

Club Members Manager Help

Introduction

This is a simple member's list manager and contact manager for clubs in size from just a handful of members to a few thousand. It can install across a network, or just one computer.

The Club Members Manager has no toolbars or menus. Ease of use is its main selling point. All work is done on the main form, save for some initial setting up. The licence you get when you purchase this application is a network or site licence so can be set up on as many computers on your local network as you like – all for the one price. It is free to install on a single computer, with a limit of 100 members.

Prerequisites

Windows XP SP2 or higher, Vista or Windows7 32 or 64 bit systems.

Other prerequisites will be downloaded from the internet on install. If you have not got internet you will need to make sure .Net 3.5 or better is installed and the Visual Basic Power pack from Microsoft.

Main Functions

The application has been designed to be as simple to use as possible. The black section at the top is the search area. The yellow area is where you add a new member, and the rest is mainly the editable list of members.

The screenshot shows the 'Club Members Manager - Main Form - Version 1.0.0.0' window. At the top is a search area with fields for Mob/Tel, Name, Add/Sub, State/Pc, Memb No, Type, Sort, and several checkboxes for member status (Financial, Not Financial, Former, Not Former, Custom3, Not Custom3, Custom4, Not Custom4). A 'Find' button is on the right. Below the search area is a yellow section for adding a new member, with fields for Memb No, First Name, Surname, Address, Suburb, State, P/code, Tel1, Tel2, Added, Email, Comments, Custom2, Custom1, Type, and Paid To. There are 'Save' and 'Add' buttons. The main area is a table of members with columns for Memb No, First Name, Surname, Address, Suburb, State, P/code, Tel1, Tel2, and checkboxes for Custom3, Custom4, and Former. The table contains 10 rows of member data. At the bottom is a toolbar with buttons for Reports, Email, Options, Help PDF, Delete, Back Up, and Close. A status bar at the very bottom shows '1 of 8' and a message: 'Press and choose paid to date - entry also made in tracker box'.

Memb No:	First Name:	Surname:	Address:	Suburb:	State:	P/code:	Tel1:	Tel2:	Custom3	Custom4	Former
987	Sarah	Smith	6 Caves Rd	Forest Grove	WA	6286	08957568		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/12/2011	martysmithandfamily@gmail.com						Type 1	Pay	08/01/12	Member paid to: 8/01/2012	
555	Cindy	Smith	6 caves Rd	Forest Grove	WA	6286	0498574587		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/12/2011	martysmithandfamily@gmail.com						Full	Pay	08/01/12	Member paid to: 8/01/2012	
98	Marty	Smith	6 Caves Rd	Forest grove	WA	6286	0497854874		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/12/2011	martysmithandfamily@gmail.com						Full	Pay	08/01/12	Member paid to: 8/01/2012	
698	Bob	Carlton	97 Bussell Hwy	Margaret River	WA	6285	0897587547		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/12/2011	bob2658@gmail.com						Pensioner	Pay	08/01/12	Member paid to: 8/01/2012	
66	Larry	Marsden	25 Plum Rd	Augusta	WA	6290	08995987	0465875471	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7/12/2011	larry.marsden@hotmail.com						Full	Pay	08/01/12	Member paid to: 8/01/2012	
25	Rod	Bennett	188 Railway Tce	Margaret River	WA	6285	0417971471	0897579007	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/12/2011	rod@computingathome.com.au		This is a comment				Full	Pay	08/01/12	Member paid to: 8/01/2012	
658	Sasha	Knowles	25 Bolton Ave	Busselton	WA	6280	0499545857		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2/12/2011	sashak@inet.net.au						Social	Pay	08/01/12	Member paid to: 8/01/2012	

At the very bottom is a help bar. Mouse hover over any part of the form to see what each button and box does.

Adding an Member

Simply fill in the yellow section. Required fields are set in the options; there might be none. Tab to the end to add, or click Add.

Finding an Member or Group of Members

Most of the search fields are “wild carded” at both the start and end, which simply means the search will find your search text, no matter where it appears in the field. For example if you put AI in the name search it will find all members with AI in their names – Alan, Ball, Sally etc.

Click ‘Find’ to activate the search or just tab twice.

Click ‘All Members’ to show all orders.

Editing an Member

It is simple to edit the details of a member – just type in the boxes, or click the appropriate boxes.

A zoom function is available on the comments box the address box as well as the tracker box. All fields are editable except the date paid to, which needs to be changed or entered by clicking on the Pay button for the member.

The tracker box is automatically populated when the “Pay” button is pressed, as well as when the “Former” check box is clicked. You can further edit this box by zooming (double click it). This can give you the membership history of a member.

Save

After editing its best to click save. That will allow the changes to be seen on the other computers. The save action is actually automatically run on most actions, including Close, so if it is not done you should not lose data.

If you edit a record, and do not save it or otherwise use the application on that machine, and someone subsequently changes that record on another computer, and then you try to save, you will receive a concurrency error. This just means the application can no longer make the change. Just OK the error click save (to be sure) and try again. This should be rare, as why would two people be trying to edit the same record at the same time anyway?

All Members

This is also activated by various other actions, but you will need to click it, to see any edits or new records from other computers, or if you just need to see all the members – after a search for example.

Searching

The main feature of this application is the ability to search for members or groups of members and report or email those members. Users should become familiar with the various options.

Mob/Tel. - Searches both telephone numbers. Wild carded. 171 will find 08975171 and 041719757.

Member No. - Searches member number. Not wild carded. 5 will find 5 not 55.

Name. - Searches both first and surname. Wild carded. Fred will find Alfred, Freddy, and Fredrickson.

Type. - Searches Membership type, which relates to the cost of membership. Wild carded.

Add/Sub. - Searches Address and Suburb. Wild carded. Main will find Main St and Main Town.

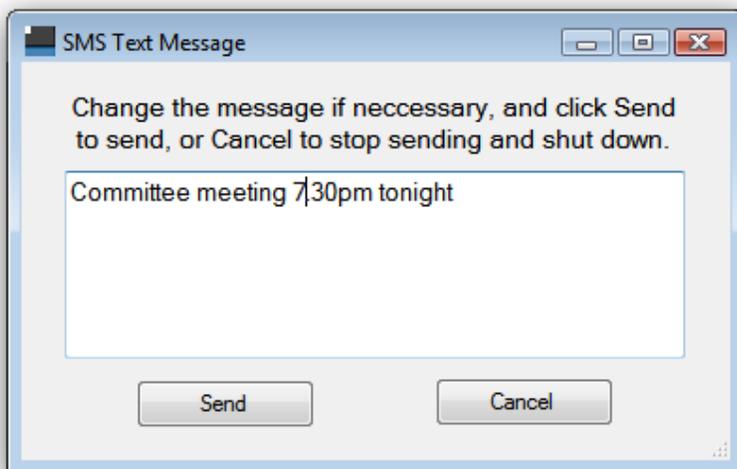
State/Pc .- Searches State and Postcode. Wild carded at end only, so A will find ACT but not SA. 62 will find all Postcodes between 6200 and 6299 but not 6562

Custom1/Custom2. - Optional. Wild carded.

The checkbox search fields can also be used. Financial members are members that are NOT OVERDUE, and this is calculated from the "Paid to" column, and adding the "Days to Overdue" Option.

Search fields can be (and often are) used together. Each additional search restricts what you would find. You might (indeed would) always search for non financial members that were also NOT Former members.

SMS the Member



A handy extra (it might not work in some countries) is the ability to SMS the member just by double clicking on the mobile telephone number. You need to set up an Account with 'SMS over the Internet' provider Exetel (as explained in Options). A default message comes up (which you set in options), and which can be edited. Exetel charge about 7c Aus per SMS call.

Just click send. A status (hopefully OK) will be returned – it might take 10 or so seconds.

Emailing

One of the main uses of this application is emailing. It emails to members found in any search. So its easy to select members to email – for example you could email members that were not financial.

Before you can email anyone, you need to put into email options your SMTP server. This is at present always your Internet service providers (ISP) and is usually in the form mail.ispname.com. You also need to supply a return address.

The screenshot shows a 'Compose Email' window with the following details:

- Subject:** Team Meeting
- Reply Email:** rod@computingathome.com.au
- Mail Merge:**
- Salutation:**
- HTML:**
- Body Text:**
Hi
Just a short note to remind everyone we have a meeting tonight (3/10) at my place to discuss the upcoming season.
Snacks provided, but bring your own drinks.
Go the Bulls!
Rod Bennett
- Buttons:** Clear, Send, Close
- Footer:** Type your email here

Step 1 – Selecting your recipients

On the mail form, make a search (if you don't want to email everyone) of the people you want to email. You could for example just email former members, or members of a particular type. Or you could just select members, or mix and match any search. If a member does not have an email address, you will need to note that – the program will not even try to send an email to that person.

Step 2 – Writing your email.

Enter a Subject. You MUST enter a reply address. The email will be sent to the reply address as well as any selected recipients. The email sent to the reply address will have a list of addresses you attempted to send the email to. In addition, if any email fails to be sent (because email is no longer valid etc) the failed notice will be sent to that address.

Mail Merge – If this is checked you can enter a Salutation (e.g. Dear or Hi) and the emails will go out personalised in the form <Salutation> <First Name> <Surname> (e.g. Dear Jim Smith). Maybe of limited use – future versions may improve this feature.

Image below is of a HTML email sent to the reply address showing the list of recipients at the top.



HTML – If you know HTML you can write an HTML email. We suggest you use an HTML editor (NVU, Dreamweaver, or HTML-Kit) and copy and paste the code here with the HTML box checked. Naturally you will want to check the resulting look of the email by sending a test copy to the reply address, as this application will not render the HTML. If you send HTML emails, make sure your signature is also HTML formatted – or maybe don't bother with it for complex HTML emails. You may find the mail merge to be of limited use as well, as it will just put the greeting first (rather than banners etc).

Saving your email - Basically the email you are working on is always saved – even if you close. So before you start to write a new email you have to click clear.

Administrator Tasks

There are several tasks.

Install

The install routine is very simple. It is explained on a separate document, because this document can only be accessed if the application is already installed. Your Licence (for the paid version) allows you install across the LAN. This includes VPN and Remote Desktop for users on the road, at home etc. Setting up a LAN, VPN or Remote Desktop is not covered by support for this application.

Delete.

Members can be deleted – probably when they have moved on and there is no chance that they might rejoin. You might want to search for former members and delete the oldest. You can only delete one member at a time.

To delete simply put the cursor into the member number box of the record to delete, and click delete. You will get no warning.

Uninstall

You can uninstall this program in Add/Remove programs. The data file ClubMembers.mdb will not be deleted.

Share.

You can share the data file ClubMembers.mdb with other members, (probably office holders) if you like. They will need the program installed on their computer of course. You just email the ClubMembers.mdb to them, in the same way as if you were emailing them a spreadsheet of members. For them to view it, they merely open the program (NOT THE FILE), and in Options, click Find to connect to the file.

Naturally any changes made will not be reflected back so you always need to know who has the MASTER copy. Just think of it like a spreadsheet for this purpose.

Backup

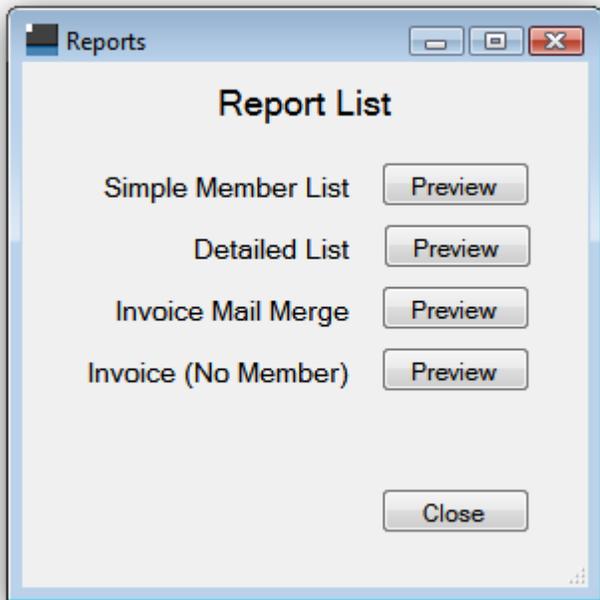
You can backup the member's database, either by just backing up the data file ClubMembers.mdb or by using the Backup button on the order form. The Backup button also compresses the data file, so we suggest you do a backup after deleting a lot of members. You will be asked to save your backup with a new name. The backup will be saved with a .bak extension. To restore (this would be VERY rare) just rename the file [yourName].bak to ClubMembers.mdb, and in Options click Find to reconnect to it.

Reporting

There are four reports. The first two are Members List and Members List detailed. These lists are the filtered searches – so you can print a list a financial members for example.

You can print a generic invoice. This invoice has the member type price list and the invoice message on it, which you set up in Options. You can also do a mail merge invoice, which means all the selected members (i.e. everything searched for, or if no search, everybody) will have an invoice printed for them - one with their name and address on as well as the information from the Options setup.

The Reports will not directly print, but Preview. You have various options from there (like email, or print as PDF). However emailing is through your default email program, and no email address from the program is used. So you can't mail merge invoices to email in this program at present, which admittedly would be useful (Possible upgrade)



Below is the sample report Invoice (No Member)

Your Club Name

188 Your St
Your Suburb
State Postcode

P: 0897579007 F: 0897579007 E: emailme@myisp.com

Write stuff about ABN and GST - Options/Invoice

Invoice:

Invoice Date: 7/12/2011

Membership Fees Due By: 31/3/2012
Membership fees for period ending: 31/12/2011

Please select membership type and return the payment with the remittance by the due date.

Please renew my membership.

Please find my nomination/nomination and fees/ enclosed.

Nominated: _____ Signed: _____

Seconded: _____ Signed: _____

Type 1	\$50	<input type="checkbox"/>
Type 2	\$40	<input type="checkbox"/>
Type 3	\$30	<input type="checkbox"/>
Type 4	\$20	<input type="checkbox"/>
Type 5	\$10	<input type="checkbox"/>
Type 6	Limit to 10	<input type="checkbox"/>

Name _____

Address _____

Email _____ Tel No: _____

Signature _____

Approved/Not Approved _____ Comm: _____

Options

Connection The connection area is talked about in the install instructions. Just note the location of the data files here – for backup purposes or if you want to install the tracker on another computer.

Find Button. This brings up a find file dialogue box so you can connect to your data file.

Create Button. Install an EMPTY new data file. Only need to be done once – immediately after installation.

Licence No: This is your licence number, and needs to be entered after you purchase the Club Members Manager. You only need a licence if you want to have more than 100 members or want to use it across a Local Area Network. It will be emailed to you, with your receipt. Do not divulge this, or use this licence number on any other site. If the licencing server detects several sites, it will try to deregister the number. There is a \$50 support charge to sort this out. (You will be issued a new licence number). Remember you can use this licence number on as many computers on the same network as you like. (Possibly 20 is a practical limit).

Licence Type: Single or Network. Use the Single free licence to determine if this program is suitable.

Option Tabs

There are 5 tabs. You will need to go through all these on installation, otherwise almost nothing will work.

General Tab

Minimum Data Requirements:

Check (tick) the boxes you would like to make compulsory. If none are ticked it is possible to have a member with no name etc. These need to be set on each machine.

Custom Names: On the main page two text fields and two checkbox fields are given over to User Choice. For example if you have various teams in your club, you can have Team. Note that the comments section can also be used in much the same way. If you leave these names blank they will not appear on th email form at all.

Days Overdue

General Settings

Minimum Data Req

- Require Member No
- Require First Name
- Require Tel

Days overdue before member becomes non financial: 100

Current Year Ends: 8/01/2012

Custom Textbox 1: Custom1

Custom Textbox 2: Custom2

Form Colour: [Color Picker]

Alt Row Colour: [Color Picker]

Custom Checkbox 1: Custom3

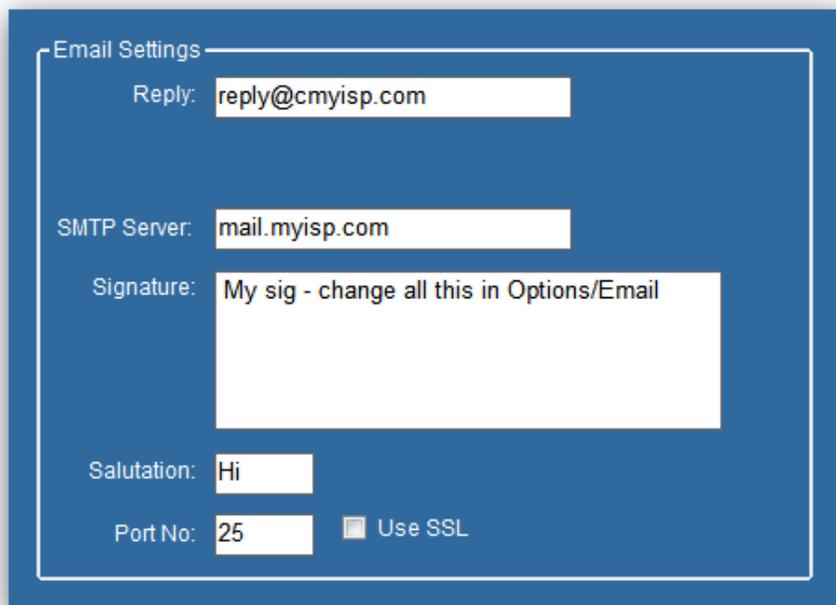
Custom Checkbox 2: Custom4

Custom names are fields on the main form - please keep name to less than 9 letters. If you do not put any text into these fields, the field will not appear on the main form. If you only want to use one custom text field, it MUST be custom Textbox 1

This is only used in determining non financial members in searches. For example membership might be to the 31/12 but members might have to 31/3 to pay. In this case you would put 90 here.

Form and Alt Row Color Change form colour (from blue) to something else that should be dark, and the alt row column to something light.

Email Tab



Email Settings

Reply:

SMTP Server:

Signature:

Salutation:

Port No: Use SSL

Reply: Enter the clubs email address. This is a requirement of this application sending emails. Anyone replying to an email will go this address (and the email client that deals with such emails). In addition a copy of any email sent goes to that address, along with a list of recipients, along with any failed emailed.

SMTP Server: The name of the default server from your email account. This is often mail.ispname.com. You must enter it correctly otherwise mail cannot be sent.

Signature: Enter a signature if needed. Note that if you are

sending an HTML email then the signature has to be HTML.

Salutation: Enter something like Hi or Dear – only used for mail merged emails.

Port No.: Normally just 25 – check your email account settings if you are not sure.

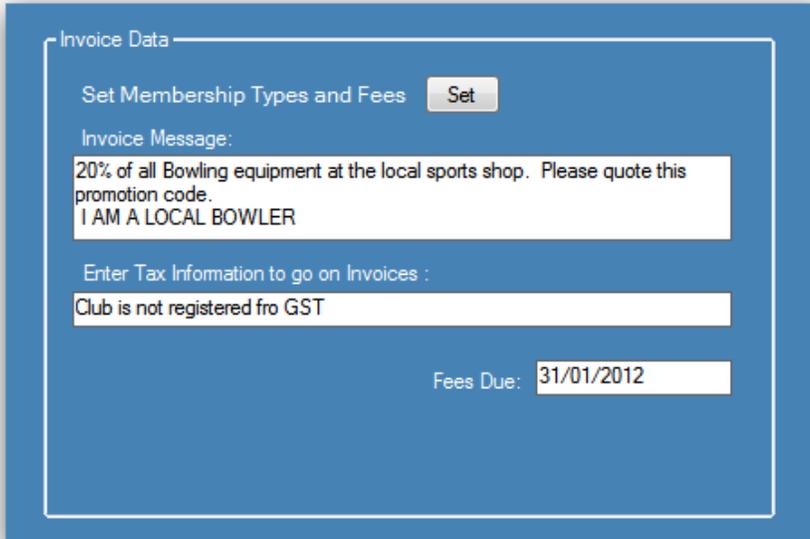
Use SSL Unsupported right now.

Other Unsupported Features

Sending mail through accounts that need to be authenticated is unsupported - however new versions of this application should fix this. This means email accounts like GMAIL and many private mail servers. It should work on most ISP mail accounts from within their network – that is, if you are using a ISPs mail server, you should have an Internet connection with them.

Invoice Tab

Set: Click this and enter the various membership fees and types. E.g. Full, Social, Supporter, Visiting etc. You will need to enter a minimum of 1.



The screenshot shows a blue-themed form titled "Invoice Data". At the top, there is a section "Set Membership Types and Fees" with a "Set" button. Below this is the "Invoice Message:" section, which contains a text area with the text: "20% of all Bowling equipment at the local sports shop. Please quote this promotion code. I AM A LOCAL BOWLER". Underneath is the "Enter Tax Information to go on Invoices :" section, with a text area containing "Club is not registered fro GST". At the bottom right, there is a "Fees Due:" label and a text area containing the date "31/01/2012".

Invoice Message If you want to write something on your invoice, this is where you write it.

Tax: Enter GST status or something else if you like - goes under the header.

Fees Due: A Fees due date, and is different from the membership expiry date. E.g. you could have membership ending 31/12/11 but fees not actually due to 31/1/12.

Contact Tab

Licensed: The name of your club – it will appear on report headers.

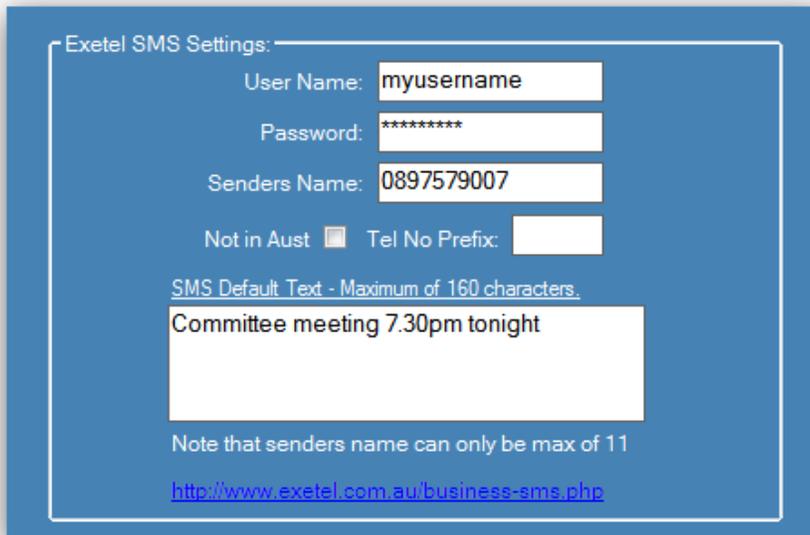
Address: Type the address – appears on Invoices.

Email: Email address for reports etc

Tel and Fax: Prints ons Invoices etc.

SMS Tab

Exetel is an Australian Internet service provider. They offer a SMS over the Internet service (they call it SMS over ADSL). While Australian, it should work for nearly every country. You do need to realise that, to them, any call that ends up in any country besides Australia is an international call, and so you will be charged at International rates. However that is still less than 10cents Australian a call.



Exetel SMS Settings:

User Name:

Password:

Senders Name:

Not in Aust Tel No Prefix:

SMS Default Text - Maximum of 160 characters.

Note that senders name can only be max of 11

<http://www.exetel.com.au/business-sms.php>

If this service is important to you, please buy a \$10 prepaid plan from Exetel, and see if it works for you. Use the link provided at the bottom of the Options page.

The User Name is your Exetel User Name,

The Password is your Exetel Password.

Senders Name can be (and usually is) your phone number. If you use letters you cannot use spaces or Symbols. (Optional)

Remember the SMS is NOT coming from your phone, so the recipient can

not press reply.

Australian users do not need to do anything more.

Non Australian users will need to click "Not in Aust" and put the international prefix (Not the + sign though) for their country. For example all US users will need to put 1.

In addition, if ALL your members have the same area code you could put that in as well. So US members, in an area code of 845 would put 1845 in that box.

However if you have members in different area codes, then you will need to type the area code with the phone number in the Club Members manager. You will need to type in an area code somewhere, but not twice.

SMS Default Text: Optional. Use you need to send the same message to several different members.

Issues, and Suggestions

No bugs reported. However there are some minor points that you should be aware of.

Backing up: Make sure you are the only one using the Club Members Manager. If any are open, you can't backup – you will get an error. Sometimes you get the same error, even if the trackers are all closed – just try again as the tracker you are on has failed to disconnect from the database in time.

Lost download: Just download it again from the website address on the Options form. Install, put the licence number in if multi-user) and you are away.

Support: Email accessible from Options form (Email developer). It will auto populate the Subject field – you must not change that, otherwise the spam filter will get it. There is no charge for support for Licenced users. However we cannot support network issues. Even if you have a free copy, still email us with bugs, queries and suggestions.

Starting up with windows: Drop a copy of the desktop shortcut into the startup folder. So copy the shortcut, go to Start>All Programs, right click on the Startup Folder, click open, and then right click inside the folder and click paste.

Upgrading: From time to time various updates will be available for downloads. If you have the paid version there will be no further charges, and free users can also upgrade. **However at the present time, if you upgrade, then (most of) the options will be lost. So remember passwords especially.**

To Do list

The following are possible improvements that may be made to this program of the coming months. We can't promise we will implement these - but we are more likely to do so if you ask (nicely of course)

1. Mail merge invoices to members
2. Bulk SMS members
3. Authenticated and SSL email.
4. Attachments sent with email (maybe how we do item 1)
5. Retain Options on upgrade
6. Import members to program from a spreadsheet (Excel probably only)

No doubt users will suggest others

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Rod Bennett

And While I have your attention

Club Members Manager is part of our Extremely Easy Software range. All software in this range works in very much the same way. Most of the titles are aimed at small business. Please visit our website for more details.

Existing titles

Customer Order Tracker Tracks customer orders easily.