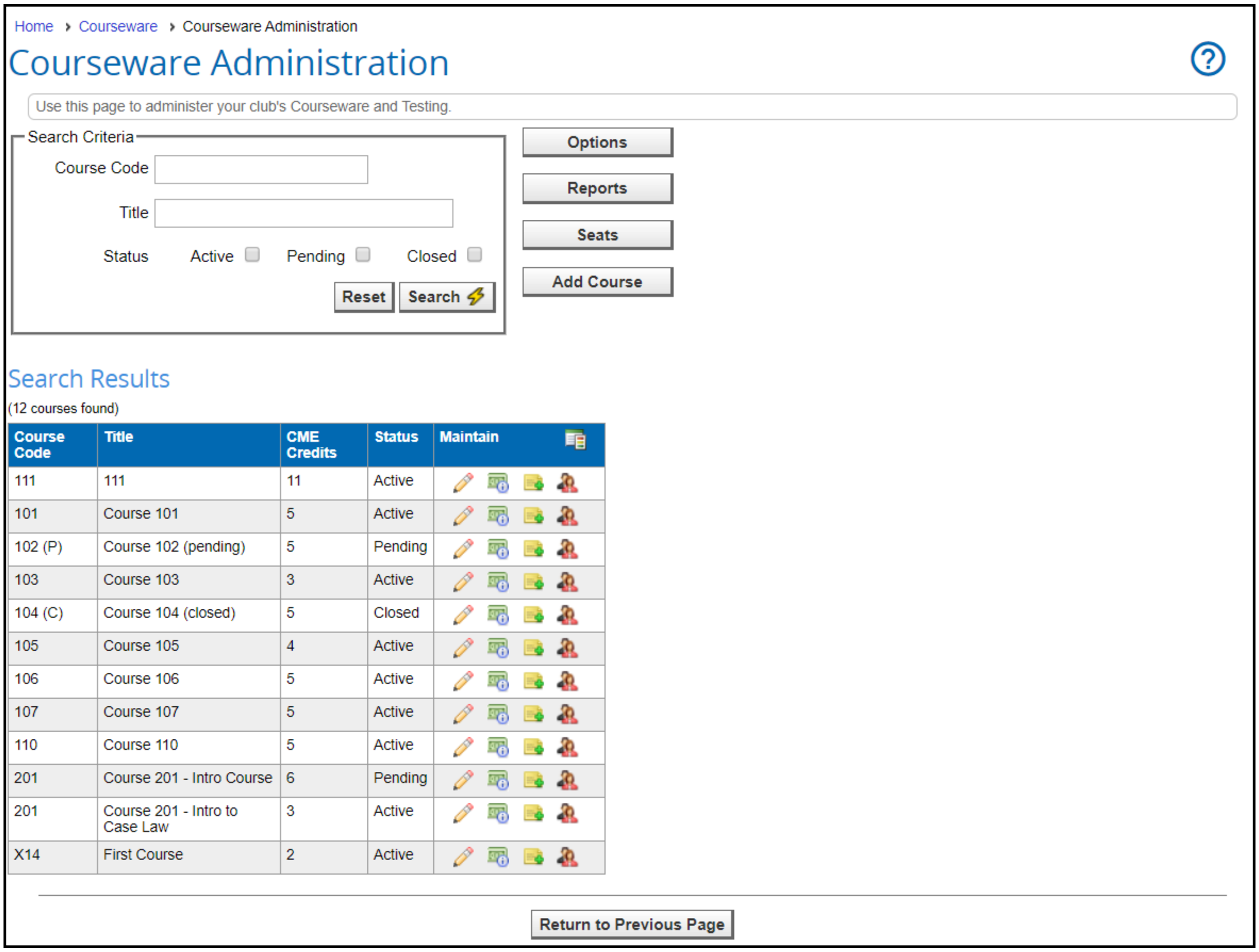
Use this screen to add or edit a course.



- 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:



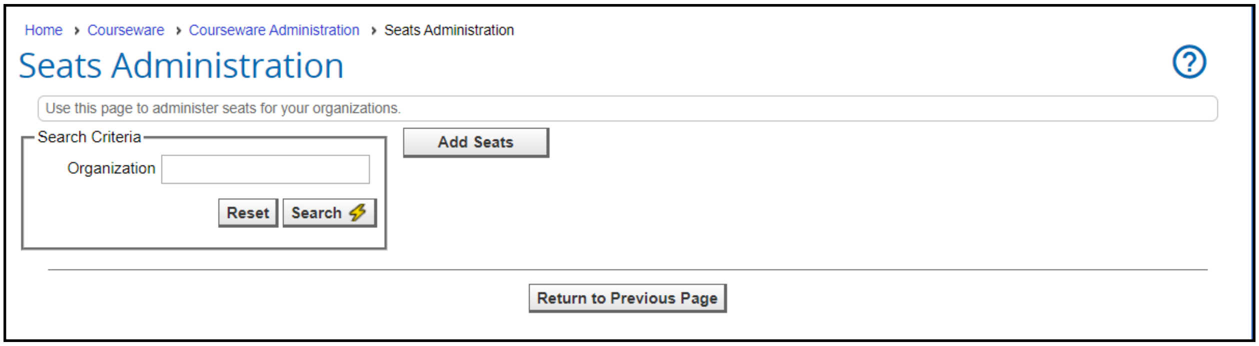
Results will show in the following columns:

- 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.

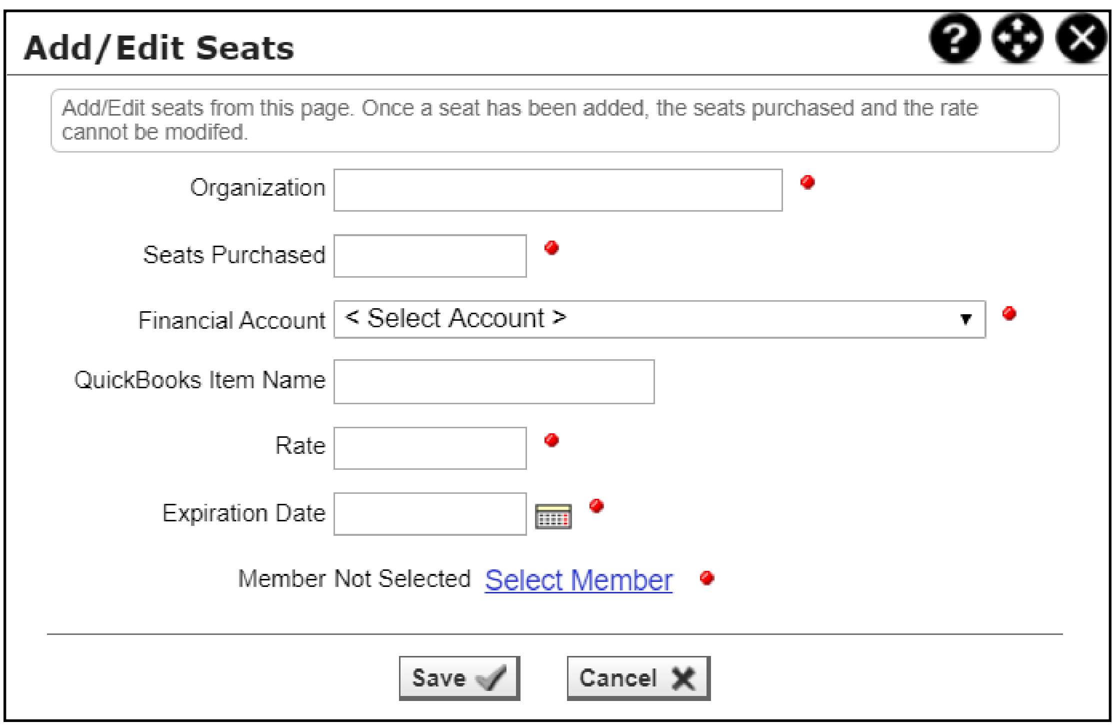
> **Note:** When an organization requests additional seats, they will be handled as a separate entry with its own expiration date.



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.



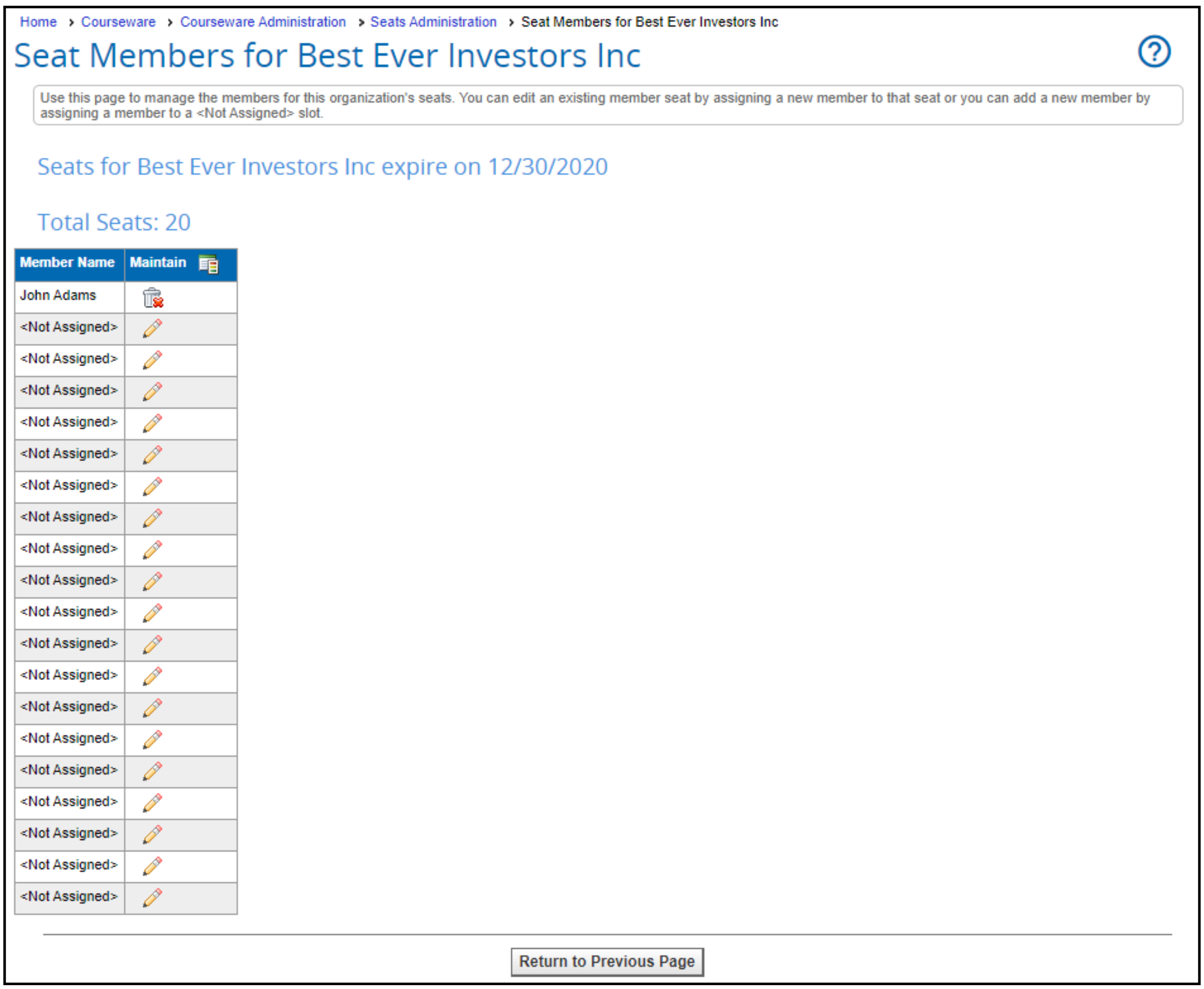
- Specify the organization name.
- Specify the number of seats purchased.
- Select the appropriate financial account.
- If the QuickBooks®export is enabled, specify the QuickBooks®Item name.
- Specify the rate for each seat.
- Specify the Expiration date. This date can be adjusted based on the date of 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.

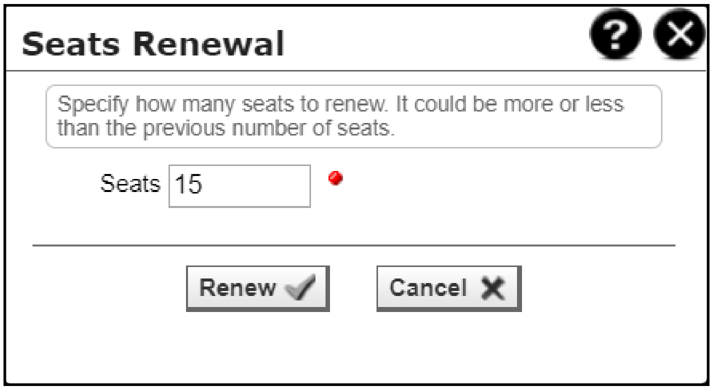
Click the **Edit** link to edit an organization.

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 "unasssigned".



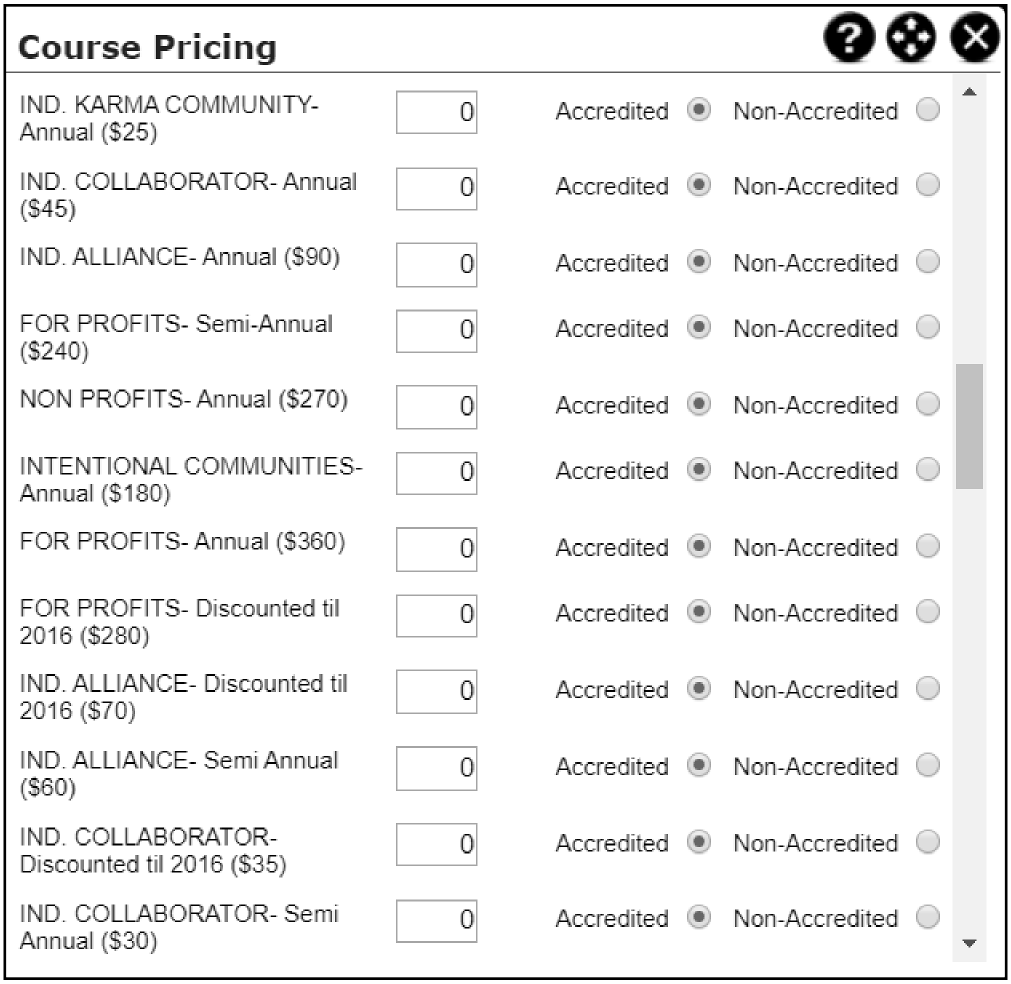
- Click the **Delete** link to remove a member from a seat.
- Click the **Add** link to assign a member to a seat.
- Click the **Select Member** link to select a member for the seat.
- Click the Save button to save your changes or the Cancel button to exit without saving.

Click the **Renew** link to renew an organization's seats.



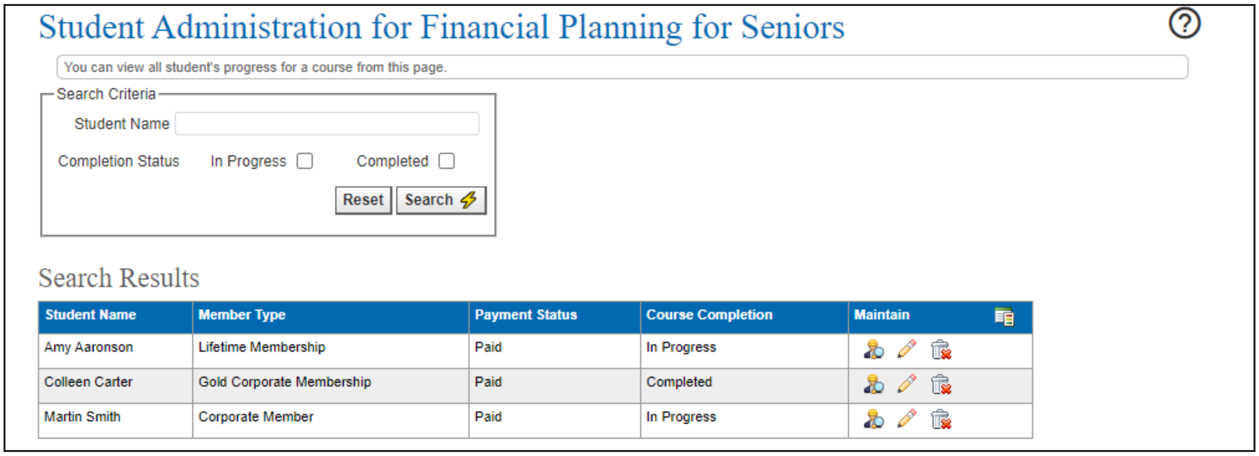
- Specify how many seats to renew. It can be either more or less than the previous number of seats.
- Click the Renew button to renew the seats or the Cancel button to exit without renewing.

Course Pricing



- 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



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.

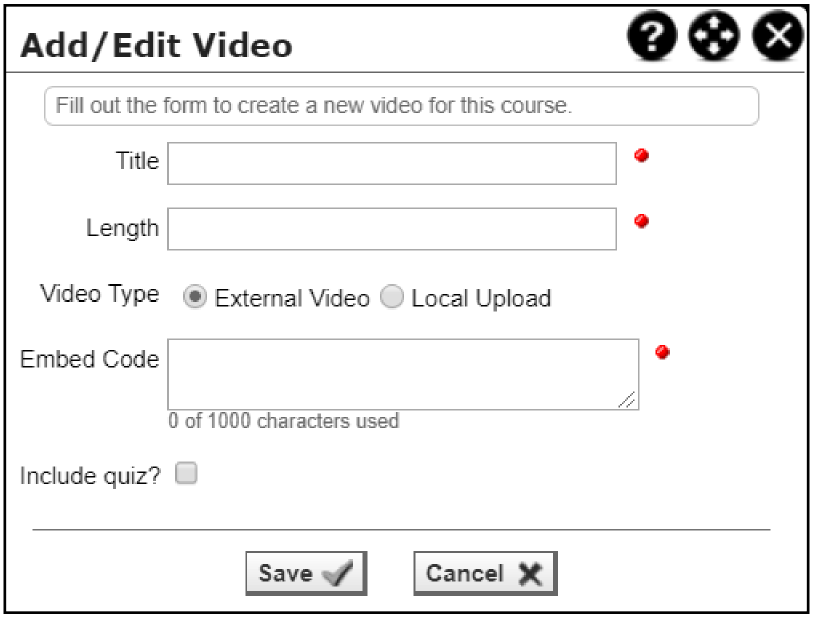
In the grid listing videos:

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



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.

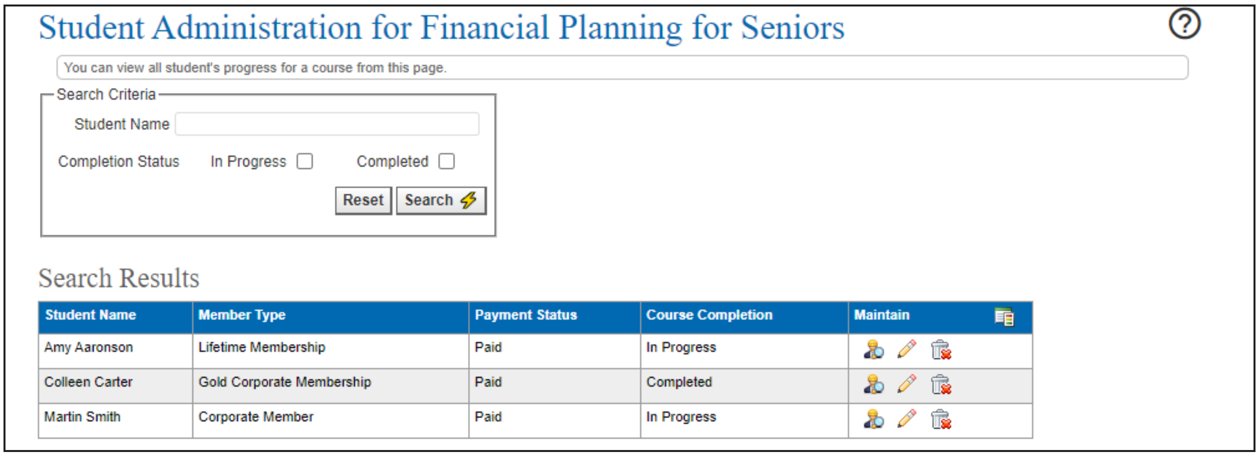
  > **Note:** To designate a correct answer, use a % symbol ahead of the answer.

  > **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



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.

View Answers

Use this screen to view your quiz answers.

Click the Cancel button when you are done.

Expense Reimbursements

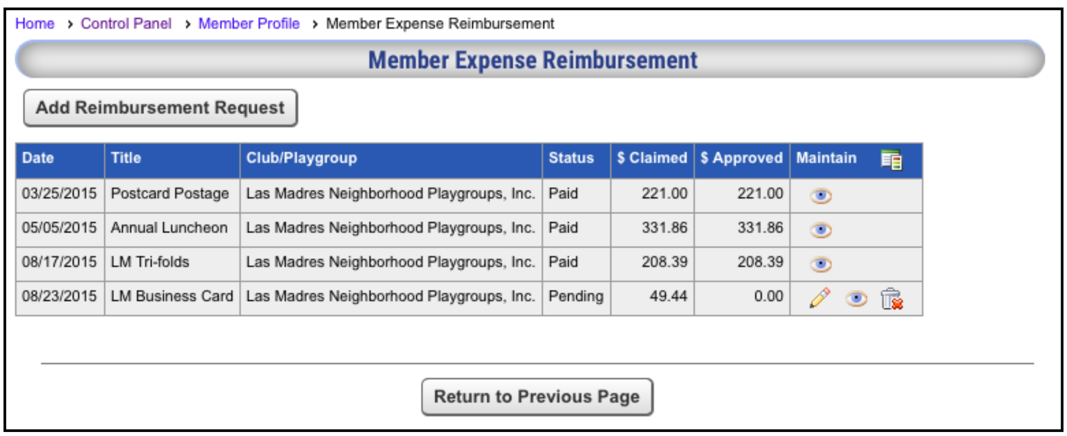
The Expense Reimbursement System provides a way for members to submit reimbursement requests on the club's website and for administrators to approve the requests and record payment information for them.

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:


Home › Control Panel › Member Profile › Member Expense Reimbursement

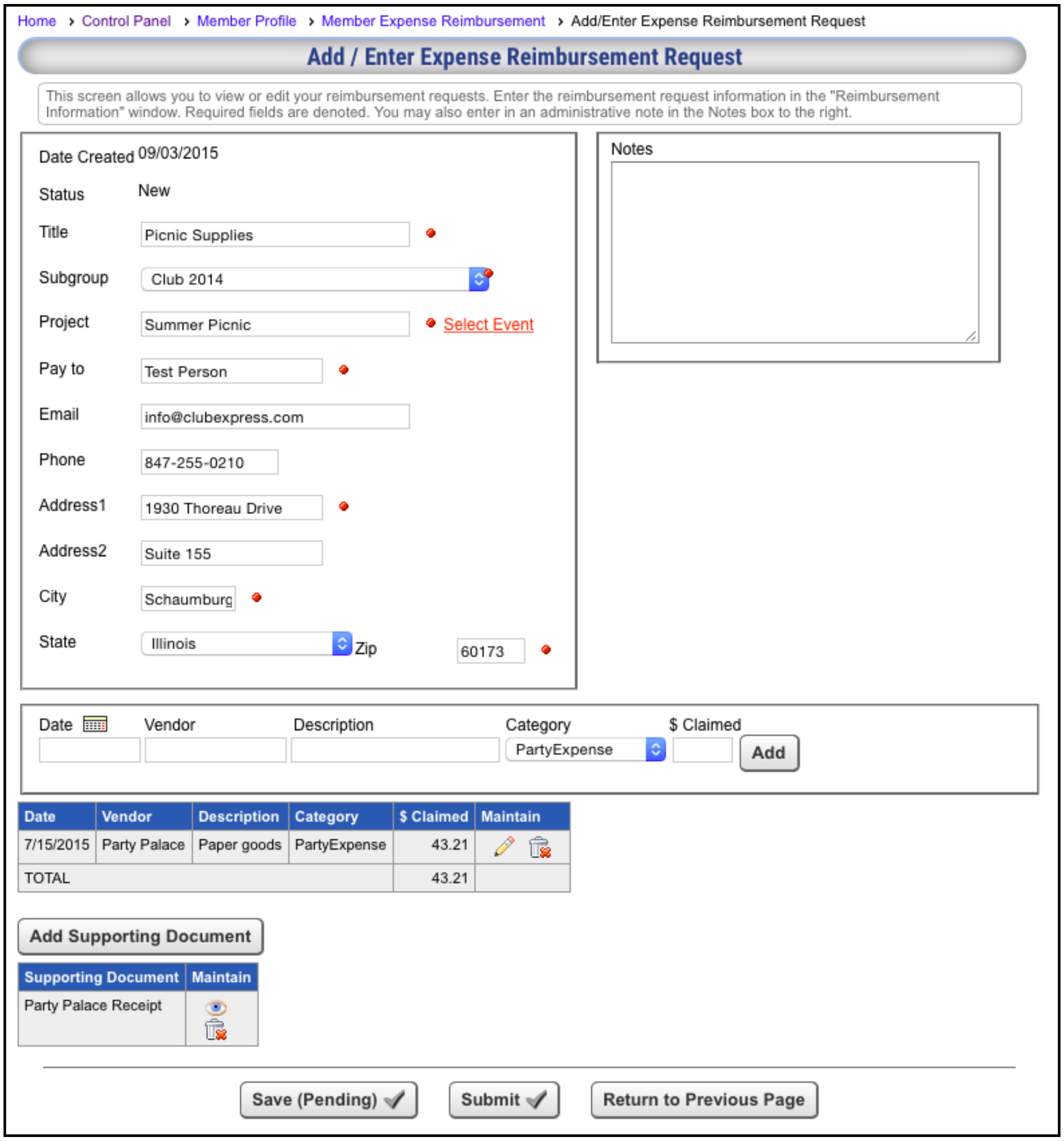
Member Expense Reimbursement

Add Reimbursement Request

Date	Title	Club/Playgroup	Status	$ Claimed	$ Approved	Maintain
03/25/2015	Postcard Postage	Las Madres Neighborhood Playgroups, Inc.	Paid	221.00	221.00	
05/05/2015	Annual Luncheon	Las Madres Neighborhood Playgroups, Inc.	Paid	331.86	331.86	
08/17/2015	LM Tri-folds	Las Madres Neighborhood Playgroups, Inc.	Paid	208.39	208.39	
08/23/2015	LM Business Card	Las Madres Neighborhood Playgroups, Inc.	Pending	49.44	0.00	

Return to Previous Page

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:



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.

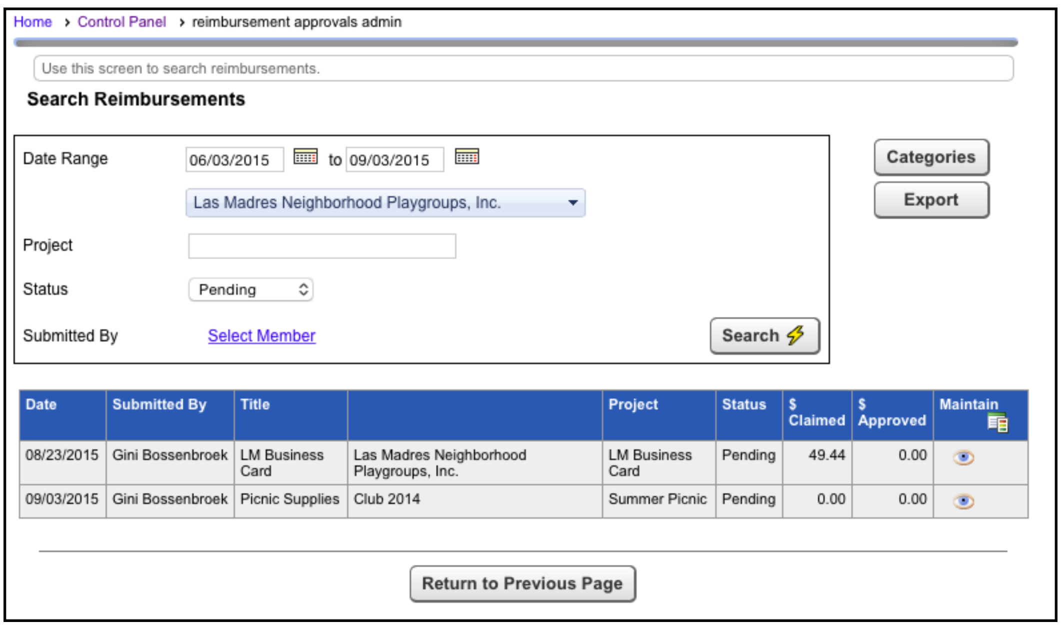
The bottom of the screen displays a section that allows users to upload one or more supporting documents. Clicking the **Add Supporting Document** button displays a screen to enter a title for that document and to select it from your local hard disk. Almost any file type can be uploaded.

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:



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

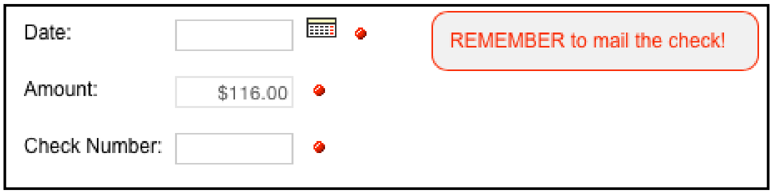
Members cannot approve their own requests, even if they are configured as administrators. Approvals must be handled by another administrator.

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:



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

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.

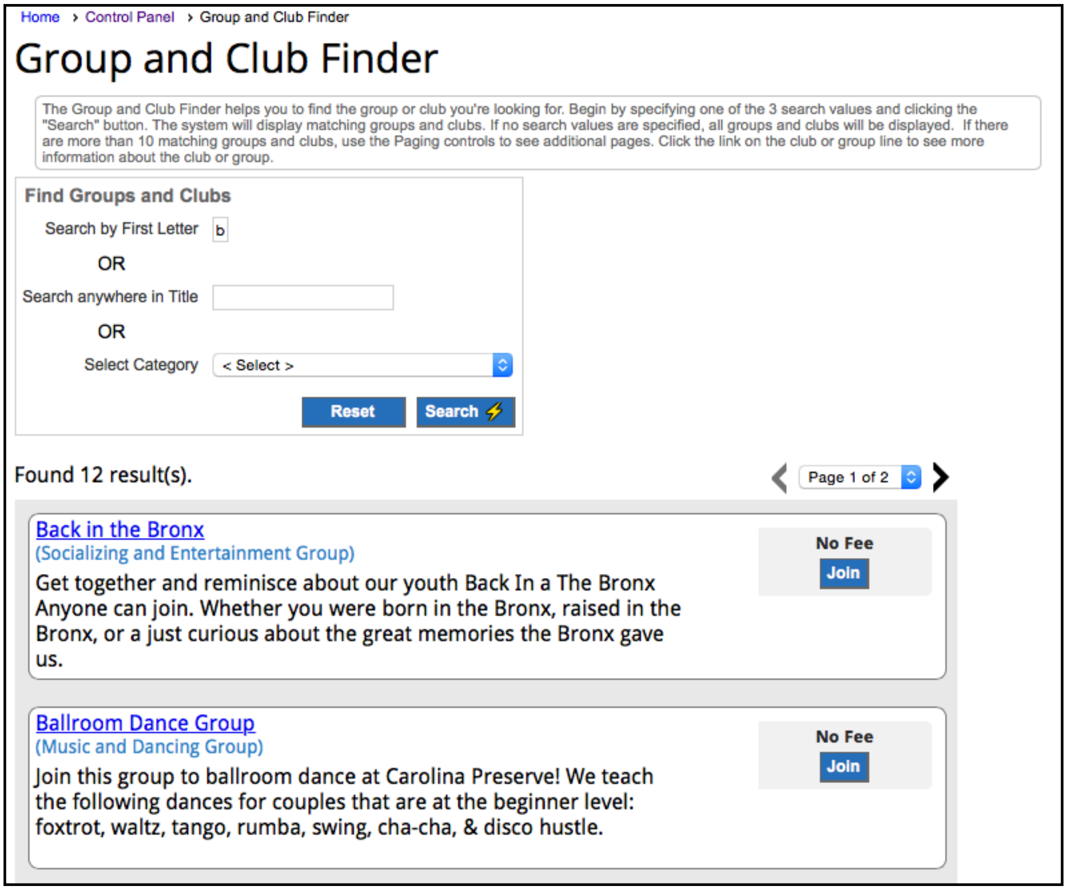
> **Administrators:** This module does not have an admin side, only a user side that can be placed on the public or members’ side of the website. On the public side of the website, it promotes the various groups within the club that members can join.

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:



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

This module allows professional and trade associations to post available jobs that members (and optionally non-members) can view.

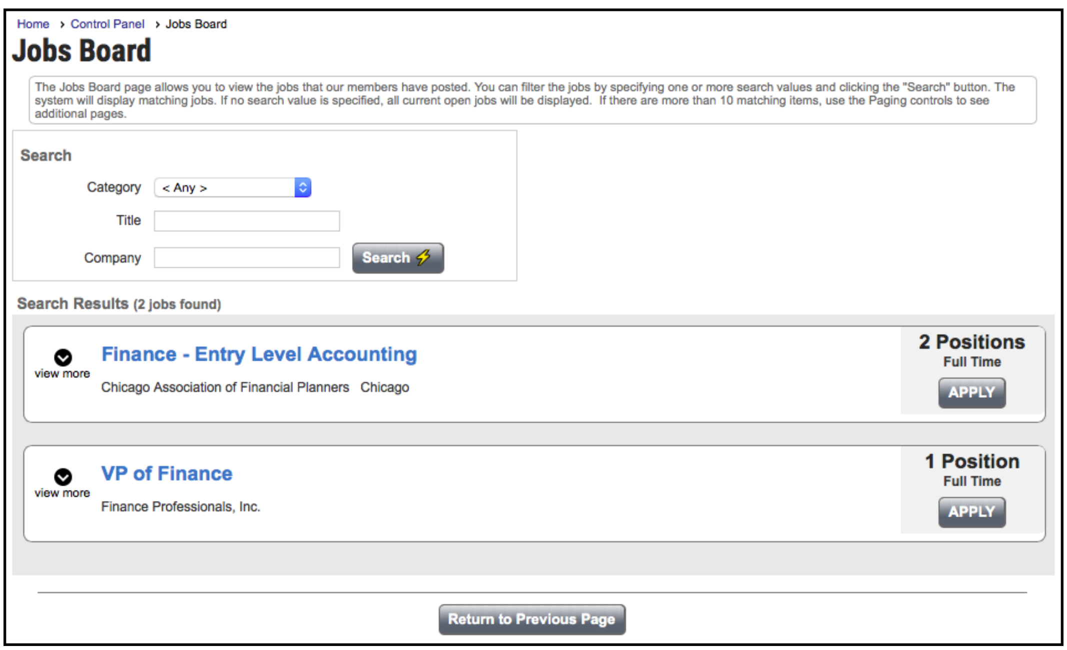
The system allows members to post jobs that may or may not immediately become visible. There may be a fee to post a job and jobs will be visible for a defined period of time, with the option to renew a listing. The module does not currently support non-members directly posting jobs.

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

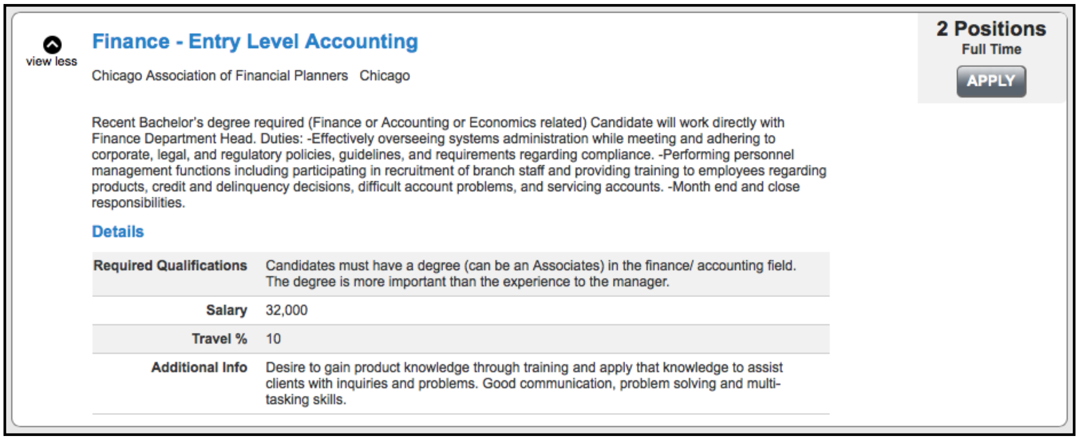
When users access the Jobs Board they will see a screen similar to the following:



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:

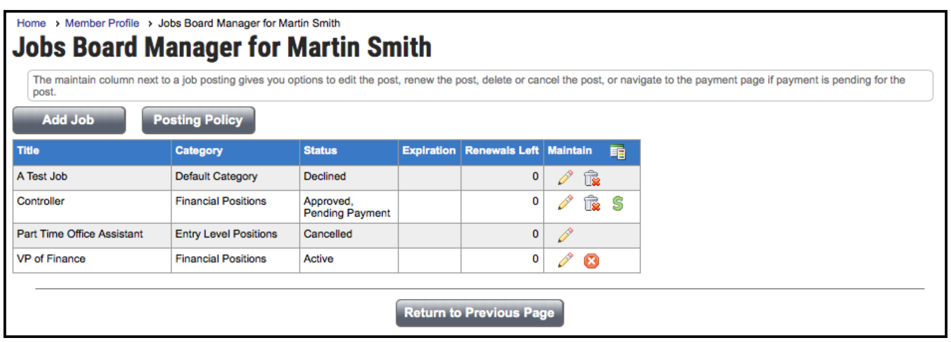


The icon changes to **View Less** to collapse this job and view another.

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 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

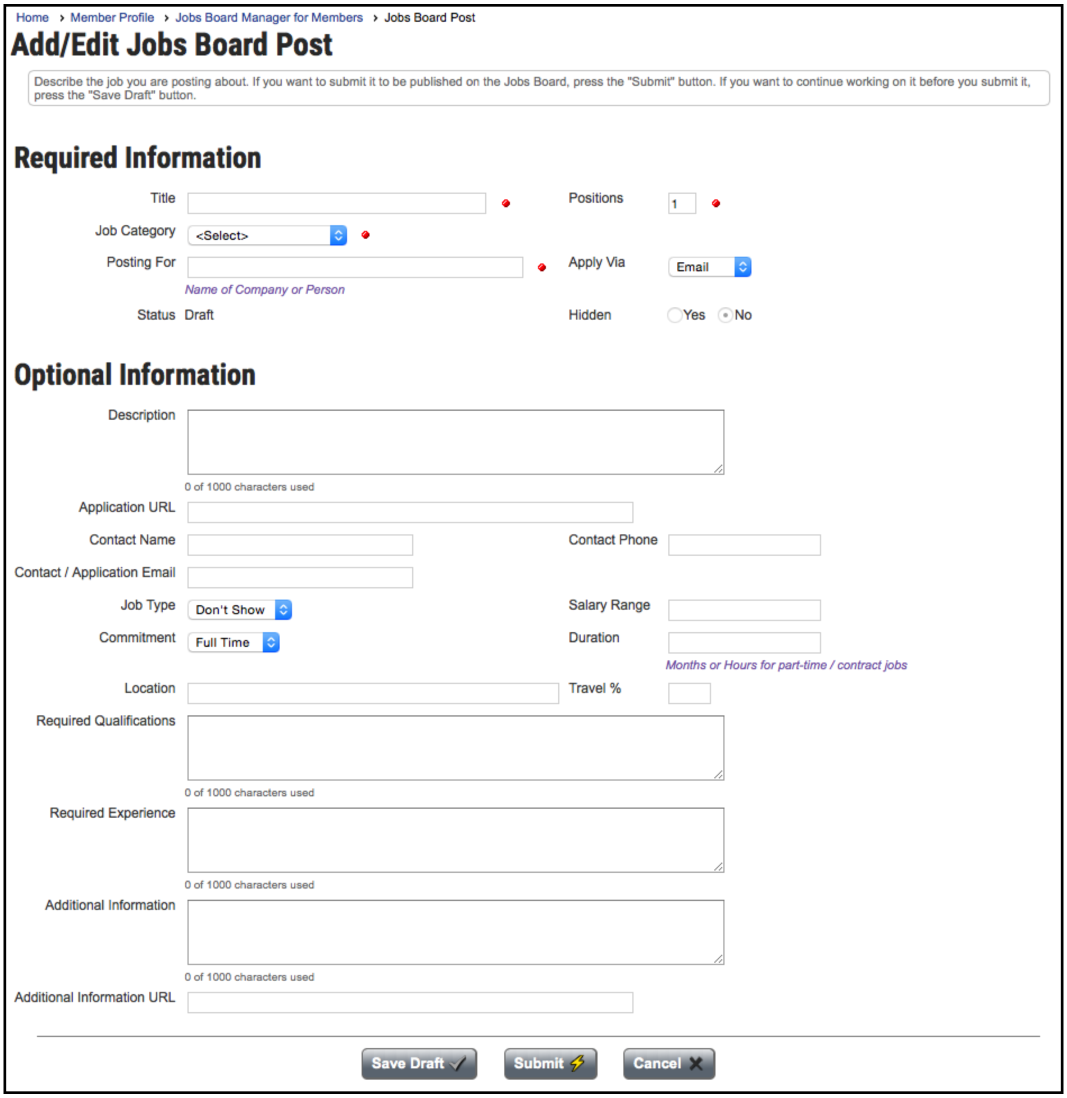
The following options can be found in the Maintain column:

Icon	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.
(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:



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.

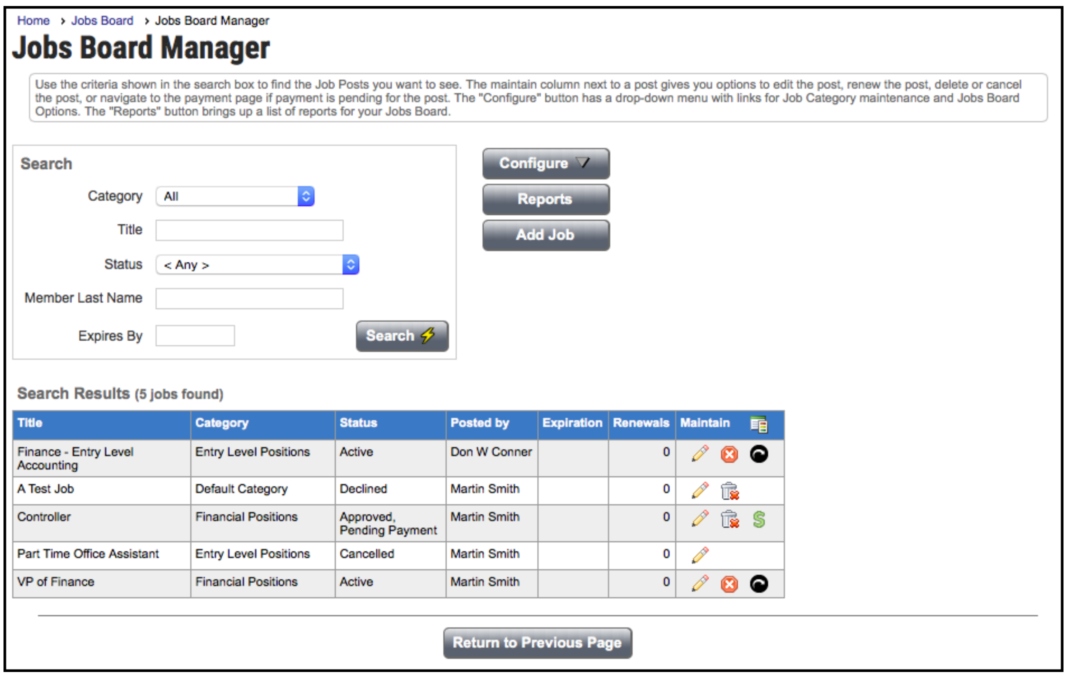
Click the **Cancel** button to close the Add/Edit form without saving your changes.

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 **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

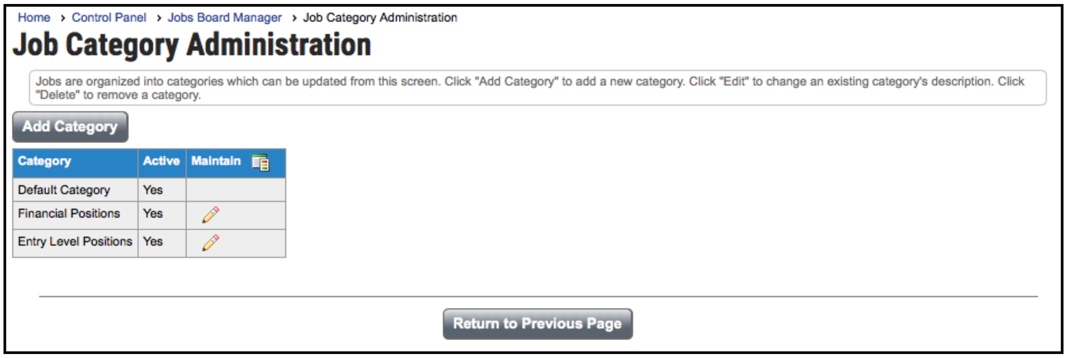
The following options can be found in the Maintain column:

Icon	Description
(Edit)	**Edit** this job description.
(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.
(Payment Pending)	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

Configure – Job Categories

Select this option to define categories into which jobs can be posted. You will see a screen similar to the following:



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.

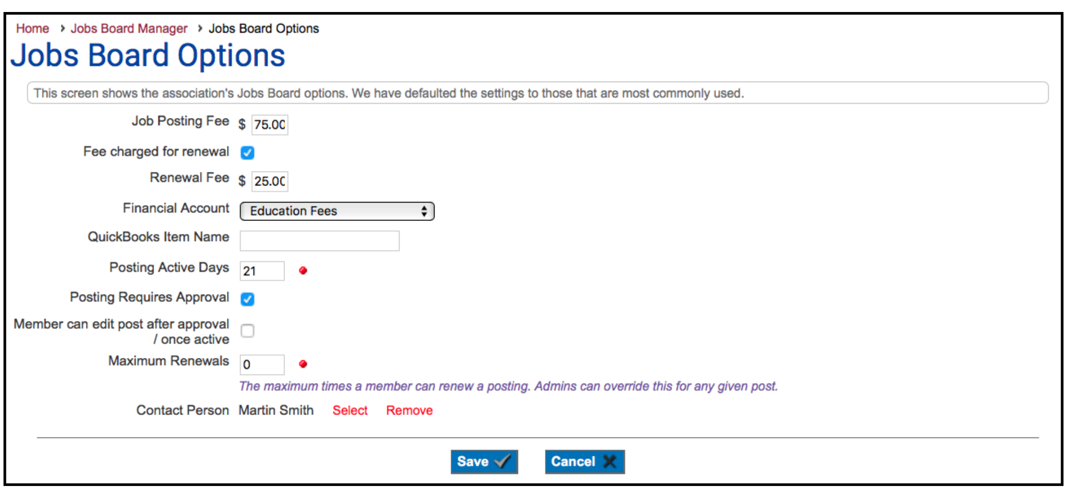
Individual categories can be activated or deactivated. Use this option if you no longer want a category to appear but it cannot be deleted completely.

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:



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.)

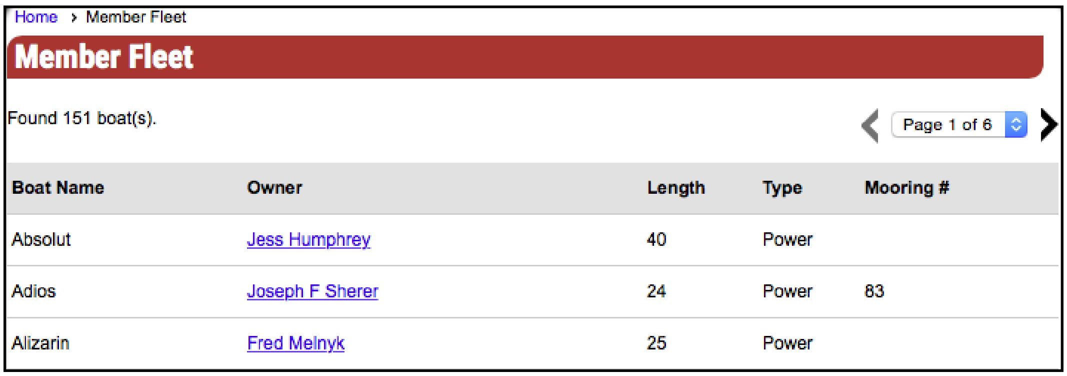
Member Fleet (for Sailing/Yacht Clubs)

> **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.

Usage

When this module is added to the menu, clicking it displays a screen similar to the following:



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

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

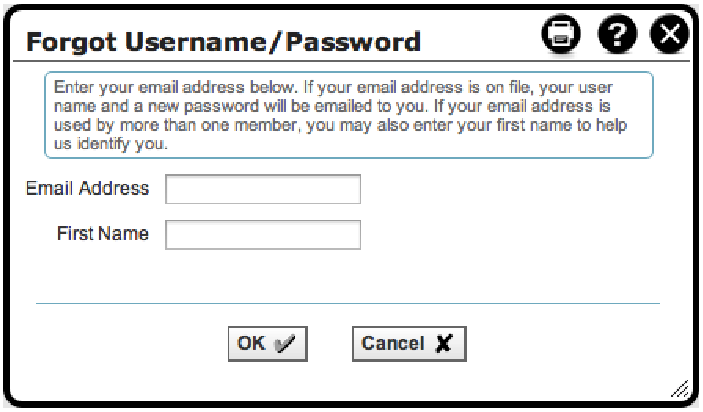
Tap the app to open it. You will see a splash screen and then the login screen.

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:



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.

Mobile App


●●○○○ Verizon
9:32 AM
97%
COME FLY WITH US
LARGEST FLEET, BEST FAMILY EVENTS.
JOIN TODAY


COMMITTEE NEWS
The Education Committee is planning an Intermediate class for the fall, designed for members who want to achieve a class C license.
Channels
Meets
Directory
Chat
Events
Polls

COMMITTEE NEWS

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.

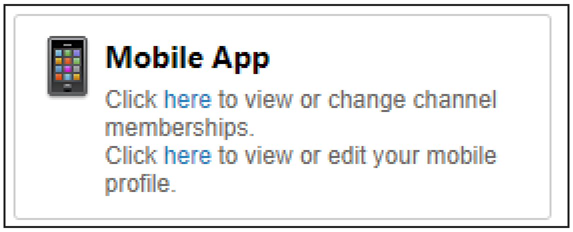
Your Info

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.

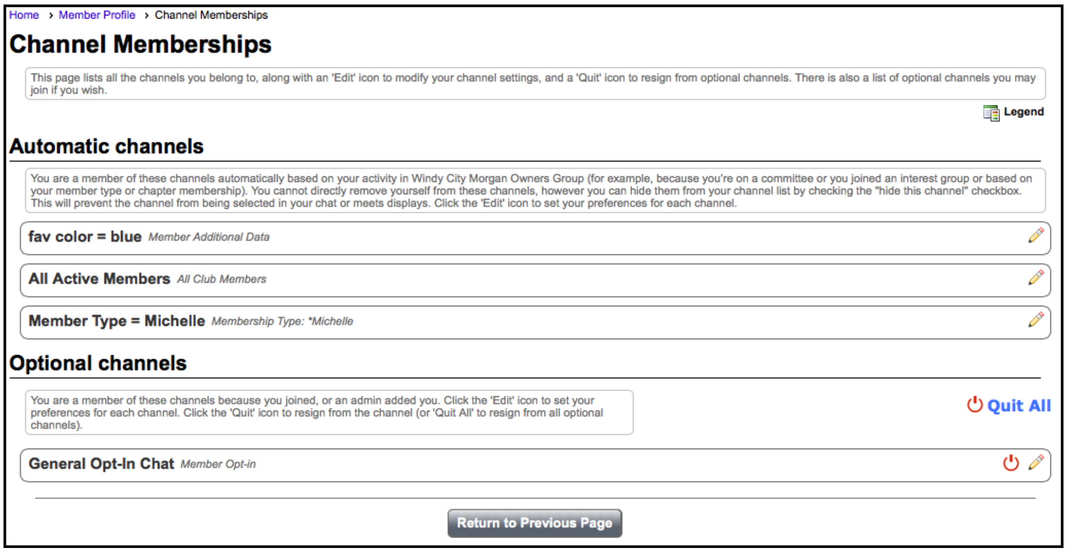
Customizing Your Experience

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

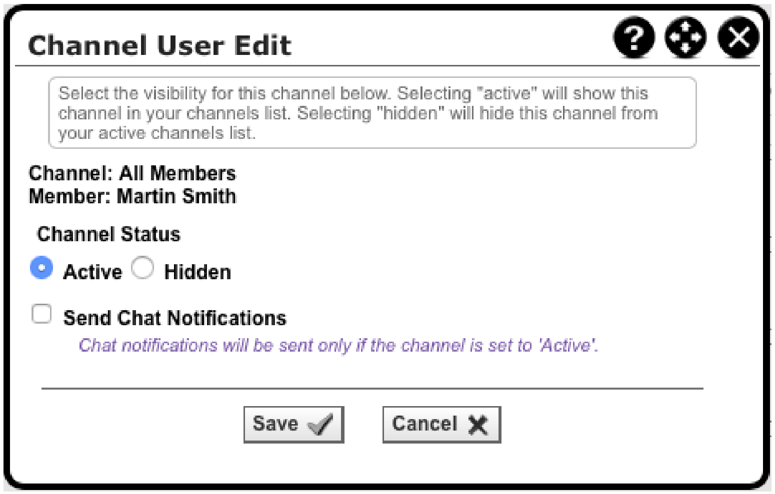


This screen lists the Automatic Channels you are a member of based on some fixed criteria:

- 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:



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

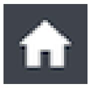
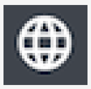
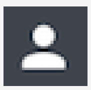
Select this option to modify your profile in the Mobile App. You will see the following screen:

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.

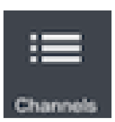
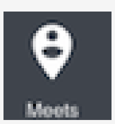
Click **Save** to save your changes and return to the Profile screen, or **Cancel** to return without saving.

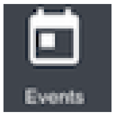
Across the top of the screen are icons to perform the following functions:

Icon	Description
	Return to the home screen.
	Display the menu from your club or association website. This option allows you to navigate to other pages on the website.
	Display a drop-down menu allowing you to view the Terms of Use, Privacy Policy, and About screens.
	Display a drop-down menu allowing you to access your Profile screen, download virtual membership cards (if this option has been enabled) or logout.
	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.

Icon	Description
	Select a **Channel** to use for the other functions along the bottom of the screen.
	Display a map showing other members of the current channel who are interested in **meet-ing** each other.
	View a **Directory** of other channel members.
	**Chat** with other channel members.

Icon	Description
	View and create Quick **Events** specifically for your channel members.
	Create and respond to quick **Polls** specifically for your channel members.

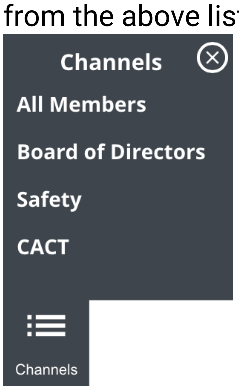
Icons - Bottom

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.



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.

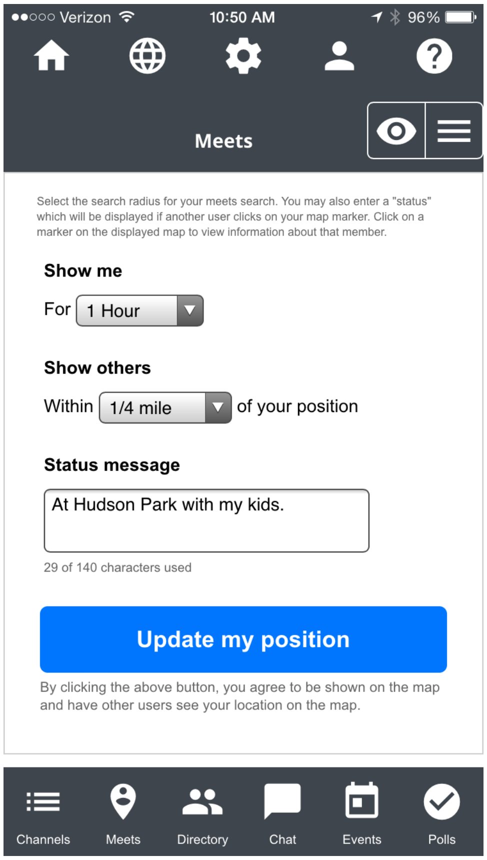
By selecting **Profile – Mobile Apps – Channel Memberships**, members can choose to be a part of any channel that is available to them.

> **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:

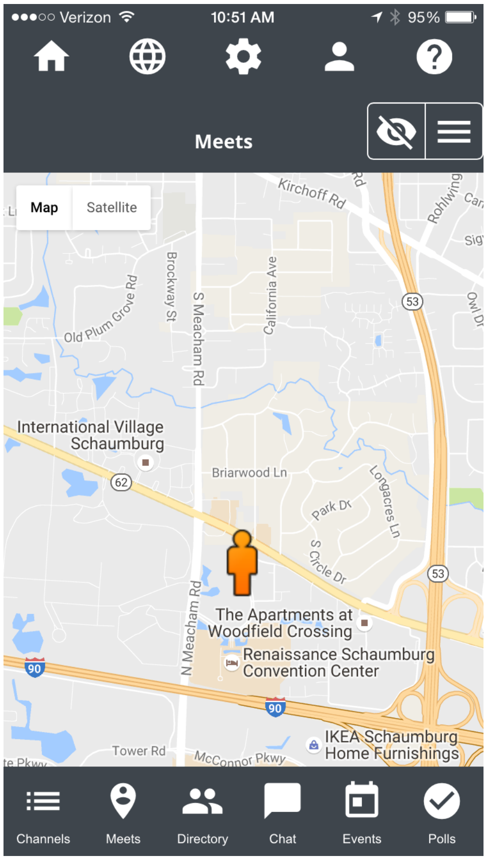


Specify for how long you want to be visible on the Meets map. Once this time is up, you will no longer be shown. You can configure visibility up to 24 hours.

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.

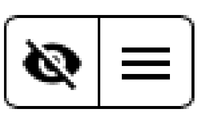


When you tap another channel member's icon, you will see a small popup window showing the following information:

- 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.)

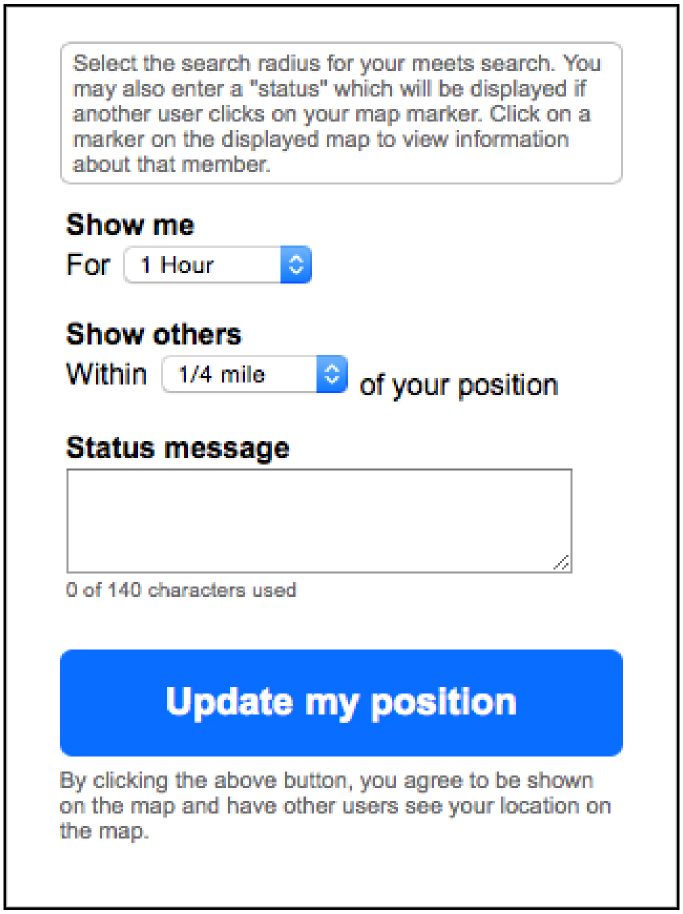
Meets Options

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:



Specify how long you want yourself to be visible. Also specify the default radius within which other channel members will be shown.

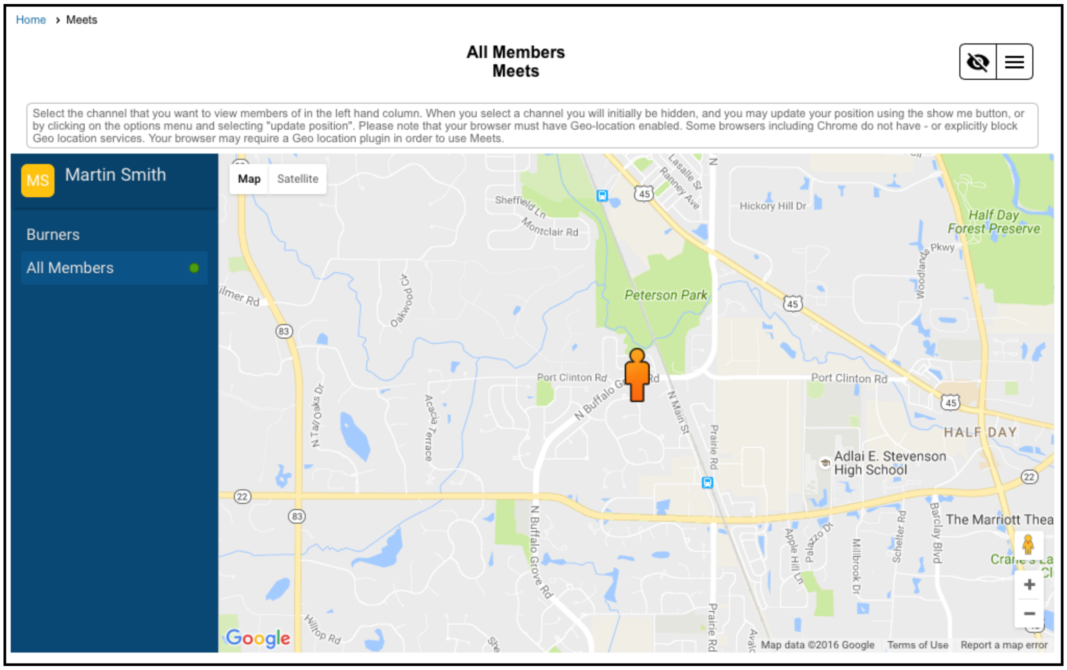
You can enter a short status message that will be shown to other channel members when they click or tap your icon on the map.

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.

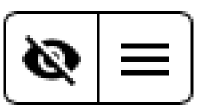
When you select this option you will see a screen similar to the following (but hopefully with many more visible icons!):



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.



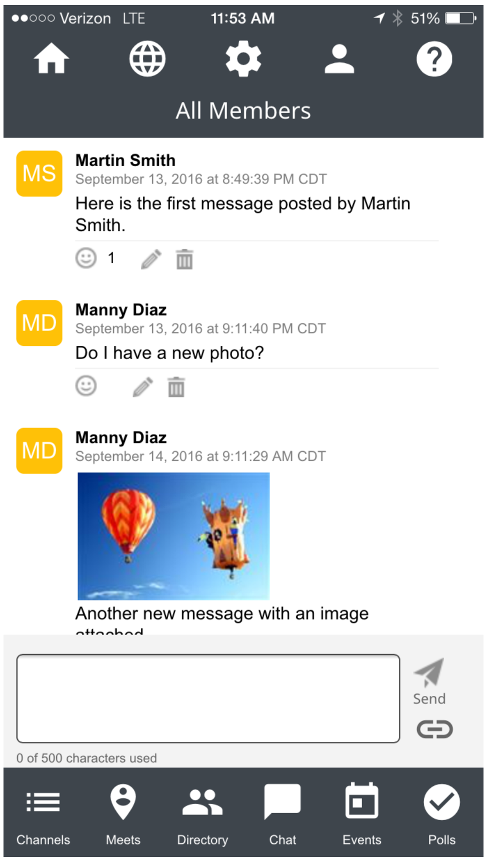
Click the left icon to toggle between Visible and Not Visible. It shows the status you want to change to (the opposite of your current status.)

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.

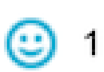
Chat

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.

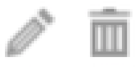


Each message is shown with the member’s avatar or initials, their name, and the date and time when the message was posted. If an image was uploaded with the message, it is shown above the message text.



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.

A **Flag** icon also appears below each message. Tap the icon to report a message to your organization's administrators.



Standard **Edit** and **Delete** icons appear for messages you have posted, allowing you to modify or remove these messages. (They also appear on every message for members with admin rights in the Chat module.)

Entering a New Message

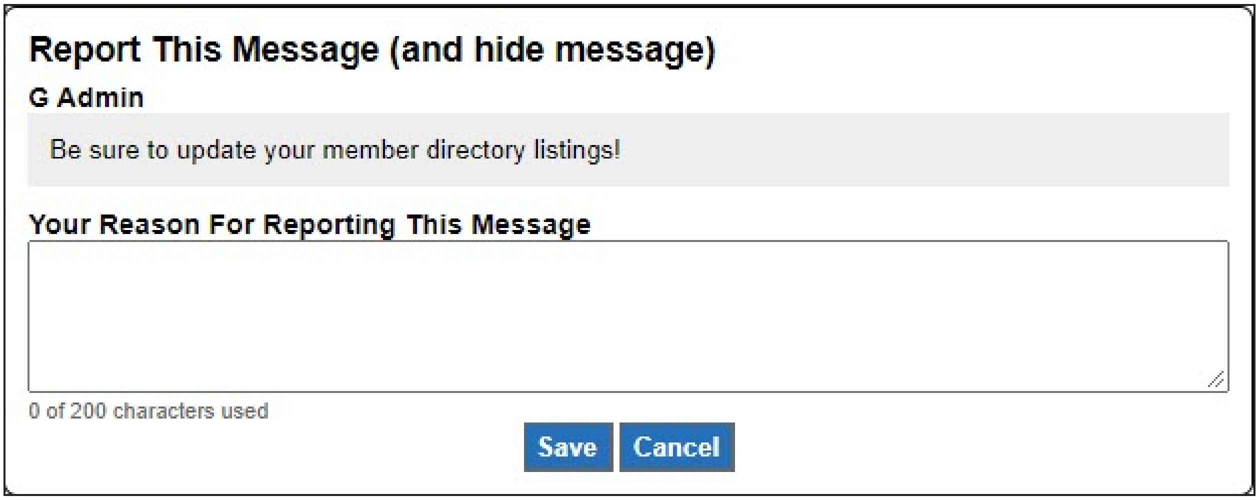
Enter your message text (up to 500 characters) in the box provided. There is no formatting but the system will recognize the **[Enter]** key to start a new line or paragraph break. Tap the **Send** icon to post your message to the chat, where it will immediately appear for any other member currently 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.



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'.

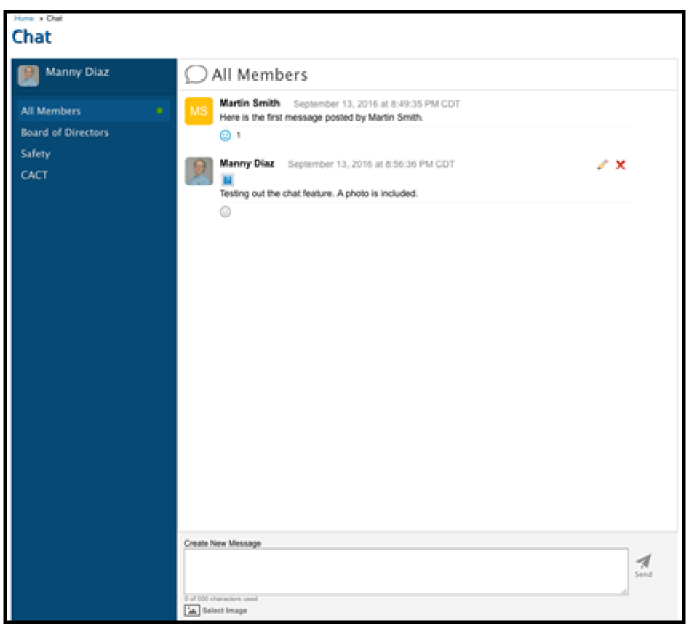
Multiple notifications from the same channel will be handled differently:

- 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.

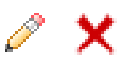
Each message is shown with the member's avatar/initials and handle, as well as the date and time that the message was posted. The message may include a single photo or image, as well as links channel events, polls, or external websites (for example, a Facebook post.)

Click the Like icon to like this message. Members can also click the count of likes to see who else liked the message.

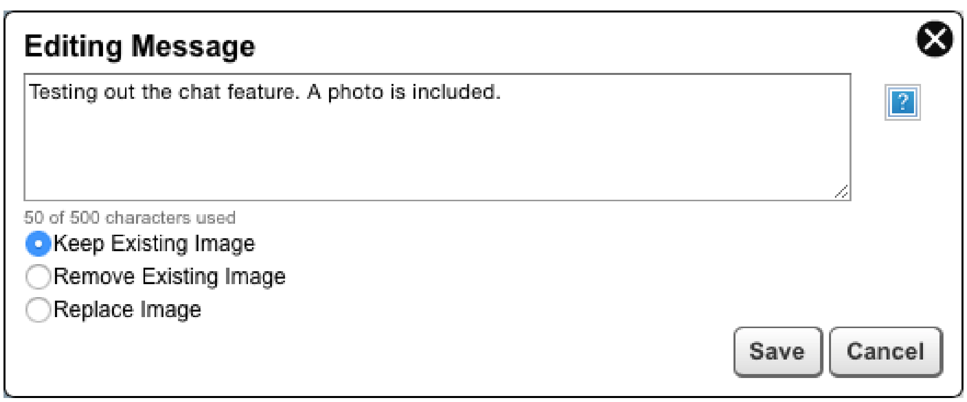
At the bottom is a text box to enter a new chat message. Enter the text and click the Send icon to send the message. You can also click the **Select Image** option to upload an image from their local computer and add it to the chat message. There is no formatting but members can easily add emojis to 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:



You can edit the message text in the top section, perhaps to remove offensive or incorrect statements.

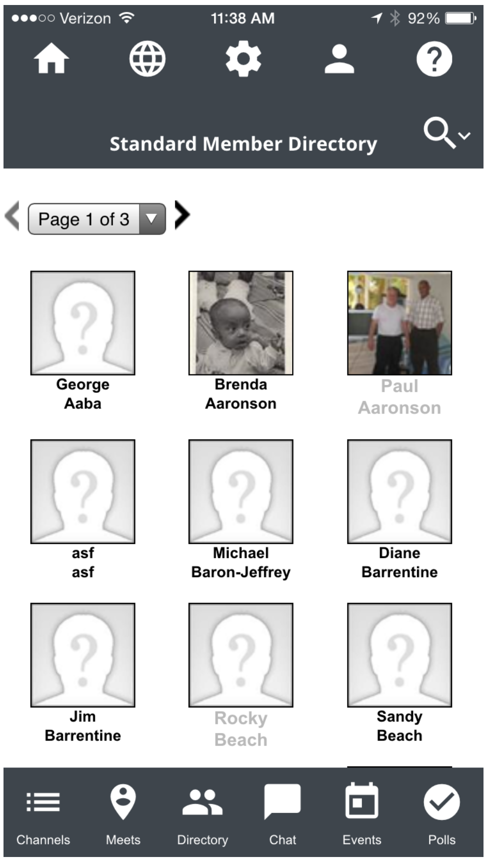
If an image was added to the message, you have the option of keeping the existing image, removing it, or replacing it with something else. When you select the **Replace Image** option, an icon appears, allowing you to select another image from your local hard disk.

Click **Save** to save your changes and return to the Chat panel, or **Cancel** to close this window without saving.

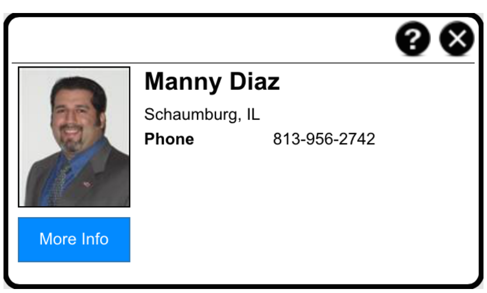
There is also a **Delete** icon to remove a message completely. You will be prompted to confirm this action. Note that for archival and legal reasons, messages are not actually deleted. Rather, they are flagged as deleted so that they are never shown, but retained in the database.

Directory

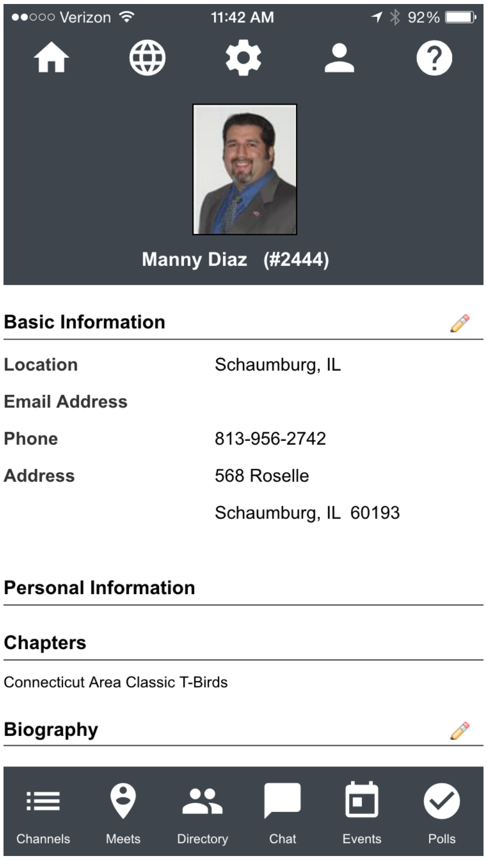
Tap the Directory icon to see a list of channel members.



Tap the photo or silhouette (if no photo was uploaded) to see a popup window showing more information about that channel member:



Tap the **More Info** button to see the full bio page:



Tap the Directory icon to return to the channel directory.

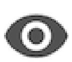
The directory also includes a Search function. Tap the magnifying glass icon in the top right corner to display a popup panel allowing you to search in a number of different ways.

> **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

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.

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

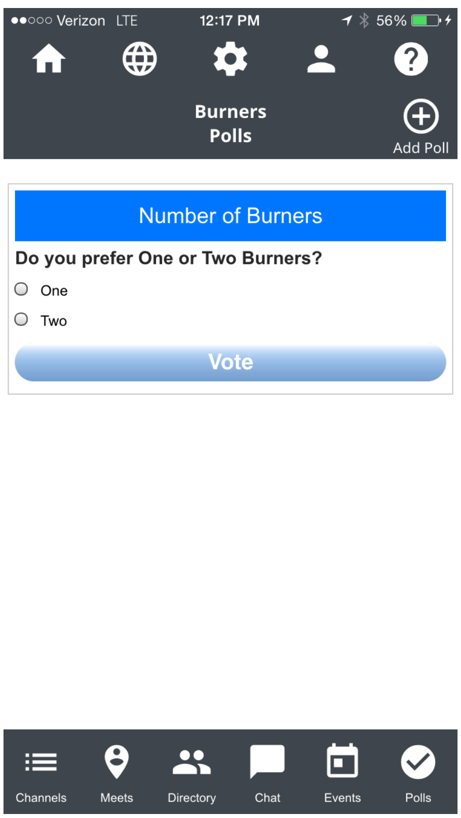
When you tap **Add QuickEvent** (see "Create a QuickEvent" on page 786), the Create QuickEvent screen is displayed. It allows you to specify the properties of a quick event, including:

- 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 usersfor 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

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.

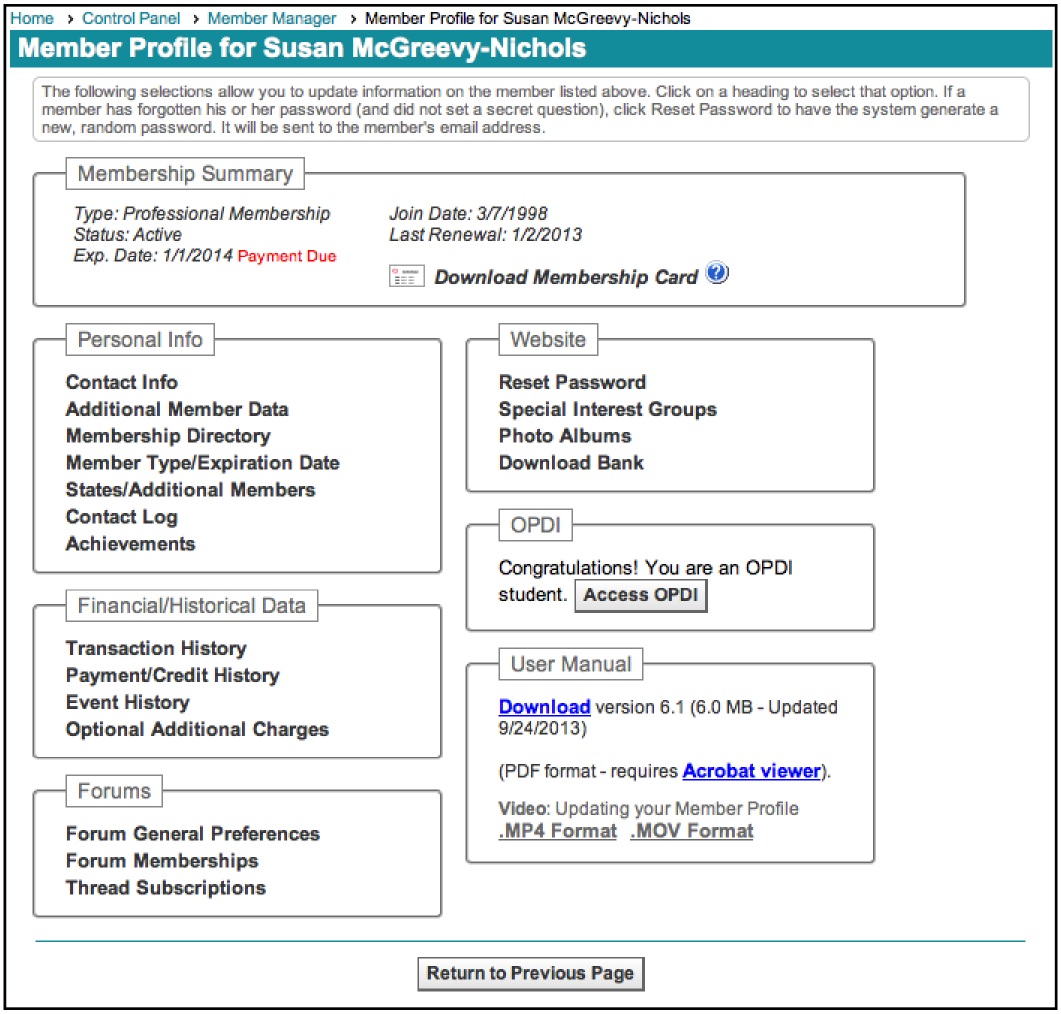
Courses are presented online using the Sakai Learning Management System (LMS), an open-source platform that is one of the most respected LMS's available. This module interfaces with an instance of Sakai managed by the LAMP Consortium (http://lampschools.org).

> **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:

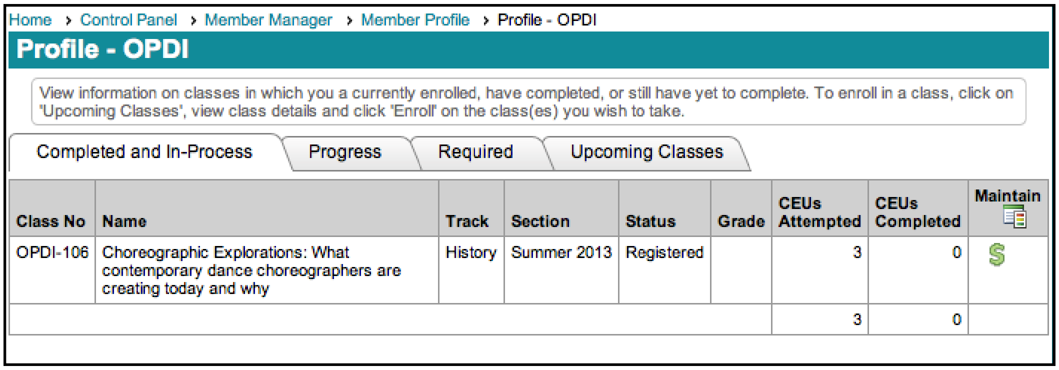


The OPDI panel will show different text and options based on the member's status in OPDI:

- 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:


Home › Control Panel › Member Manager › Member Profile › Profile - OPDI

Profile - OPDI

View information on classes in which you a currently enrolled, have completed, or still have yet to complete. To enroll in a class, click on 'Upcoming Classes', view class details and click 'Enroll' on the class(es) you wish to take.

Completed and In-Process | Progress | Required | Upcoming Classes

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	
						3	0	

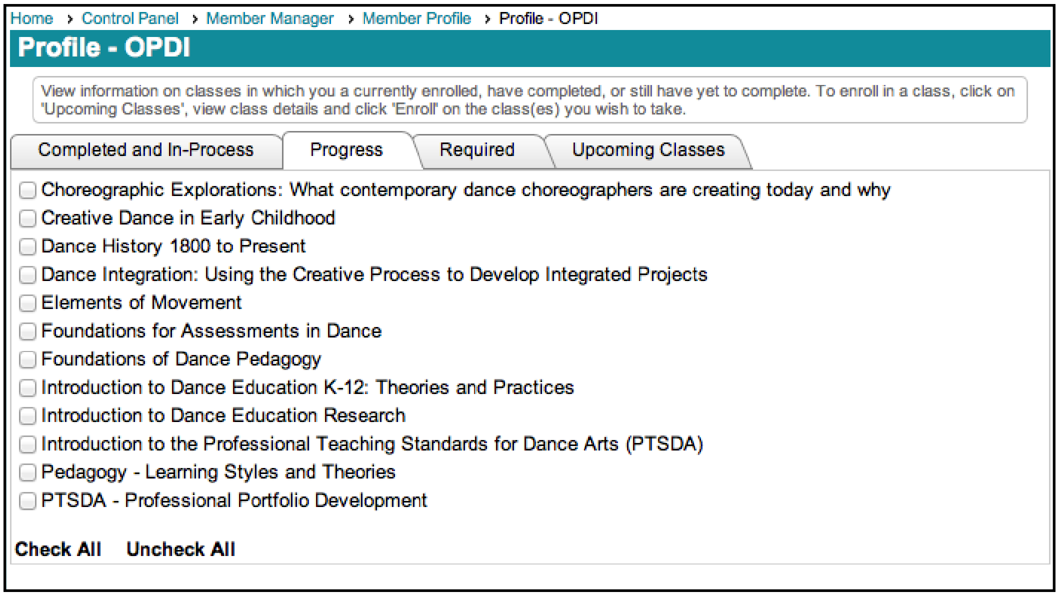
This screen shows completed and in-process classes, including the class no, name, and track, section and status, grade and CEUs for completed classes. For classes where the status is In Process, clicking the Access Sakai icon jumps the user over to Sakai, logged in and accessing the learning space for 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.

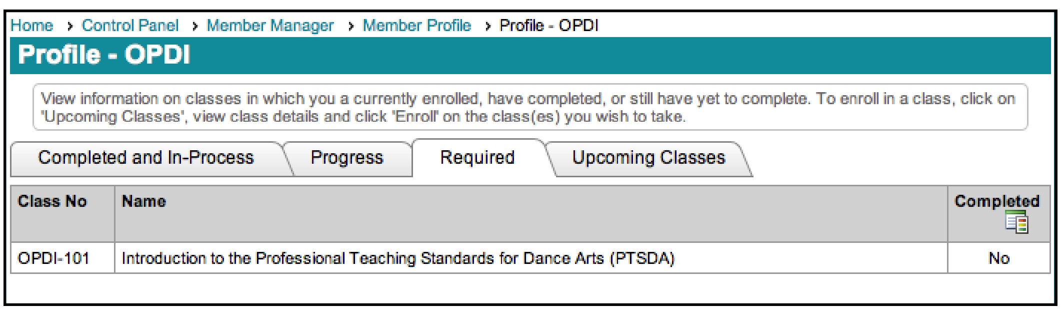
Progress Classes



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.

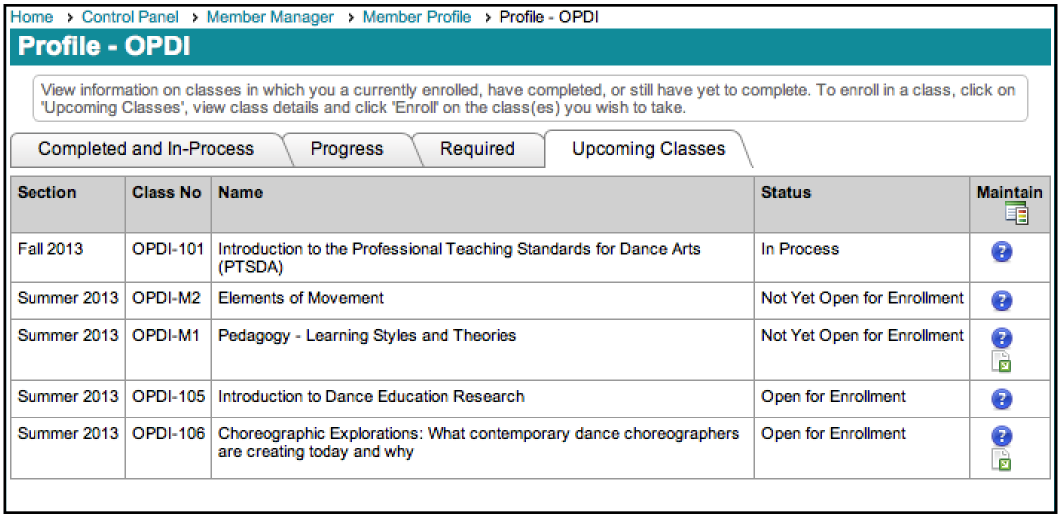
Required Classes



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


Home › Control Panel › Member Manager › Member Profile › Profile - OPDI

Profile - OPDI

View information on classes in which you a currently enrolled, have completed, or still have yet to complete. To enroll in a class, click on 'Upcoming Classes', view class details and click 'Enroll' on the class(es) you wish to take.

Completed and In-Process | Progress | Required | Upcoming Classes

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	
Summer 2013	OPDI-M1	Pedagogy - Learning Styles and Theories	Not Yet Open for Enrollment	
Summer 2013	OPDI-105	Introduction to Dance Education Research	Open for Enrollment	
Summer 2013	OPDI-106	Choreographic Explorations: What contemporary dance choreographers are creating today and why	Open for Enrollment	

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

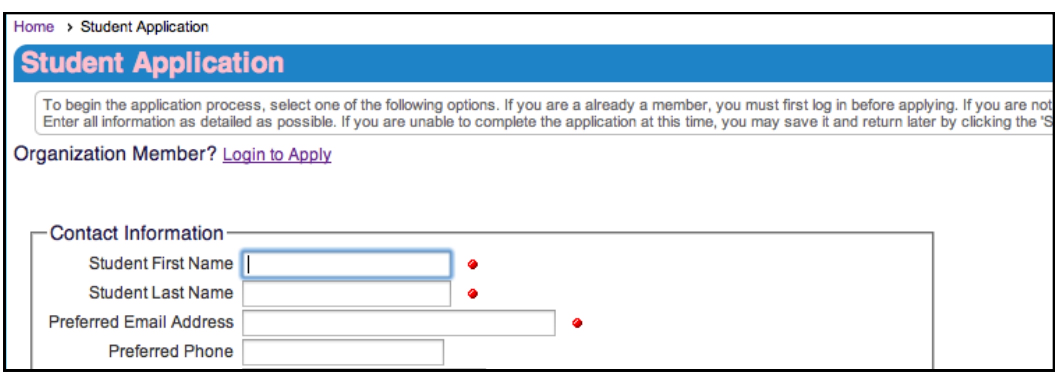
The O

PDI application form can be placed anywhere on the website. Its title is **OPDI Application**.

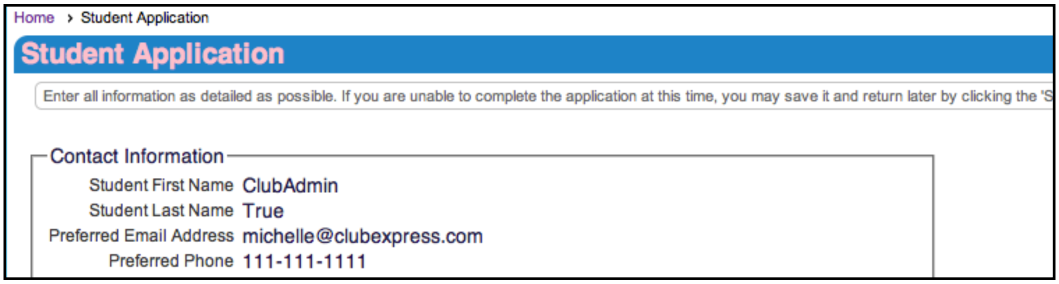
It can be found in the list of available modules and pages when you are building a menu or submenu. It can also be found in the list of Built-in Modules in the Link Builder, available in the advanced content editor.

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.



Members will see this version of the same screen, with their contact information already filled in.



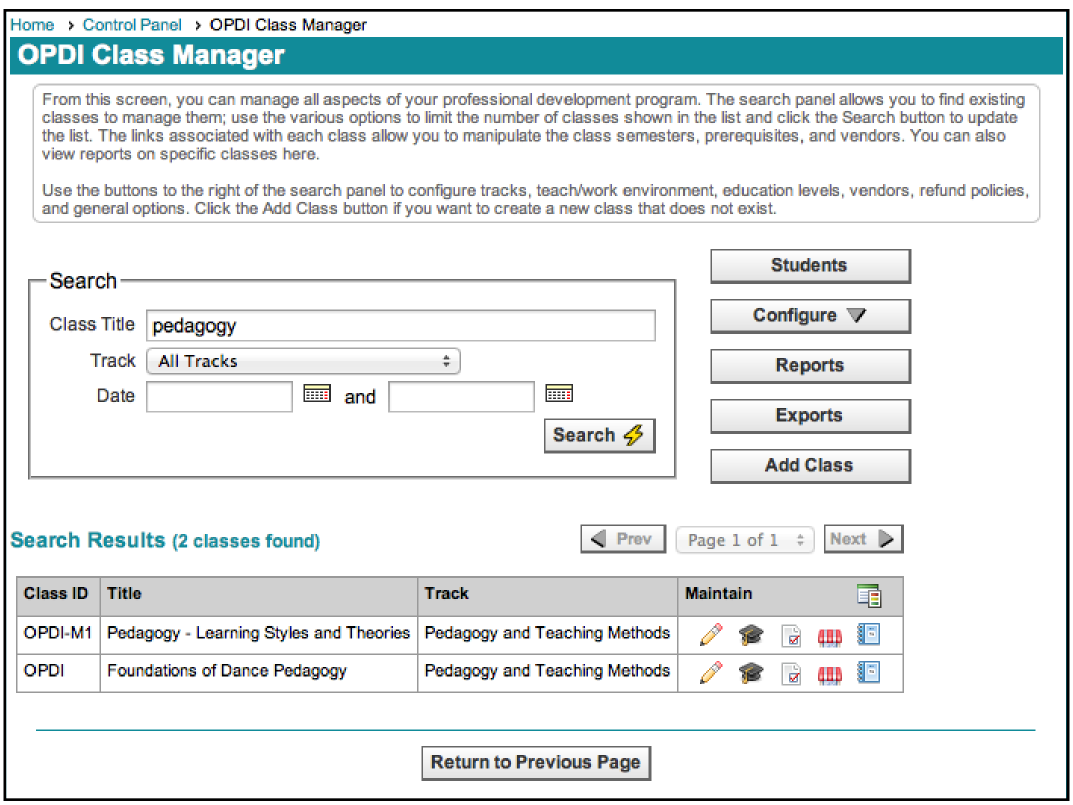
Class Manager

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:



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.

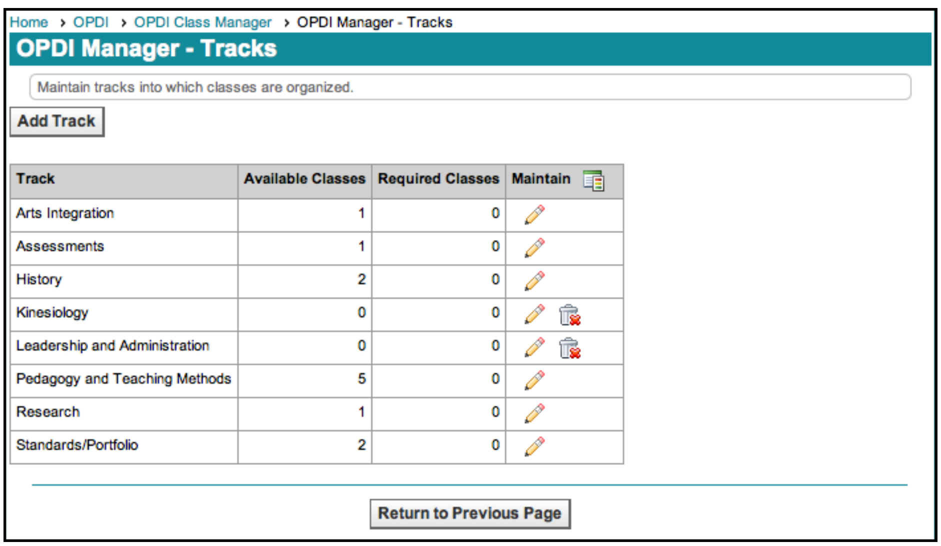
Click the **Students** button to switch over the Students side of OPDI.

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 Manager › OPDI Manager - Tracks

OPDI Manager - Tracks

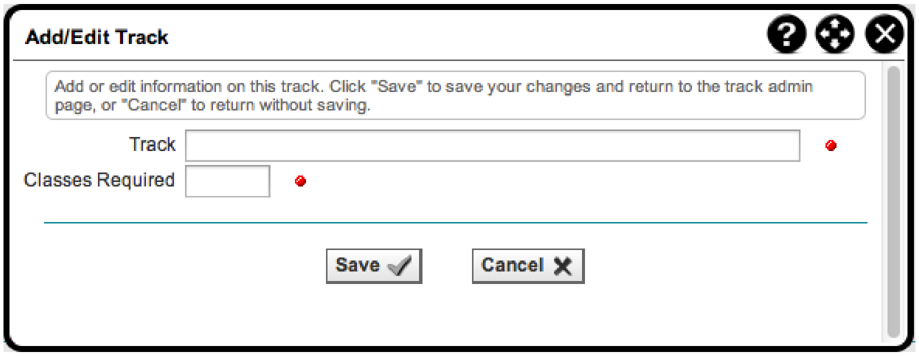
Maintain tracks into which classes are organized.

Add Track

Track	Available Classes	Required Classes	Maintain
Arts Integration	1	0	
Assessments	1	0	
History	2	0	
Kinesiology	0	0	
Leadership and Administration	0	0	
Pedagogy and Teaching Methods	5	0	
Research	1	0	
Standards/Portfolio	2	0	

Return to Previous Page

When you click **Add Track**, the following screen appears:



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

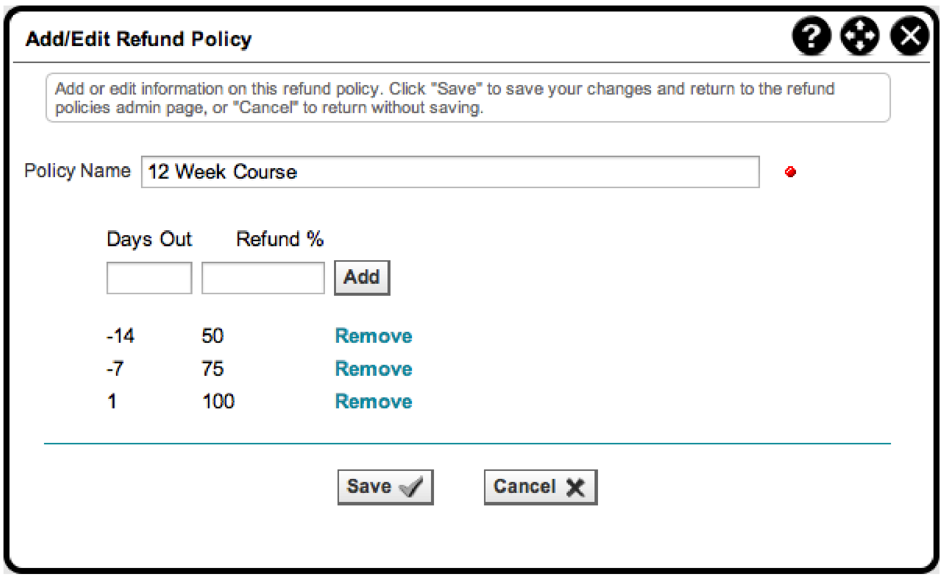
Select **Primary Place of Employment** to modify the lookup list of employment types. Includes an “Active” flag.

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:



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.

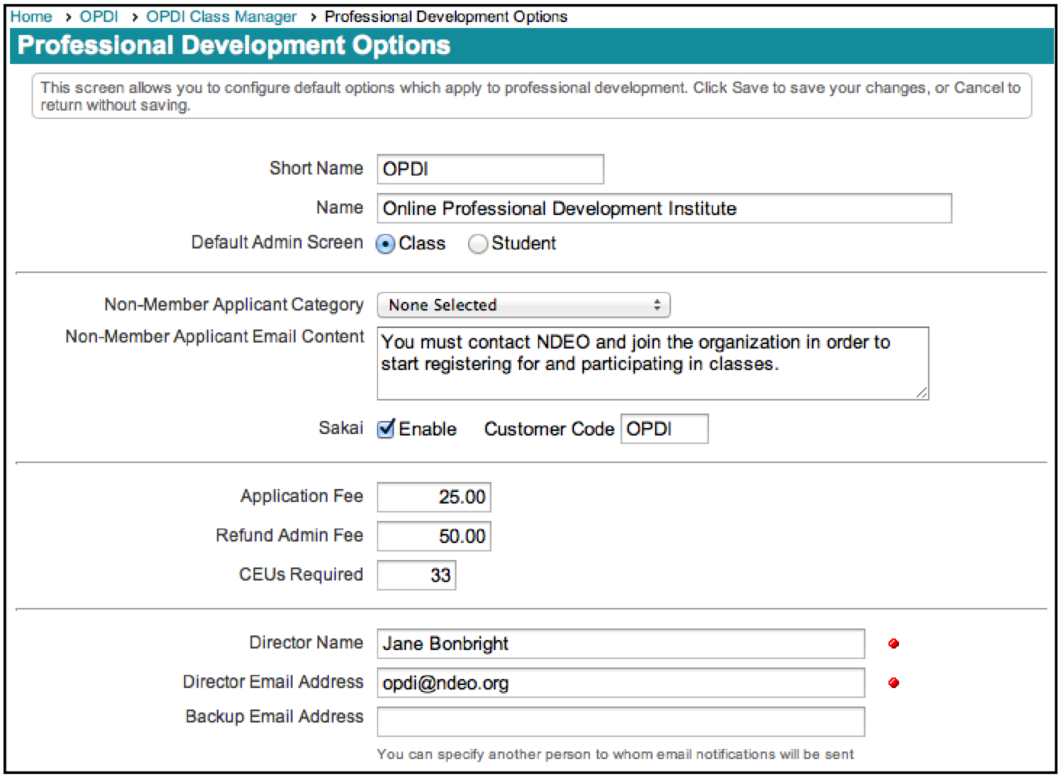
When you have finished, click **Save** to save your refund policy and return to the main list of policies, or **Cancel** to return without saving.

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:



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.

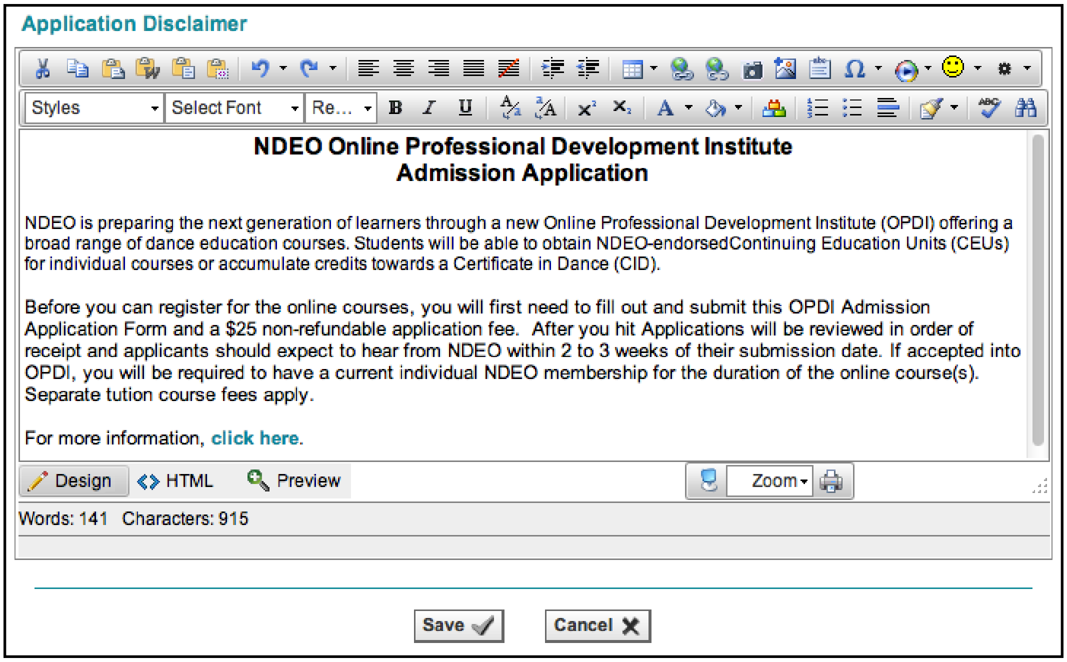
Non-Member Applicant Category is used when non-members first apply to take OPDI courses. The Email Content field specifies custom text that is added to the confirmation email when a non-member application is received.

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.



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)

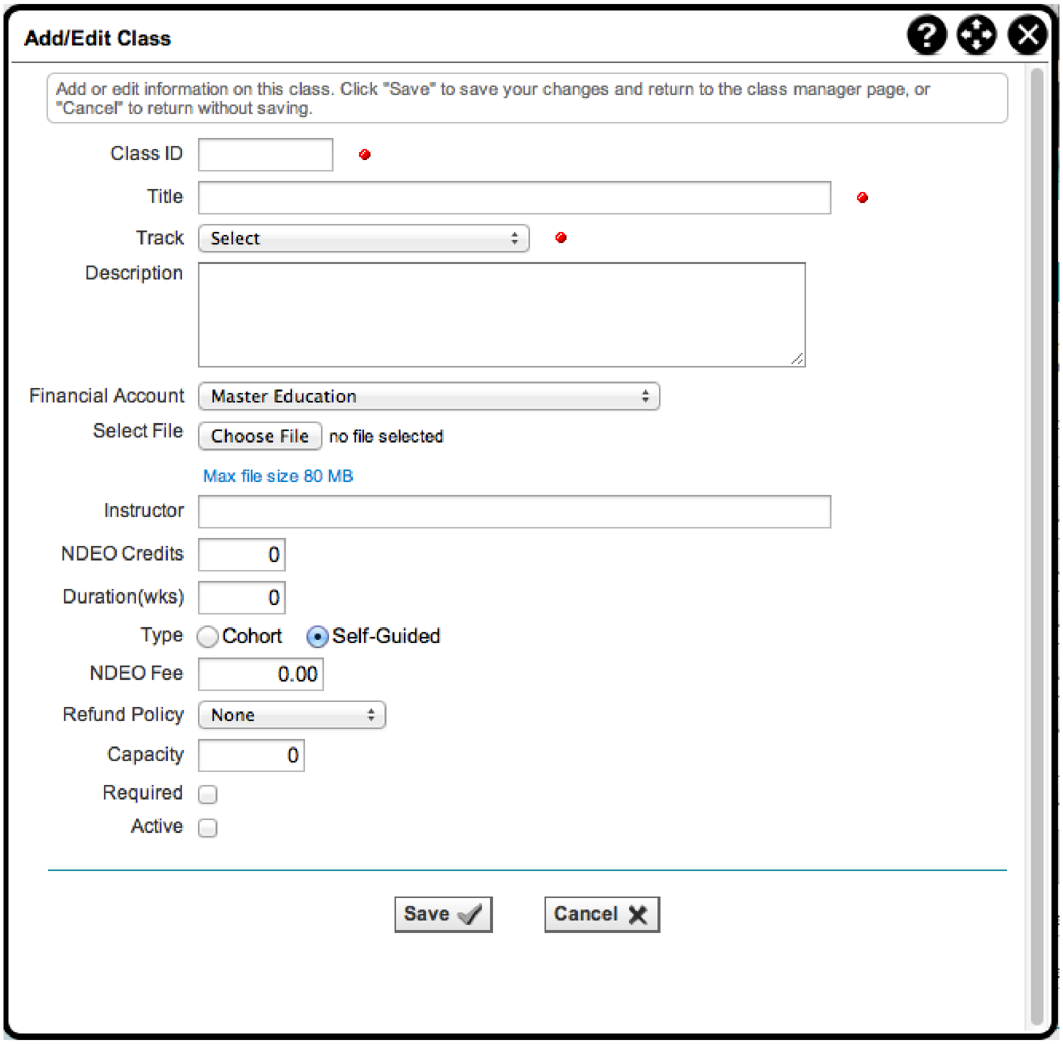
When you click **Reports**, you will see a standard ClubExpress Reports dialog, showing available reports at the Class level or, if you are viewing the Student Manager, available reports at the Student level.

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:



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.

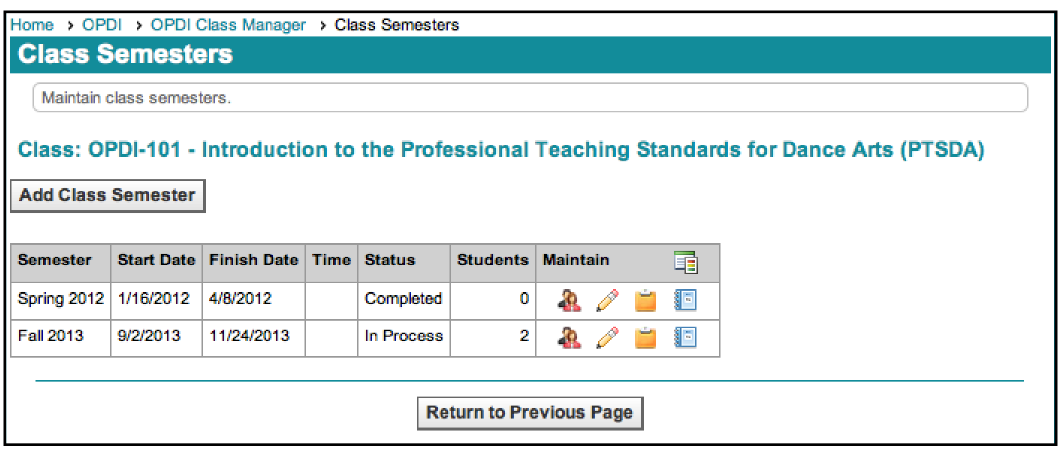
If you want to upload a new or updated class document, check the **Additional Info** option on the dialog; the screen will refresh to provide the Select File option, including the ability to replace the original file name or to use a new file name.

Manage Semesters

A class covers specific and related information that is taught as a single unit.

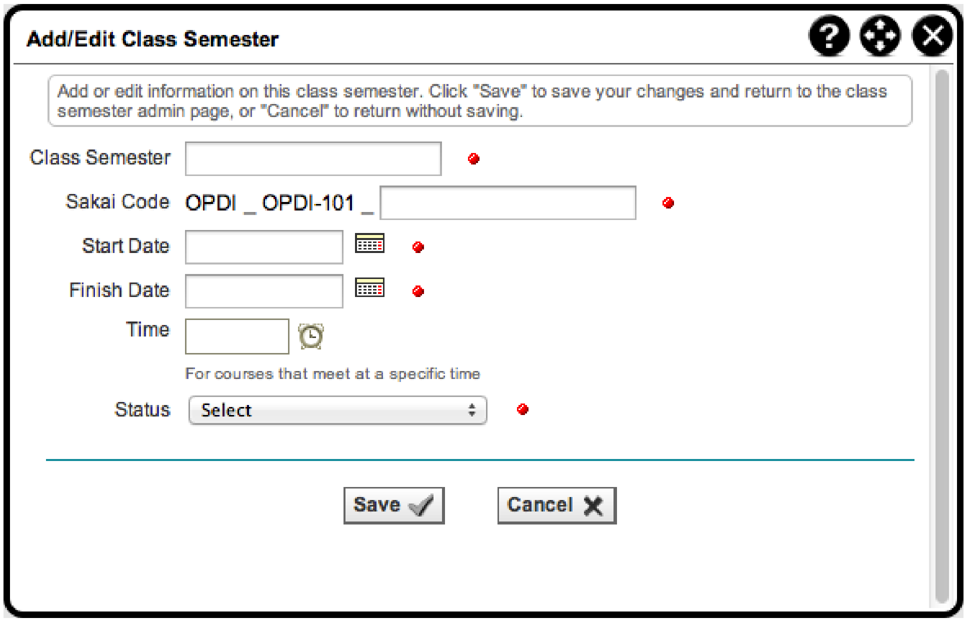
> **Example:** “Dance History – 1800 to Present”. A class semester is an instance of that class offered at a specific date. For example, the Fall, 2014 session of a class.

Select the Class Semesters icon to review, add, and update these instances. You will a screen similar to the following:



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:



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 is one of the following values:

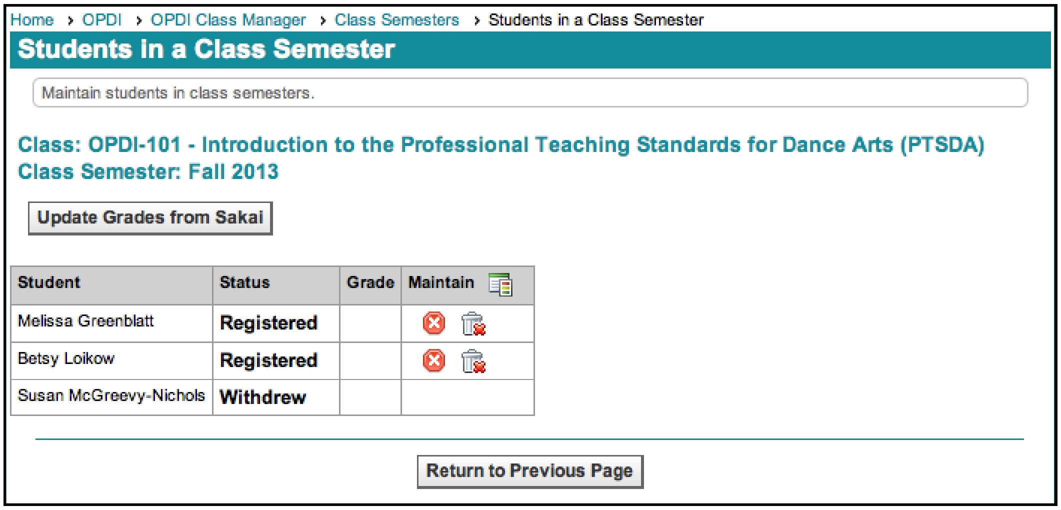
Status	Visible to Admins - Drop Down List	Visible to Members - Profile - OPDI Screen	Enroll Link Shown
In Development	Yes		
Not Yet Open for Enrollment	Yes	Yes	
Open for Enrollment	Yes	Yes	Yes
Full	Yes	Yes	
In Process	Yes	Yes	
Completed	Yes		
Cancelled	Yes		

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:



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

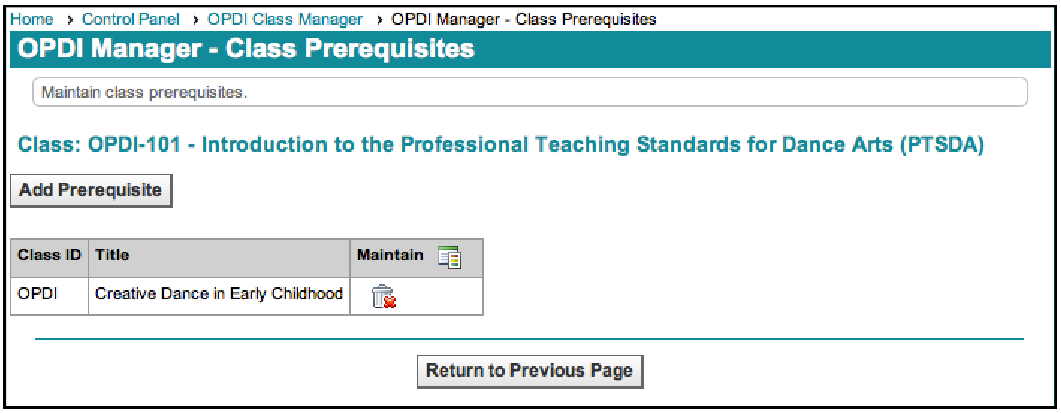
Click the Edit icon to modify the properties of a class semester.

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:



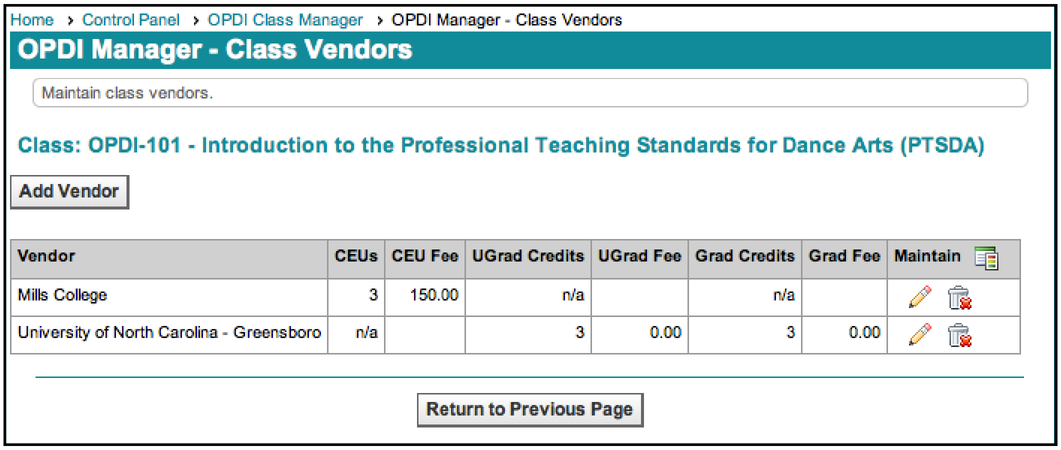
Click **Add Prerequisite** to add a new class to this list. You will see a popup screen allowing you to select a class and click **Save** to add it.

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.)

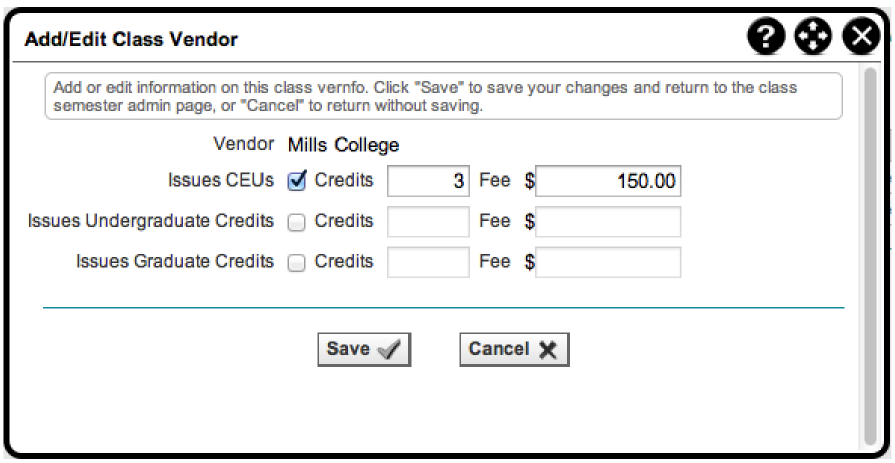
Manage Vendors

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:



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:



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.

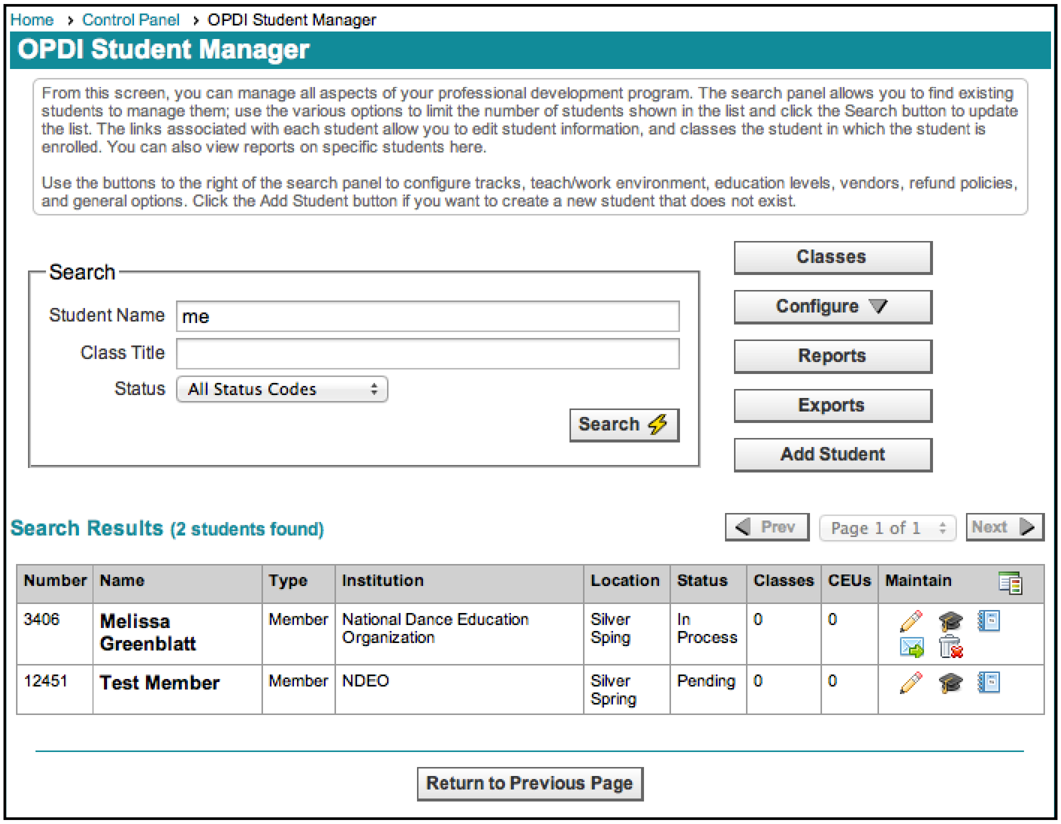
Student Manager

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:



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.

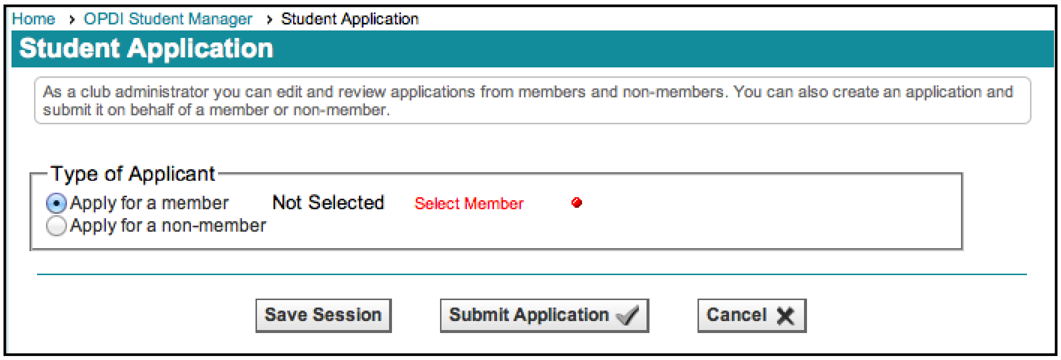
Click **Reports** to display and run reports across all students enrolled in OPDI. This is a standard ClubExpress dialog.

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.

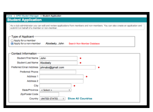
Click **Add Student** to add a student to OPDI as an admin. You will initially see the following screen:

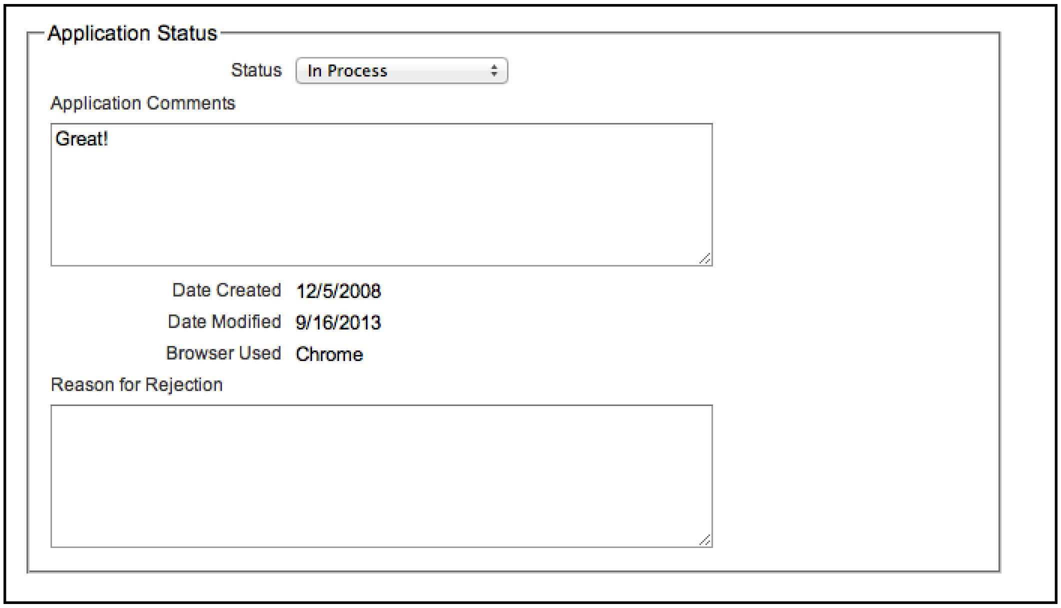


When you select “Apply for a Member”, click the Select Member link to select an existing member. The system will display the standard ClubExpress member selector. When you click **Select**, the screen will refresh to show that member’s contact information together with the rest of the student application.

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.





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

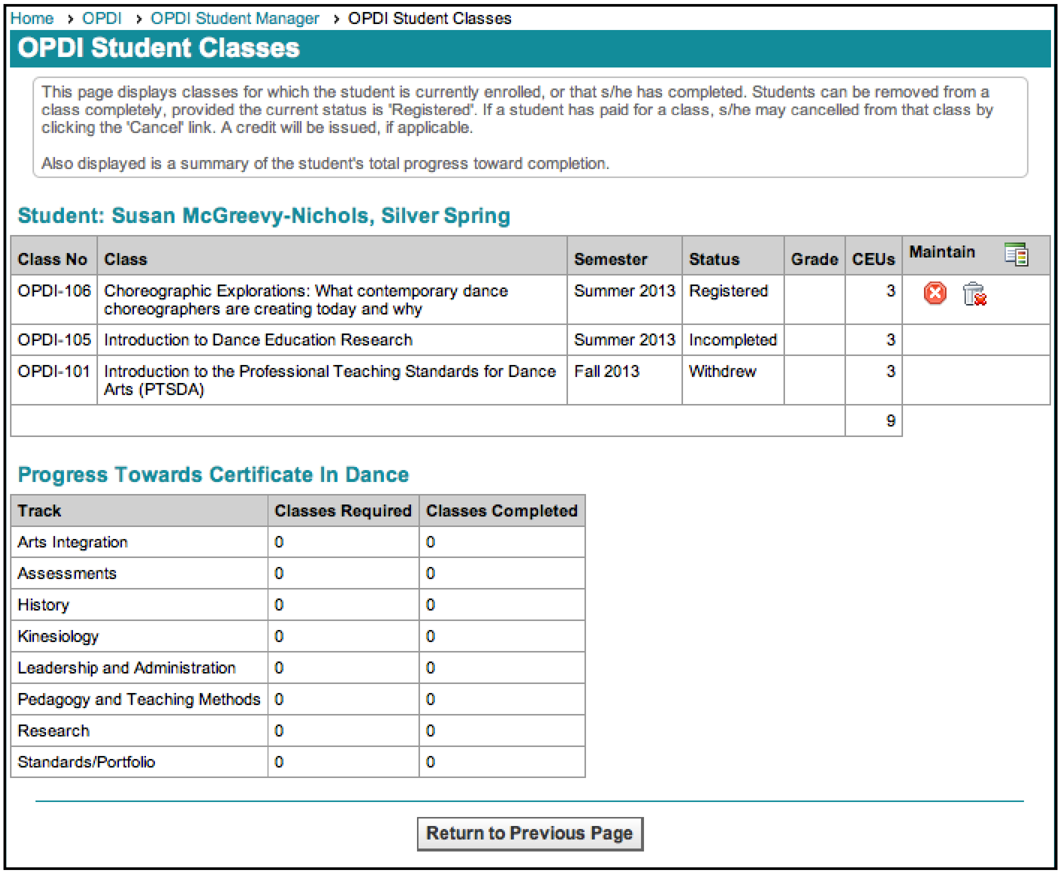
When members and non-members start the OPDI application process, they can complete the application in stages. Clicking **Save Session** saves their work to date. It also generates an email that includes a link allowing them to resume working on the application. Their status is “In Process”.

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:



Home › OPDI › OPDI Student Manager › OPDI Student Classes

OPDI Student Classes

This page displays classes for which the student is currently enrolled, or that s/he has completed. Students can be removed from a class completely, provided the current status is 'Registered'. If a student has paid for a class, s/he may cancelled from that class by clicking the 'Cancel' link. A credit will be issued, if applicable.

Also displayed is a summary of the student's total progress toward completion.

Student: Susan McGreevy-Nichols, Silver Spring

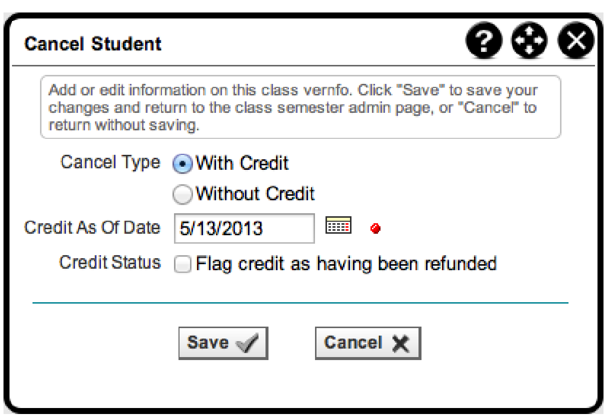
Class No	Class	Semester	Status	Grade	CEUs	Maintain
OPDI-106	Choreographic Explorations: What contemporary dance choreographers are creating today and why	Summer 2013	Registered		3	
OPDI-105	Introduction to Dance Education Research	Summer 2013	Incompleted		3	
OPDI-101	Introduction to the Professional Teaching Standards for Dance Arts (PTSDA)	Fall 2013	Withdrew		3	
					9	

Progress Towards Certificate In Dance

Track	Classes Required	Classes Completed
Arts Integration	0	0
Assessments	0	0
History	0	0
Kinesiology	0	0
Leadership and Administration	0	0
Pedagogy and Teaching Methods	0	0
Research	0	0
Standards/Portfolio	0	0

Return to Previous Page

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: 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

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).

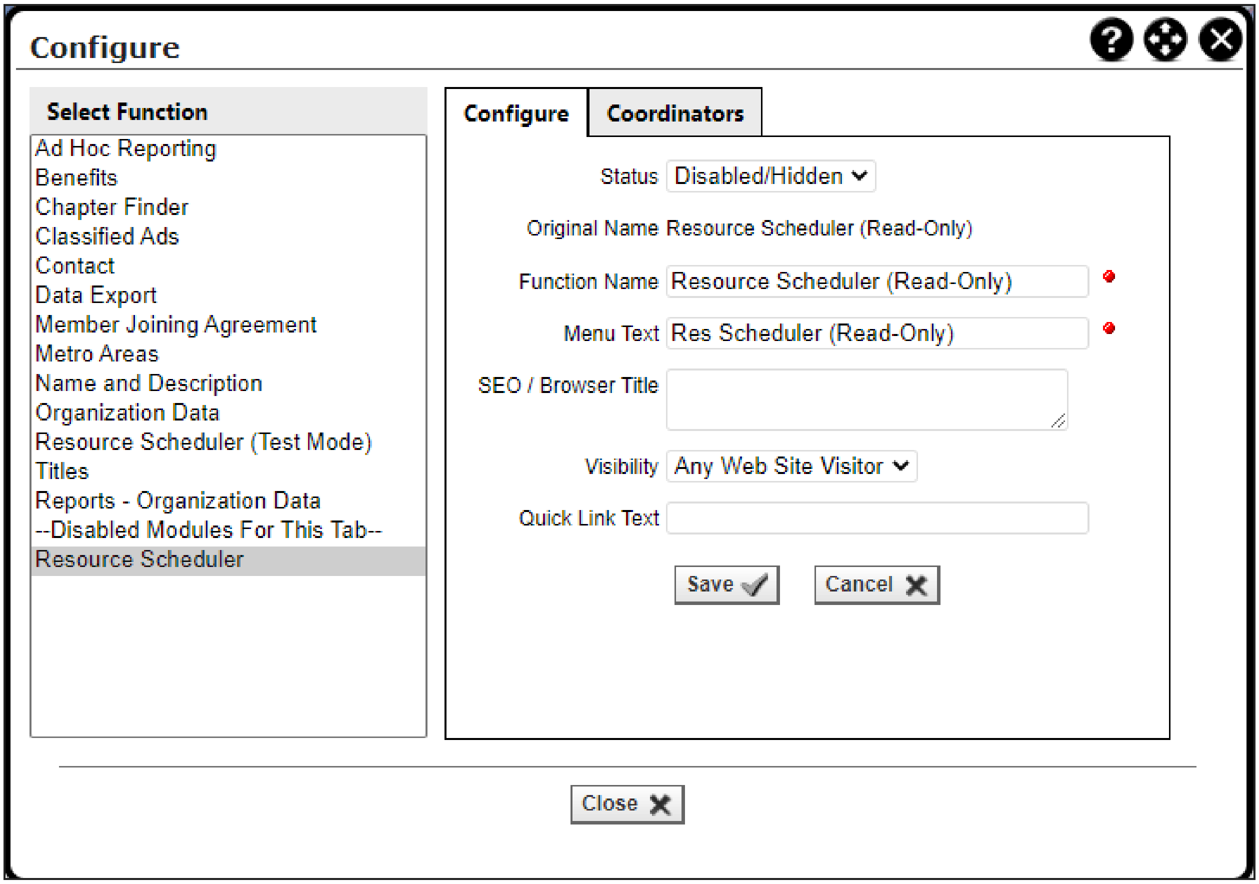
Each resource can have different properties and rental rules. The club can define a setup period before the reservation starts and a cleanup period for after the reservation finishes. Resources can have different fees at different times of the day, week, month, or year. Clubs can define a resource setup 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.

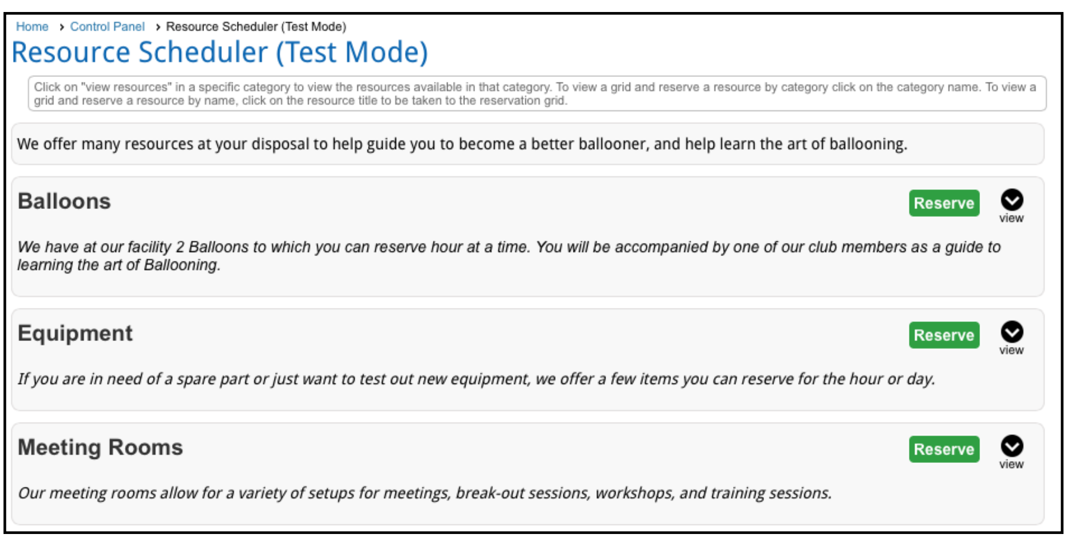
This option is available in the Control Panel > Club Tab (note that the tab may be labeled differently to match your organization type). Select the Configure option to view available modules to activate and deactivate. In the list of available items, you'll see the read-only version of the Resource Scheduler. 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.



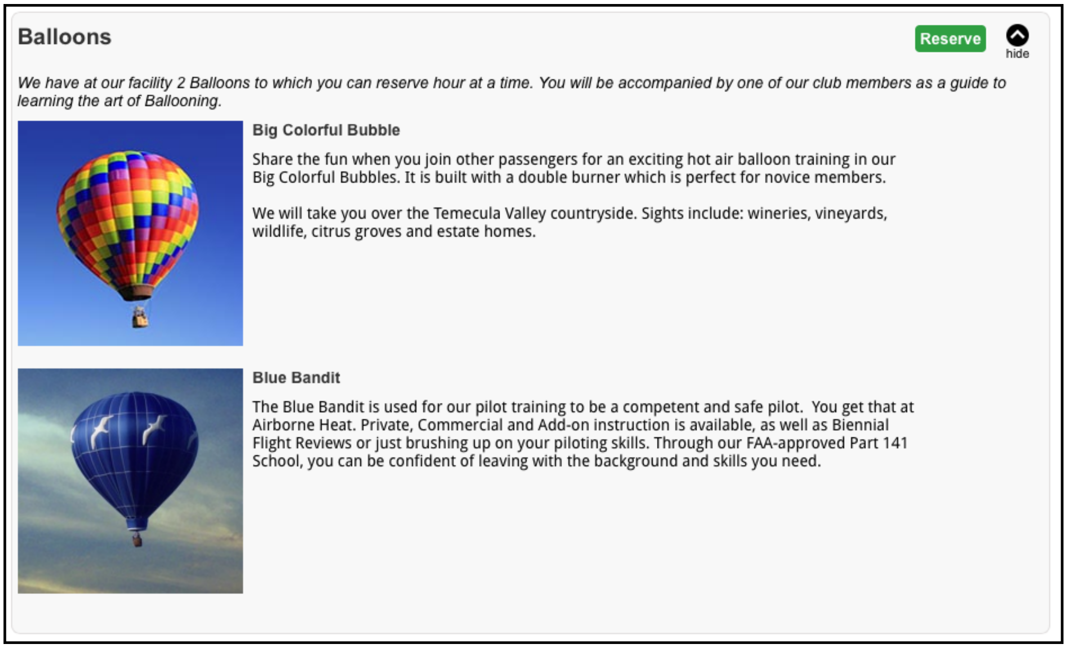
> **Activation:** The one-time fee to activate this module for your website is $500.

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:



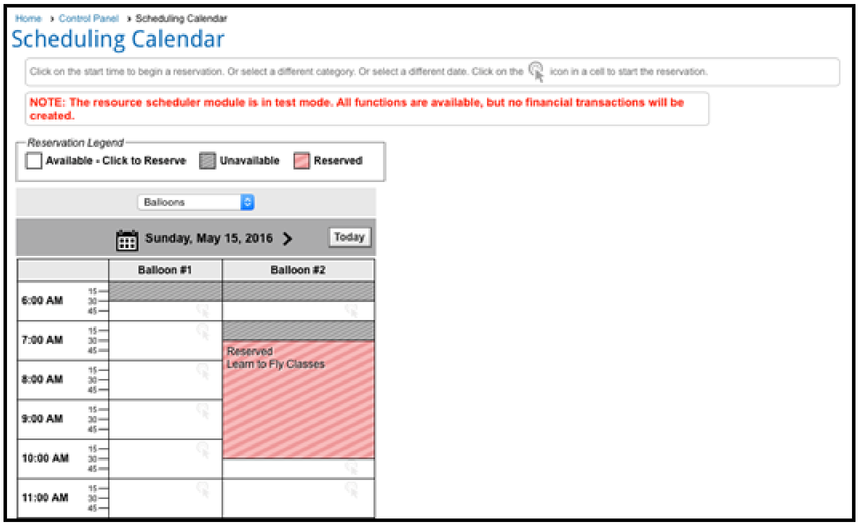
If you have a reservation in process, with one or more resources in your reservation Cart, a **Show Cart** button will appear at the top of the screen, allowing you to jump to the cart or make changes or check out (see below for the checkout process.) If a **Cancellation Policy** has been defined, clicking that button will display it.

Click the **Reserve** button to begin the reservations process.

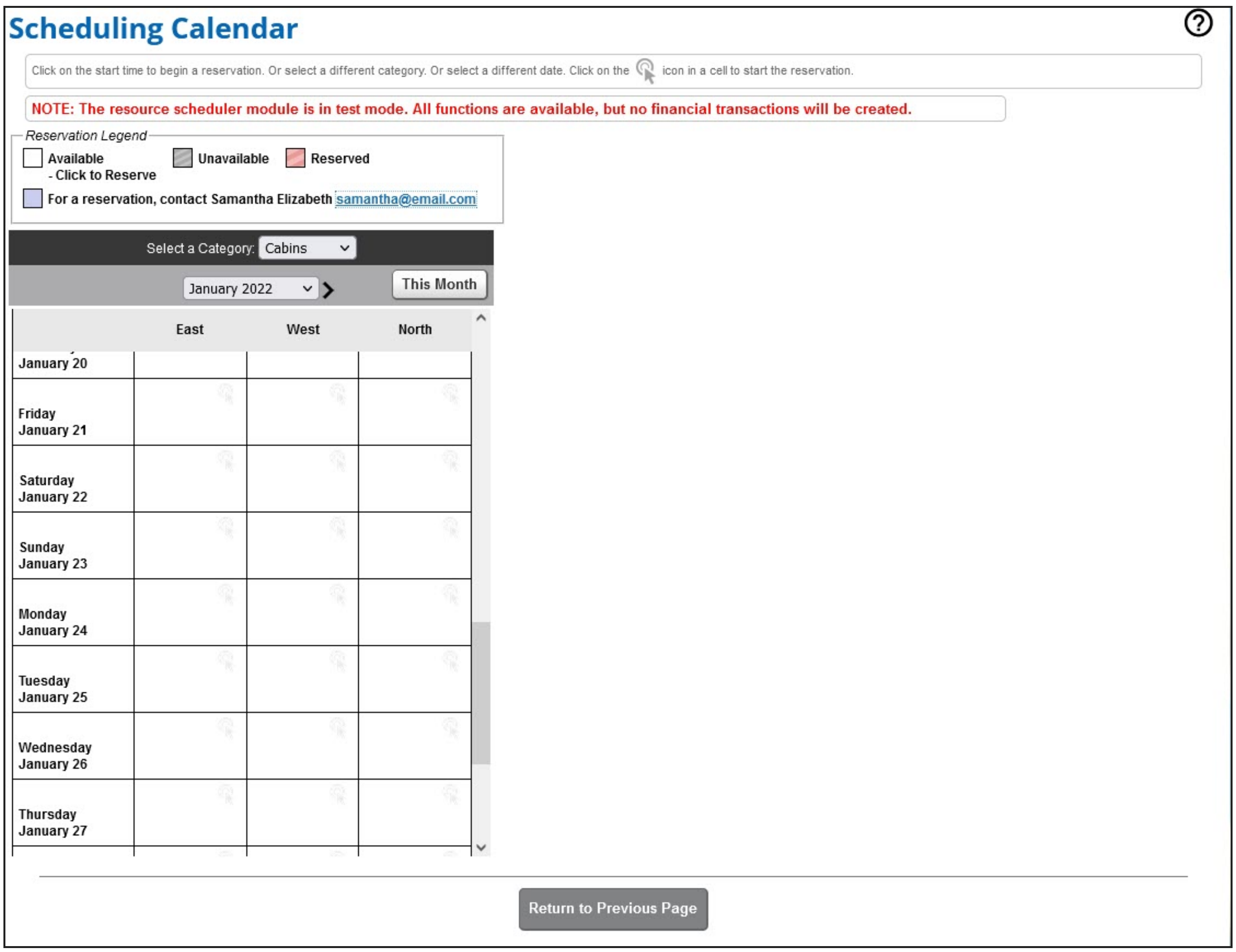
Reserving a Resource

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.



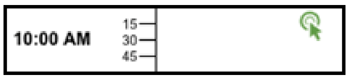
For resources available by the day, each resource is a separate column and each screen shows a single month.



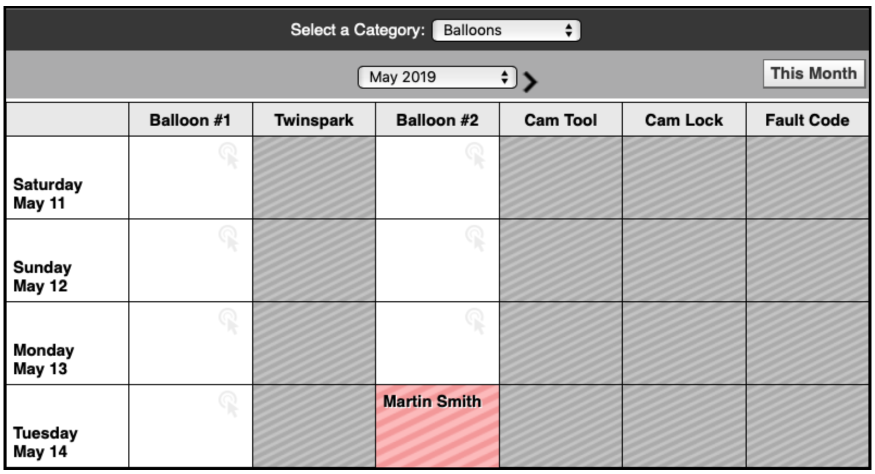
Different categories can be selected by clicking the drop-down list above the grid. Click the arrows to the right and left of the date to move forward or backward by one day at a time. You can also click the calendar icon to select any date in the future, or the **Today** button to jump back to today.

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:

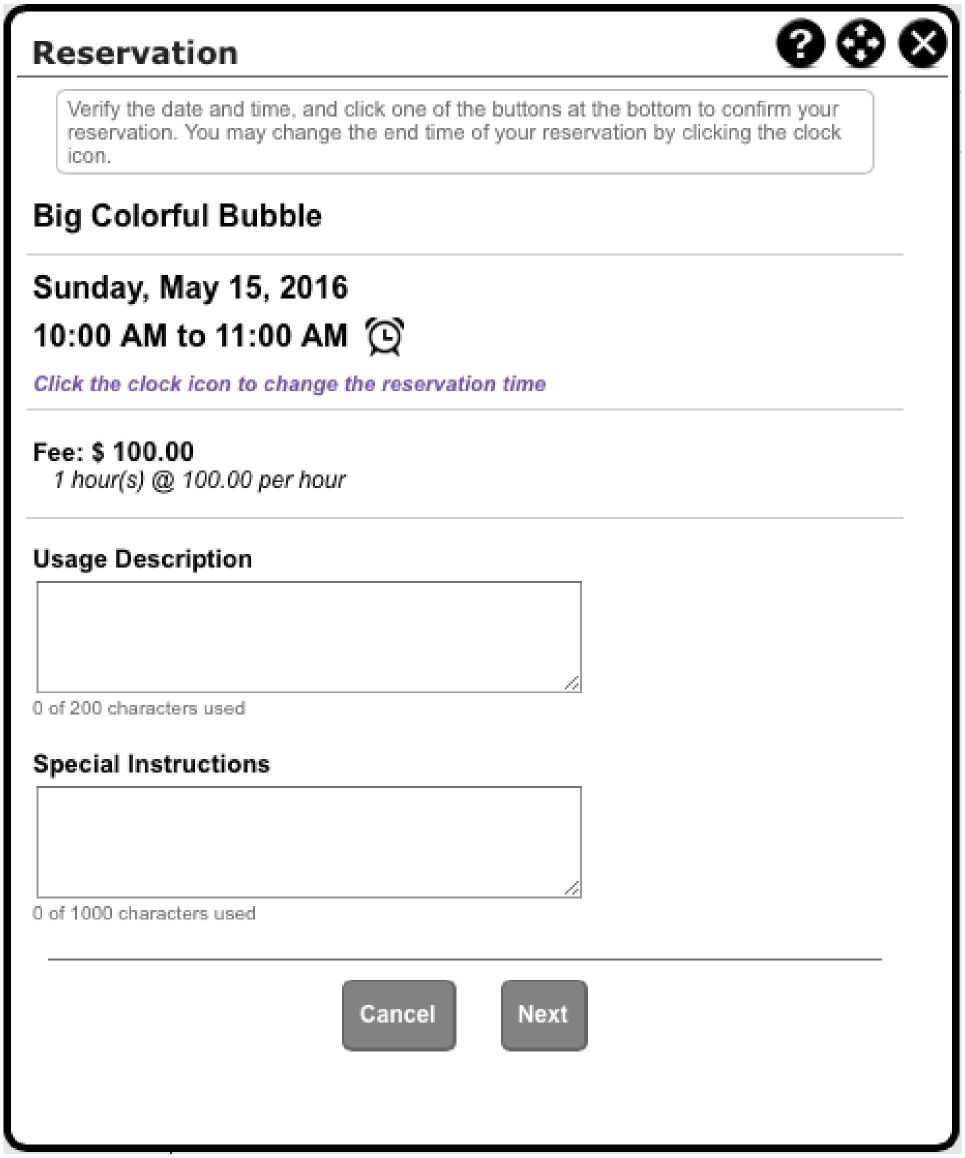


Click the arrows to the right and left of the date to move forward or backward by one month at a time. You can also click **This Month** button to jump back to the current month.

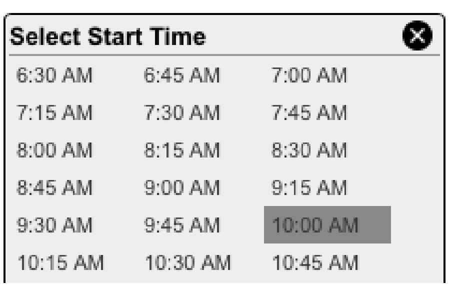
In either mode, when you hover over a cell in the grid a small icon will appear and that cell is highlighted.

Reservation Wizard

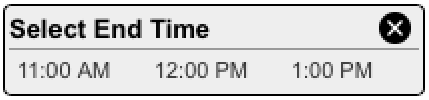
Click this icon to begin the reservation process for that resource. For an **hourly** reservation, you will see a screen similar to the following:



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.



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.



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.)

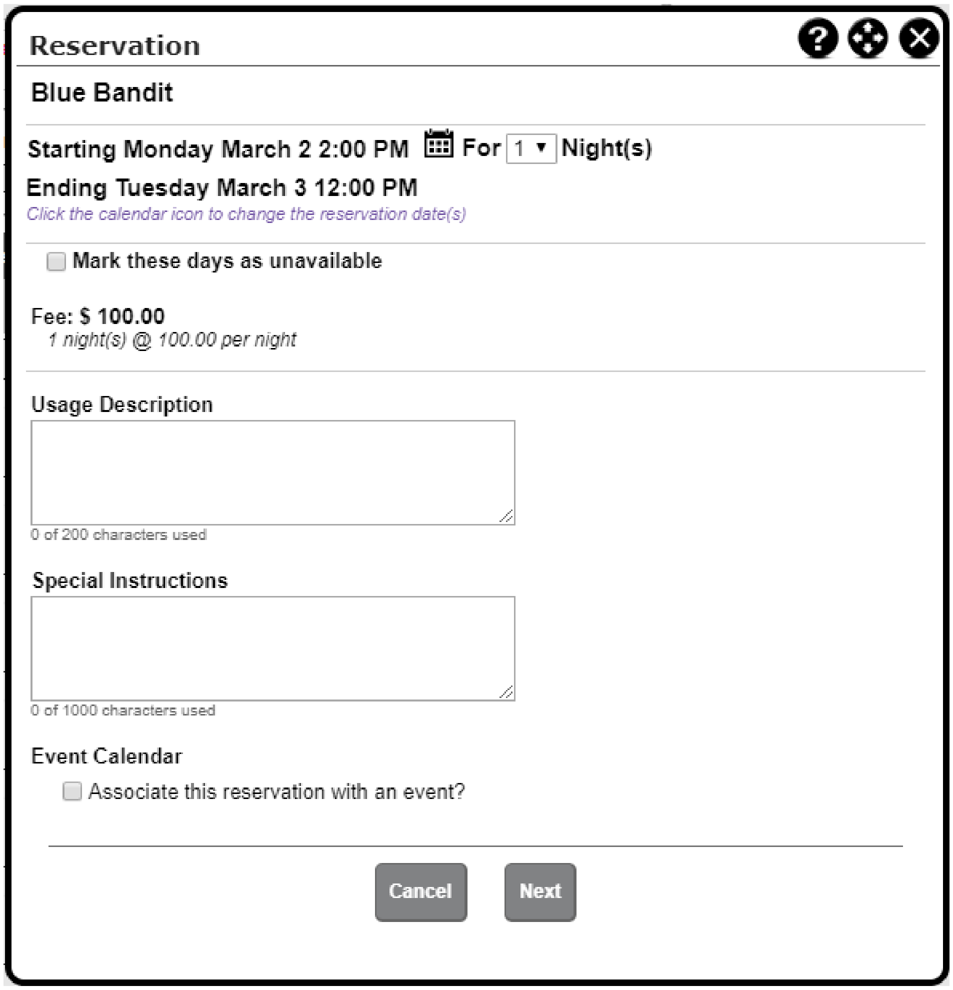
Click the **Next** button to move to the next step of the reservations process, or **Cancel** to cancel your reservation and return to the scheduling calendar.

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:



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 and banned activities.

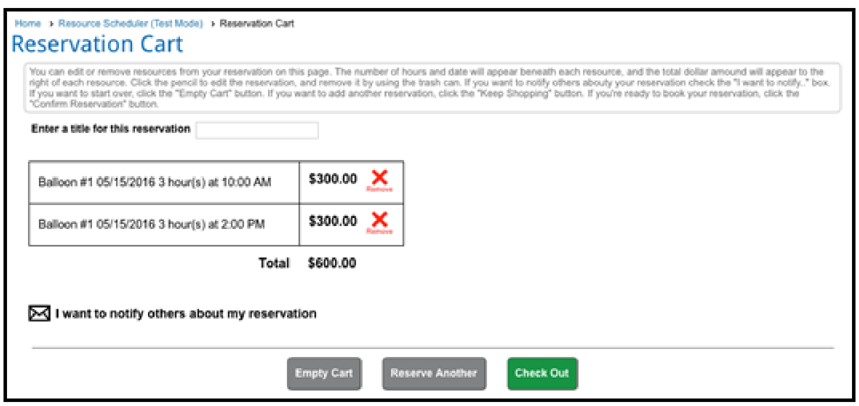
If this screen appears, you must click **I Agree** before you can complete the reservation.

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:



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.

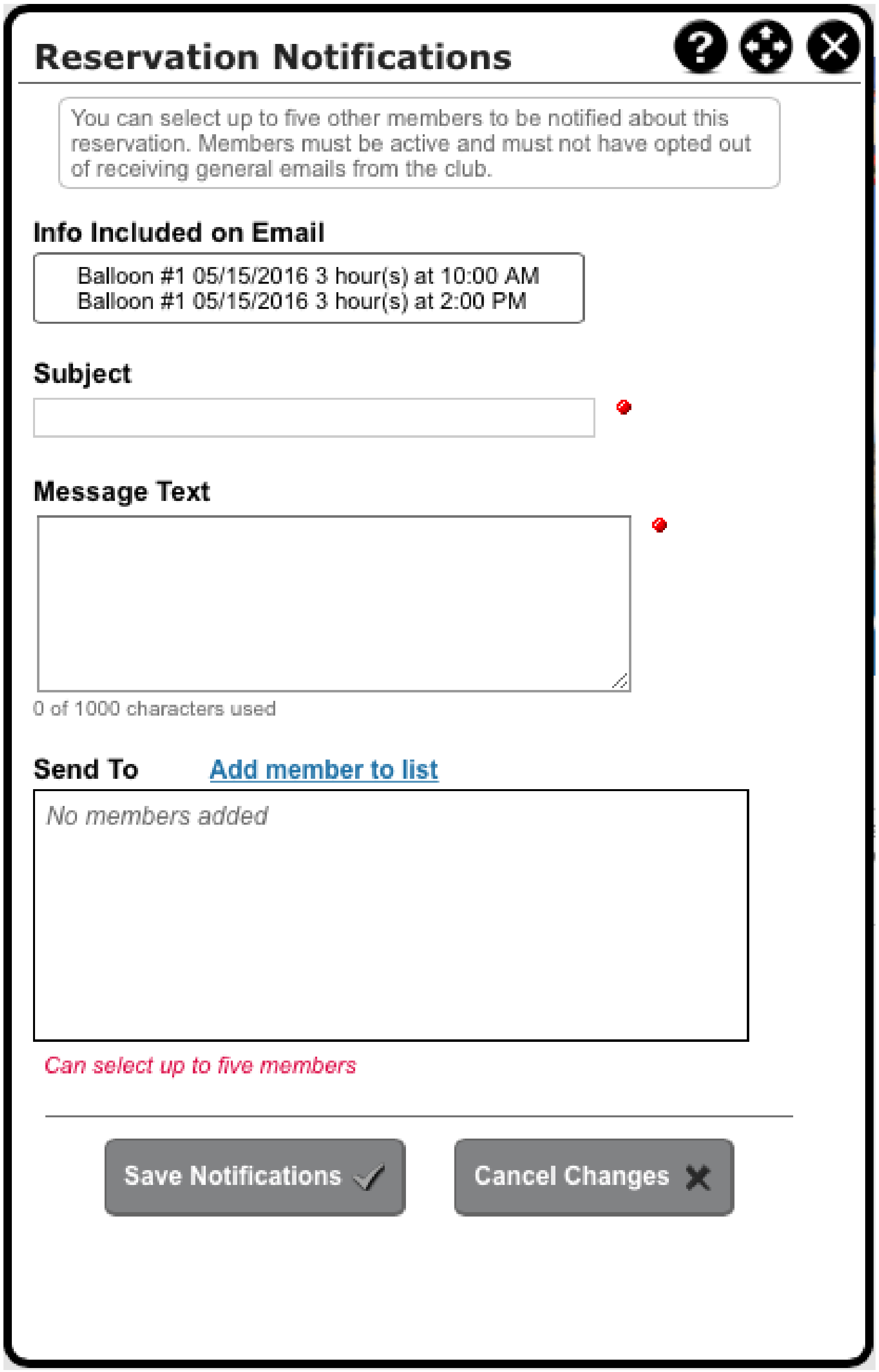
Click the **Reserve Another** button to continue adding items to the cart.

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:



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.

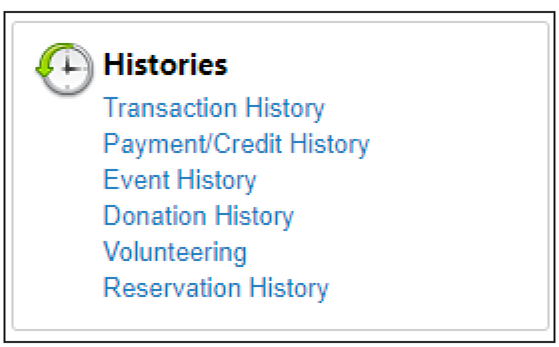
> **Example:** Staff may need time to set up a meeting room for your event and then to clean up once the event is over. These times will be added to your reservation as “Unavailable”, If a fee is due, it is only charged for the actual duration of your reservation, not including the setup and cleanup 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.

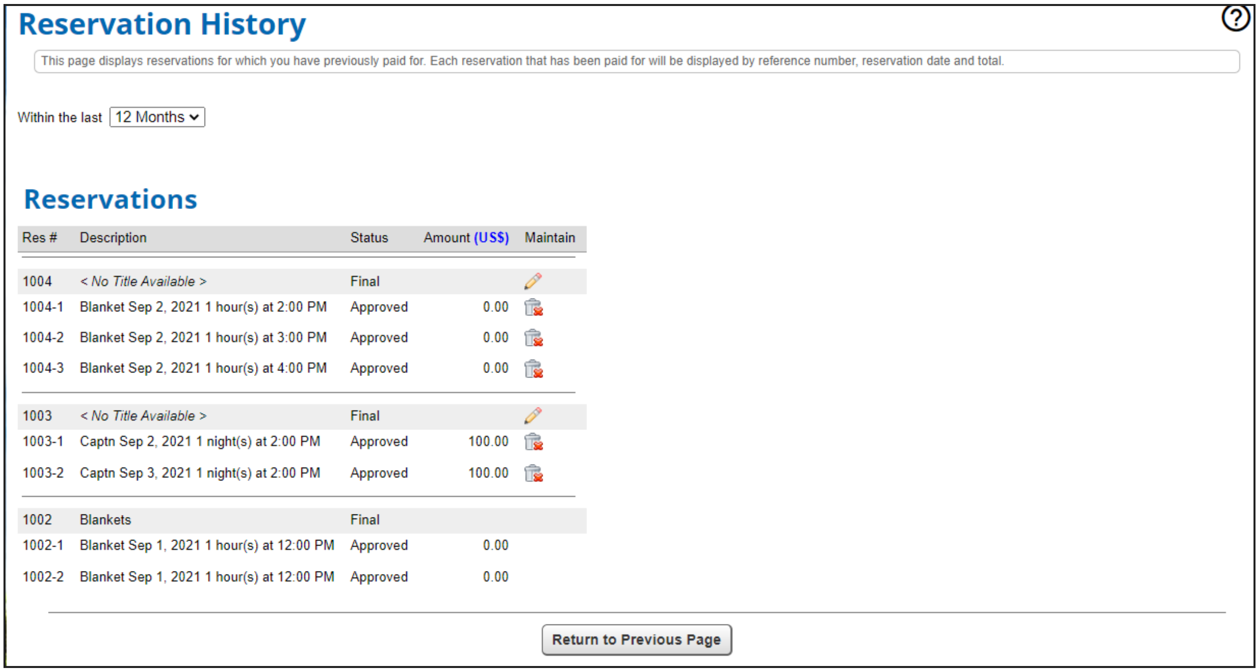
In the Member Profile

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:



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.

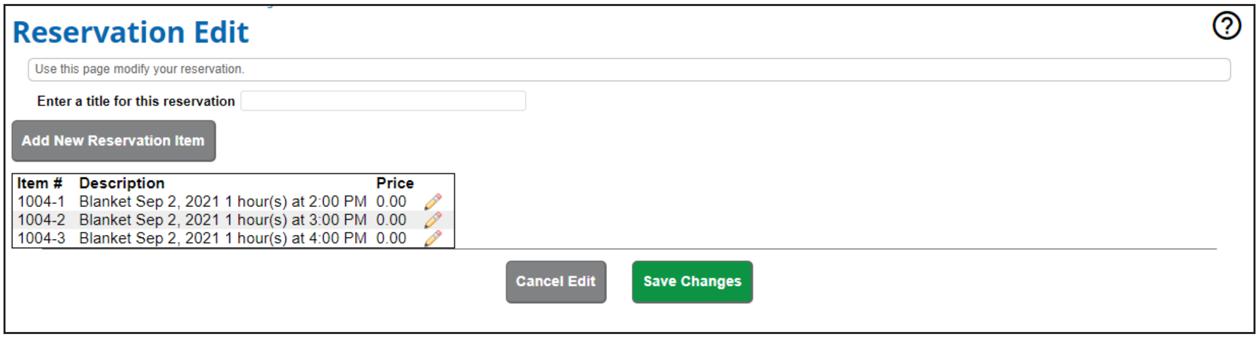
Further options are available in the **Maintain Column**:

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:



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.

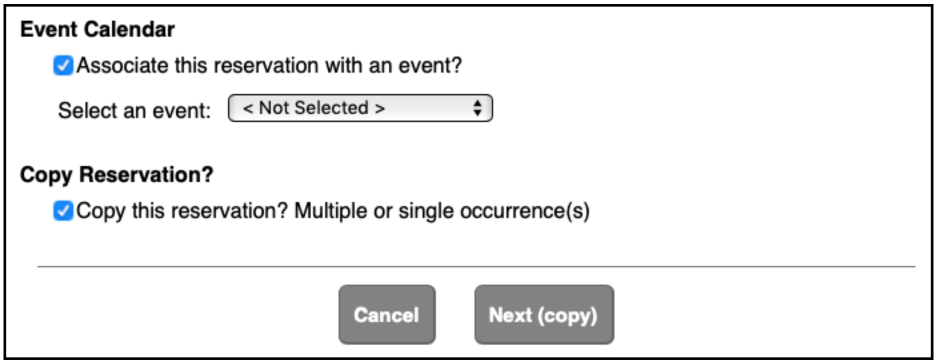
Select the **Edit** icon next to an item to edit the reservation details for that item.

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 in-line 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.**

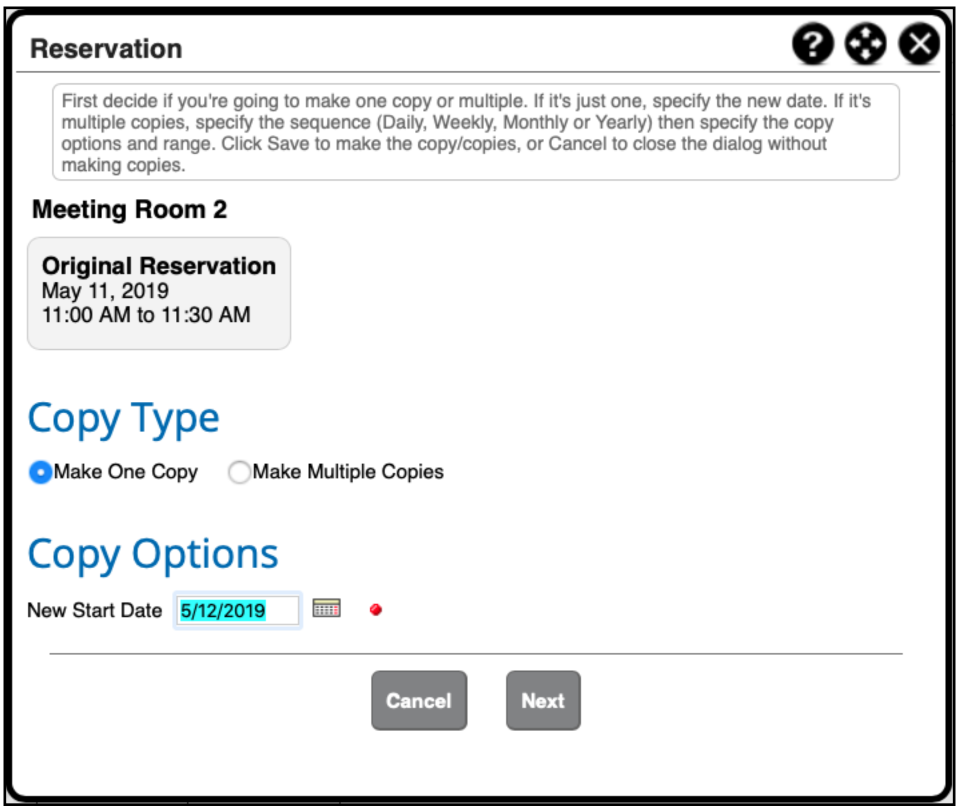
Reserving a Resource as an Admin

When administrators or module coordinators make a reservation, there are additional options available at the bottom of the Reservation dialog:



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.

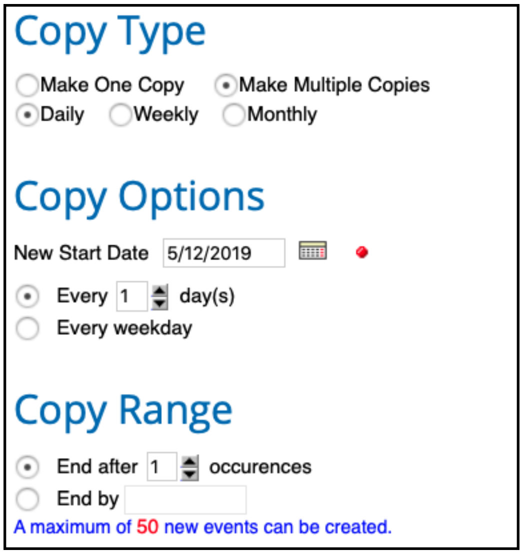
When the **Copy Reservation** box is checked, the Next button at the bottom of the dialog changes. Clicking this button displays a new panel in the Reservation Wizard, allowing you to make single or multiple copies of the reservation. You will see the following screen:



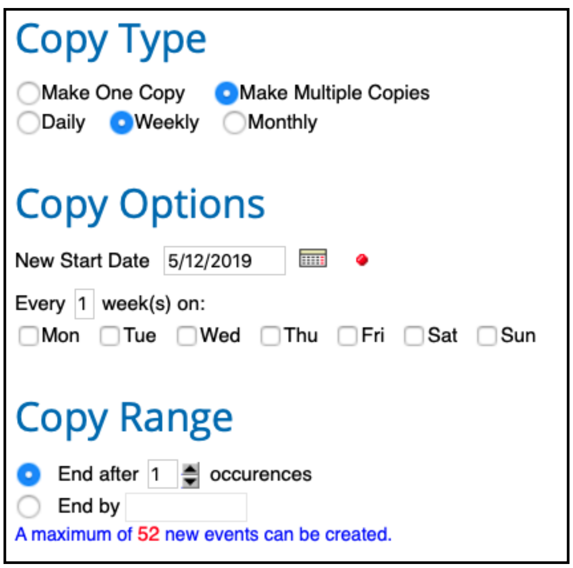
Check **Make One Copy** to copy the same resource to another date, as part of the same reservation. Specify the date and click **Next.**

Check **Make Multiple Copies** to copy the same resource over multiple dates.

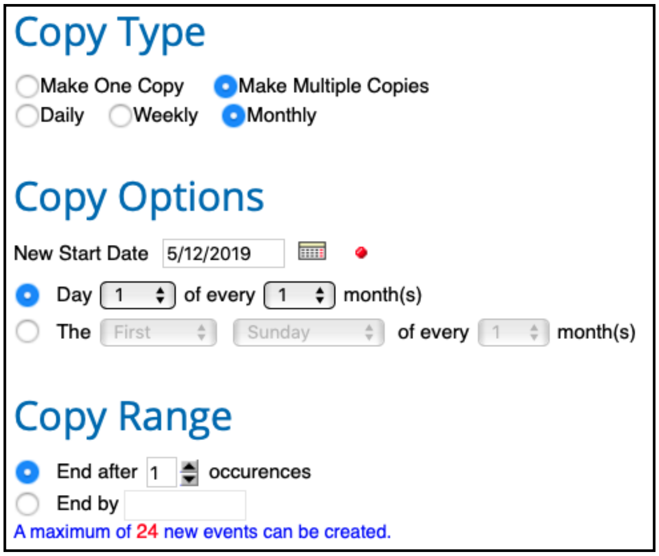
Example: If the Bridge club always meets from 10:00 AM to 12:00 Noon on Wednesdays, in Meeting Room 2, you can build the reservations for a full year using this feature. You will see a screen similar to the following:



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.

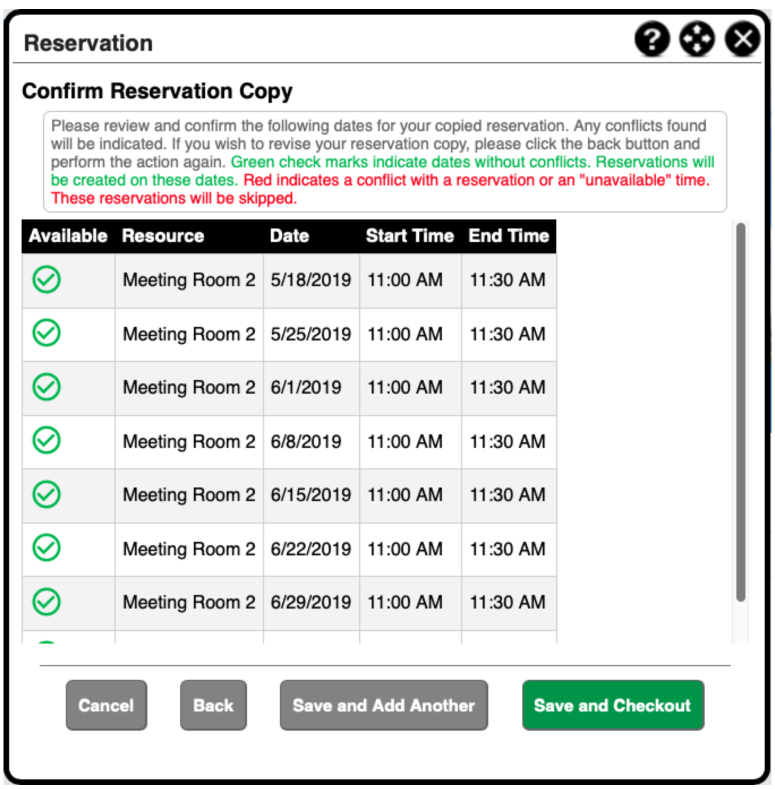


When you specify **Weekly** copies, enter a start date and frequency. Specify the day or days of the week and then the range. Up to 52 copies can be made as part of a single reservation.



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:



This reservation includes the same resource on multiple days, based on the copy instructions.

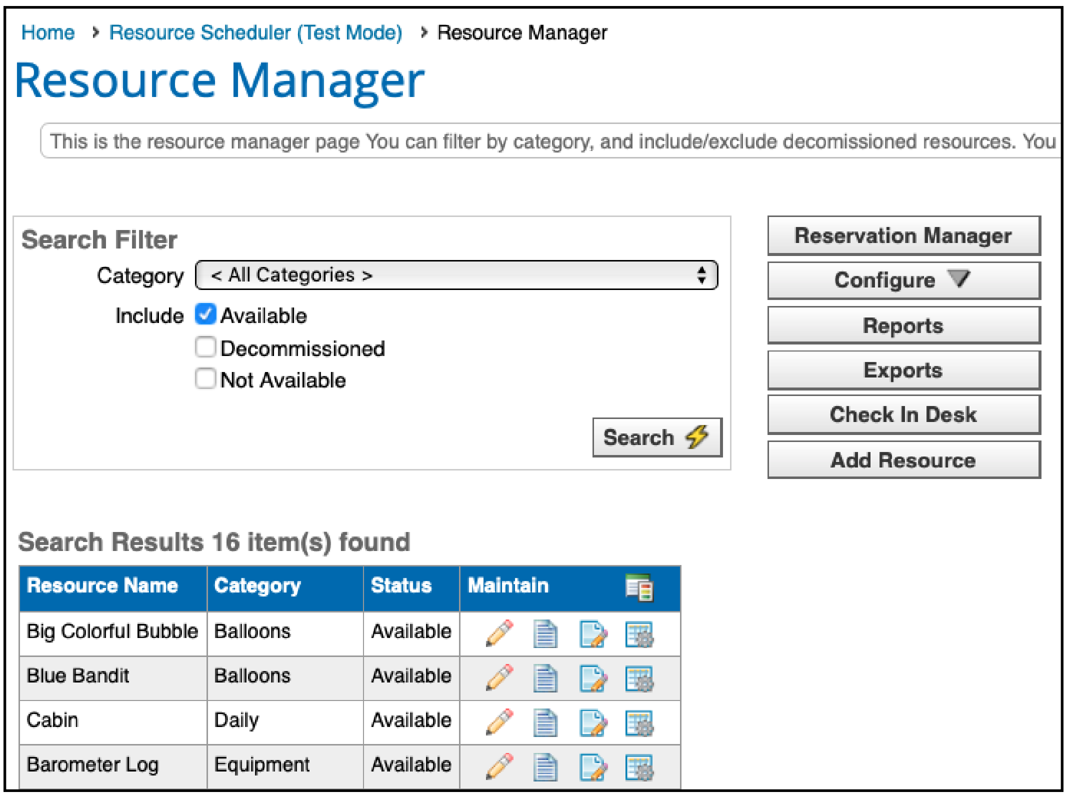
- A green check mark indicates dates without a conflict. When you click one of the **Save** buttons, these resources will be reserved.
- A red X indicates dates with a conflict or a date/time when that resource is unavailable. When you click one of the **Save** buttons, these resource date/times will 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:



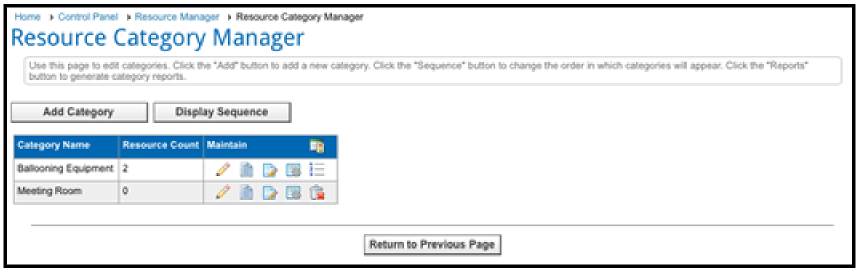
At the top of the screen is a search panel that allows you to filter the list of resources by category and resource status. The results panel lists each matching resource and its status.

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.

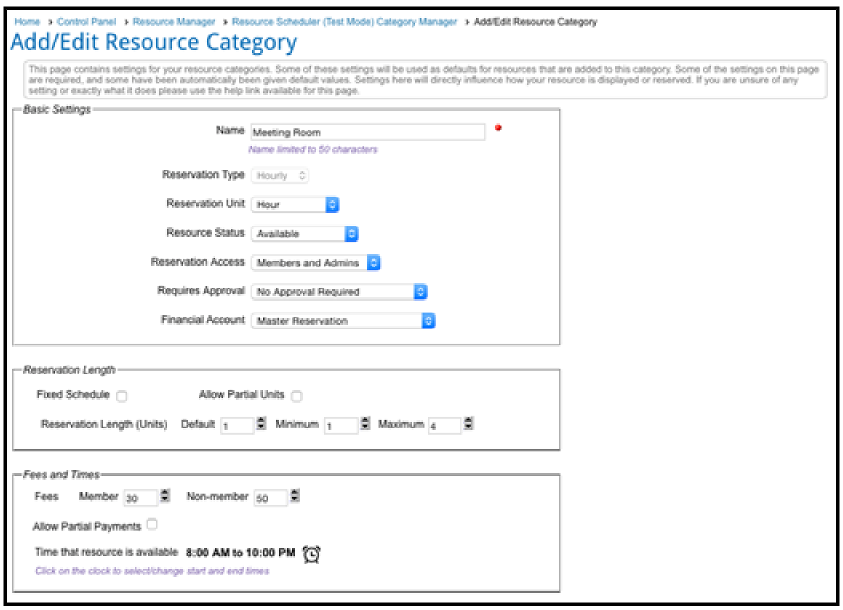
Clicking the **Configure** button displays a drop-down menu of configuration options:

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:



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 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 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:

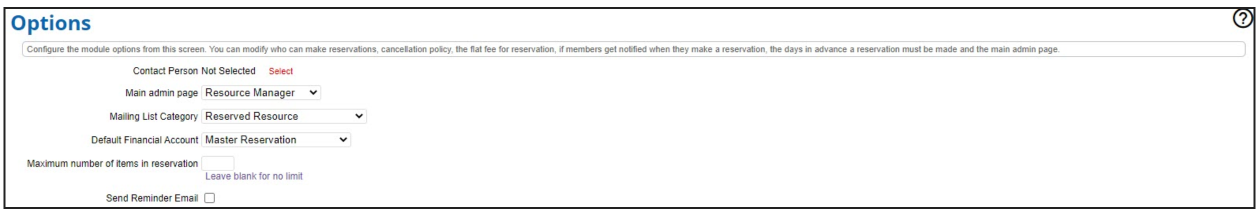
Icon	Description
(Edit)	**Edit** the properties of this resource category.
(Edit Description)	**Edit** the detailed description of this category of resources. The advanced content editor is displayed to allow you to create a fully-formatted description. It can also be customized at the individual resource level.
(Edit User Agreement)	**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
(Customize 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 individual 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:



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

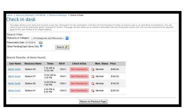
Reports

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:

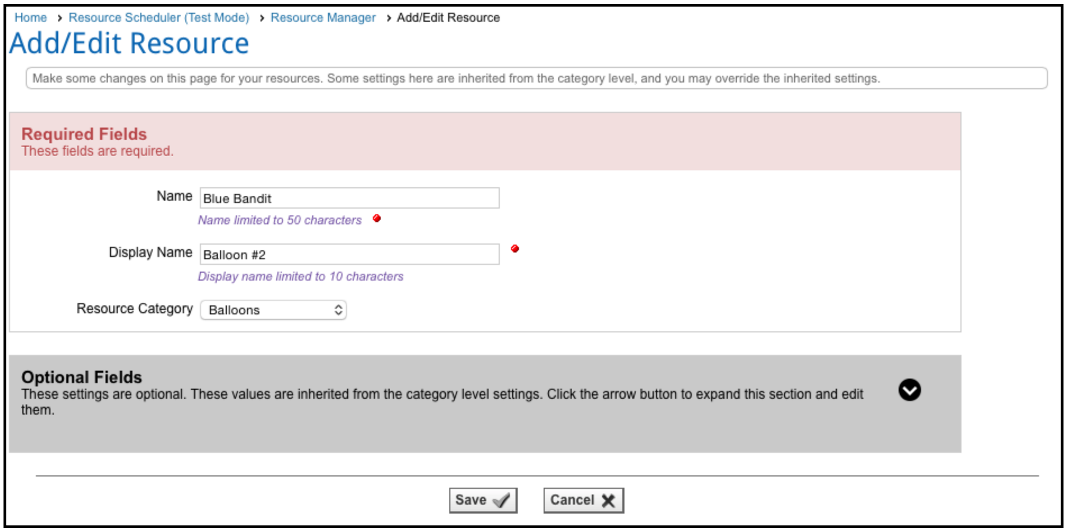


Use the search filter panel to limit what items are shown in the results panel by category, date and status. A reservation may include one or more resources; this screen will show each resource reserved by a user (member or non-member) as a separate line, with the ability to check-in or check out the 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:

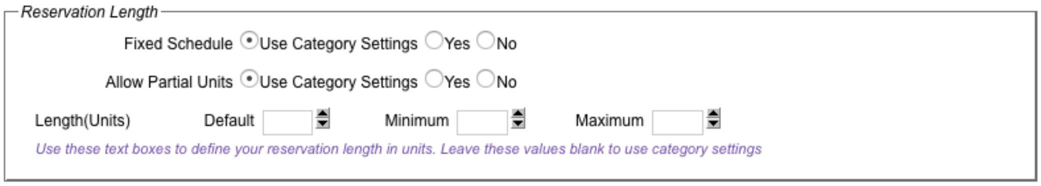
- Resource name
- A shorter name for display purposes
- The category

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:

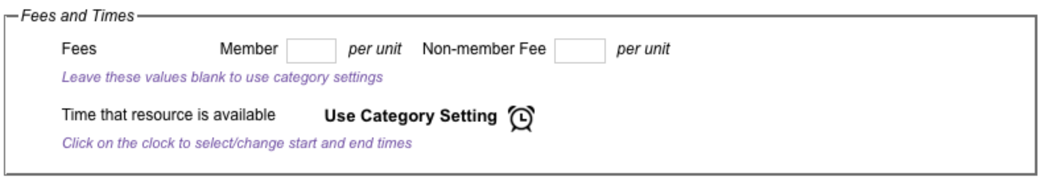
You can control the status, access, approval requirement, and unit type (hourly reservations only) for individual resources within a category.

> **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.



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.



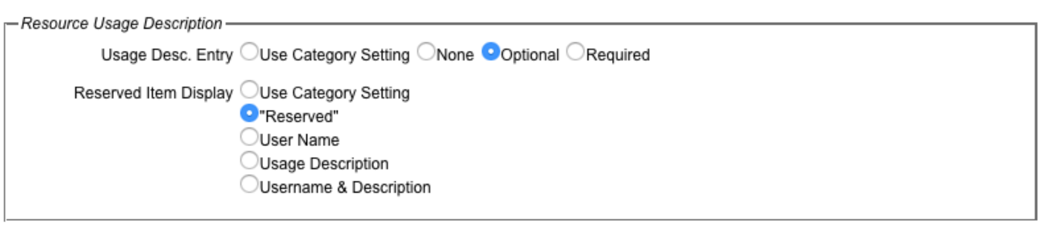
Specify the fee per unit to be charged for members and, optionally, non-members.

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.

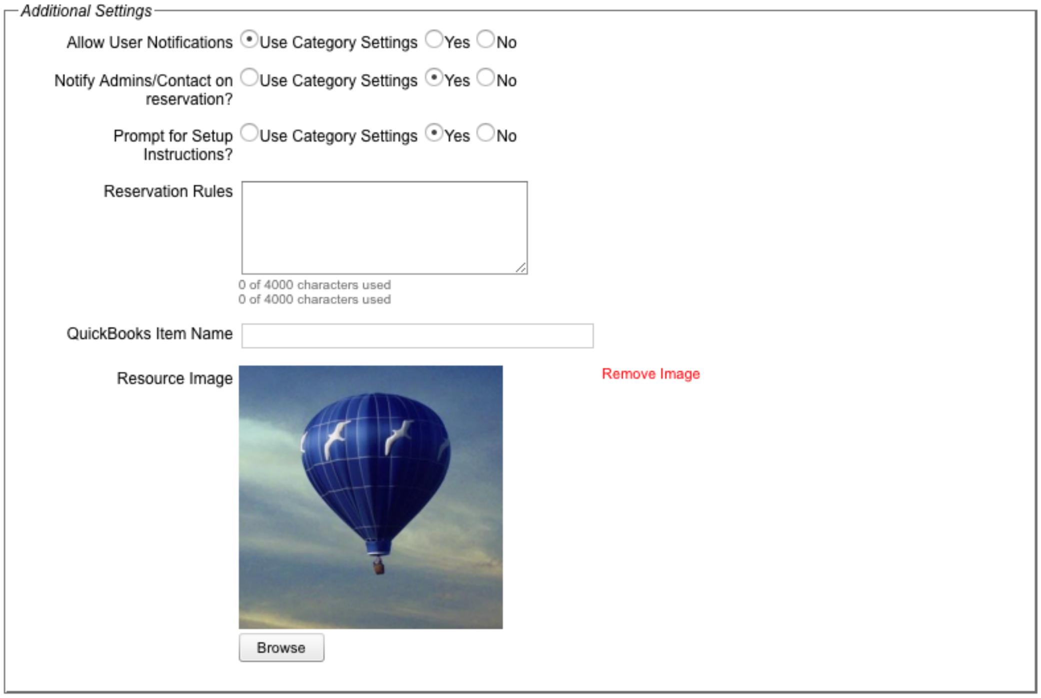
> **Example:** An unlighted tennis court might need to end reservations at 5:00 PM while a lighted tennis court can be available until 9:00 PM or later.

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.



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.



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

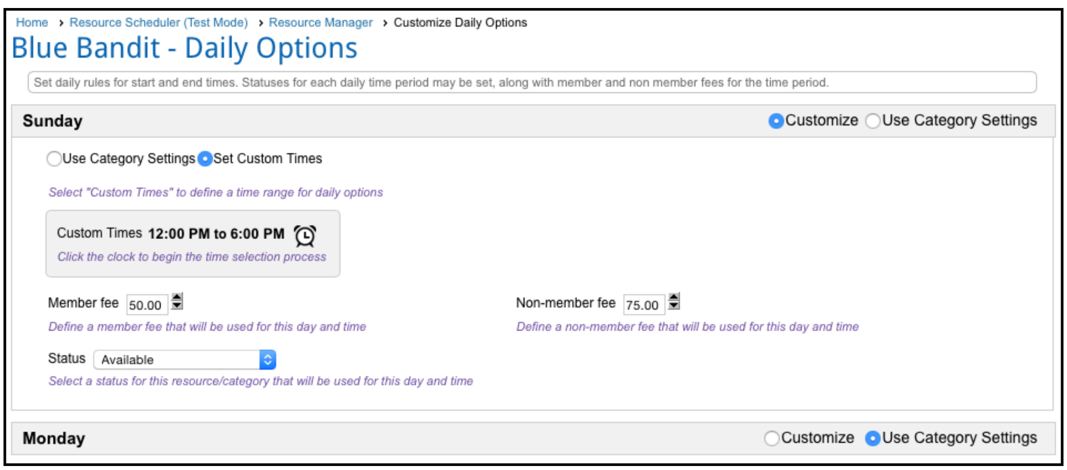
The following options can be found in the Maintain column:

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 Agreement)	**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.
(Customize 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:



Three settings can be customized for each day of the week:

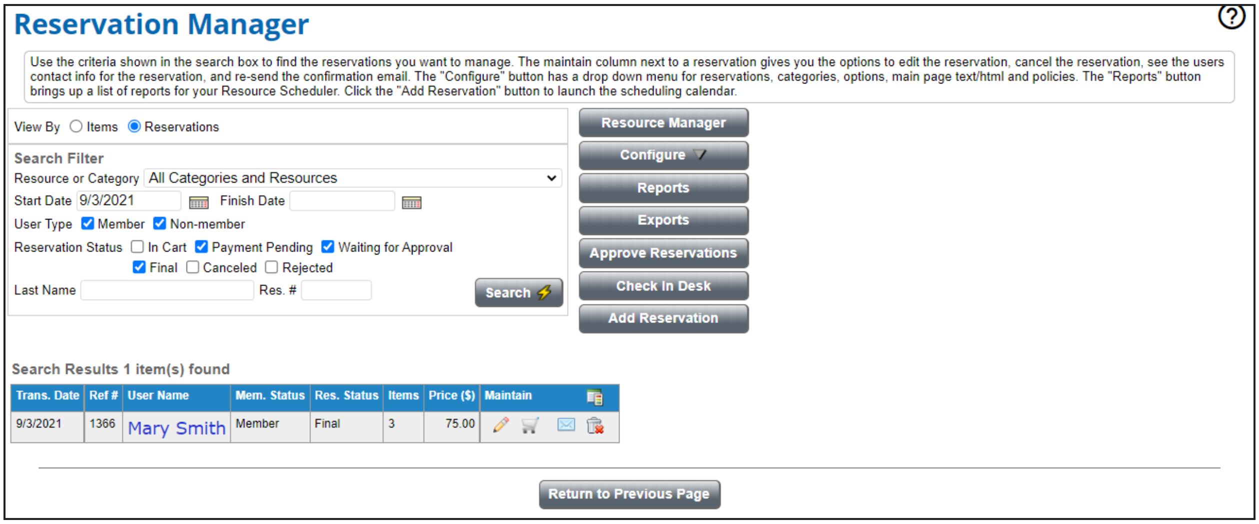
- The times when a reservation is available. For example, a meeting room may only be available on Sundays from 2:00 PM onwards but available based on the category settings on all other days.
- The fee charged to members and, optionally, non-members. For example, club canoes for rent may have one fee 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:



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.

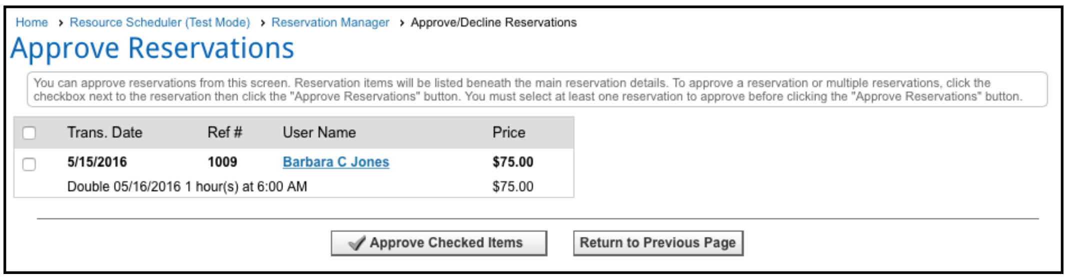
The buttons to the right of the Search panel are similar to those found on the Resource Manager screen:

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:



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.

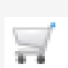
Note that when admins or module coordinators make reservations, approval is handled automatically when the reservation is made.

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.

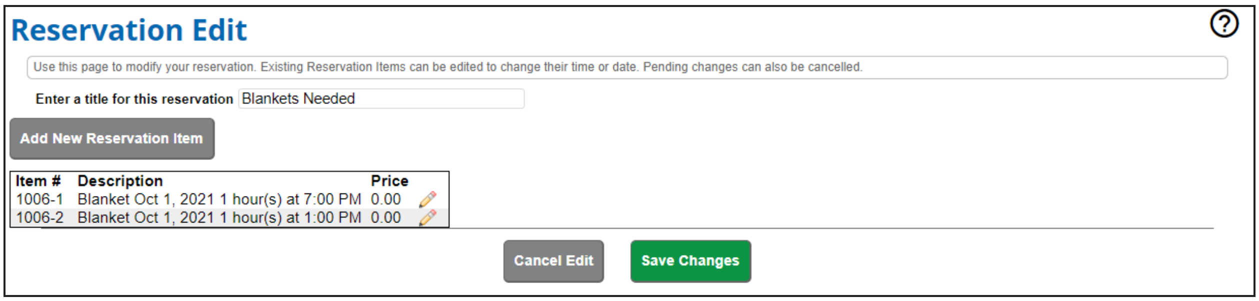
Icon	Description
 (Edit)	Selecting this icon takes you to the Reservation Edit screen. You have the option to edit each item in the reservation. The option to edit reservation items is only available in this view.
 (Reservation Details)	Clicking this icon displays a popup screen showing the details of 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.

Icon	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 Reservation)	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.

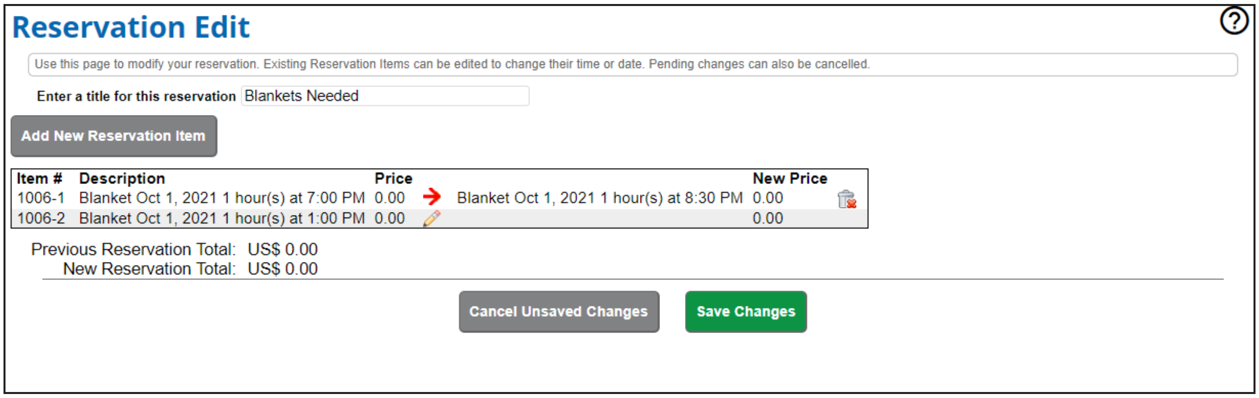


The screen will list all items included in the reservation, including the

- **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 in-line 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.**

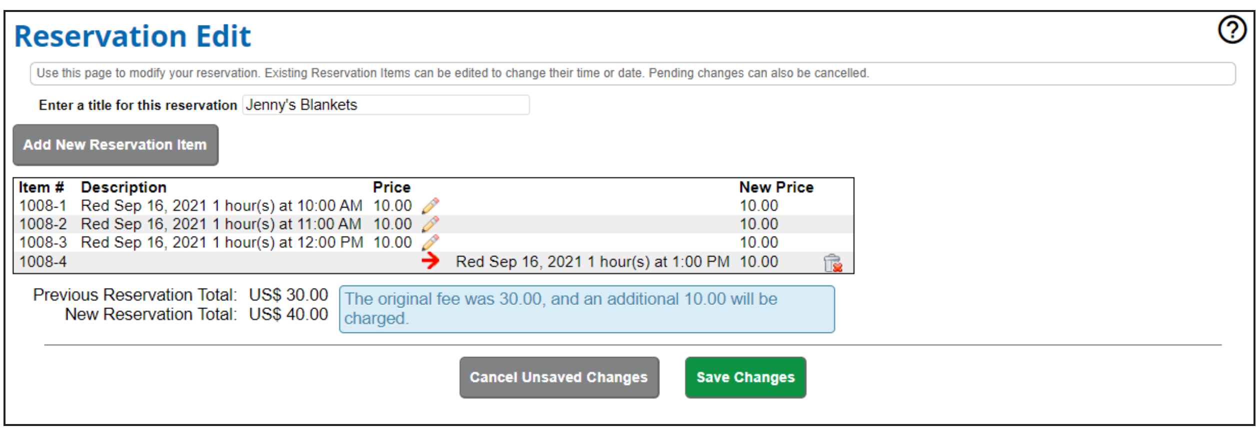


On the *Reservation Edit* screen, the **Description** for the edited item will include the original reservation time, followed by the new reservation time. The original price of the reservation will be listed, followed by the new price of the reservation. You will also see a Delete (trashcan) icon. Select 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 .



Maintain Options for Items

The following icons appear in the Maintain column when reviewing Items.

Icon	Description
 (Reservation 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 prompted 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)

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.

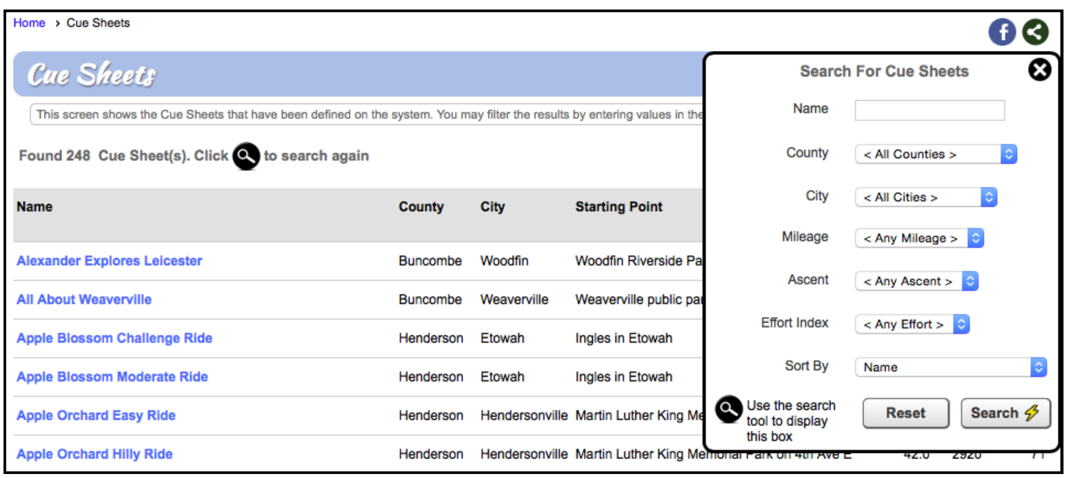
The module also includes Ride With GPS support.

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:



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.

Searching

The search panel appears when the module is first opened. It allows searching on the following fields:

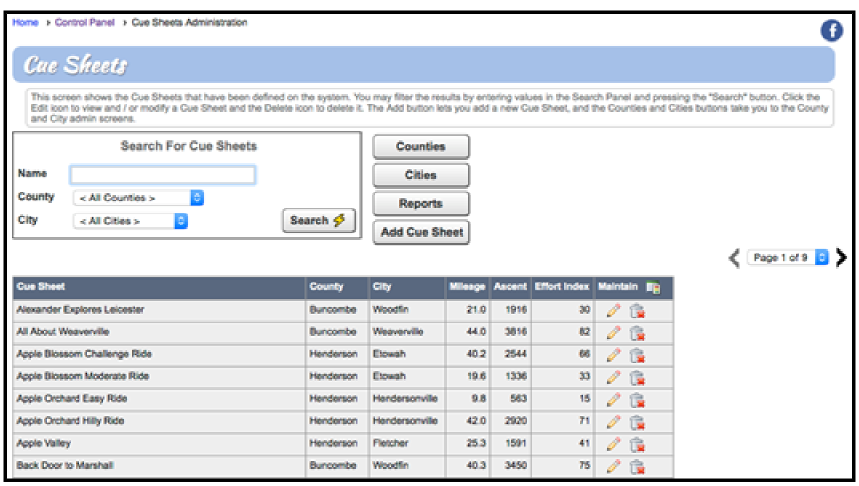
- Name (anywhere in field)
- County
- City
- Mileage (using predefined ranges)
- Ascent (using predefined ranges)
- Effort Index (using predefined ranges)

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.

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:



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.

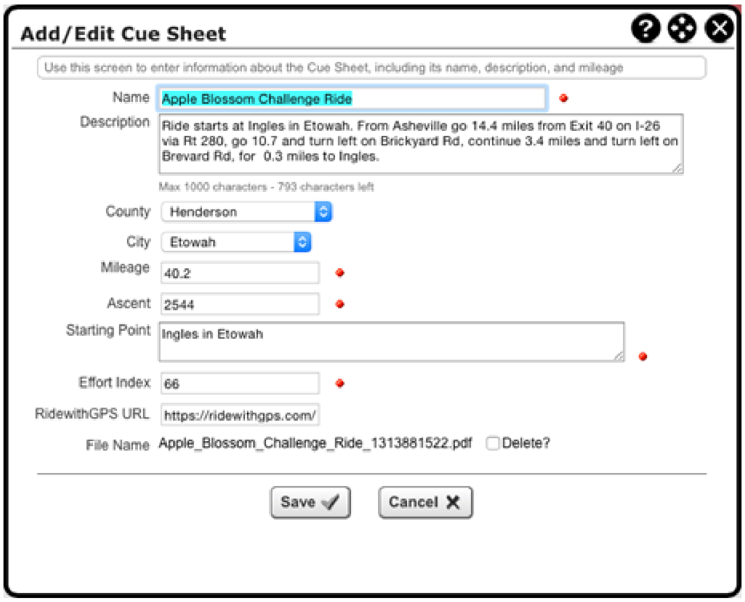
The Maintain column includes the standard **Edit** and **Delete** icons.

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.



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)

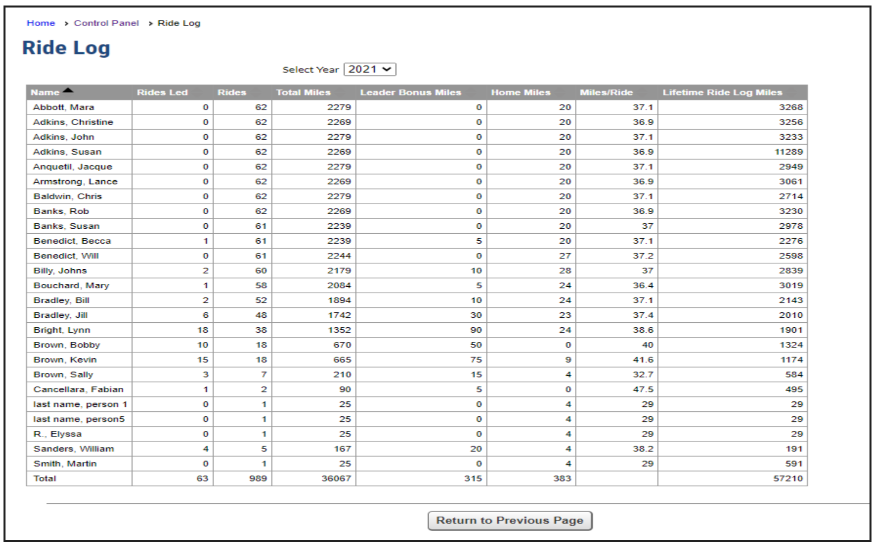
Many cycling clubs run competitions to see which members ride the most miles or kilometers in a year, or the most number of rides; or which members lead the most number of rides.

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.


Home > Control Panel > Ride Log

Ride Log

Select Year 2021

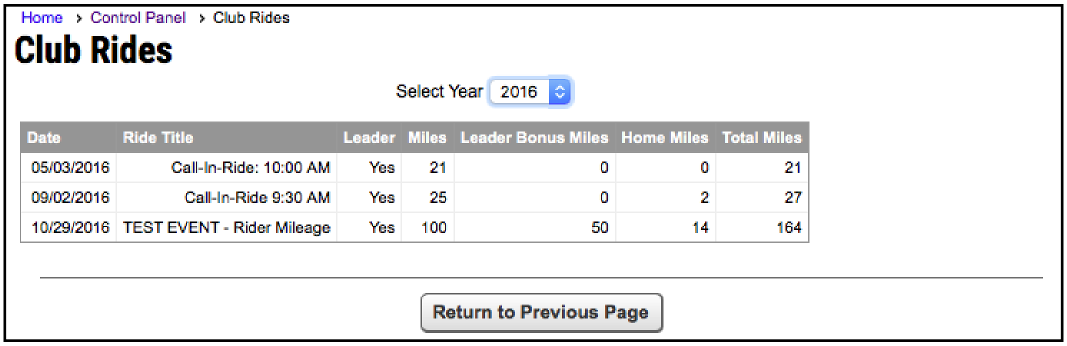
Name	Rides Led	Rides	Total Miles	Leader Bonus Miles	Home Miles	Miles/Ride	Lifetime Ride Log Miles
Abbott, Mara	0	62	2279	0	20	37.1	3268
Adkins, Christine	0	62	2269	0	20	36.9	3256
Adkins, John	0	62	2279	0	20	37.1	3233
Adkins, Susan	0	62	2269	0	20	36.9	11289
Anquetil, Jacque	0	62	2279	0	20	37.1	2949
Armstrong, 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

Return to Previous Page

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

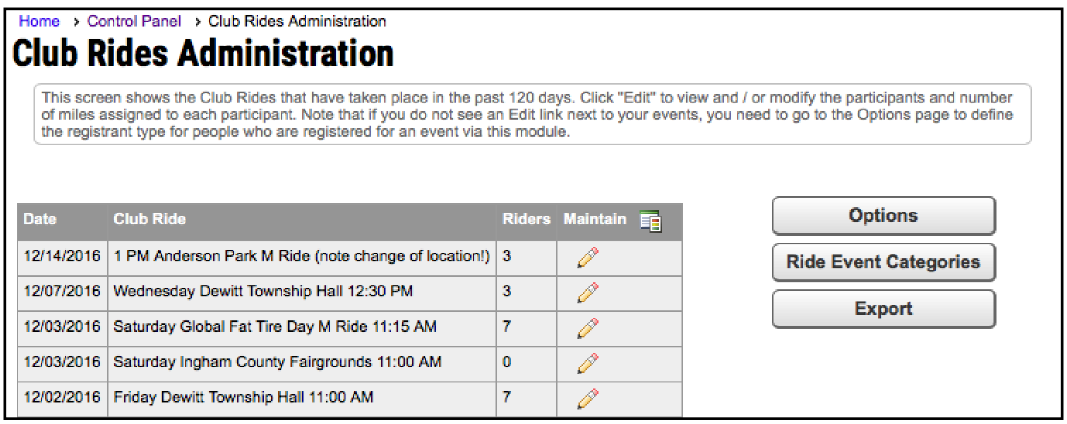
The Ride Log module also includes a Profile screen for each club member. Clicking **My Rides** displays a screen similar to the following:



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.

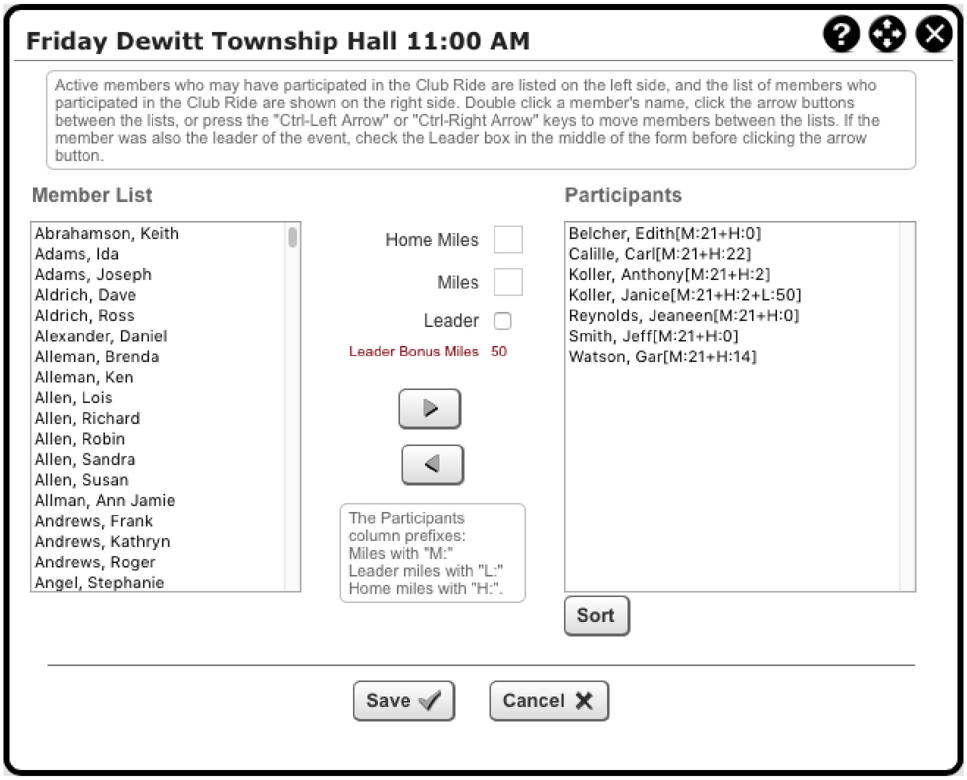
Ride Log Manager

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:



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:



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.

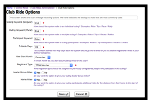
New entries are added to the Participant list at the end. Click the **Sort** button to resort the list to verify who has been added and who still needs to be added.

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

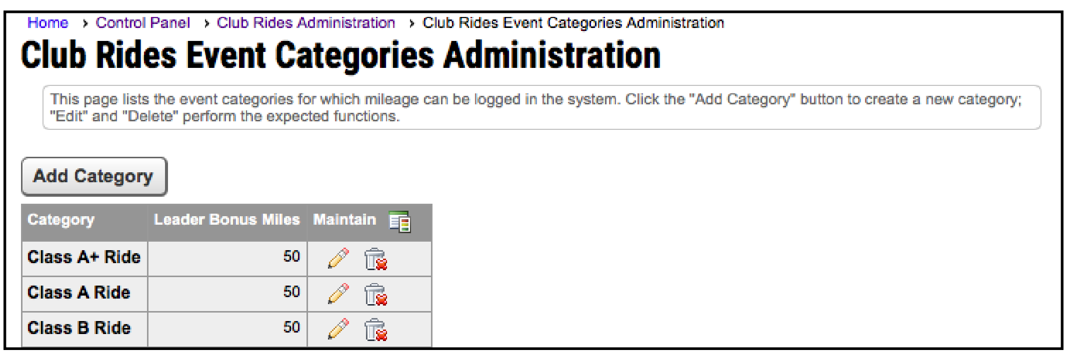
Click the **Options** button to see the following screen:



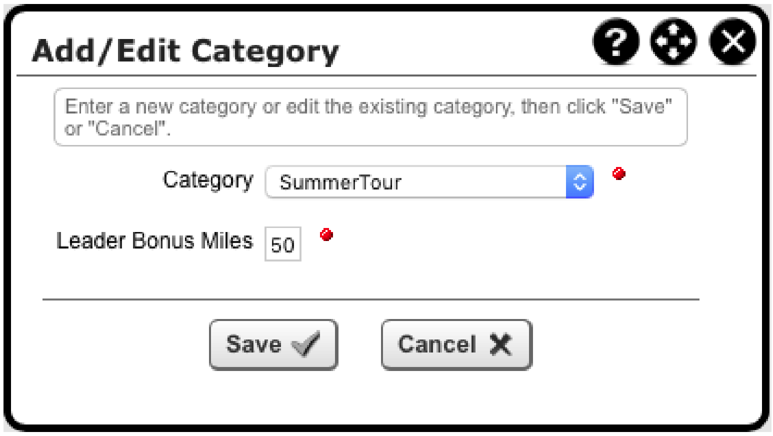
- Specify the keyword used for a ride (singular and plural) and for a ride participant.
- **Editable Days** defines how far back the system should look for rides.
- Specify the month in which the club's "ride year" begins.
- Specify the event Registrant Type that should be assigned to previously unregistered 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:



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.



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

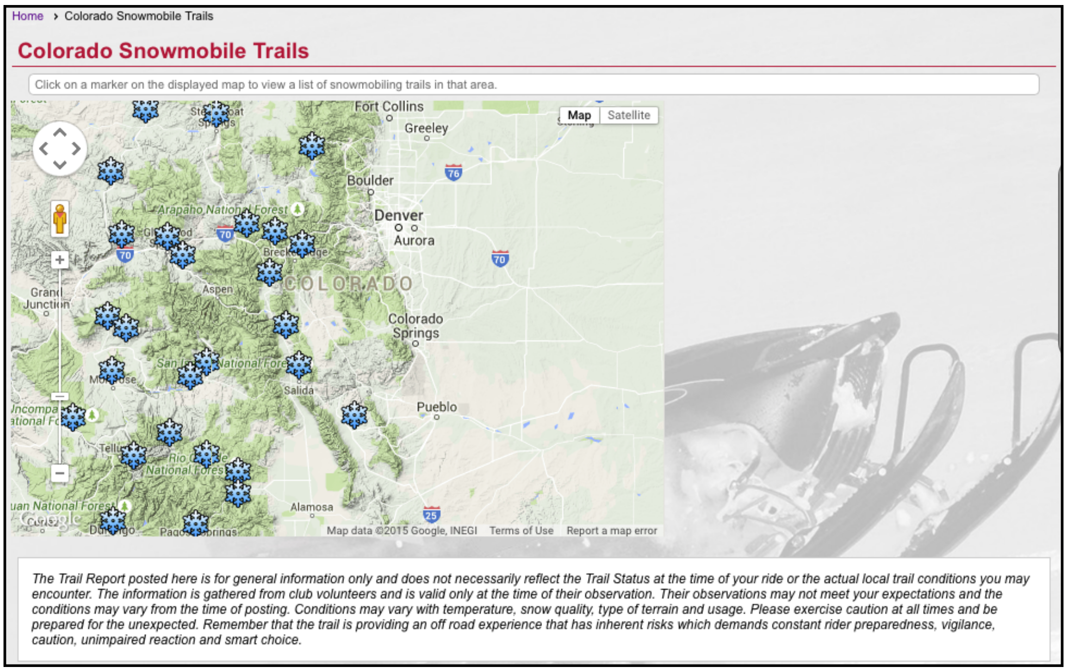
This module was designed for a state snowmobile association. It tracks every major trail in a defined area, showing the trail status, snowfall, base, trail conditions and other relevant information. Users have the option of downloading a trail map in a PDF file.

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.

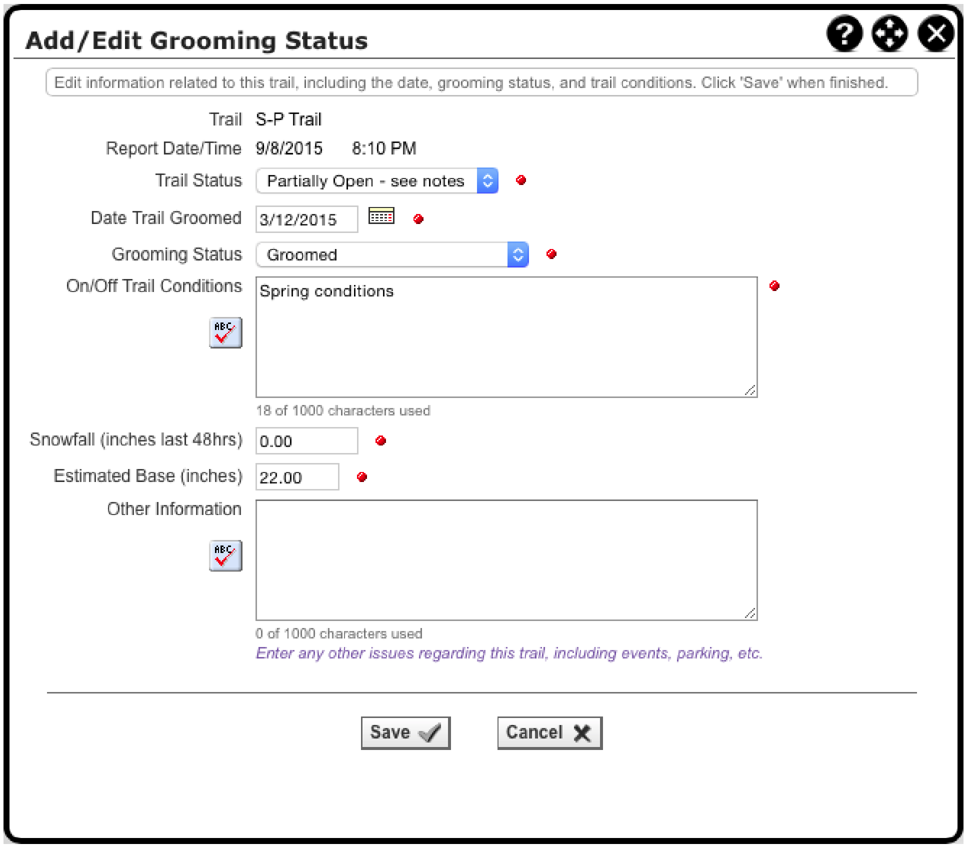
> **Example:**

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:

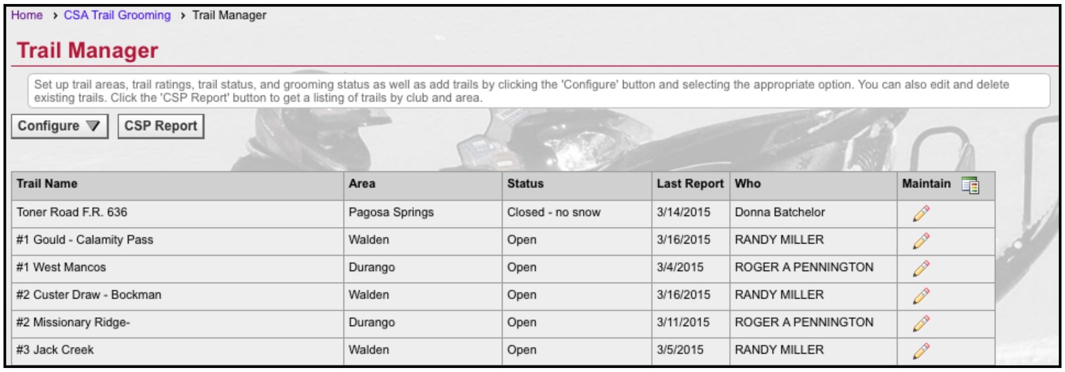


The trail being edited is shown at the top along with the report date/time (which is generated by the system.) Trail Status and Grooming Status are selected from drop-down lists; the values can be configured in the Admin screens (see below.)

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:


Home › CSA Trail Grooming › Trail Manager

Trail Manager

Set up trail areas, trail ratings, trail status, and grooming status as well as add trails by clicking the 'Configure' button and selecting the appropriate option. You can also edit and delete existing trails. Click the 'CSP Report' button to get a listing of trails by club and area.

Configure | CSP Report

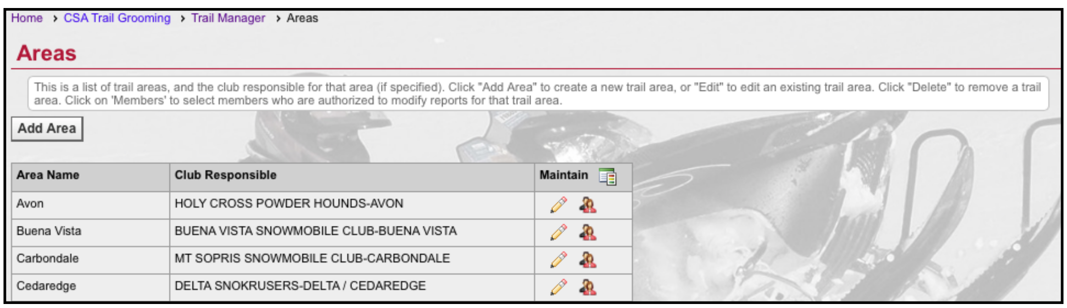
Trail Name	Area	Status	Last Report	Who	Maintain
Toner Road F.R. 636	Pagosa Springs	Closed - no snow	3/14/2015	Donna Batchelor	
#1 Gould - Calamity Pass	Walden	Open	3/16/2015	RANDY MILLER	
#1 West Mancos	Durango	Open	3/4/2015	ROGER A PENNINGTON	
#2 Custer Draw - Bockman	Walden	Open	3/16/2015	RANDY MILLER	
#2 Missionary Ridge-	Durango	Open	3/11/2015	ROGER A PENNINGTON	
#3 Jack Creek	Walden	Open	3/5/2015	RANDY MILLER	

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 Grooming › Trail Manager › Areas

Areas

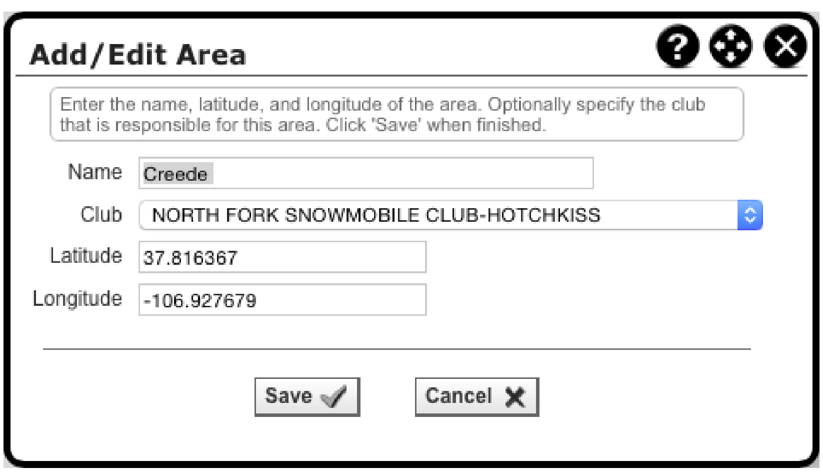
This is a list of trail areas, and the club responsible for that area (if specified). Click "Add Area" to create a new trail area, or "Edit" to edit an existing trail area. Click "Delete" to remove a trail area. Click on 'Members' to select members who are authorized to modify reports for that trail area.

Add Area

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	

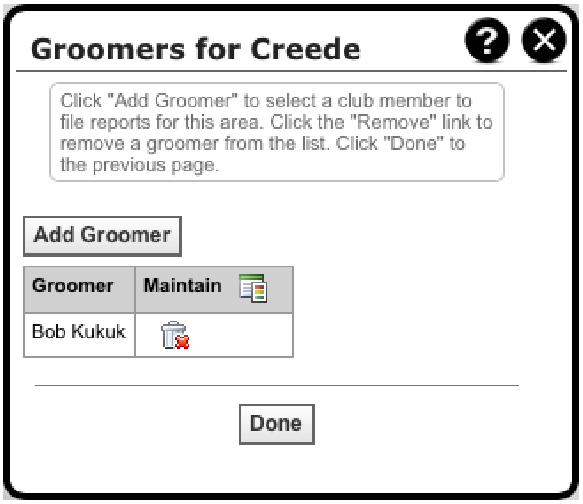
This screen lists the major trail areas; each one becomes an icon on the Google map.

Clicking the **Add Area** button displays the following popup screen:



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:



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:

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:

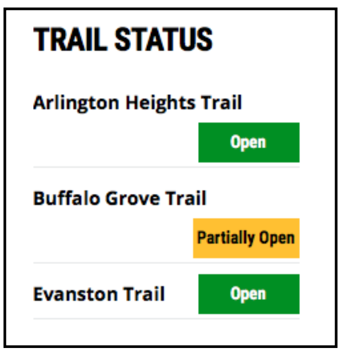
- Keyword for a trail user (e.g. snowmobile, bike, horse)
- Title for the main page
- Disclaimer text to be placed under the map
- Map icon (e.g. a snowflake or a bike or a horse)
- Trail status label (e.g. “Grooming Status” or “Trail Conditions”)
- Trail status date label (e.g. “Date Groomed” or “Date 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.



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

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.)

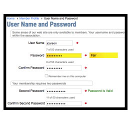
We have also updated the user’s “Forgot My Password” function and the admin “Reset Password” function that generates new temporary passwords for these members. The system also ensures that the initial and second passwords are not the same.

> **Activation:** The one-time fee to activate this feature for your website is $200.

Related Tasks

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:

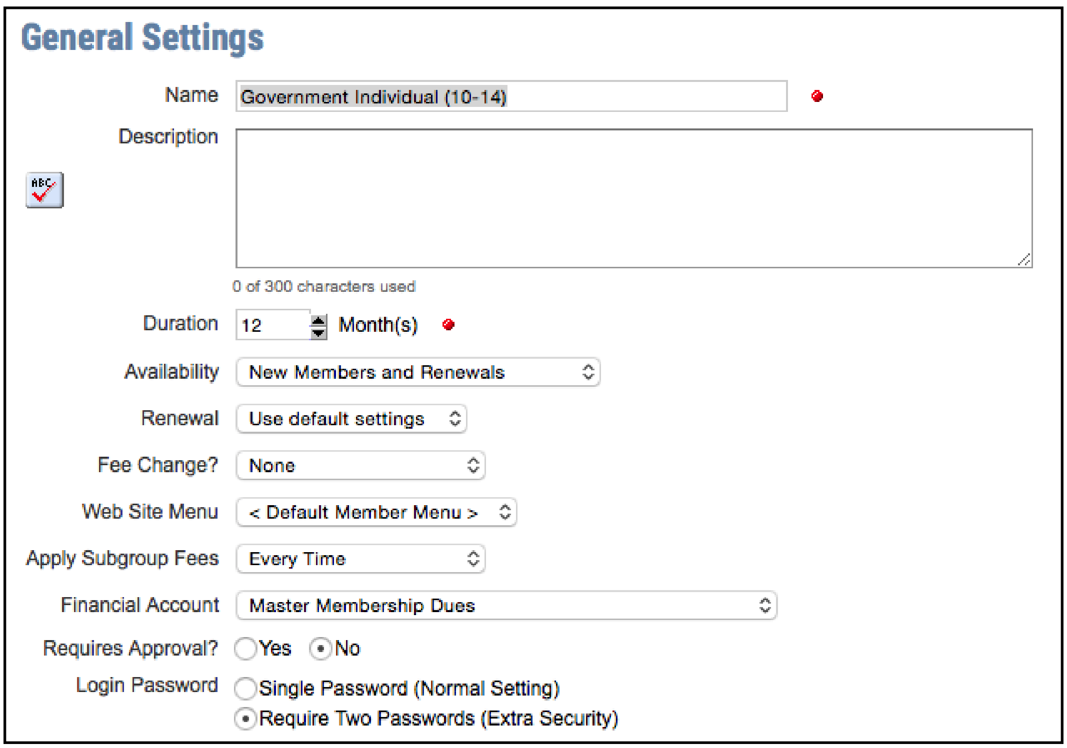
- Must be at least 10 characters long
- Cannot be the same as your first password, user name, first name, or last name
- Cannot contain sequences of more than two matching characters in a row

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

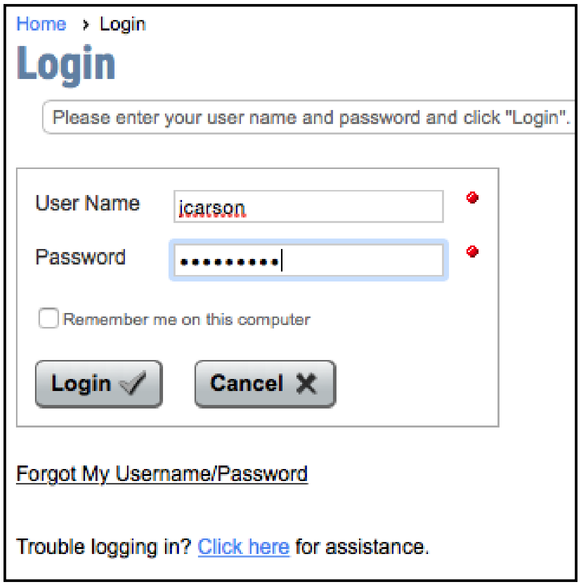
When this feature is enabled, the **Add/Edit Member Type** screen is modified to include the following option (at the bottom of the screen shot):



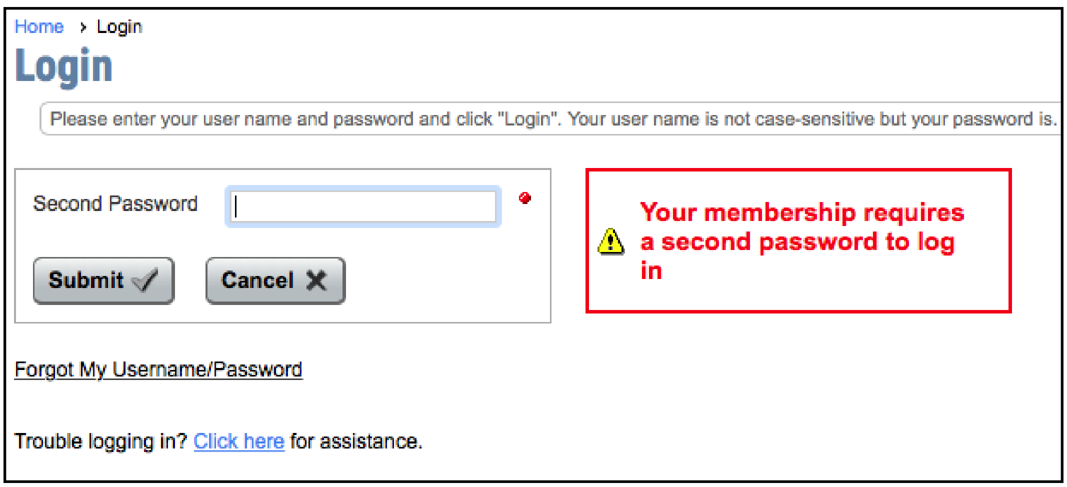
Specify **Single Password** to use the normal setting for member logins, or **Require Two Passwords** to enable the extra security option.

Logging In

When members with two passwords login, the initial screen is the same as always:



The second login screen is then displayed:



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), company 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.

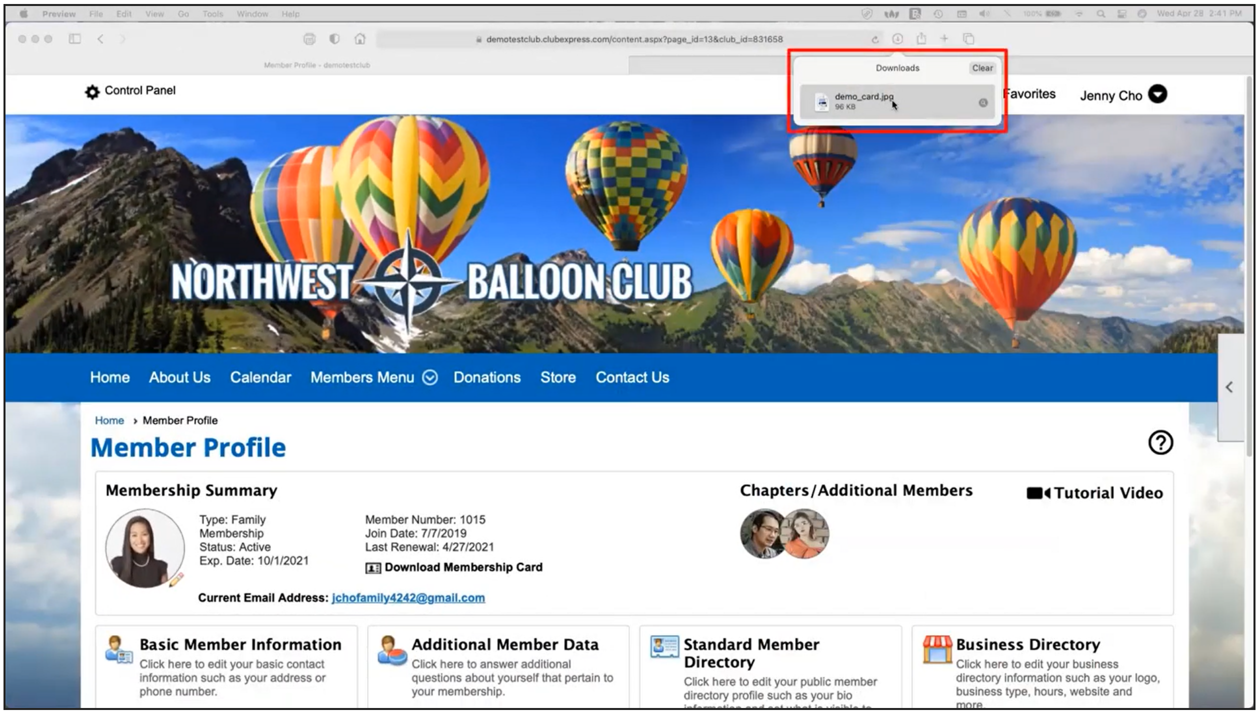
Some clubs use secondary memberships for spouses while others simply list the spouse information as part of the primary membership; if this is the case, let us know if spouse cards should be enabled.

If your organization offers business memberships, virtual membership cards for those members can show the business name above the member's name.

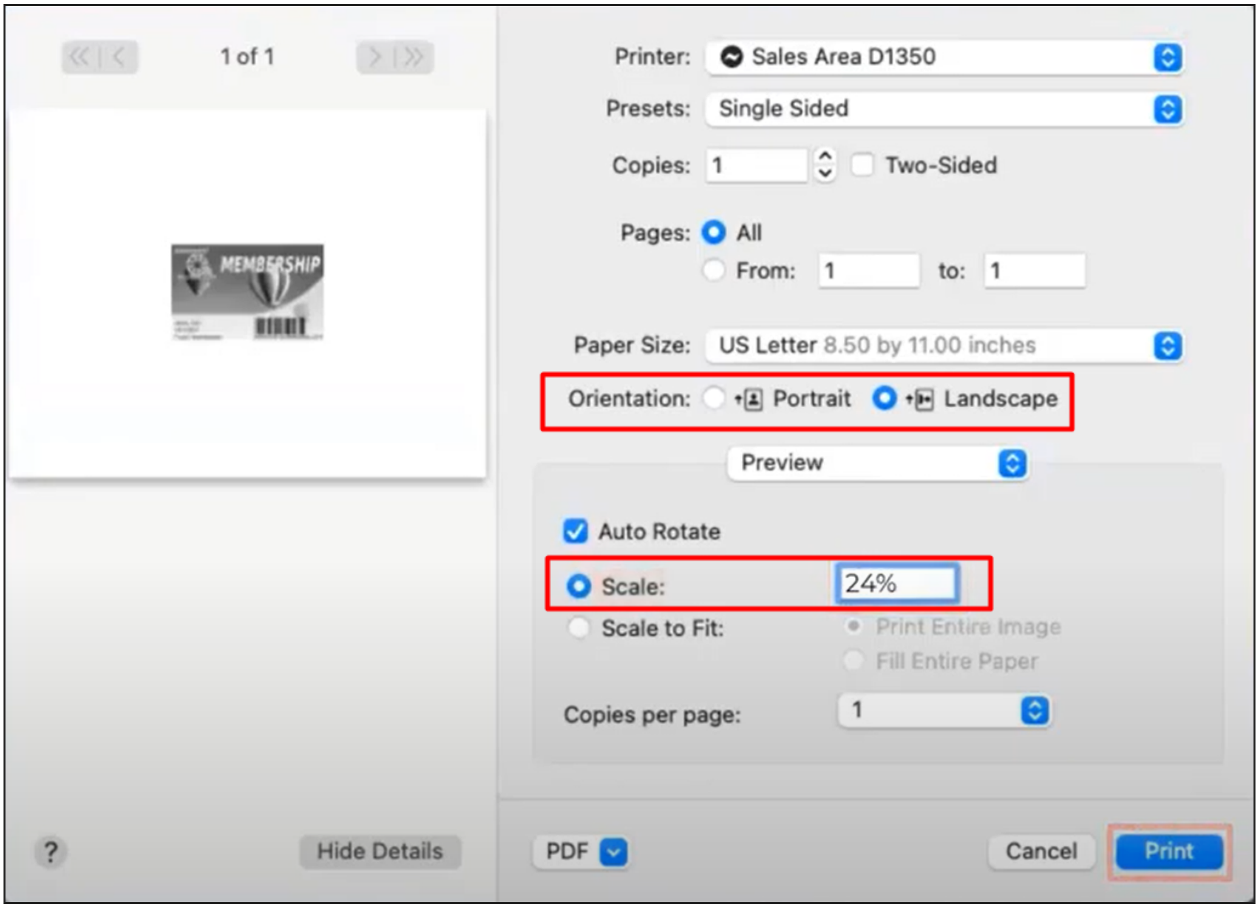
Tips On Printing Your Membership Card

Printing from a Mac

Click the membership card link. Once the image has downloaded, select the image to open it.



In the *Print* popup, select **Orientation: Landscape**, and **Scale: 24%**.



Select the **Print** button to print a copy of your card.

Printing from Windows

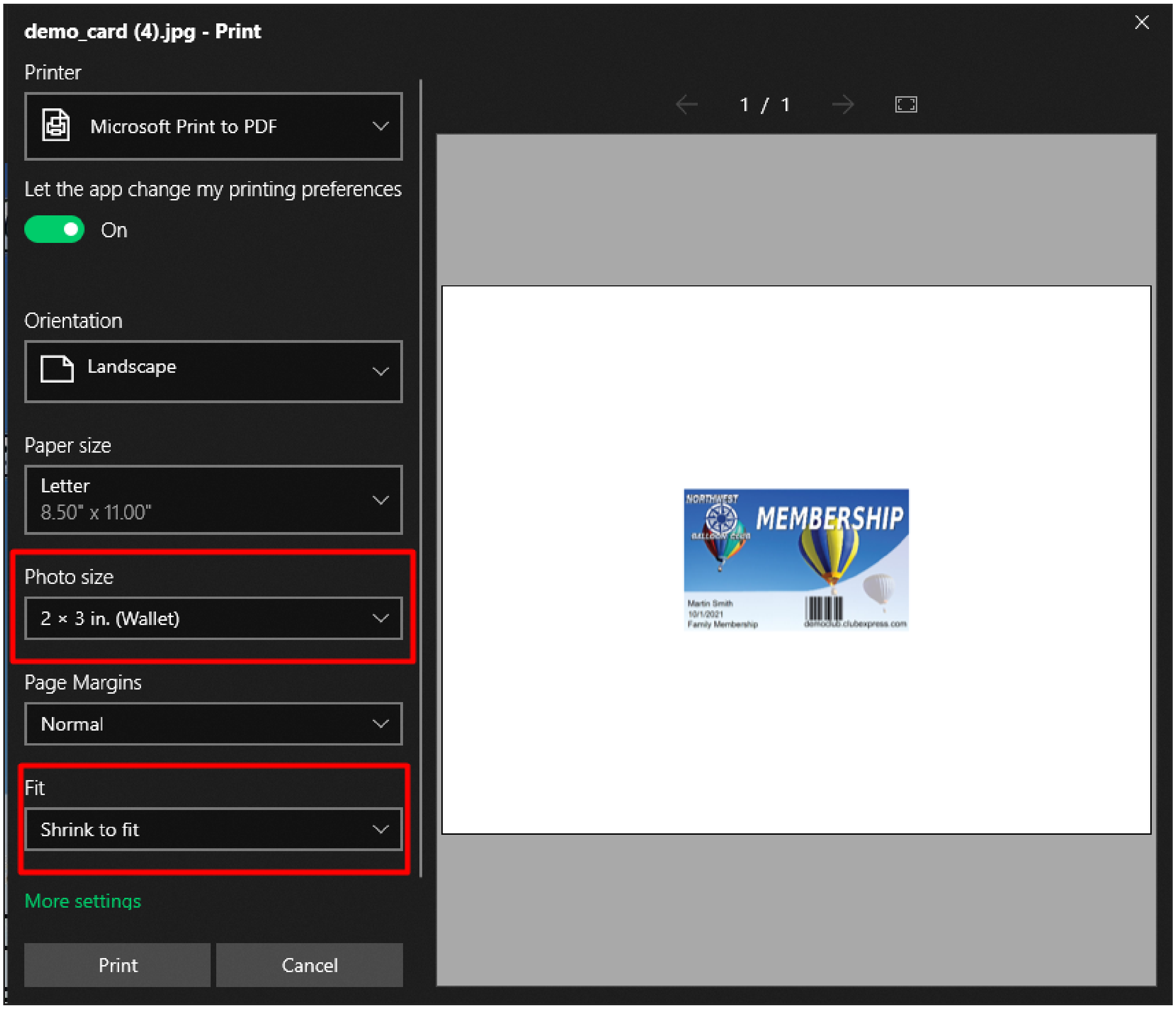
Windows users have two options to print their membership cards:

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**.

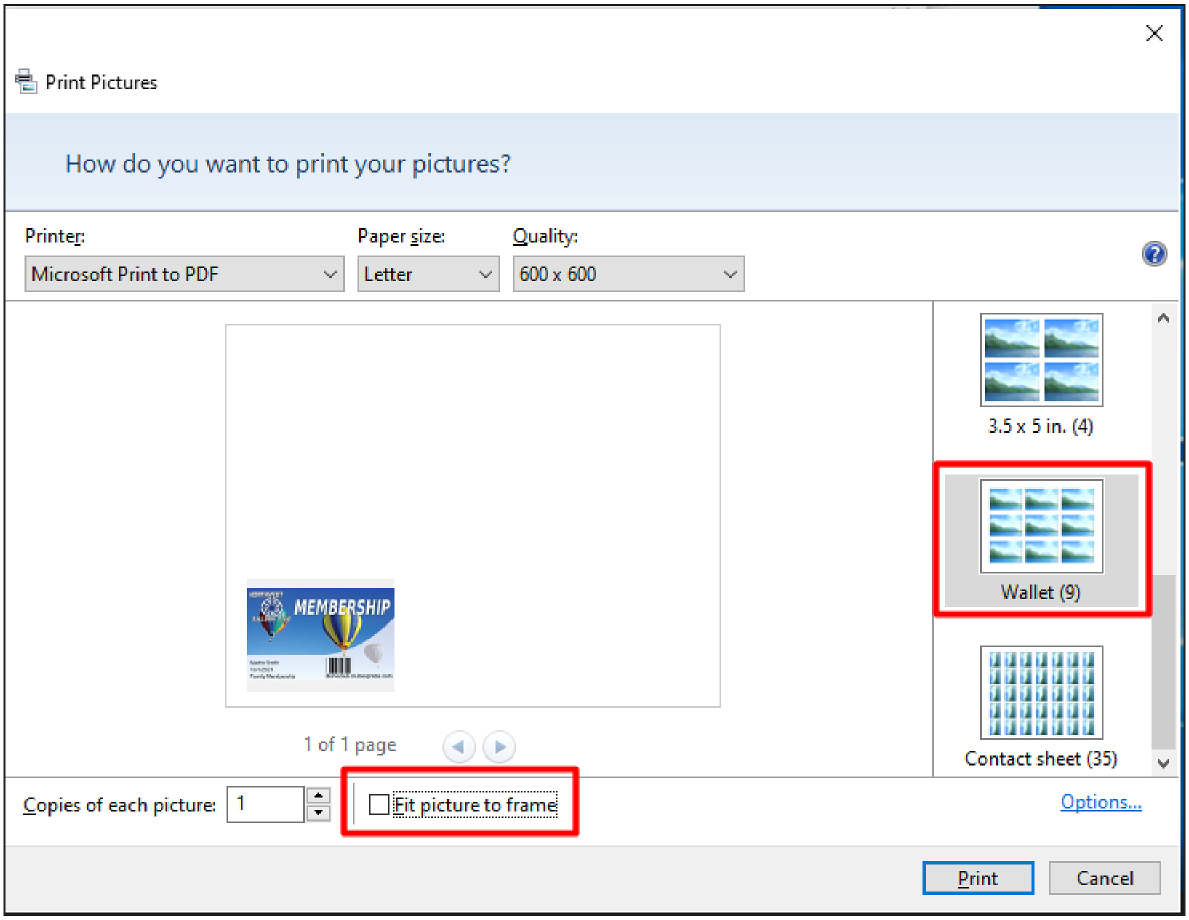


Select the **Print** button to print a copy of your card.

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*.



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: https://ws.clubexpress.com/member_status.ashx?cid=<CLUB_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

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

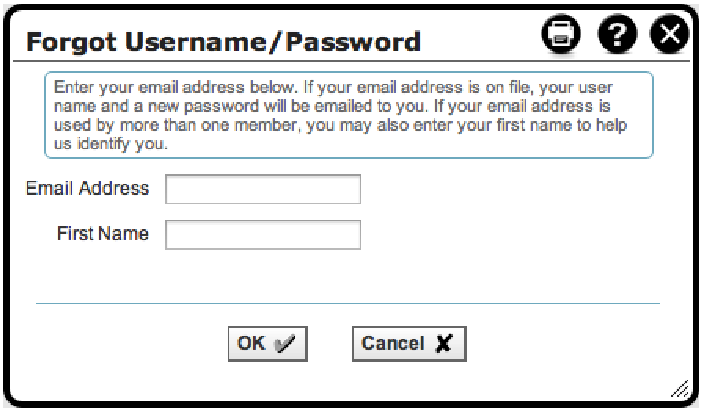
Enter your user name and password and click the **Login** button. Click **Cancel** to return to the home page.

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:

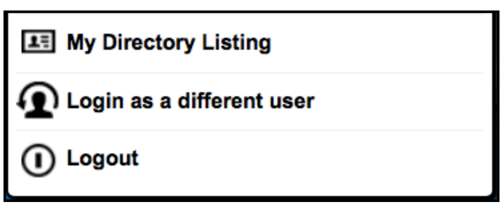


The system will prompt you to enter your email address and, optionally, your first name. When you click **OK**, the system will search for this information in the club's membership database. If one matching record is found, the username and a new temporary password is generated and sent to the email 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

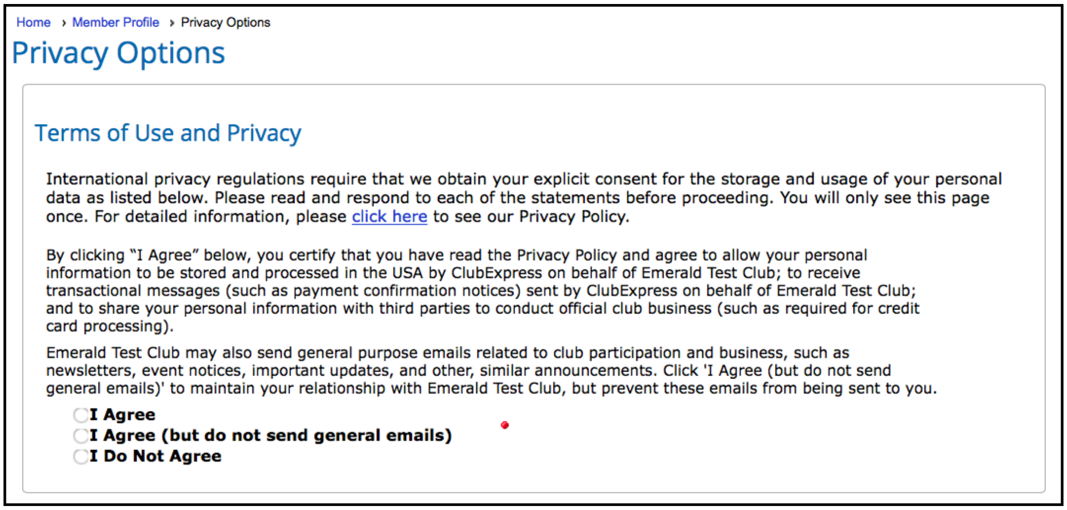
If you use a shared computer, there is an option on the drop-down name panel to log in as a different user:



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:

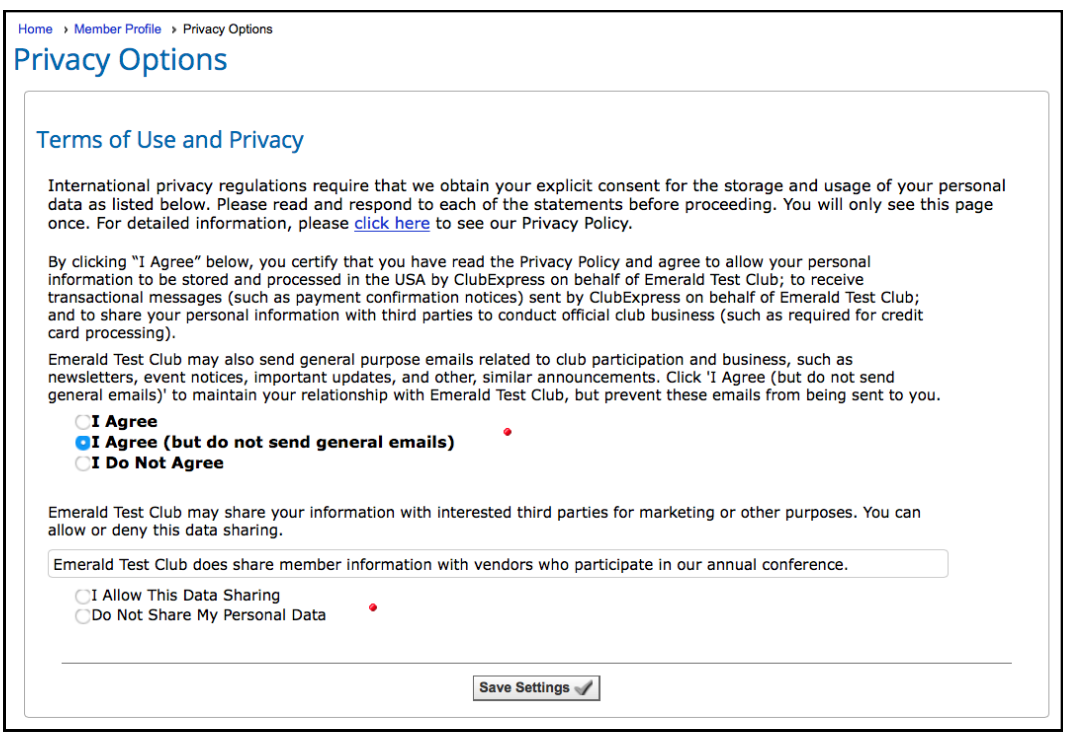


You are asked to consent to the following 3 provisions:

- 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.

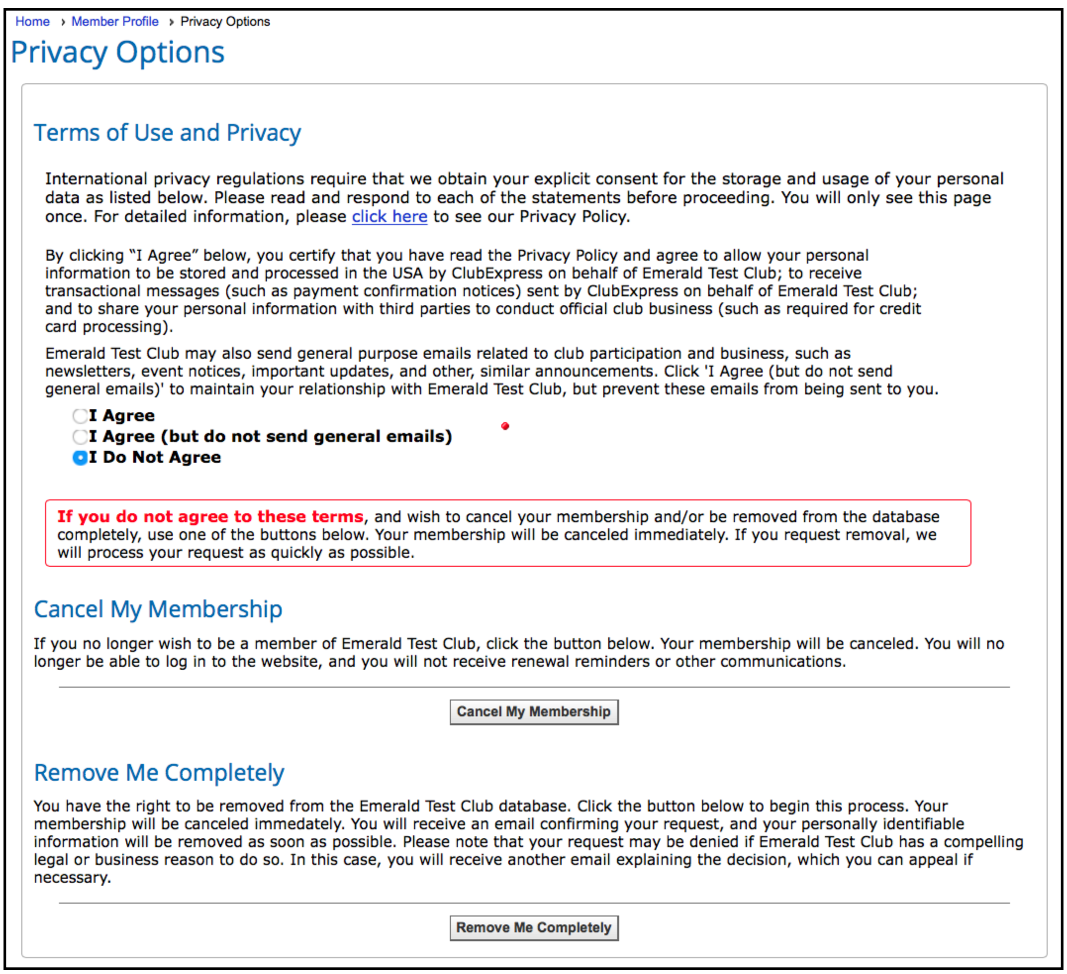
If your club or association shares personal data with third parties for marketing or fund-raising purposes, the final question allows you to opt in or out of having your personal data included in such lists. You may see some additional text from your organization explaining how and why they share such 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.

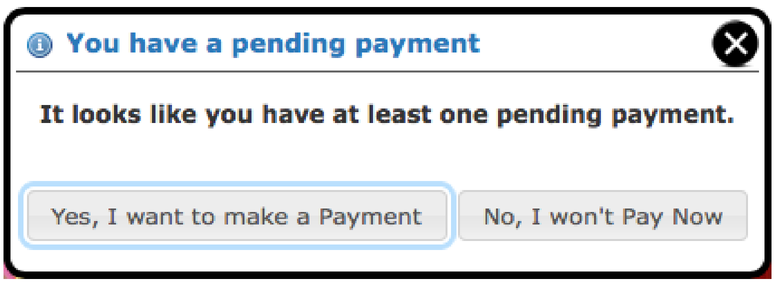
If you click **I Do Not Agree**, you will see the following screen:



- **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

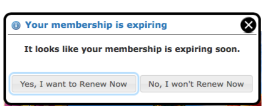
When members login, if they have a pending payment, they will see the following popup message:



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:

- 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.

- 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:

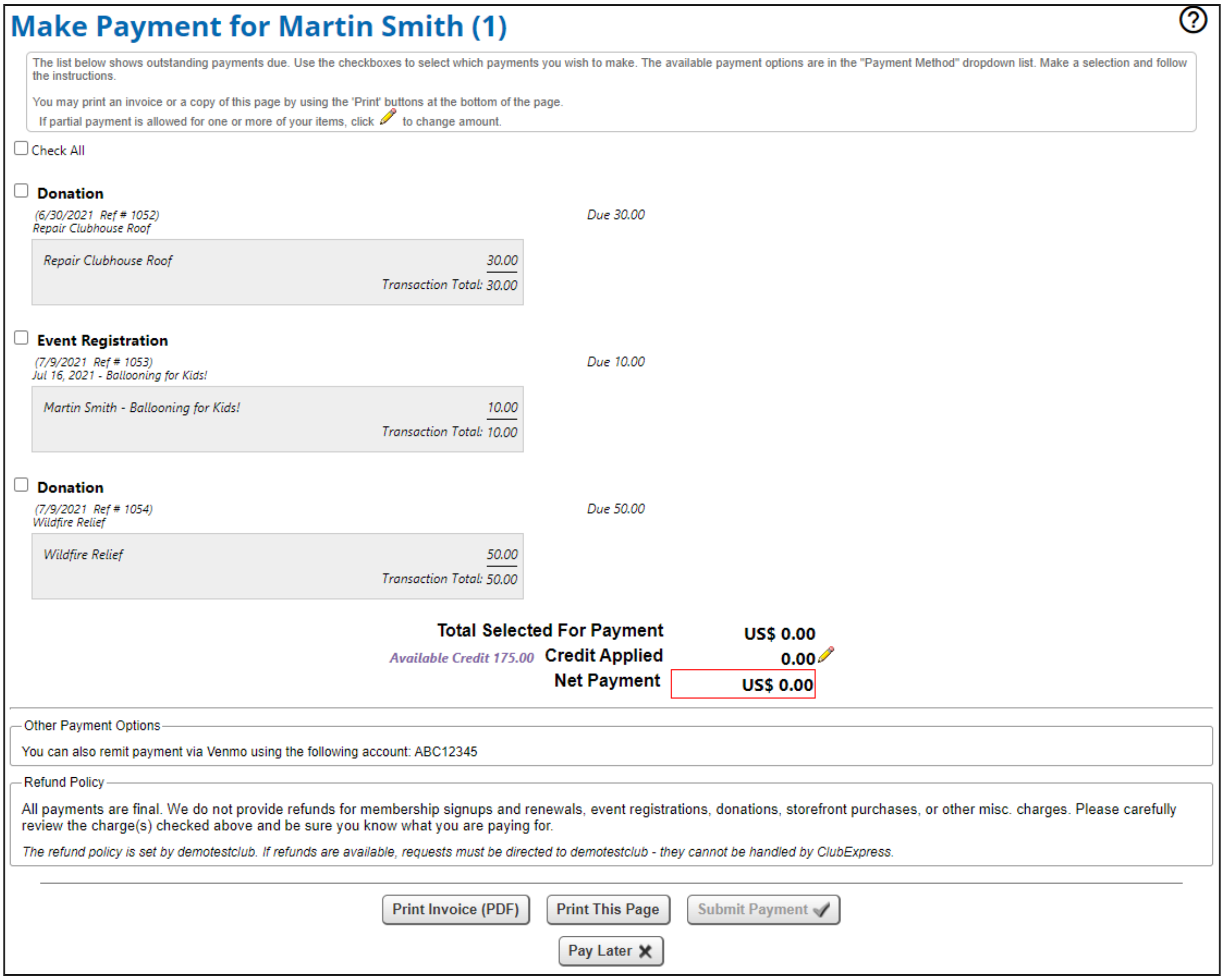
- Select "Tools - Options" from the browser menu. A box title "Options" will appear.
- Click on the "Site Controls" option.
- Check the "Allow cookies" checkbox.
- Check the "From originating site only" checkbox. (This is optional, but recommended.)
- Press the "OK" button.

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.



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:

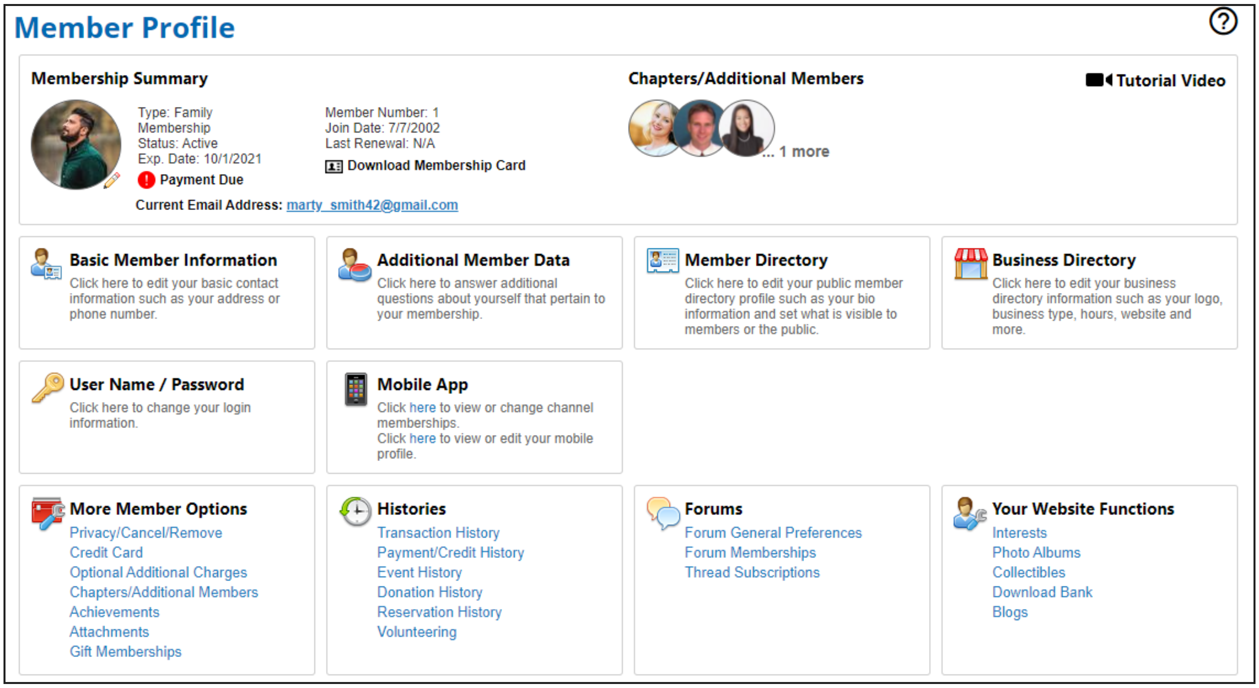
- Credit card processed on this website
- PayPal (if enabled)
- Print invoice to send with check

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.

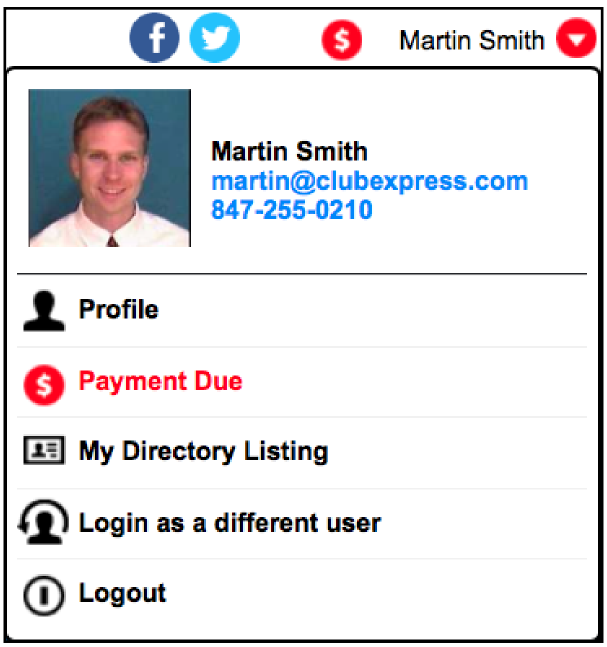
Member Profile

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.



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.

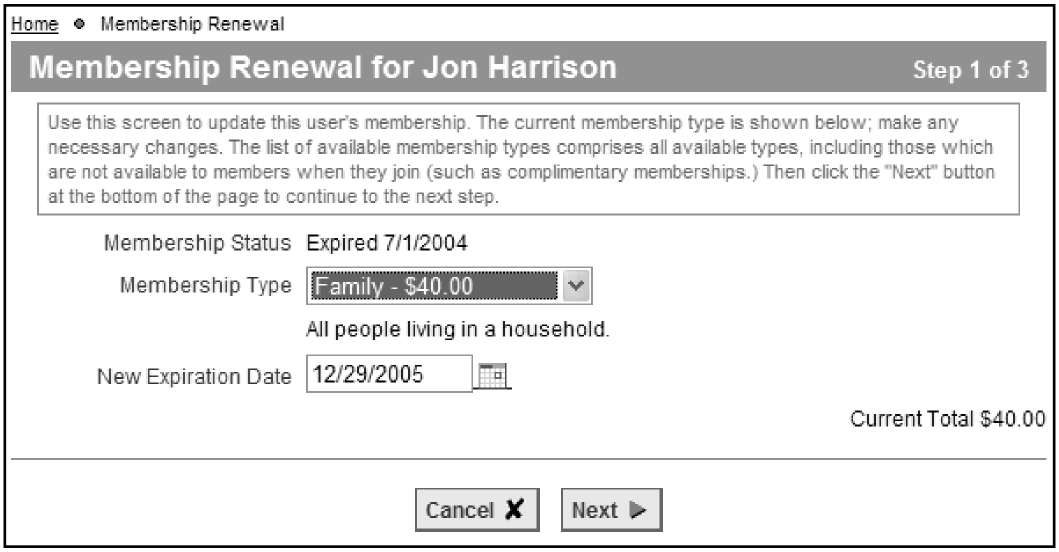
Click the photo to jump the Member Bio add/edit screen to update your bio, photo, social networking links or visibility.

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

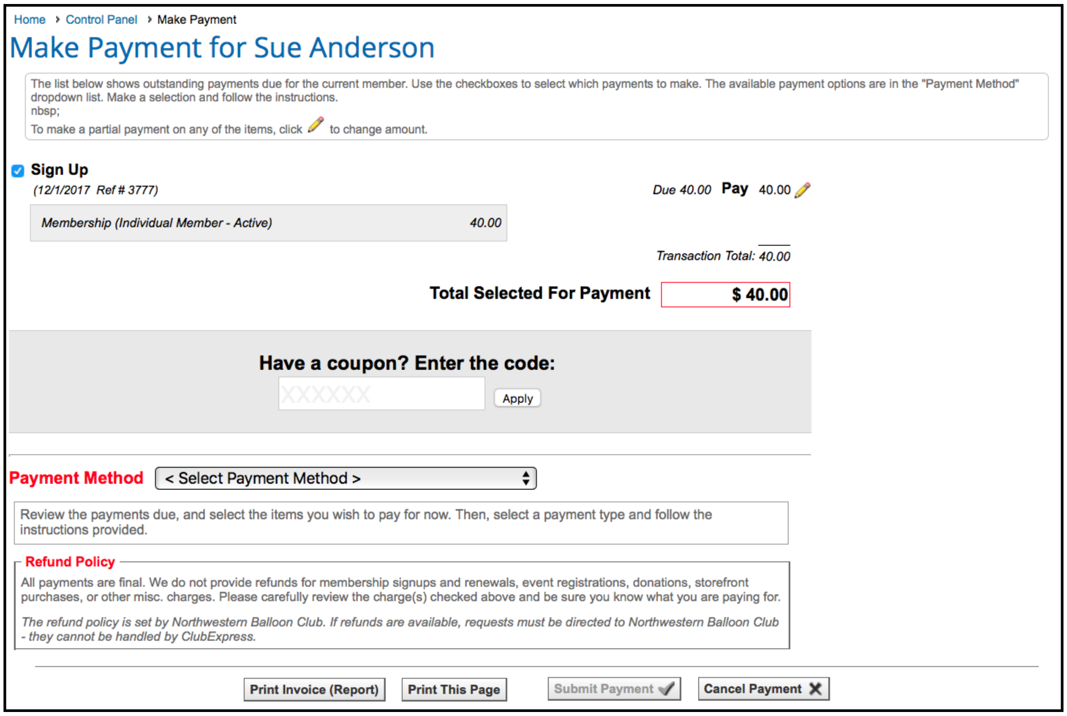
Click the red **Renew** link to renew your membership. This choice only appears if your membership is up for renewal. You will be taken into the Member Renewal wizard, the first screen of which is shown below:



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:



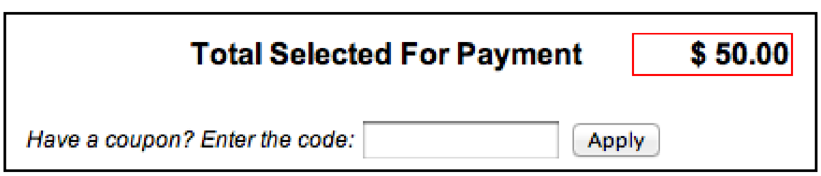
This screen shows one or more payments pending, including the detail for each. If there is only one payment shown, it will be checked. If multiple payments are shown, none of them will be checked; you must check at least one to pay.

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:



Once the code has been entered, the screen changes as follows:

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.

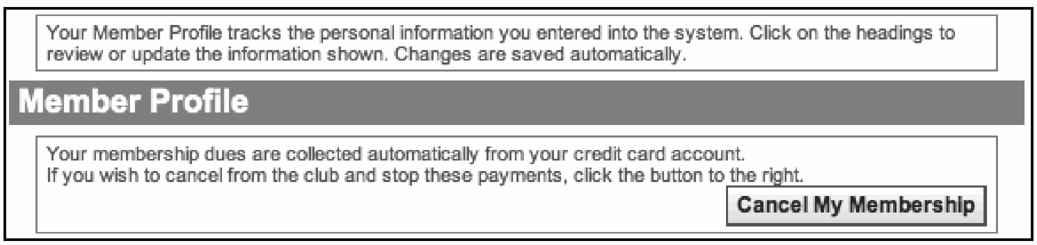
If you choose to pay by check, or if you select credit card but the transaction does not complete, your payment is flagged as Pending and can be “revived” at any time. If you have pending payments, you will see a **Payments** link when you log in as well as on the Profile screen. Clicking it takes you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

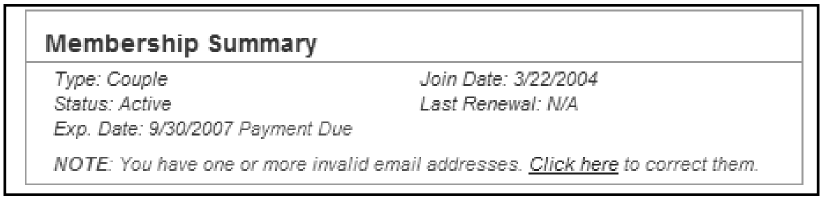
If you select a member type that is configured for automatic renewal and payment, you will see a special note on the summary page, before you save your membership and proceed to the payment page.

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)



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.

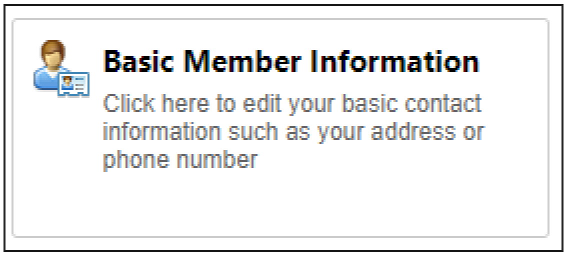
Select the appropriate action from the choices in the right-most column:

- **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.

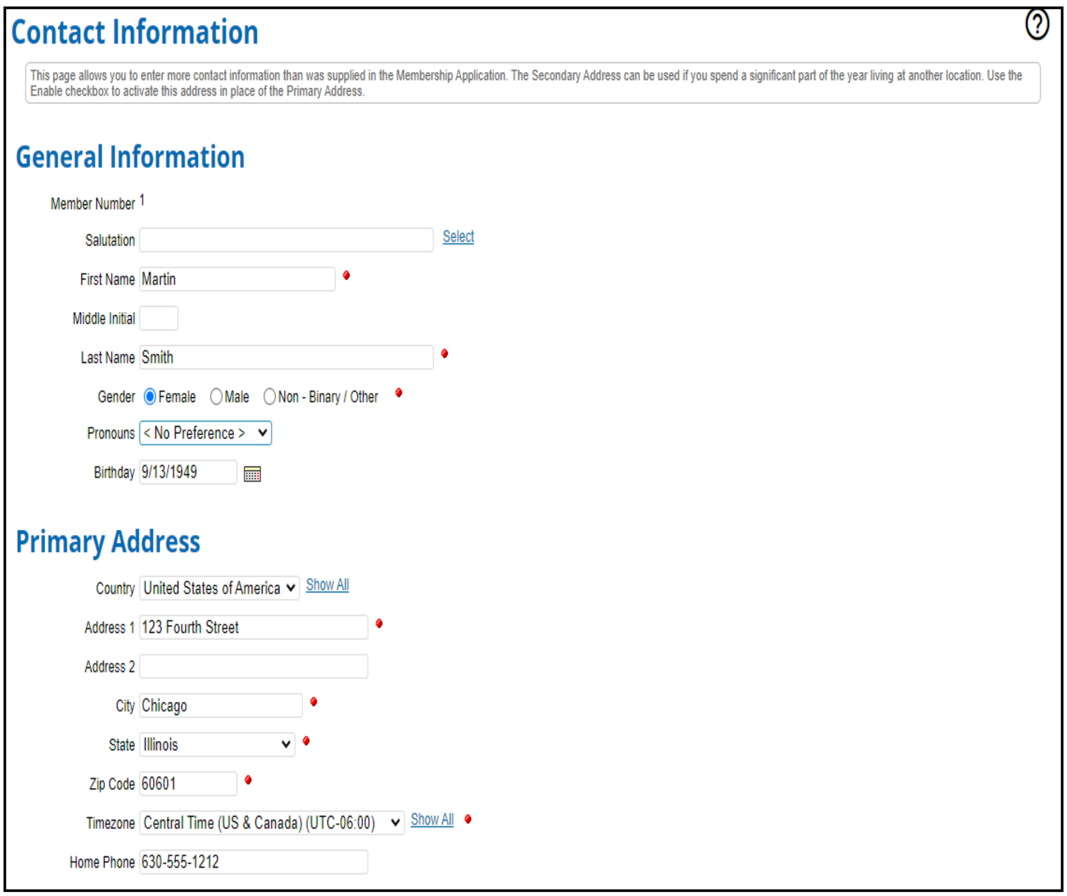
Basic Member Information

In the Member Profile, the Basic Member Information option allows you to edit or update your contact information.

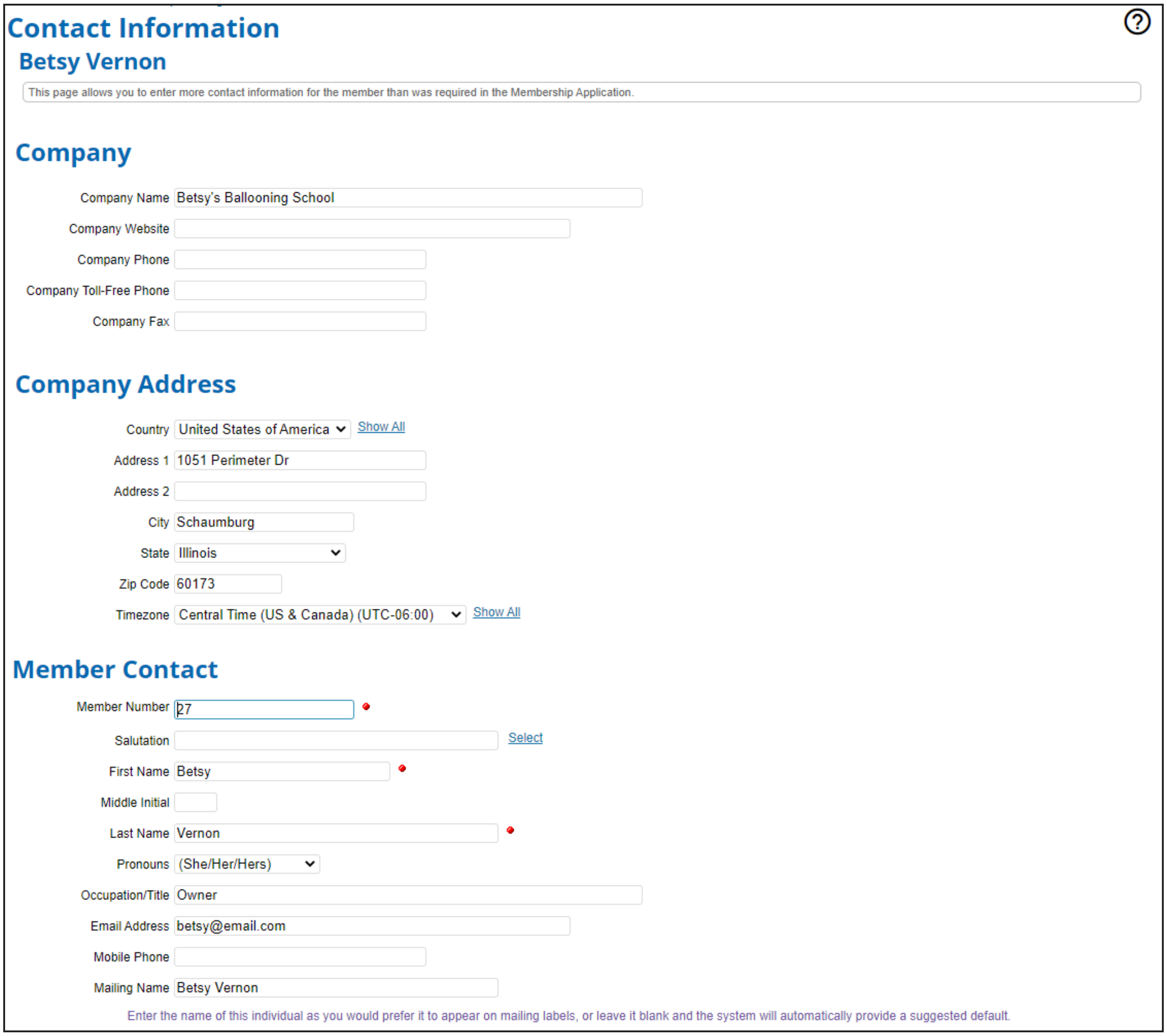


Click **Basic Member Information** to modify your name, address(s), phone number(s) work information, and email address. If the membership is a business membership, click **Company Profile** to manage the contact information for the company and the primary member contact. You will see a screen similar to either of the following:

Contact Information



Company Profile



Contact Information

Betsy Vernon

This page allows you to enter more contact information for the member than was required in the Membership Application.

Company

Company Name: Betsy's Ballooning School
Company Website:
Company Phone:
Company Toll-Free Phone:
Company Fax:

Company Address

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 Contact

Member Number: 27
Salutation: — Select
First Name: Betsy
Middle Initial:
Last Name: Vernon
Pronouns: (She/Her/Hers)
Occupation/Title: Owner
Email Address: betsy@email.com
Mobile Phone:
Mailing Name: Betsy Vernon
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.

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.

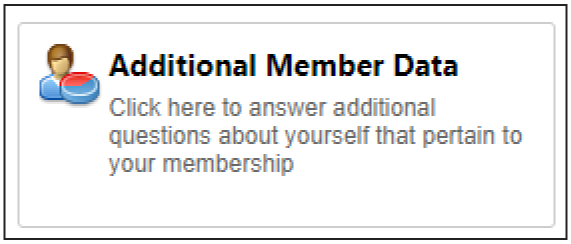
Required fields are indicated with a red dot. The Gender, Nickname, Spouse First and Last Name, Secondary Address and Work Information fields are optional and may not be visible if your club or association is choosing not to collect this information.

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.

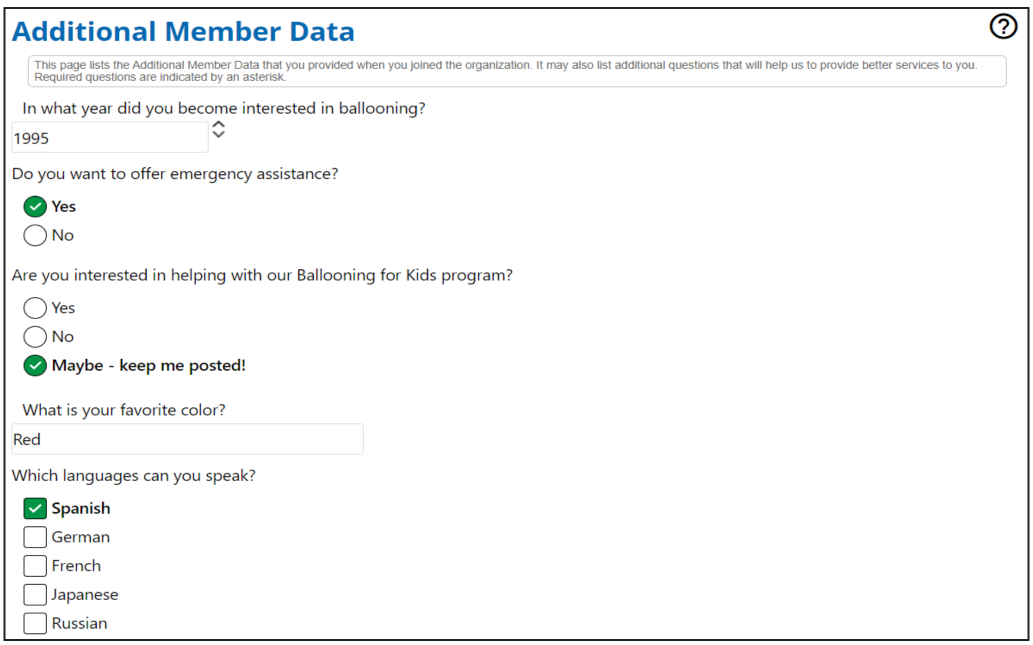
Additional Member Data

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:

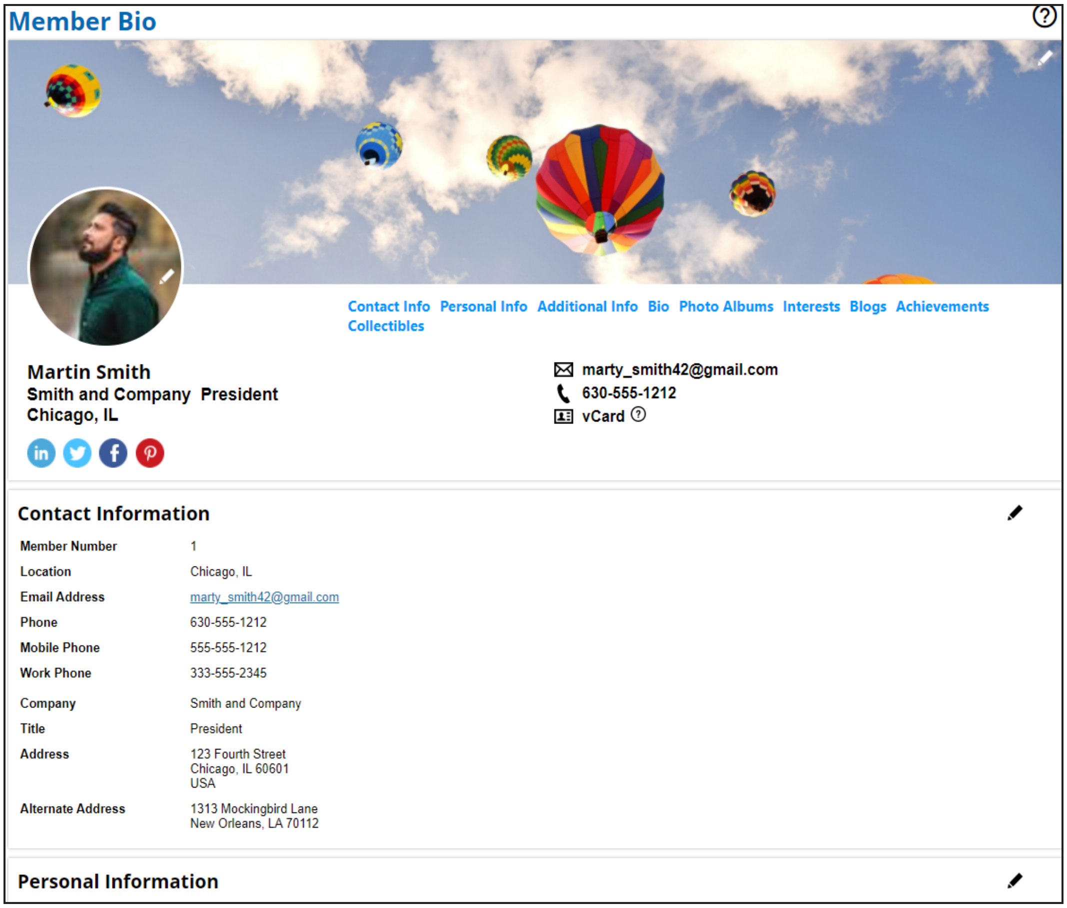


The answers to questions can take many forms, including Yes/No, a number or date, a selection from a list or a text response. Each question will have an answer "field" beside it which is appropriate for the question. Required questions are shown with a red dot. Some questions may be editable by administrators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

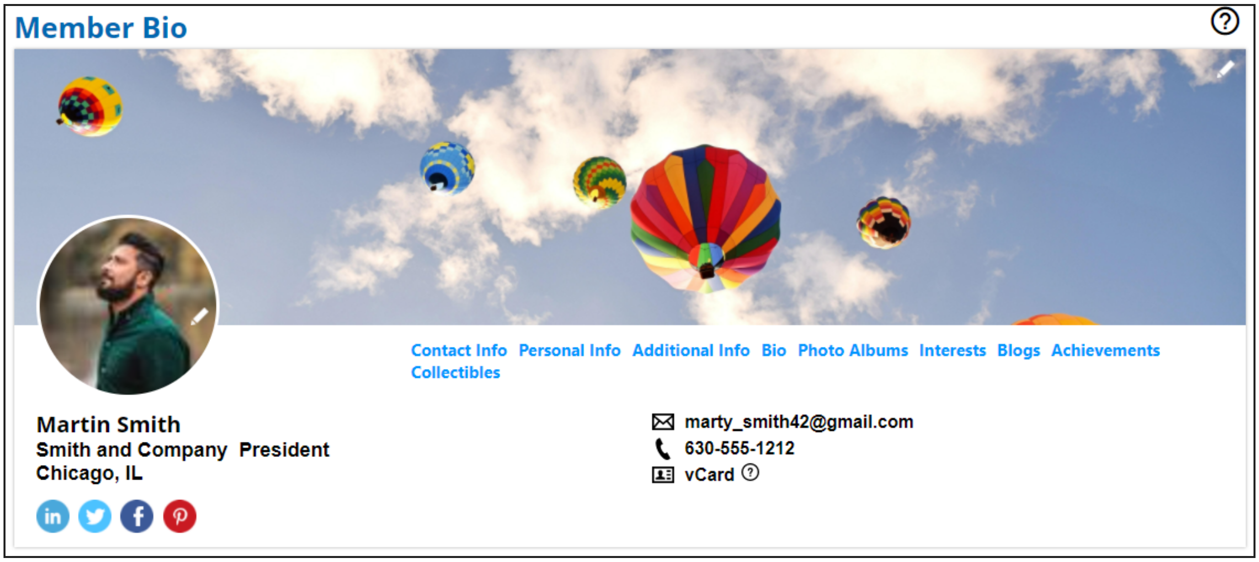


The information shown on this screen will vary based on the Visibility level chosen by the member. Individual members who have specified not to be listed in the directory will not be shown.

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:

Item	Item Notes	(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 information 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 address	(6) Show all information except email	(7) Show all information
Name		Not shown	Shown	Shown	Shown	Shown	Shown	Shown	Shown
City, State		Not sho-	Shown	Shown	Shown	Shown	Shown	Shown	Shown

Item	Item Notes	(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 information 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 address	(6) Show all information except email	(7) Show all information
		wn							
Metro Area	If configured, shown in Contact Info	Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown
Bio		Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown
Contact Info	Contact info entered in Basic Contact Info in the Member Profile	Not shown	Not shown	Shown (member number, location, metro area)	Shown (member number, location, metro area, email)	Shown (member number, location, metro area, email, phone)	Shown (member number, location, metro area, email)	Shown (all contact information except email)	Shown
Personal Info	Birthday (if enabled in the directory by an administrator), spouse/partner,	Not shown	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	Shown (includes birthday, personal website)	Shown (includes birthday, personal website)	Shown

Item	Item Notes	(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 information 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 address	(6) Show all information except email	(7) Show all information
	personal website			member directory search results)	member directory search results)	member directory search results)			
Social Networking	If enabled in the directory by an administrator	Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown
Email	Shown in Contact Info	Not shown	Not shown	Not shown	Shown	Shown	Shown	Not shown	Shown
Address	Primary address, secondary address. When no address is shown, if the map is enabled you will be shown in the center of	Not shown	Not shown	Not shown	Not shown	Not shown	Not shown	Shown	Shown

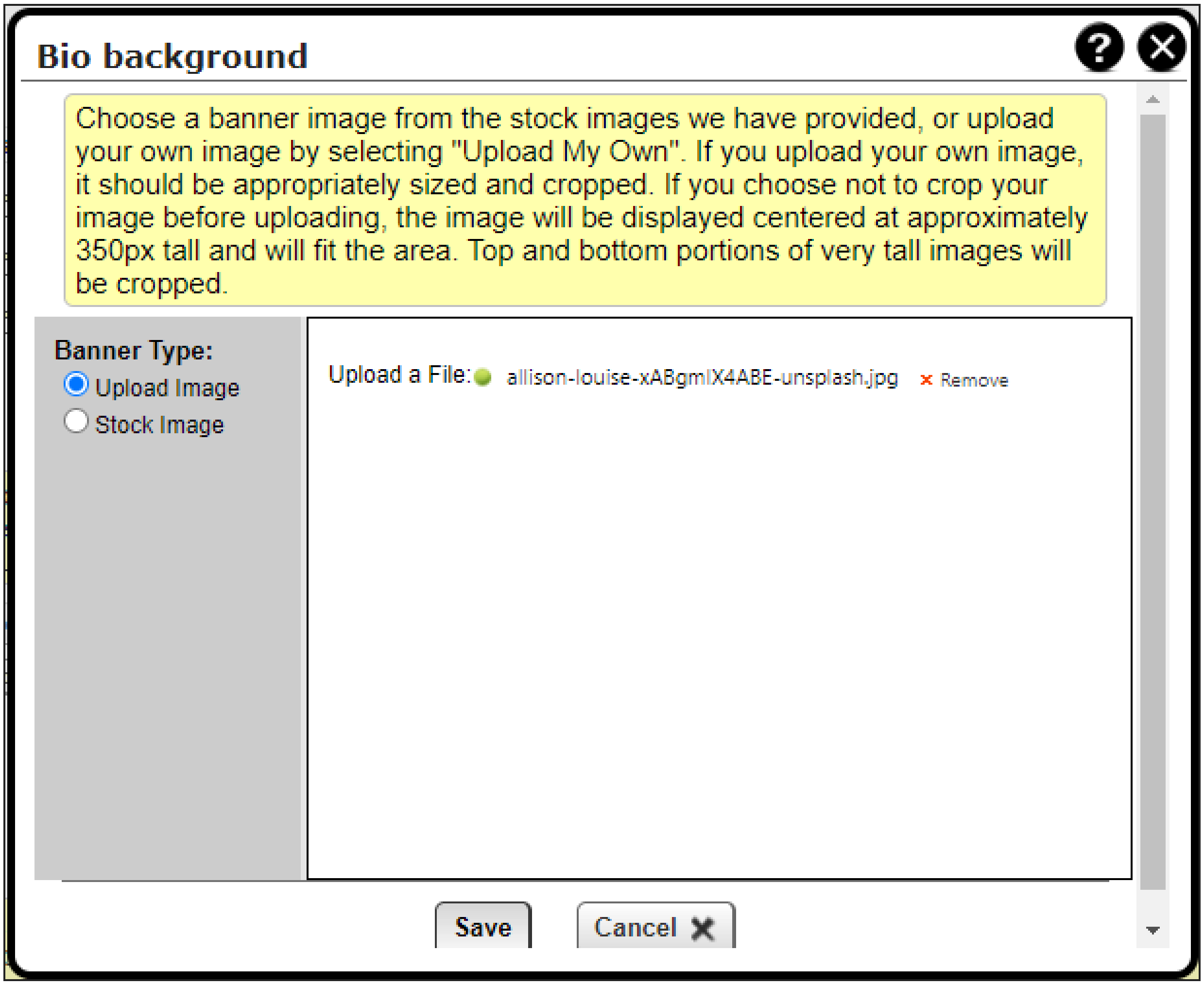
Item	Item Notes	(0) Do not list me in the dir-ect-ory	(1) Show name, city and state only; no bio or con-tact inform-ation	(2) Show name, city, state and bio only; no contact inform-ation	(3) Show name, city, state, bio and email; no address, work inform-ation or phone	(4) Show name, city, state, bio, 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	If enabled	Not sho-wn	Not shown	Shown	Shown	Shown	Show-n	Shown	Shown
Chapter-s	If 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

Item	Item Notes	(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 information 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 address	(6) Show all information except email	(7) Show all information
	pany, title, phone and toll-free phone	wn		**where members join through their professional lives**, only company and location are shown	**where members join through their professional lives**, only company and location are shown	**where members join through their professional lives**, only company and location are shown			
Interests	If enabled, shows interests selected by the member	Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown
Photo Albums	If enabled, shows photo albums created by the member	Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown
Blogs	Shows blog posts	Not shown	Not shown	Shown	Shown	Shown	Shown	Shown	Shown

Item	Item 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.

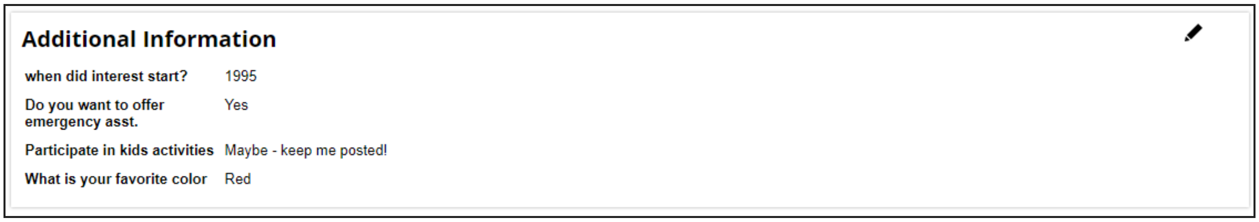


vCard Link

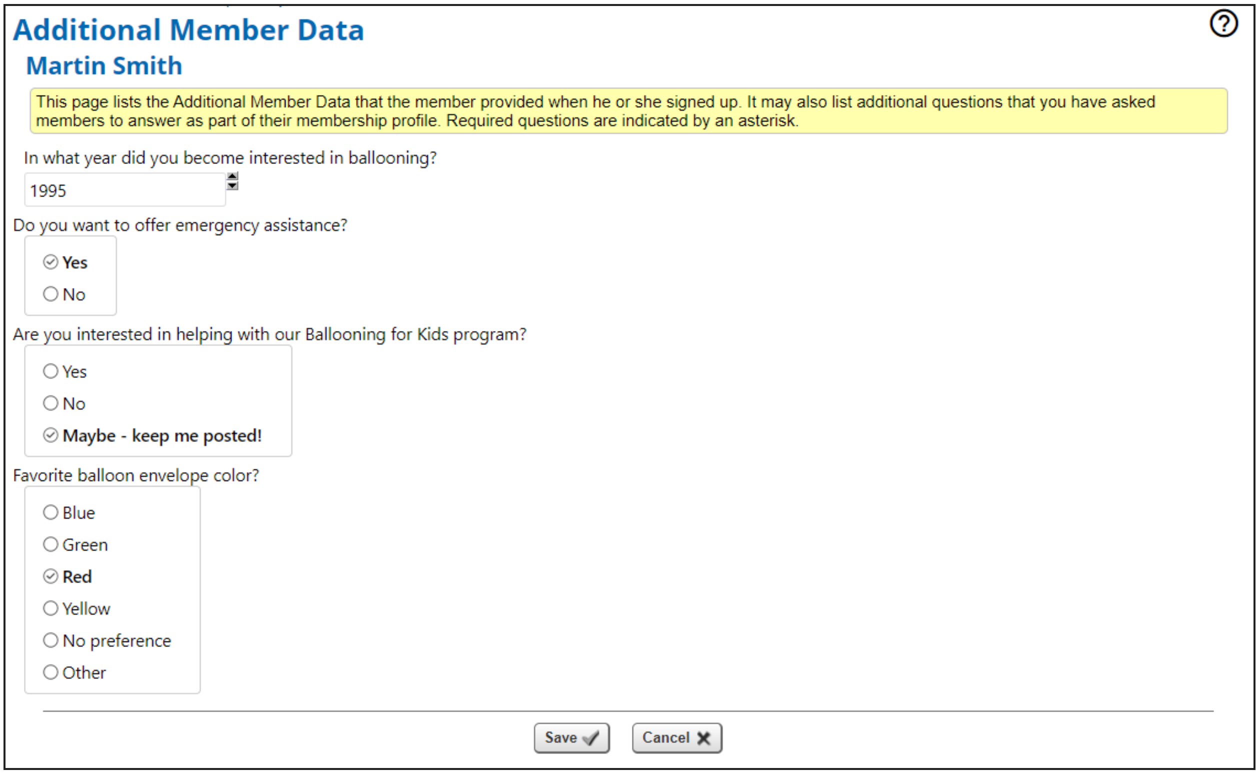
Below the member's photo is an icon that allows you to add this person to the personal address book on your computer. This feature uses another Internet standard called a "vCard" file which is supported by most Contact Manager programs, including Outlook, Mozilla Thunderbird, etc. vCards can also be 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.

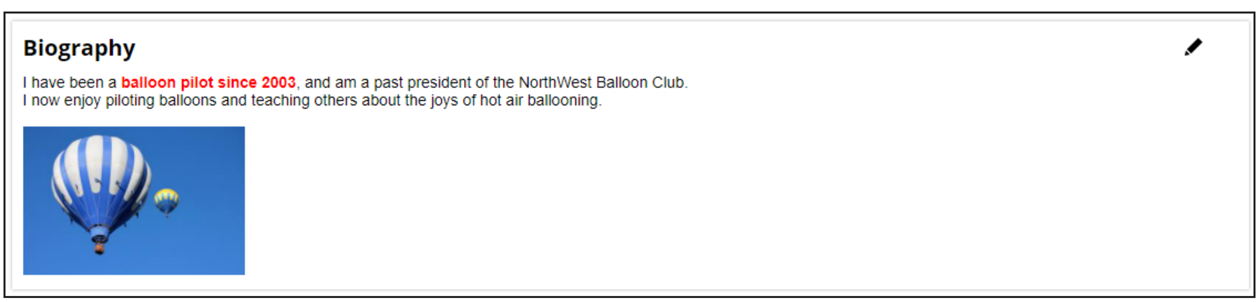
Additional Information



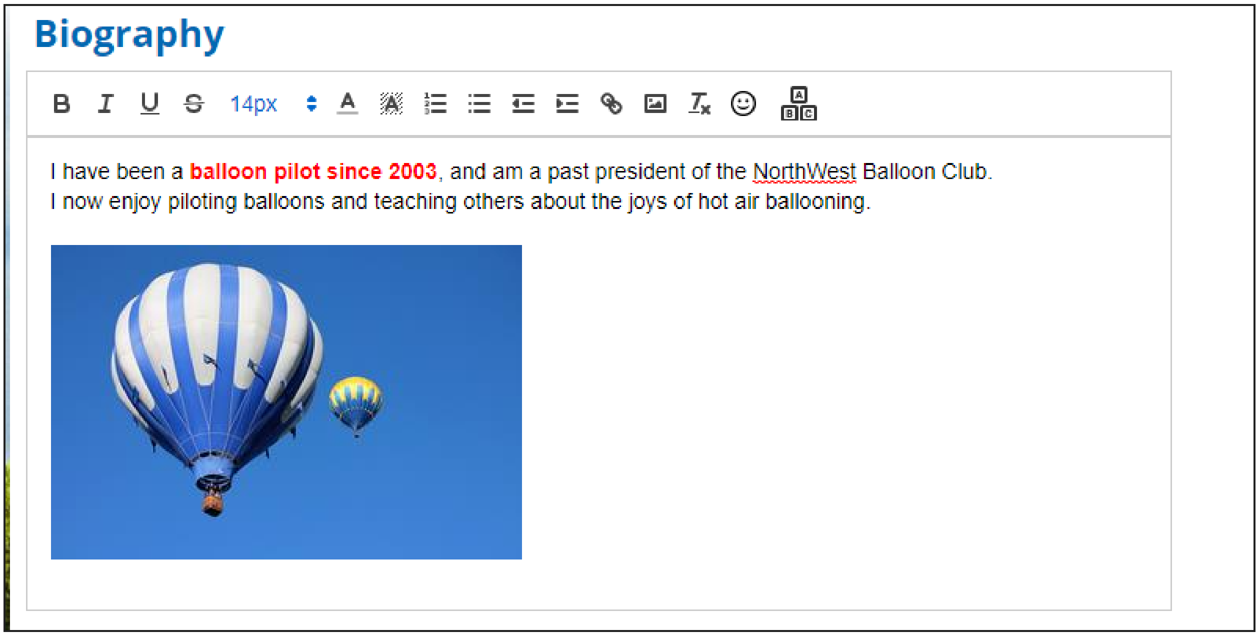
If additional member data has been collected from members, the Additional Information panel will list the questions along with the member's answers. Select the edit icon to change or update answers.



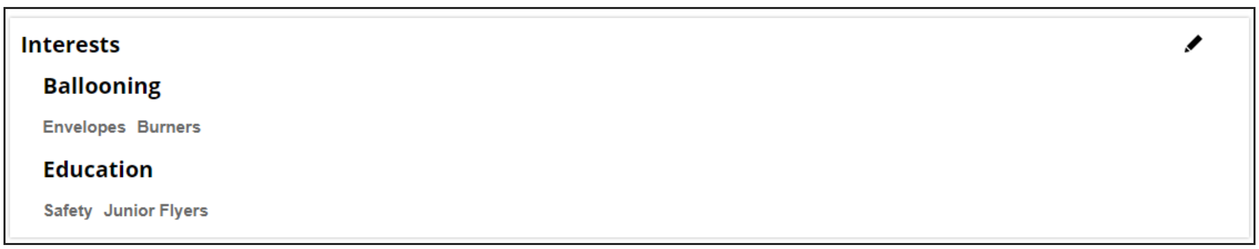
Biography



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.

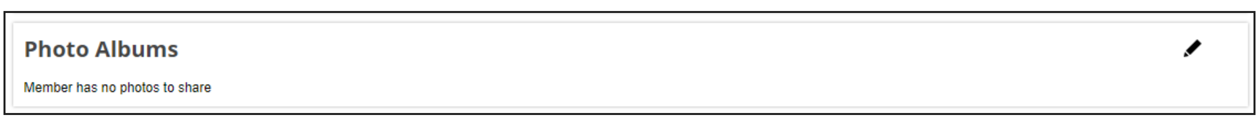


Interests



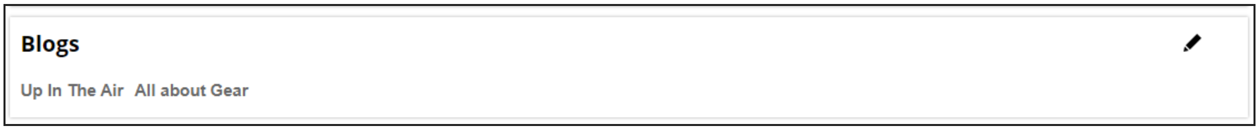
If the club or association has enabled the Interests function, a member's interests will be shown in the Interests section. Select the edit icon to change or update the selected Interests. These interests can be tied to blast emails, forums and events, so make sure they are up to date!

Photo Albums



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

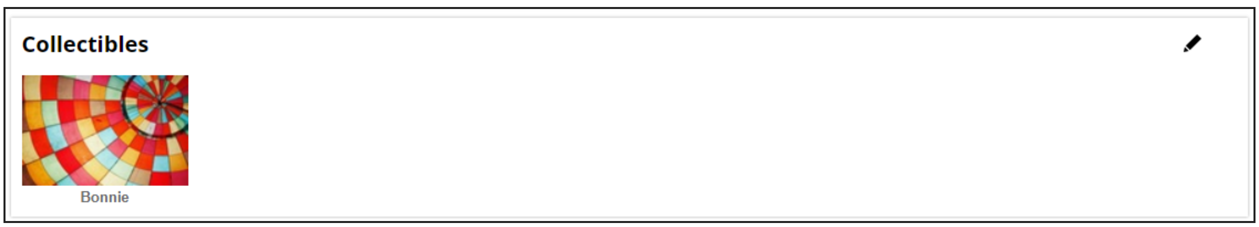


If the member authors one or more blogs on the club's website, you will also see links for each blog. Select the edit icon to view blog entries or author another blog post.

Achievements

If the club or association has enabled the Achievements function, a member's listed achievements will also be shown in the Bio.

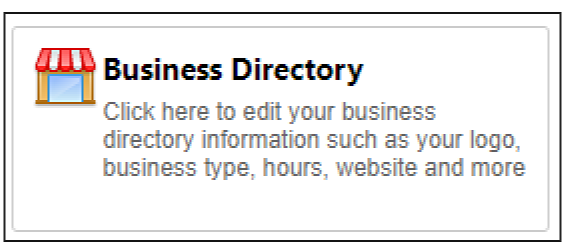
Collectibles



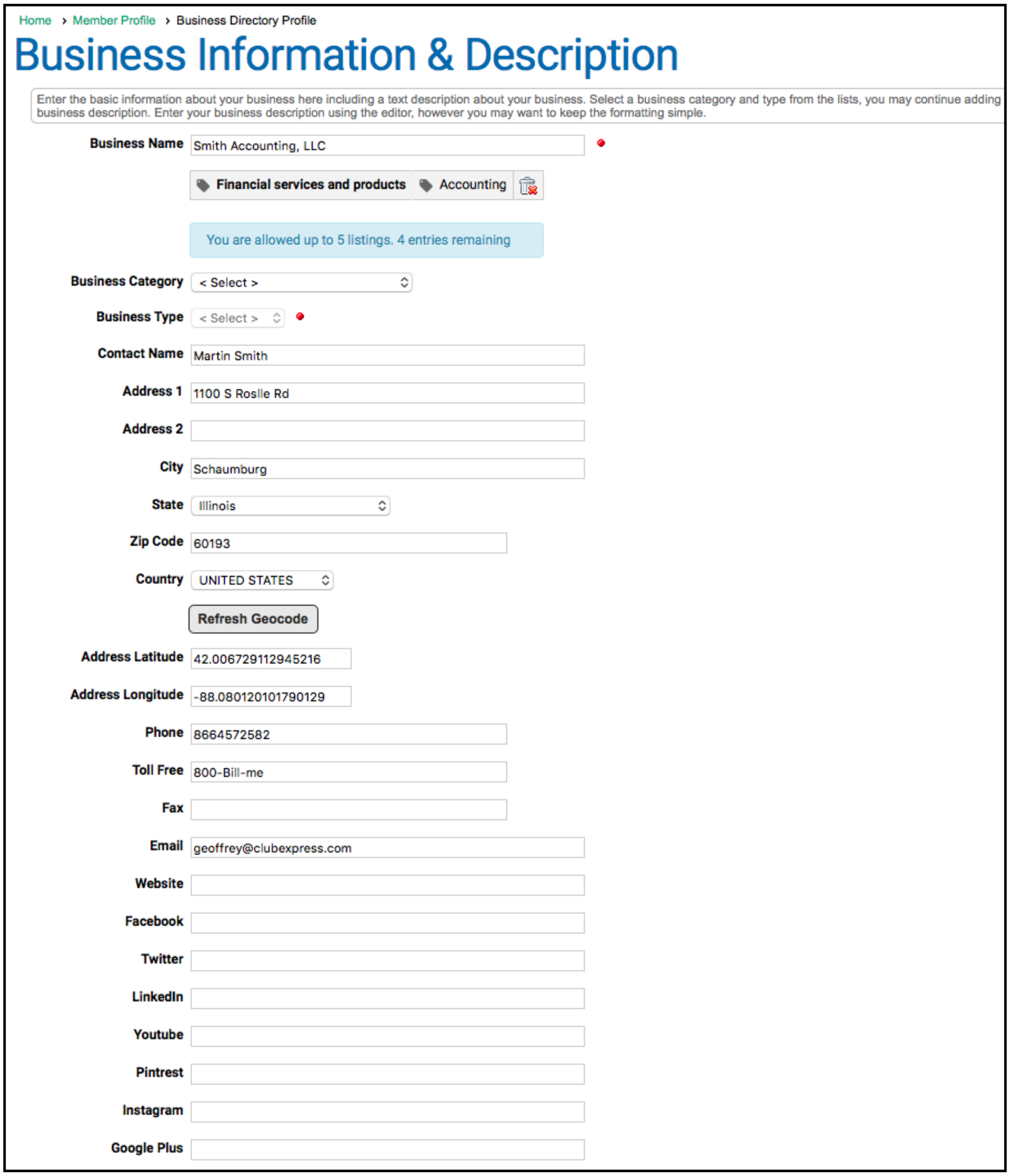
If the club or association has enabled Collectibles, the member's collectibles will be shown in the Bio. Select the edit icon to edit existing collectible items, or add new ones.

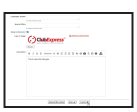
Business Directory

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:



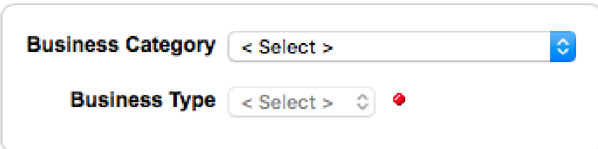


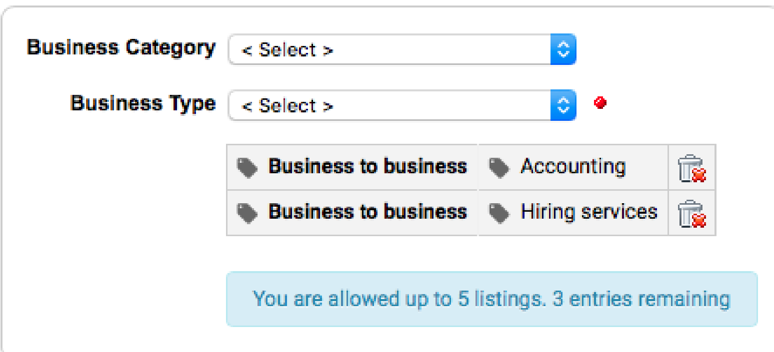
When this screen is first accessed, the system will copy over the member's personal contact information. But everything can be changed to show different information.

> **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.





- 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.

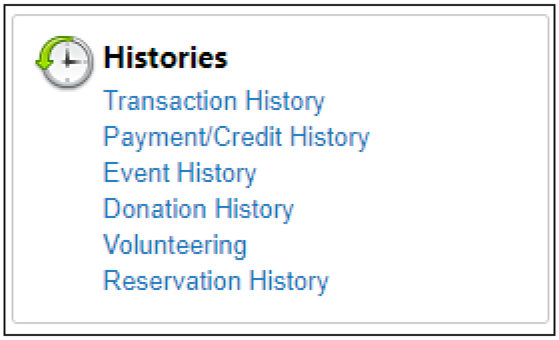
For each of the social networking fields, a **Test** button will appear when a value is entered. This allows the user to verify that the link leads to the correct opening page on each social network.

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

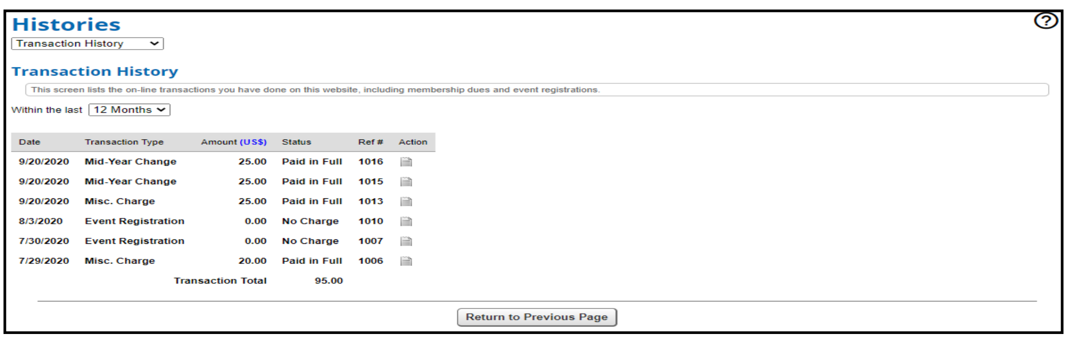


In the Member Profile, the Histories options allow you to edit or update:

- 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

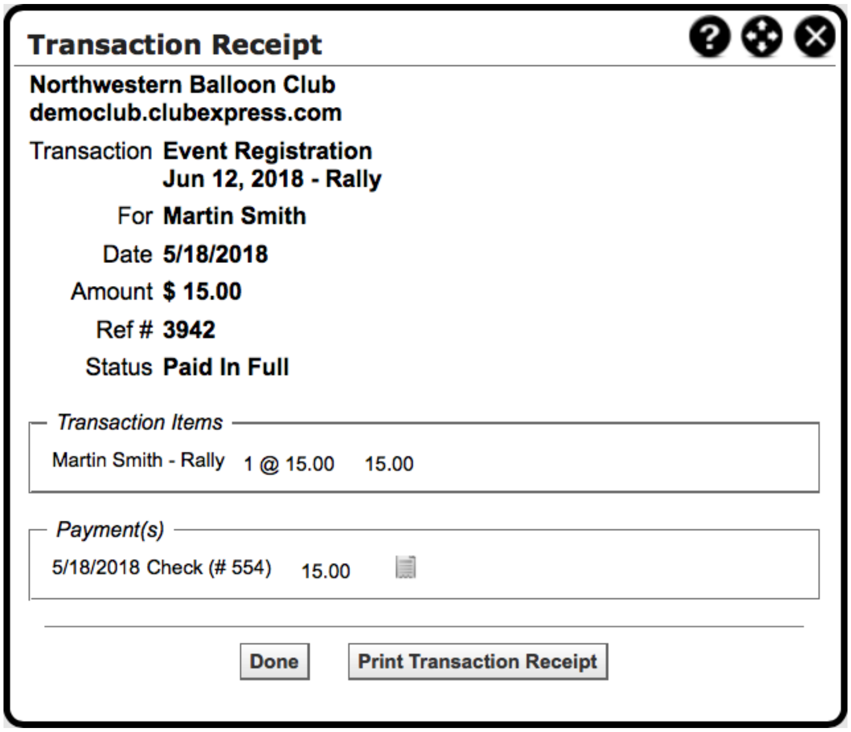
This option allows you to view the transactions you have made through your club's website. When you select **Transaction History**, a screen similar to the following is displayed.



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:



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

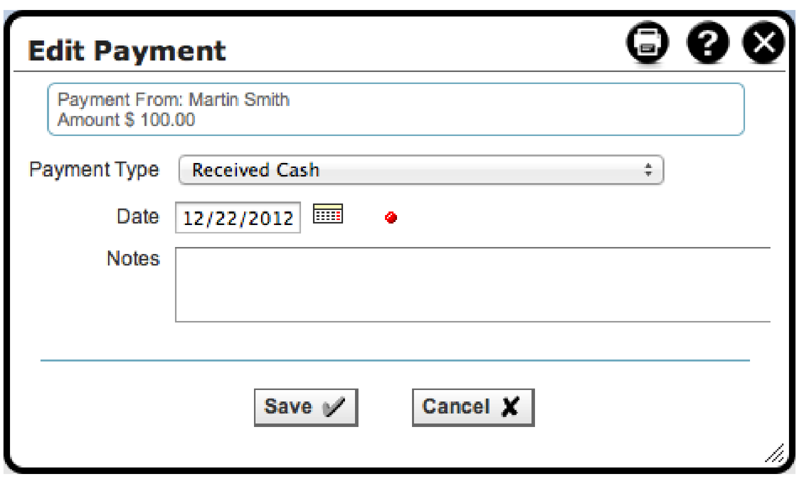
This option allows you to view the payments you have made through your club's website. When you select **Payment/Credit History**, a screen similar to the following is displayed.

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:



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.

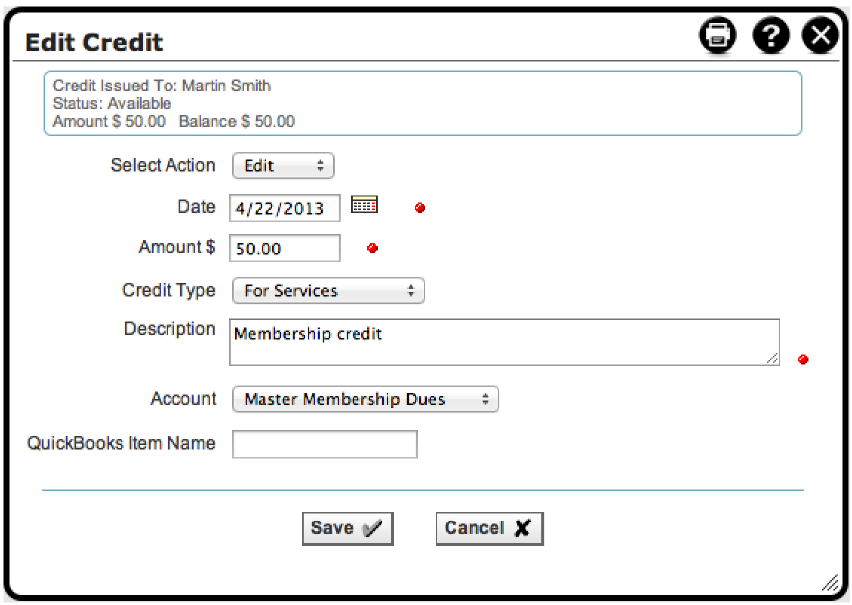
Click **Save** to save your changes and return to the Payment/Credit History screen, or **Cancel** to return without saving.

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:



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

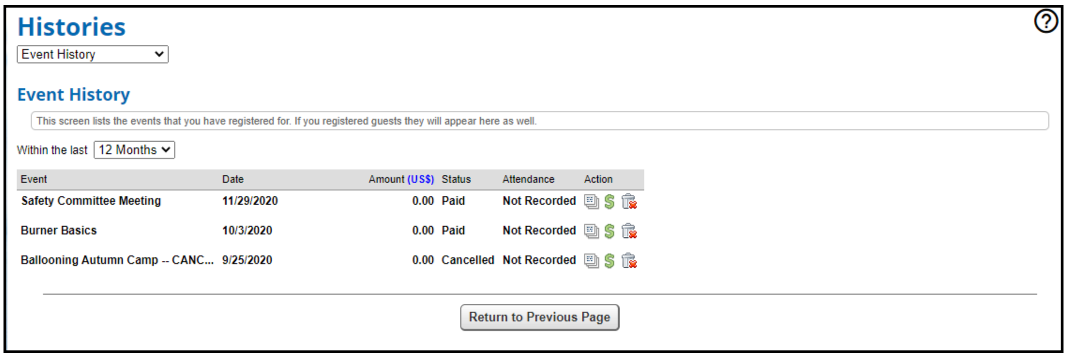
- **Edit** – change the various properties of the credit.
- **Refund** – mark the remaining balance of the credit as having been refunded to the member. Note that no credit is actually issued by ClubExpress; the actual refund must be handled by the club's treasurer.
- **Waive** – this option marks the 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:



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:

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:

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.

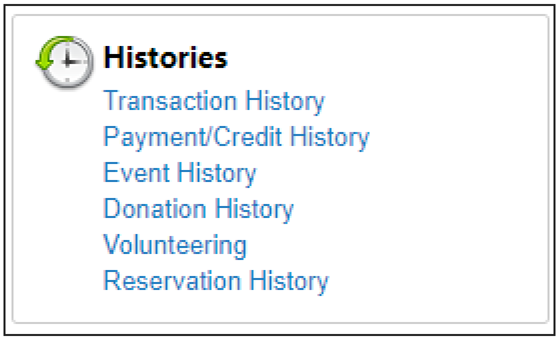
The **Delete** (trashcan) icon exists at the overall opportunity and the individual slot levels, allowing you to cancel your volunteering assignments at either level. You will be asked to confirm this step. You will receive a cancellation confirmation email and the volunteer opportunity coordinator will also be notified by email.

The bottom panel lists past opportunities.

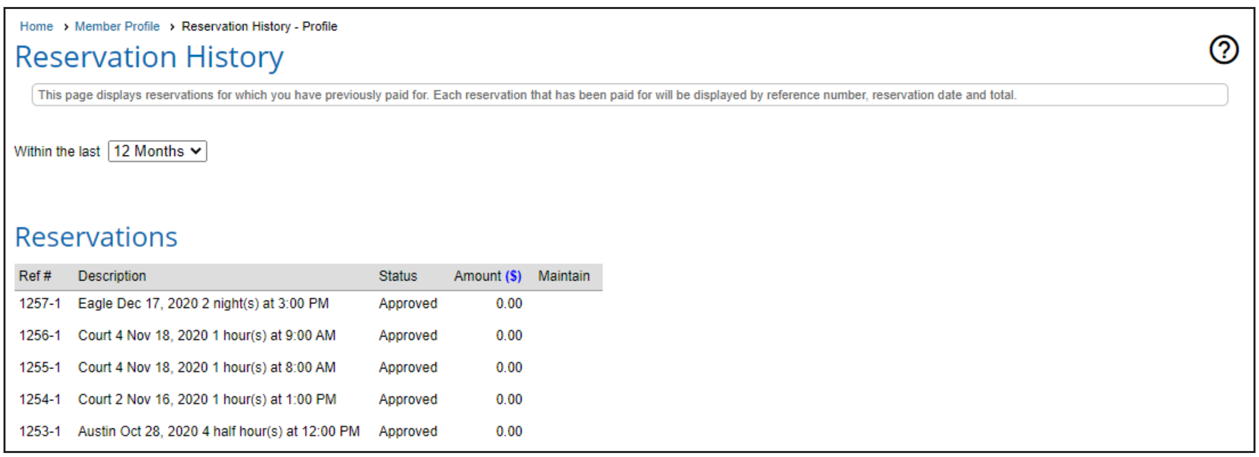
Click **Return to Previous Page** to return to your Profile screen.

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:

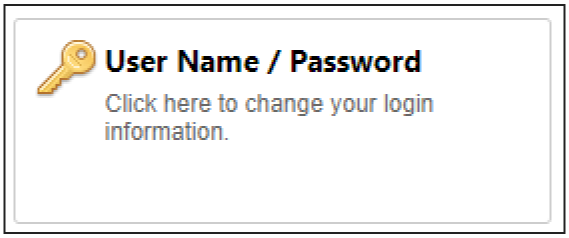


Ref #	Description	Status	Amount ($)	Maintain
1257-1	Eagle Dec 17, 2020 2 night(s) at 3:00 PM	Approved	0.00	
1256-1	Court 4 Nov 18, 2020 1 hour(s) at 9:00 AM	Approved	0.00	
1255-1	Court 4 Nov 18, 2020 1 hour(s) at 8:00 AM	Approved	0.00	
1254-1	Court 2 Nov 16, 2020 1 hour(s) at 1:00 PM	Approved	0.00	
1253-1	Austin Oct 28, 2020 4 half hour(s) at 12:00 PM	Approved	0.00	

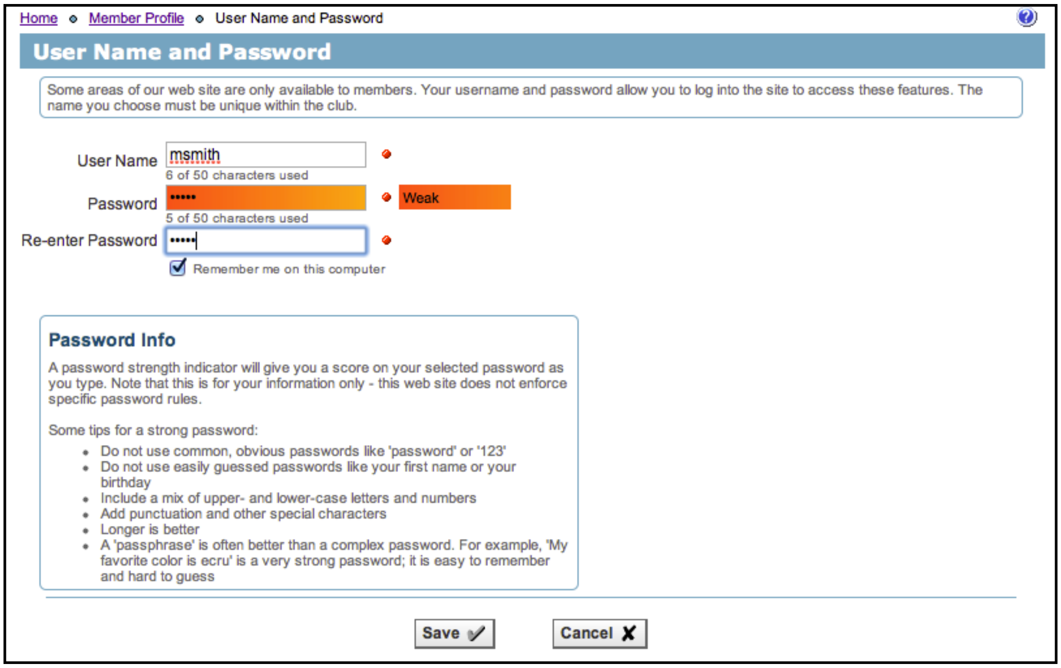
Learn more about managing your reservations here.

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:



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 case-sensitive. It can be up to 50 characters long.

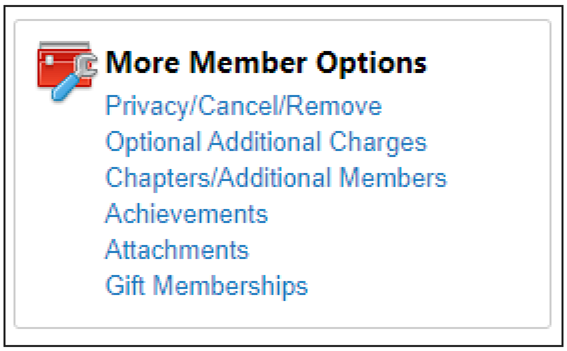
Passwords can be up to 50 characters long and may include anything, even punctuation symbols. The password is case-sensitive. The system will display a dynamic "password strength" meter as you type. Stronger passwords include a mix of upper and lower case letters, numbers, punctuation, even spaces.

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

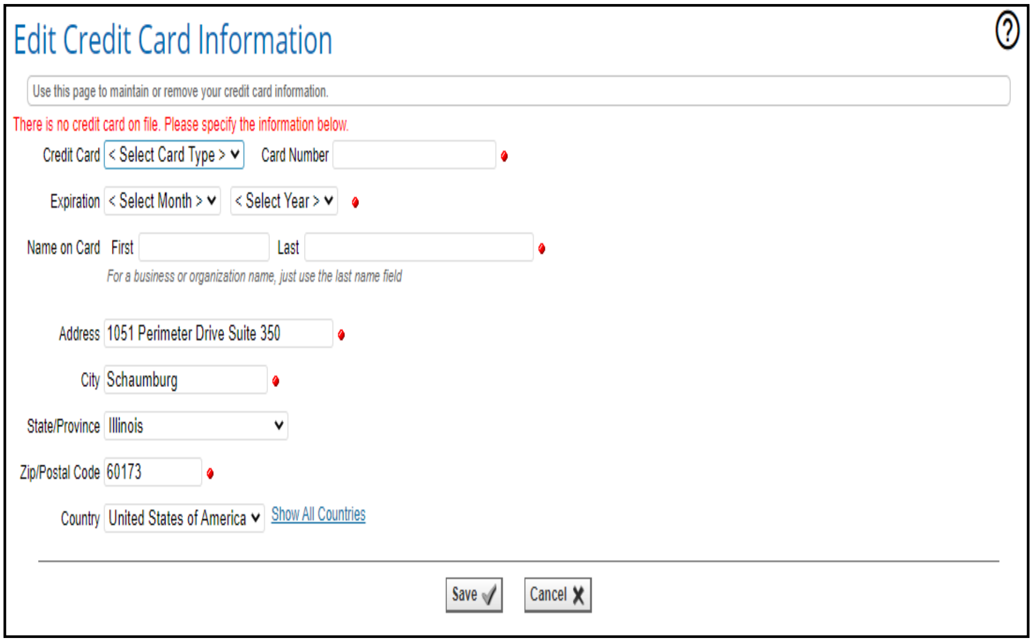


In the Member Profile, the More Member Options panel allows you to edit or update:

- 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:



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.

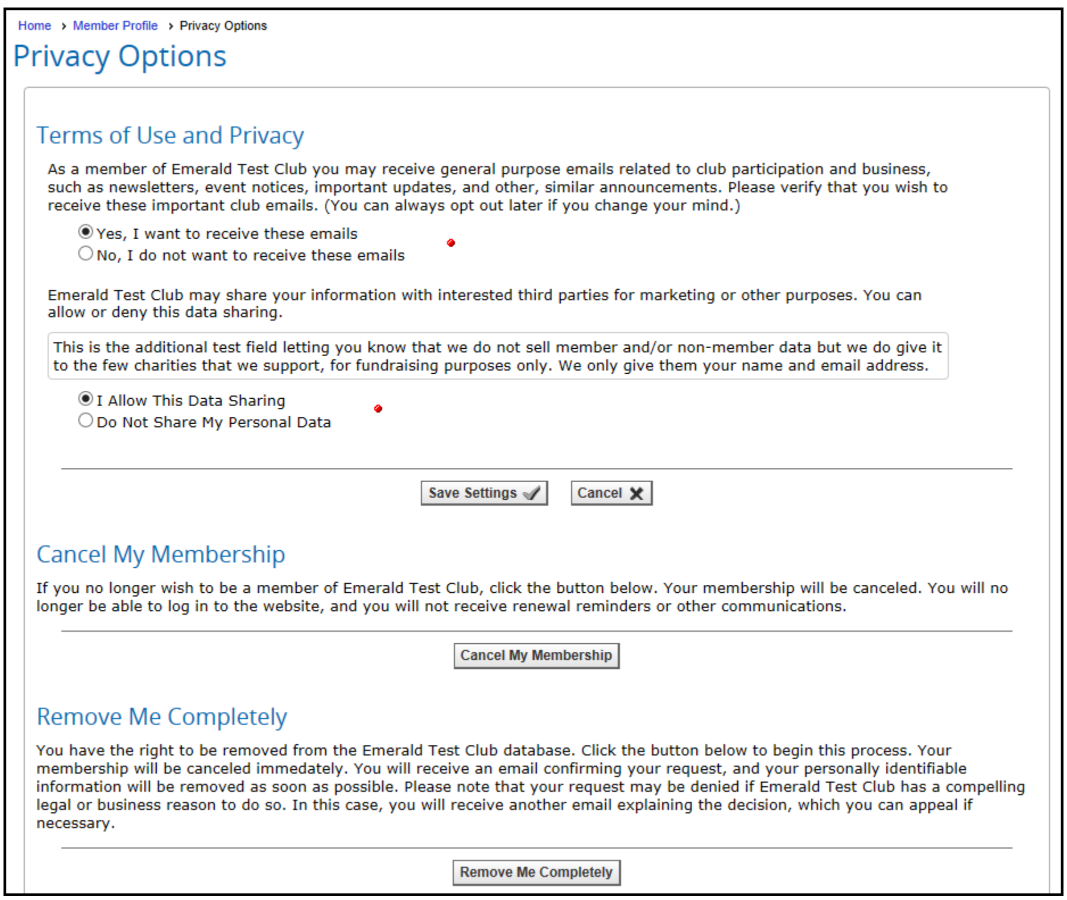
When this option is enabled, the system requires that your credit card be saved and you will not have the ability to remove it. You will still see this screen so that you can change the card or update it (for example, to modify the expiration date or validation code when a new card is issued.) However,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



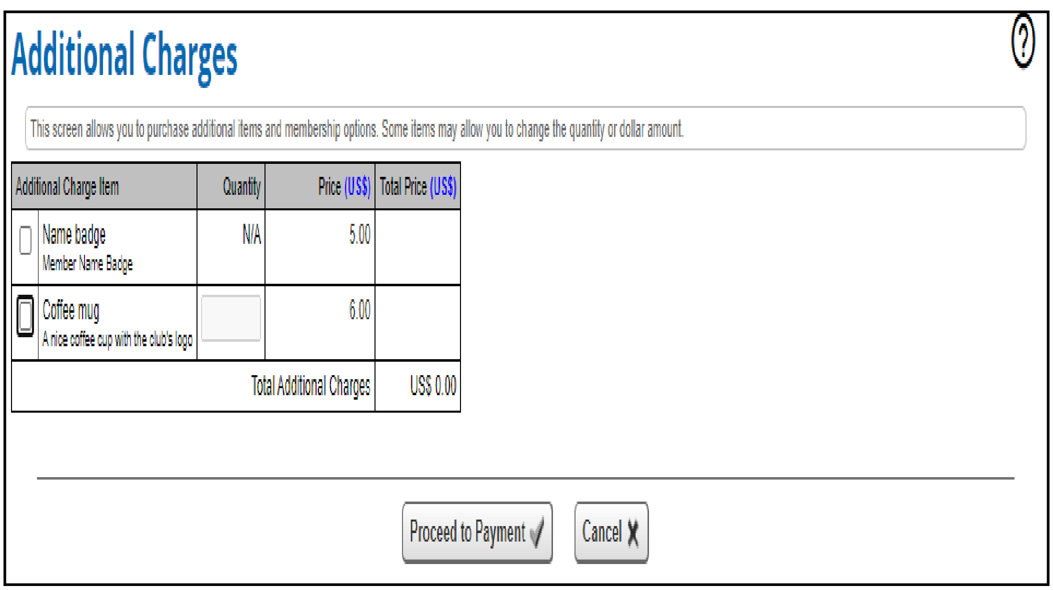
The first question allows you to update your settings with respect to general communications from your club or association, such as event announcements, a monthly newsletter, etc.

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 Completel**y - 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:

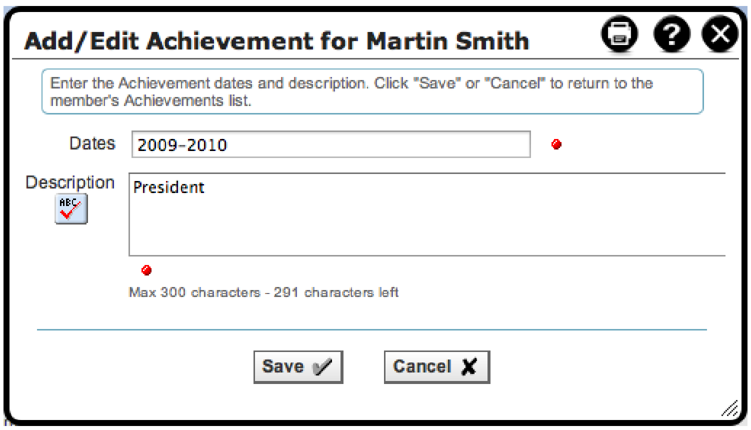


Select one or more charges. Some charges may give you the option of adjusting price (for example, for a donation) or quantity. The Total at the bottom will update automatically. Click the **Proceed to Payment** button to complete your selection and jump to the payment page. Complete payment as normal.

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:

Click **Add Achievement** to create a new achievement. You will see the following screen.

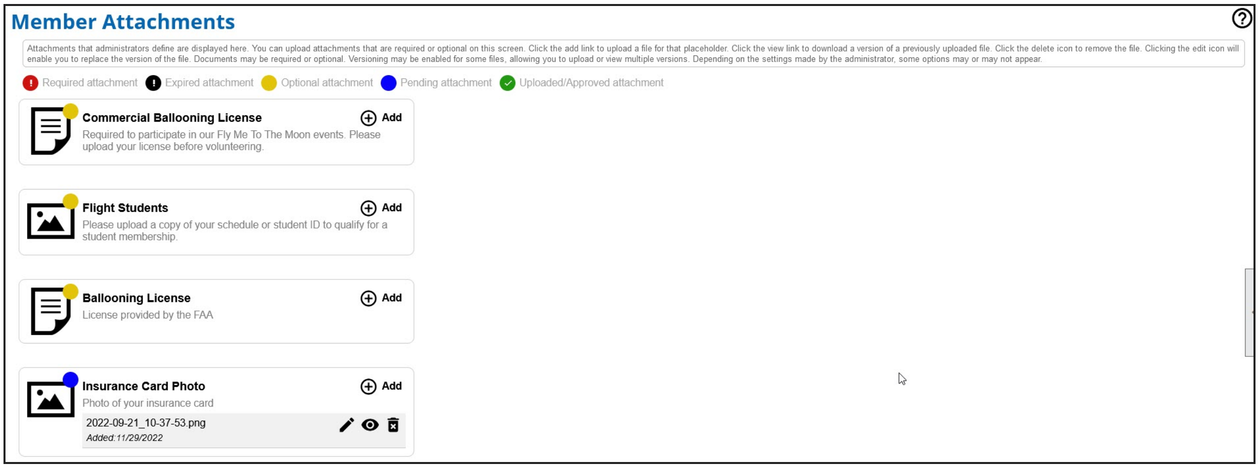


Enter a free form date and description, then click **Save** to save your change, or **Cancel** to cancel without saving.

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

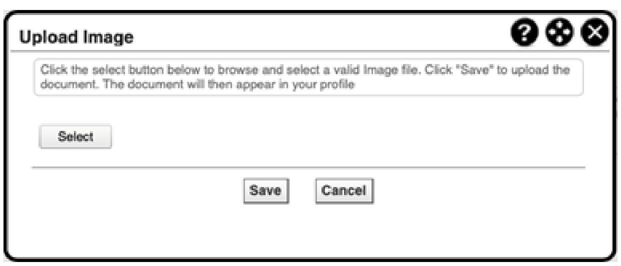
This option allows you to upload files and images and attach them to your Profile. Any required or optional files will have been defined by your club or association. When you select **Attachments**, a screen similar to the following is displayed:



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.

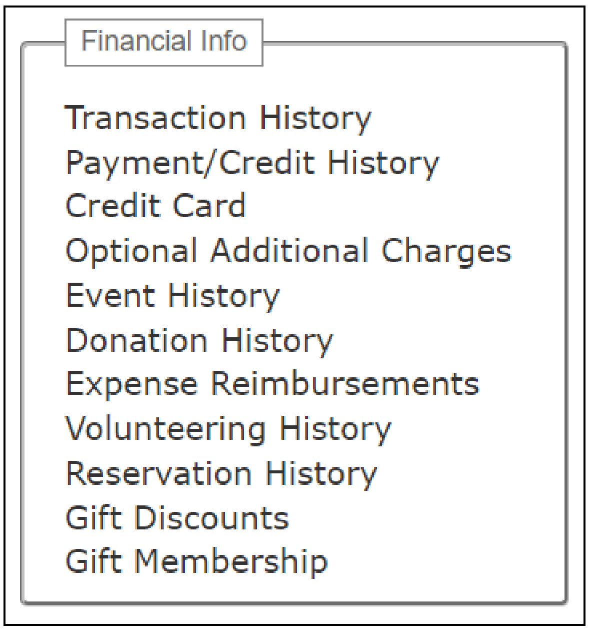
- Click the **Edit** (pencil) icon to replace the uploaded file.
- Click the **View** (eye) icon to view the uploaded file.

- 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.

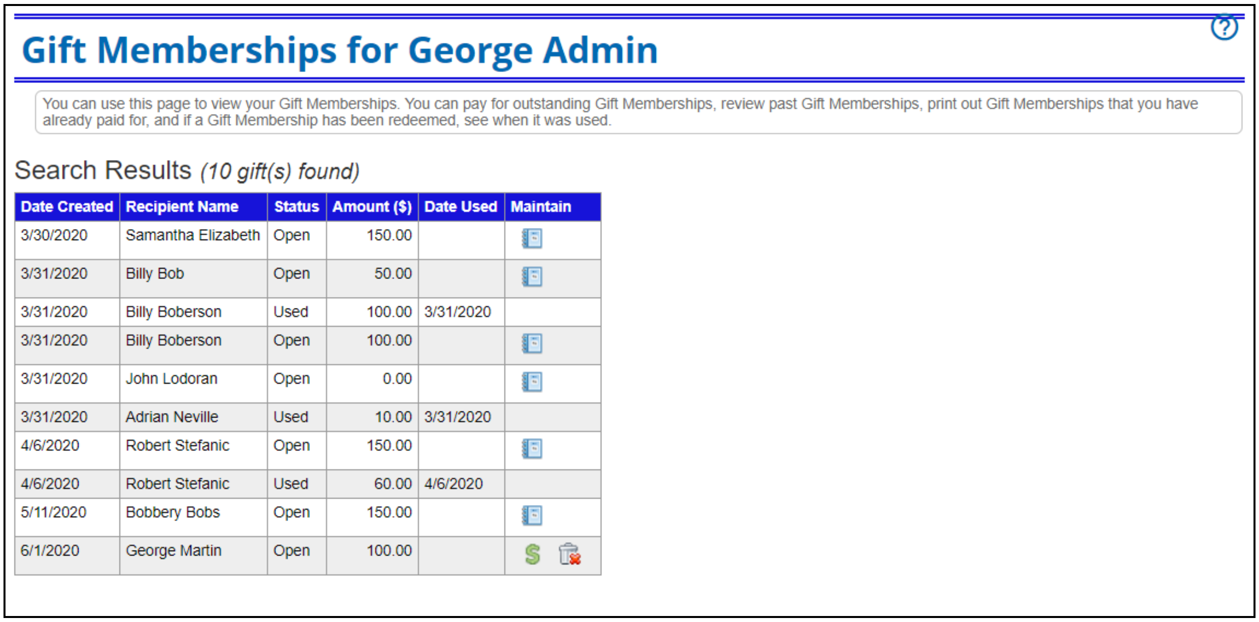
Depending on the configuration settings for each attachment, some or all of these icons may not be visible.

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 Memberships for George Admin

You can use this page to view your Gift Memberships. You can pay for outstanding Gift Memberships, review past Gift Memberships, print out Gift Memberships that you have already paid for, and if a Gift Membership has been redeemed, see when it was used.

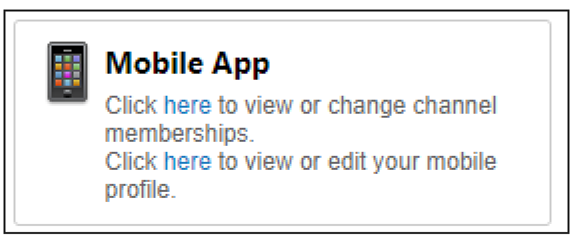
Search Results *(10 gift(s) found)*

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		
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		

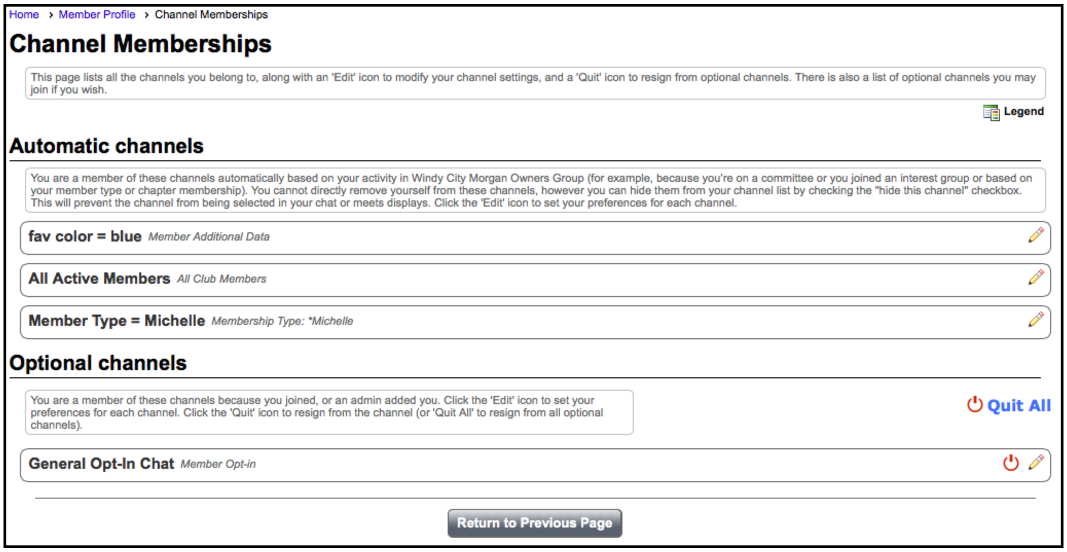
From this screen, you can delete or pay for unpaid gift memberships. You can also print out a gift membership certificate if you want to send it in the mail to the recipient.

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

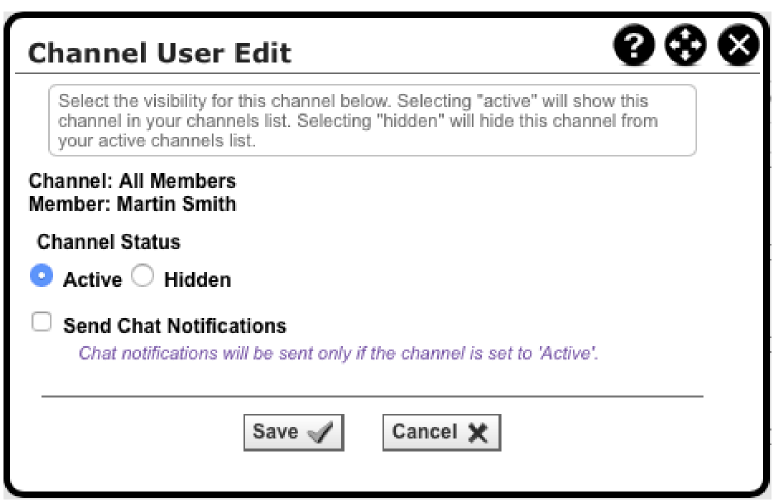


This screen lists the Automatic Channels you are a member of based on some fixed criteria:

- 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:



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

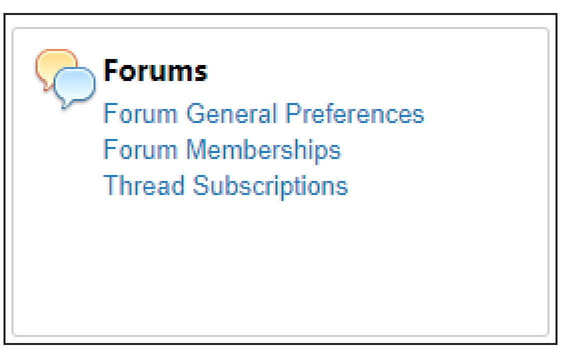
Select this option to modify your profile in the Mobile App. You will see the following screen:

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

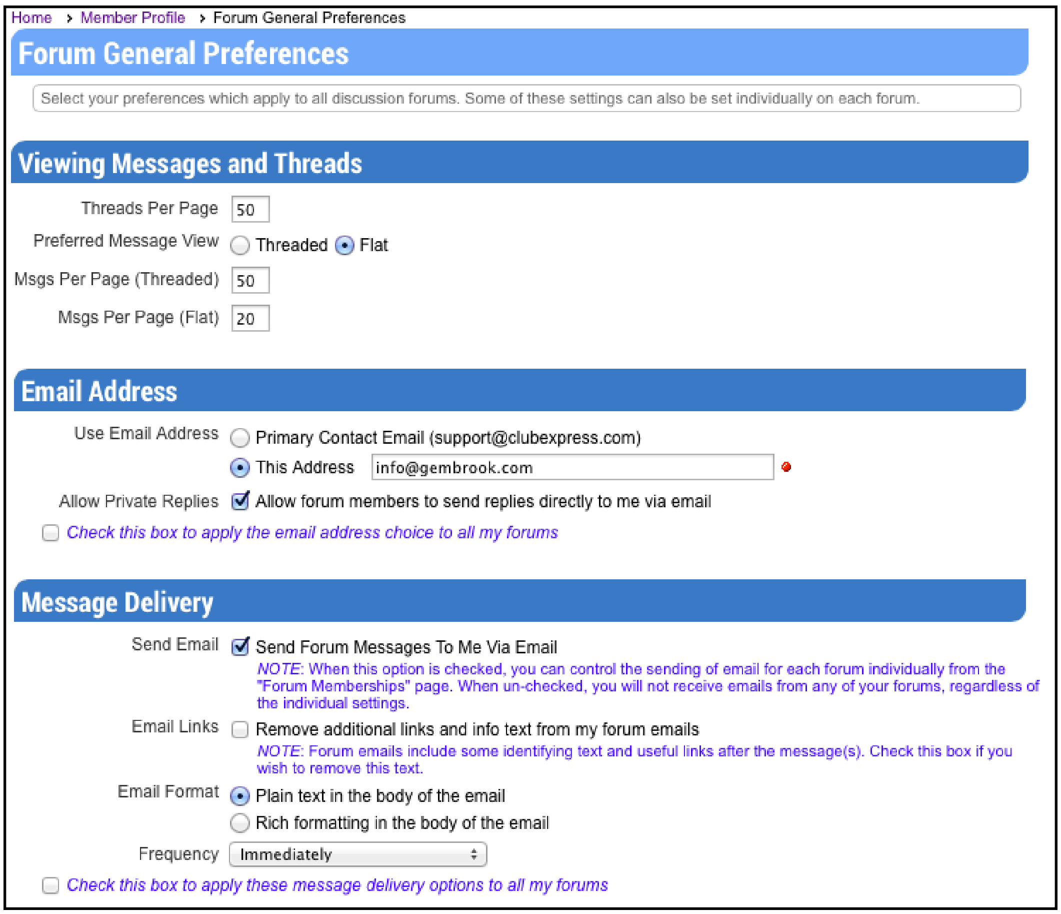


In the Member Profile, the Forums options allow you to edit or update:

- Forum General Preferences - specify your general preferences for participation in discussion forums
- Forum Memberships - 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:



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.

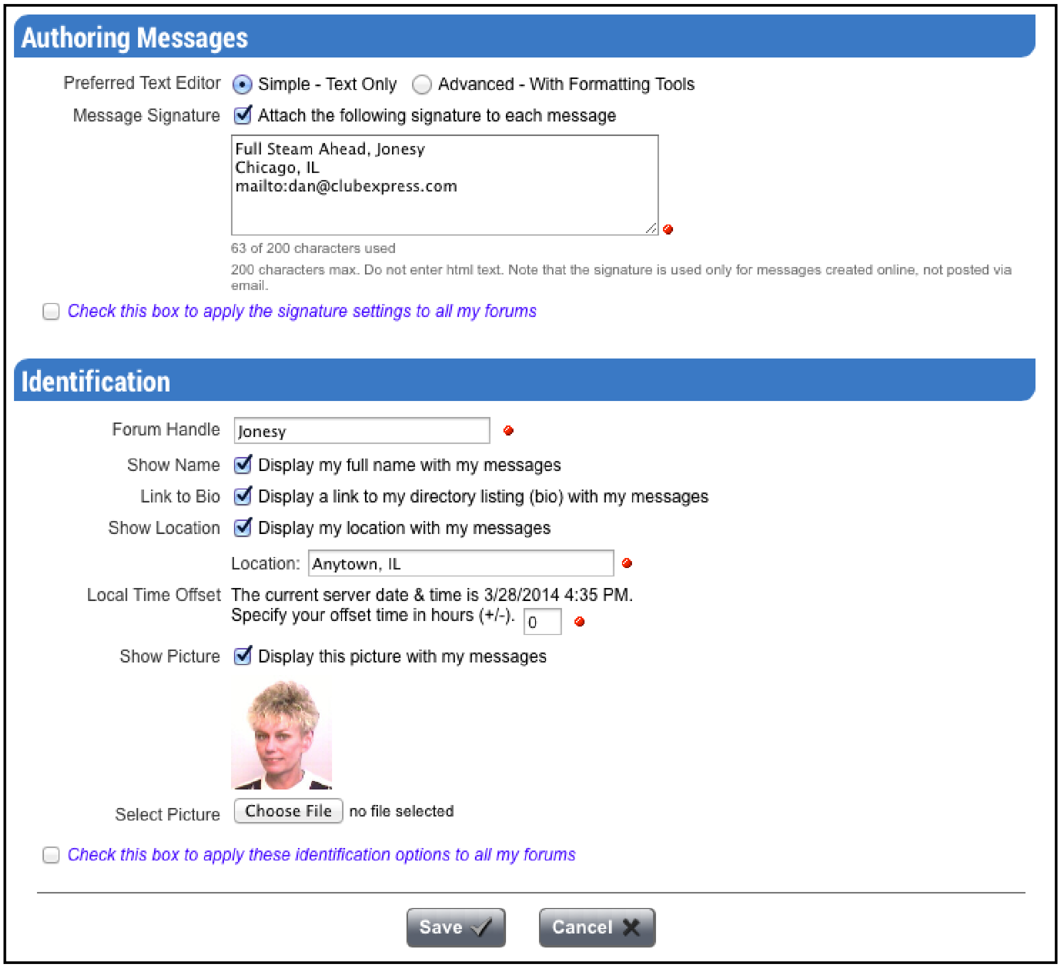
The **Allow Private Replies** checkbox controls whether other forum members can send replies to you directly via email.

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.

The description of Forum General Preferences screen continues below:



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 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.

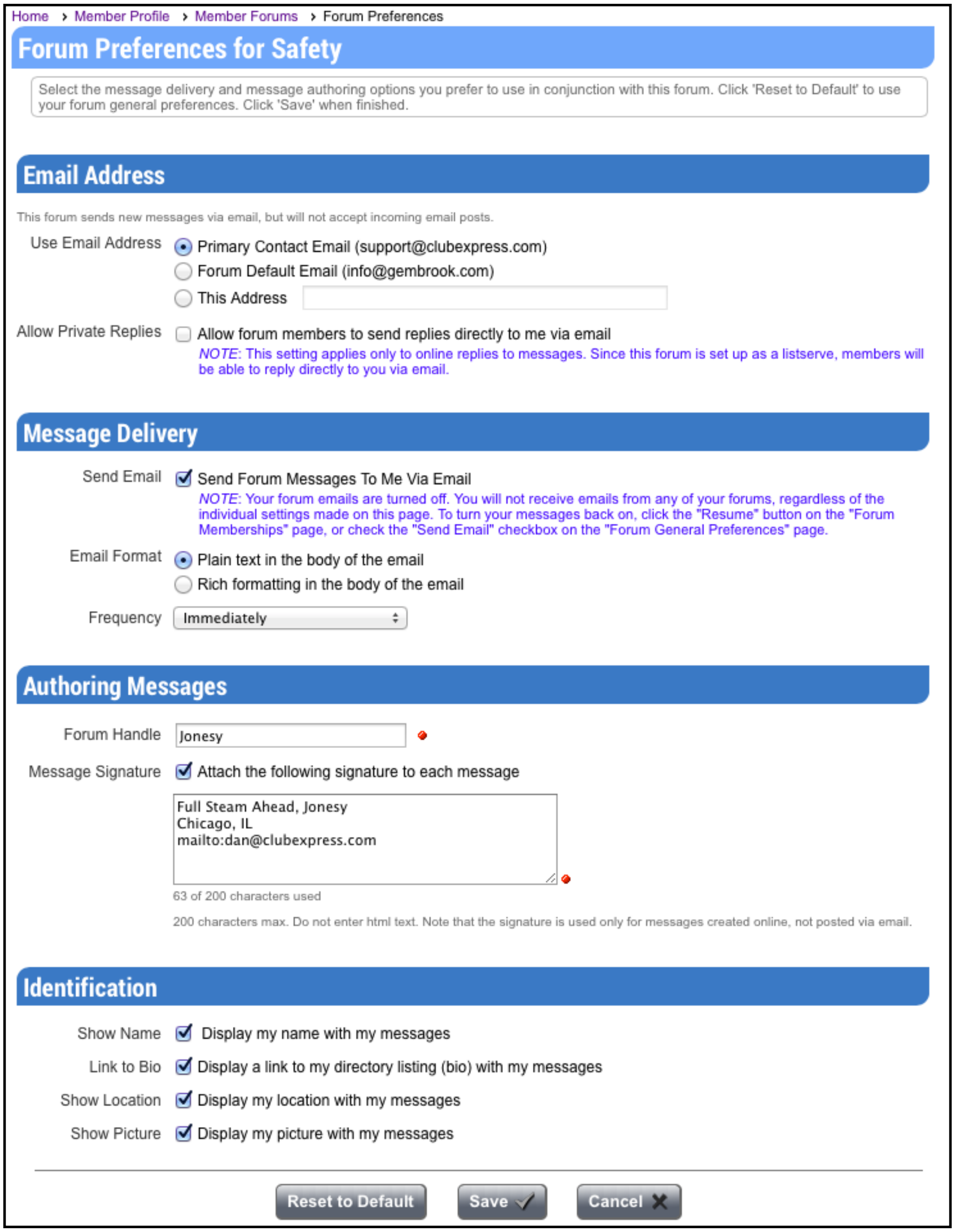
The screen is divided into three sections:

- **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:



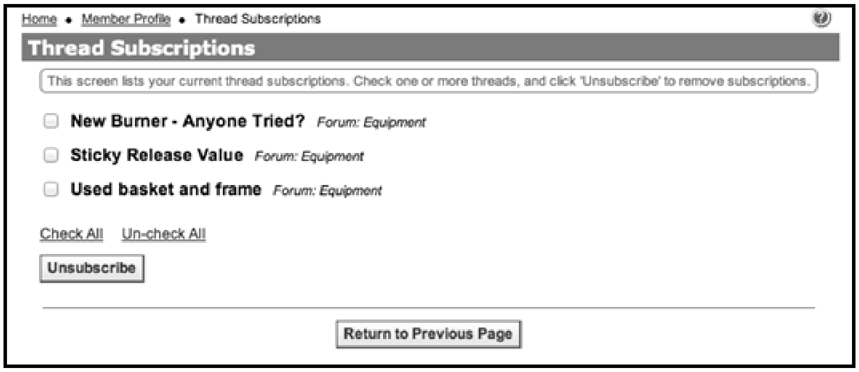
Most options on this screen match choices on the general preferences screen, so they won't be repeated here. Some choices may or may not be displayed, depending on whether that forum supports email posting and/or delivery.

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

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

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
- Download Bank - 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 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.

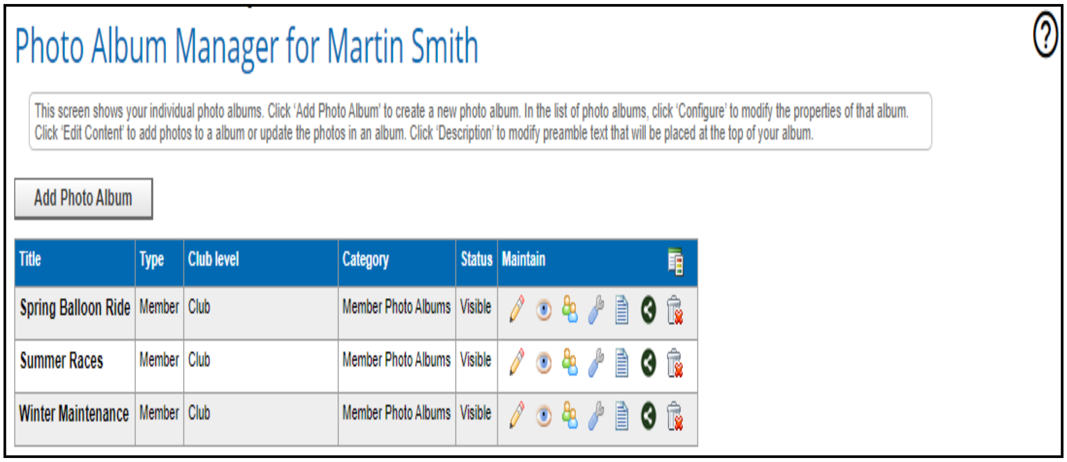
Administrators can also configure this screen to be included as part of the Member Signup Wizard. Go to Control Panel – Membership Wizard Setup and check the appropriate boxes.

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:

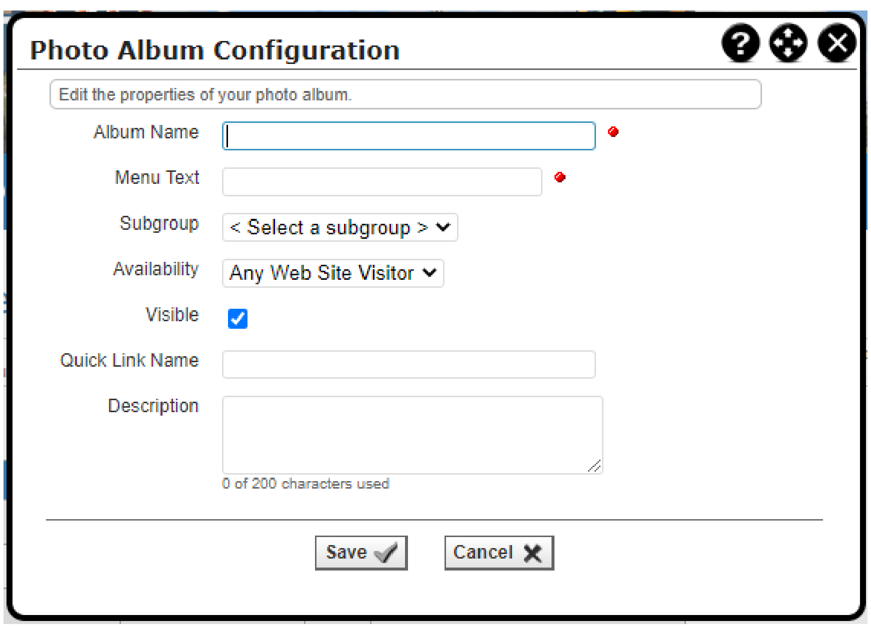


The grid shows photo albums that you have created, perhaps built around a specific event or project. The grid shows the title and status for each photo album.

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:



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

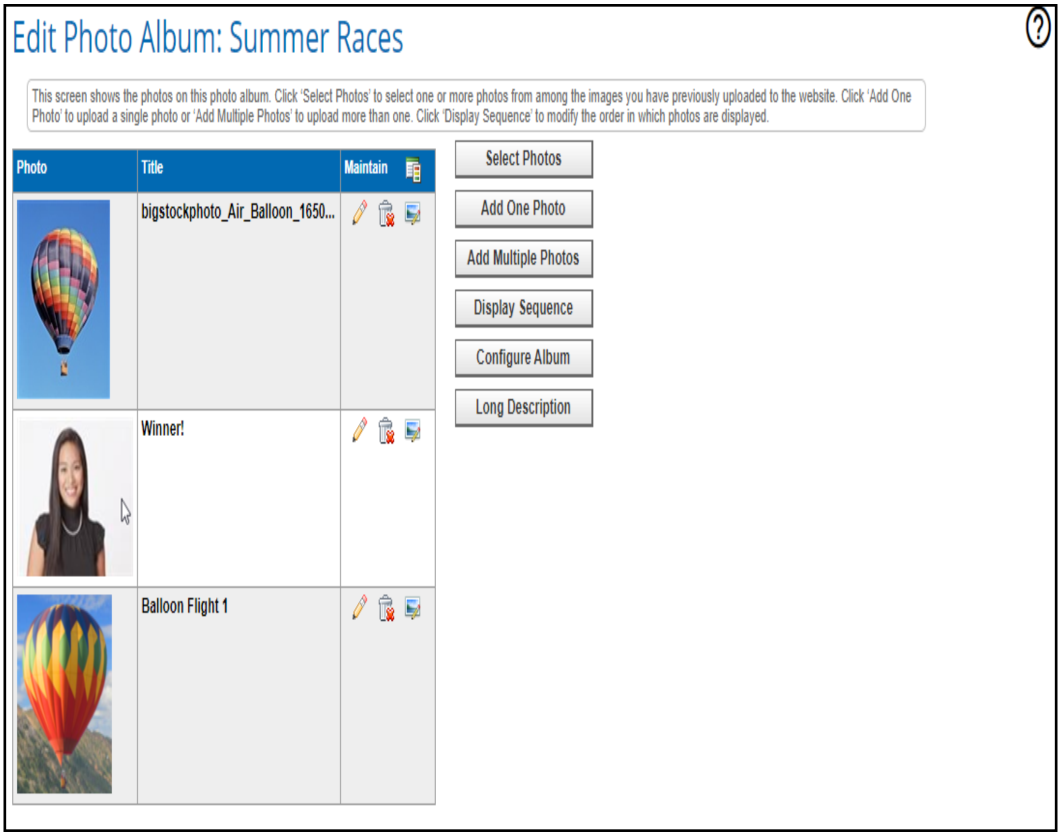
The following options are available in the Maintain column:

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 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

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



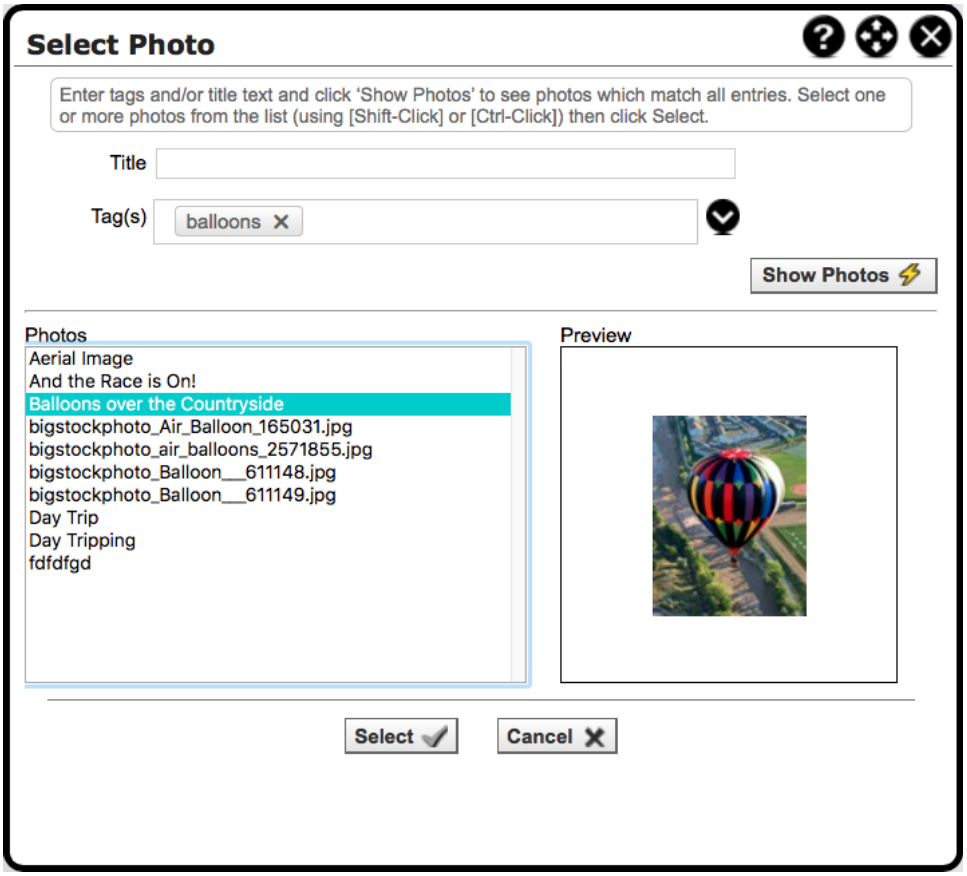
This screen shows the photos uploaded to the album. For each photo, the following options are available:

Icon	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 manager 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:



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:

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

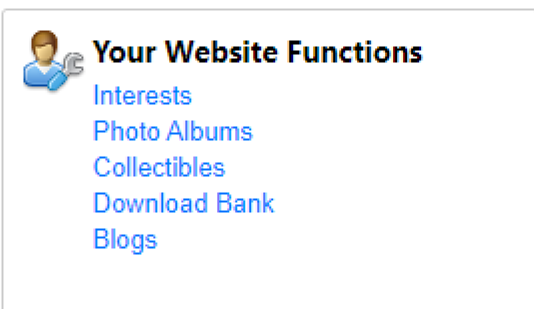
Click the **Configure Album** button to modify the album title, menu text, and visibility. You will see the Photo Album Configuration dialog.

Album Description

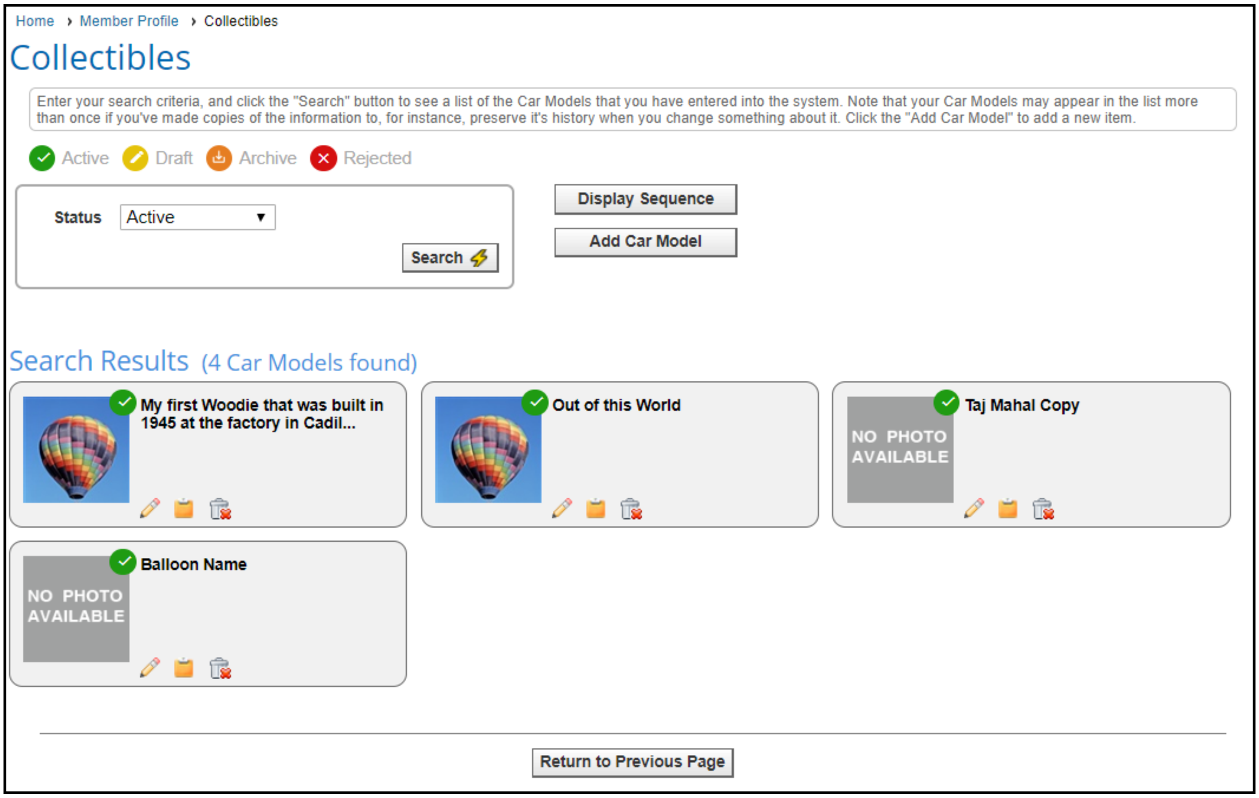
Click the **Album Description** button to modify the preamble text placed at the top of the album. You will see the advanced content editor dialog.

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.



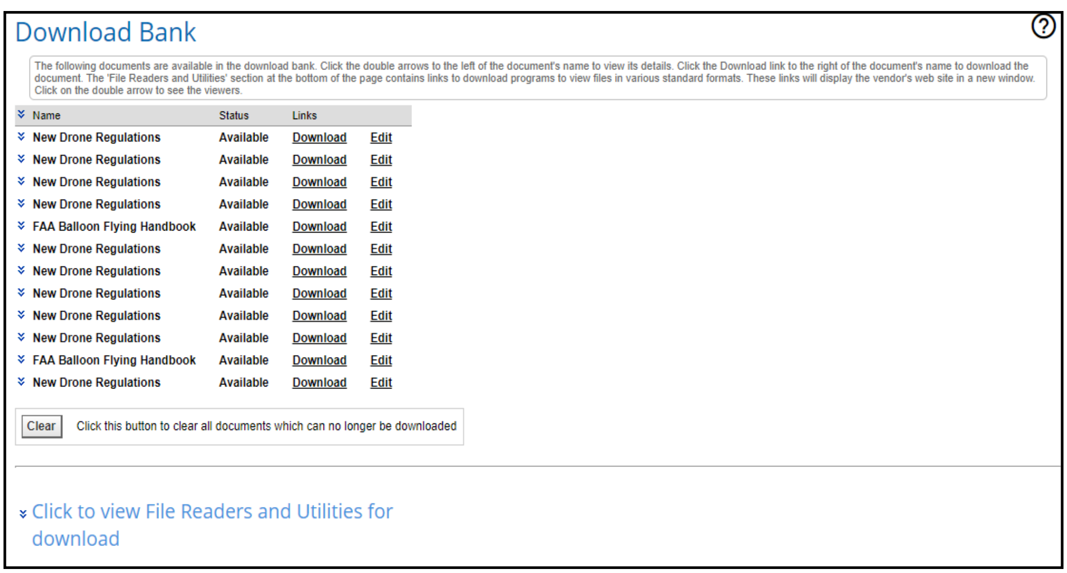
Clicking this link displays a screen similar to the following:



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:



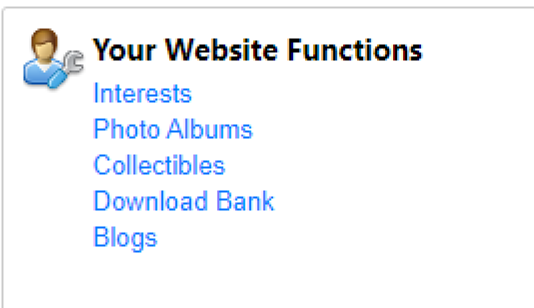
Click the double-arrow character on the left to view details of each document. Click the **Download** link to download the document. The **Edit** link will only appear for administrators; it allows them to update the properties of the document, including its status and expiration date.

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.

Blogs

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

M

My Term
My definition