



User Manual

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Chapter 1 – Introduction

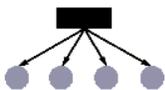
Welcome to ClubExpress, the most powerful tool on the Internet for managing hobby and enthusiast clubs, sports and leisure clubs, social clubs, homeowner and condo associations, fraternities and alumni clubs, community service clubs, and professional and trade associations of all kinds.

ClubExpress was designed to allow clubs and associations 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.

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

THIS USER MANUAL

This user manual is designed for club or association members only. It does not include discussion of coordinator and administration functions, which are described in a separate manual.



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



Within ClubExpress, every screen also includes a link to an online help system (on the right-side floating Page Tools Widget) that includes all of the material in this manual. There is also instruction text on many screens.

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

Chapter 2 – Screen Orientation

INTRODUCTION

This chapter describes the various components of a ClubExpress screen. Figure 2.1 below shows a typical screen, with the major components highlighted.

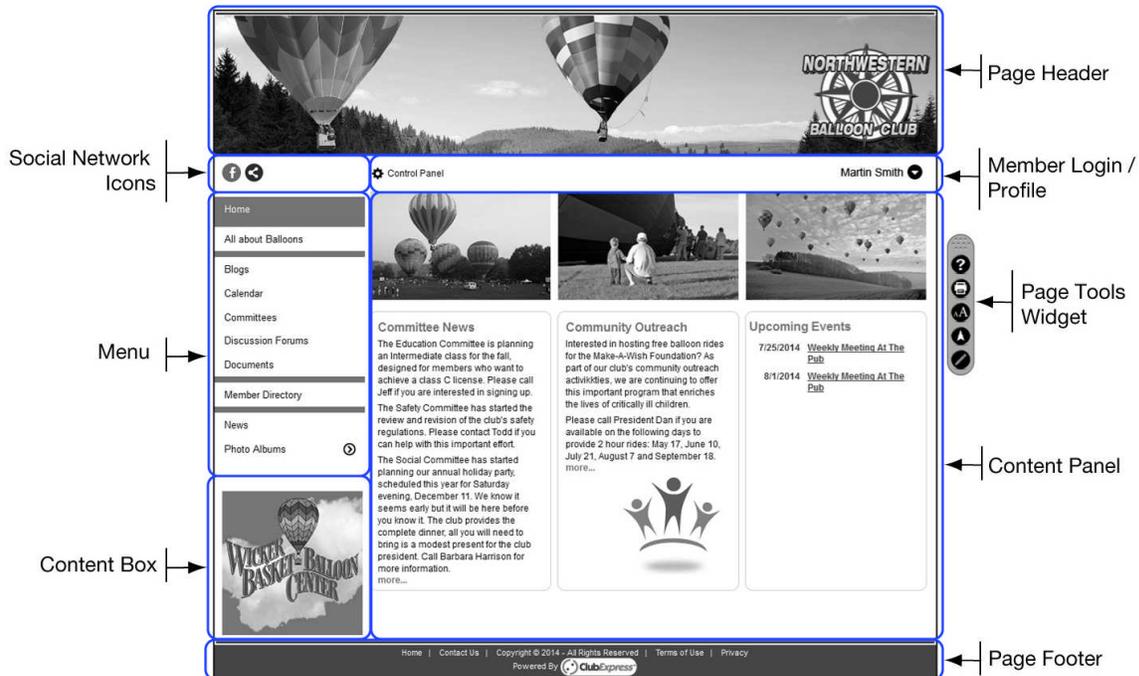


Figure 2.1 – ClubExpress screen

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.

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:



Figure 2.2a – Login Panel (logged in)

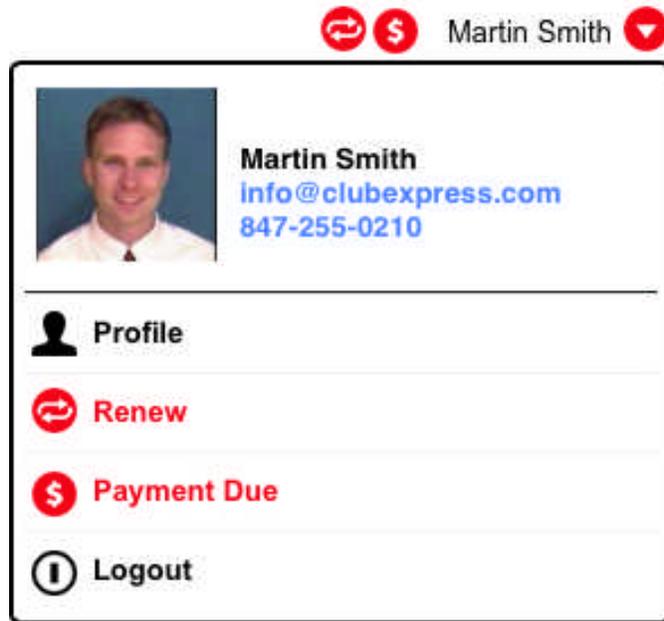


Figure 2.2b – Login Panel (hovering over the name/arrow)

- 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 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, 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.

For clubs and associations using an old-style or custom template and theme (prior to version 6.0), the login panel will look like this:



Figure 2.3 – Login panel (old style)

- Site visitors and members who have not yet logged in will see the phrase Member Login. Clicking this link brings up the login page, allowing members to log into the site and view content reserved for members only.
- Members who have logged in will see a “Welcome, <first name>” message. The Login link is replaced by two links: one to Logout and the other to jump to the member’s personal Profile page (see page 54).
- 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.

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.)

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:



Figure 2.4 – Social Networking Links

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:

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.

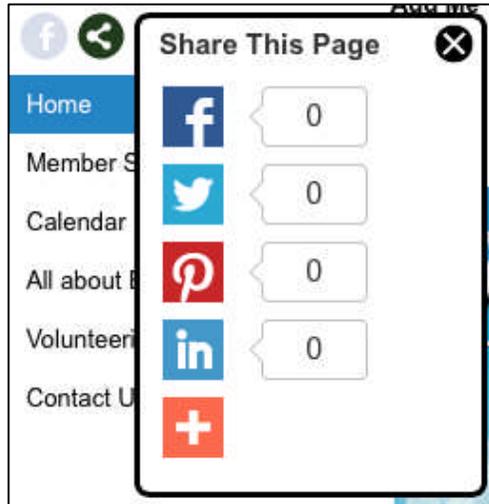


Figure 2.5 – Social Networking Sharing Links

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:

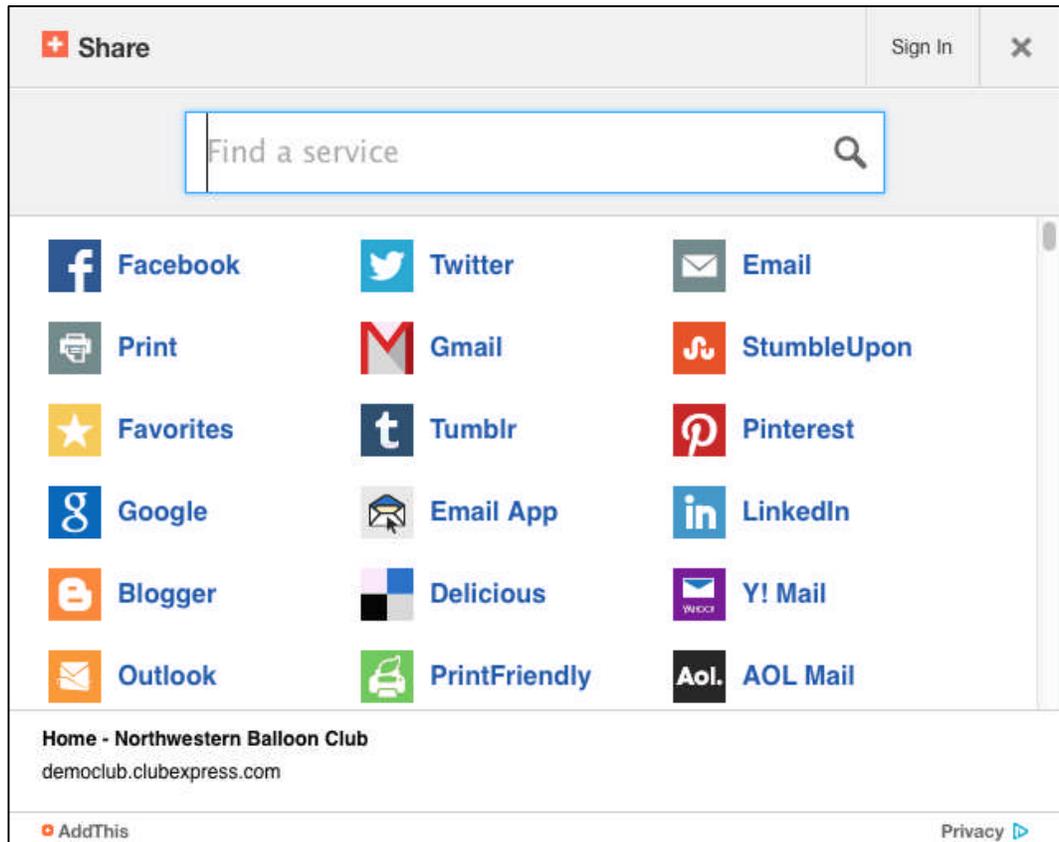


Figure 2.6 – More Sharing Options

PAGE TOOLS WIDGET

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



Figure 2.7 – Page Tools Widget

This widget appears on every page and may have between four and six icons. The dotted section at the top can be used to click and drag the widget to a different position on each page.



The first icon (“question mark”) displays the context-sensitive help system, providing instructions for the current page or module.



The second icon (“printer”) provides a “Print this page” function.



The third icon (“AA”) expands text on the current page to make it easier to read for older readers and others with reduced eyesight.



The fourth icon (“up arrow”) jumps to the top of the screen.



Selected pages may also display a “magnifying glass” icon, providing Search tools specific to that page. Over time, we will enable this icon in additional places.



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.

The Page Tools 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

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.

ADD ME TO YOUR MAILING LIST

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

Home > Add Me

Add Me To Your Mailing List

Complete the information below to be added to our mailing and emailing list.

First Name

Last Name

Email Address

Address 1

Address 2

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Phone

Cell Phone

Fax

Title

Organization

How did you hear about us?

Category Guest

Select the category or categories that best describe you.

Figure 2.8 – Add me to your Mailing List

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

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.

ACCESSING A CLUBEXPRESS WEBSITE 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:

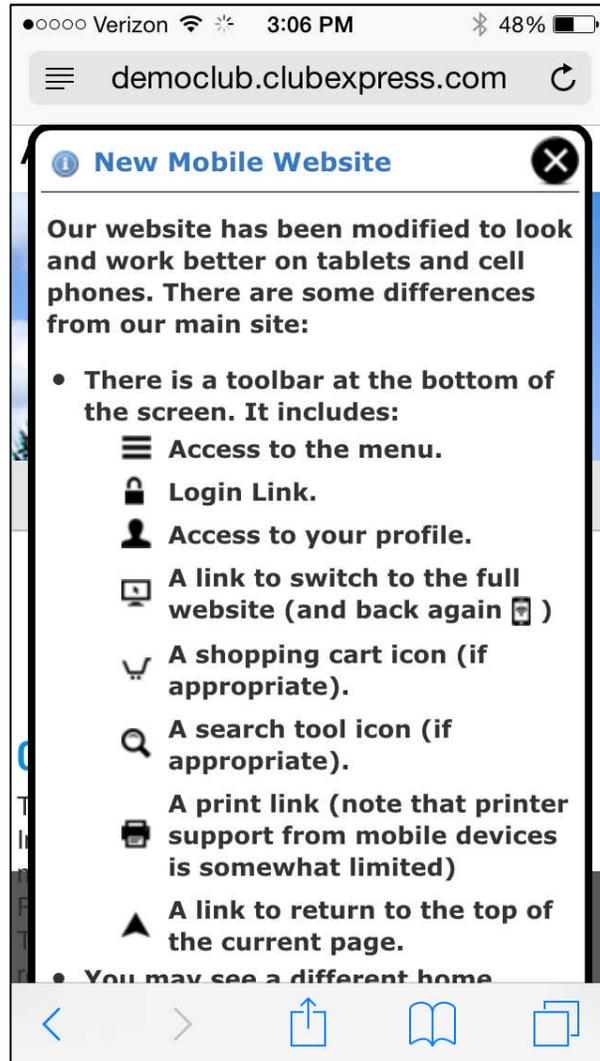


Figure 2.9 – New Mobile Website

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:

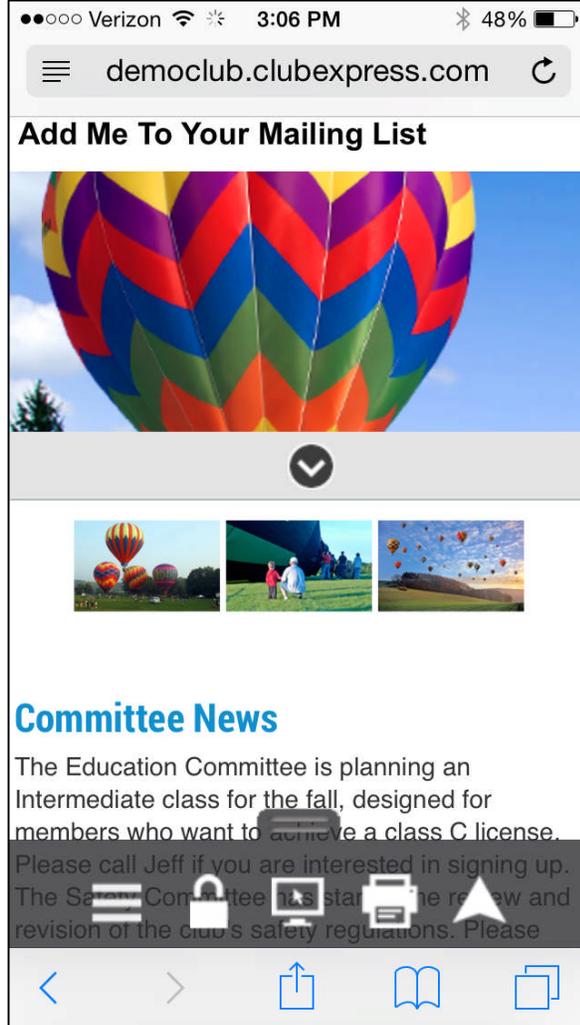


Figure 2.10 – Main Website screen on a smartphone

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:



(Menu)

Tapping this icon displays the website menu. (See below)



(Login)

Tapping this icon allows you to login to the website. (See below)



(Profile)

When you are logged in, the **Login** icon changes to this one. Tapping it displays your individual Profile menu. (See below)



(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.

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:

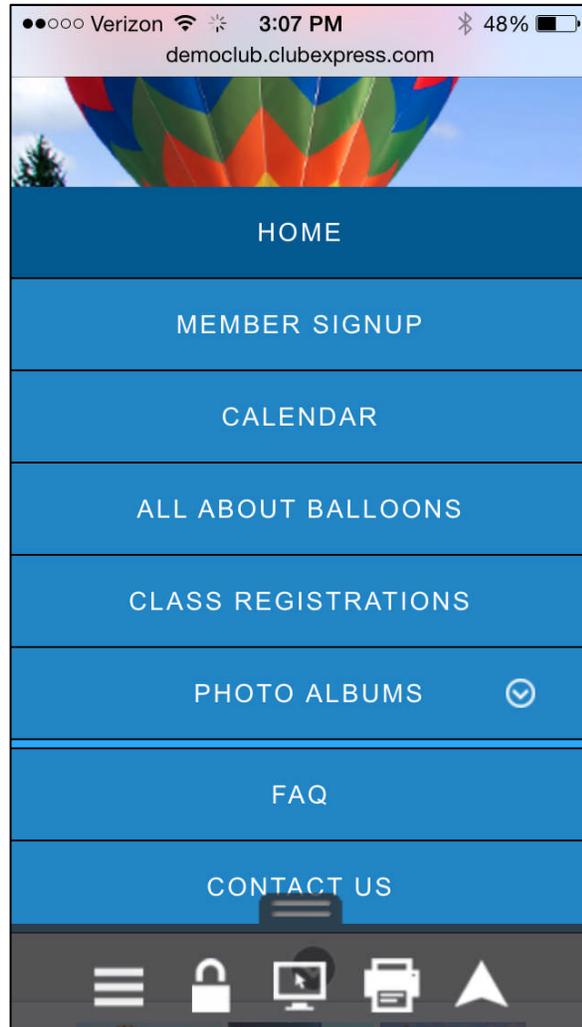


Figure 2.11 – Mobile Menu

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 differ 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:

The screenshot displays a mobile web browser interface for the ClubExpress login page. At the top, the status bar shows 'Verizon' service, signal strength, Wi-Fi, cellular data, the time '3:09 PM', and a 47% battery level. The address bar contains the URL 'democlub.clubexpress.com'. The main content area has a blue header with the word 'Login'. Below the header, there is a paragraph of instructions: 'Please enter your user name and password and click "Login". Your user name is not case-sensitive but your password is. Click "Cancel" to return to the Home Page.' There are two input fields: 'User Name' and 'Password', each with a red dot indicating a required field. Below the password field is a radio button labeled 'Remember me on this computer'. At the bottom of the form area are two large buttons: 'Login' with a checkmark icon and 'Cancel' with an 'X' icon. A link for 'Forgot My Username/Password' is visible above a dark navigation bar at the very bottom. The navigation bar contains icons for a menu, a lock, a computer monitor, a printer, and a home arrow. Text at the bottom of the screen reads 'Trouble logging in? Click here for assistance.'

Figure 2.12 – Mobile Login

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:

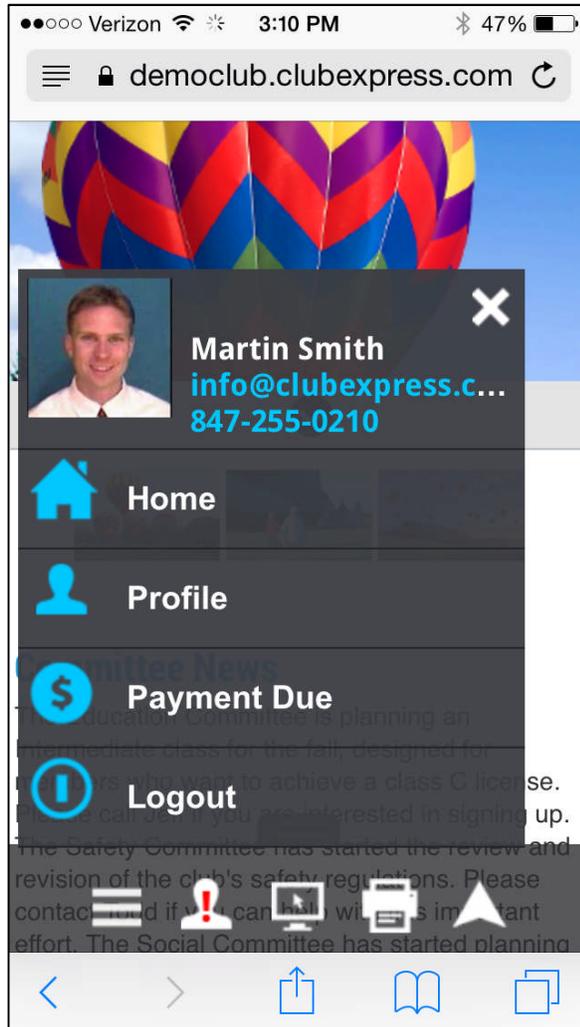


Figure 2.13 – Mobile Profile

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. For example, here is the Event Calendar:

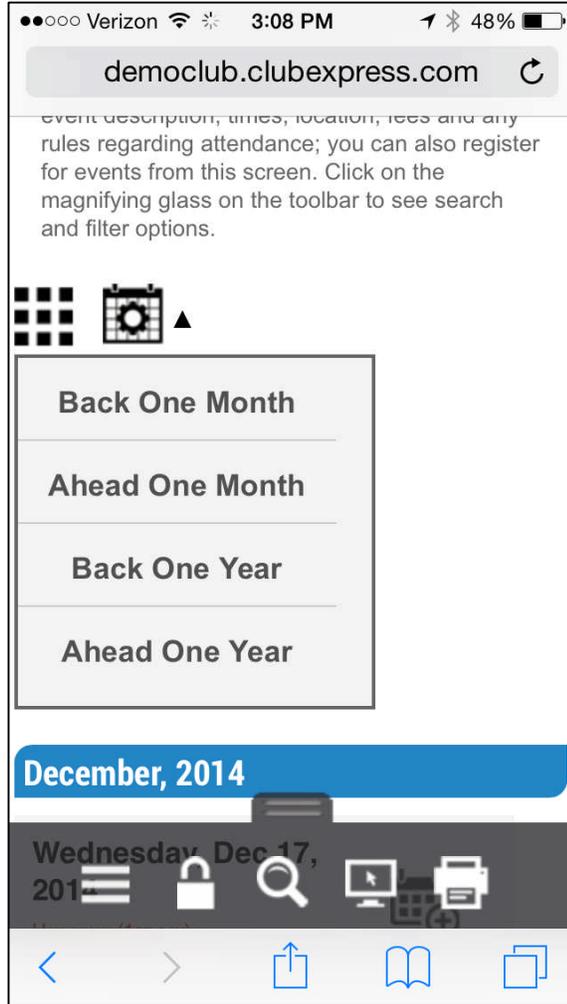


Figure 2.14 – Mobile Event Calendar

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 than 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 described above. 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.

And, as noted above, you can also create mobile-specific versions of your page header, home page, and 2 content boxes, to make them more appropriate for mobile devices.

Note that 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.

Chapter 3 – Logging In

INTRODUCTION

Every member has his or her own account in ClubExpress. When a web site is first displayed, the Login link allows members to login into their accounts with a user name and password and to access member's only features. Members who forget their password can retrieve it with a standard secret question and answer mechanism.

LOGGING IN

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



Figure 3.1 – Login Page

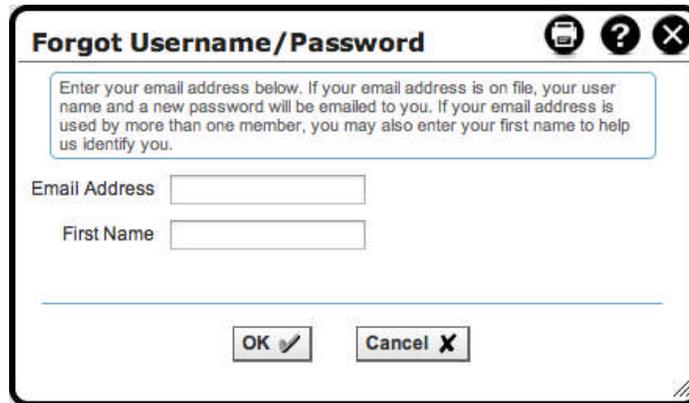
Enter your user name and password and click the **Login** button. Click **Cancel** to return to the home page.

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

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

RETRIEVING A LOST USERNAME/PASSWORD

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



The screenshot shows a standard Windows-style dialog box titled "Forgot Username/Password". It features a title bar with a question mark icon and a close button. The main content area contains a text box with the following text: "Enter your email address below. If your email address is on file, your user name and a new password will be emailed to you. If your email address is used by more than one member, you may also enter your first name to help us identify you." Below this text box are two text input fields, one labeled "Email Address" and one labeled "First Name". At the bottom of the dialog are two buttons: "OK" with a checkmark icon and "Cancel" with an 'X' icon.

Figure 3.2 – Retrieving a Lost Username and Password

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

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

Chapter 4 – Member Profile

INTRODUCTION

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

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

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

ACCESSING YOUR MEMBER PROFILE

To access your Member Profile, you must first log in using your Username and Password. Click the **Member Login** link near the top of the screen. Once you have logged in, this prompt is replaced with your name and an arrow. Hover over either of these elements to see a drop-down menu. Click the **Profile** option to enter the Member Profile. You will see the following screen:

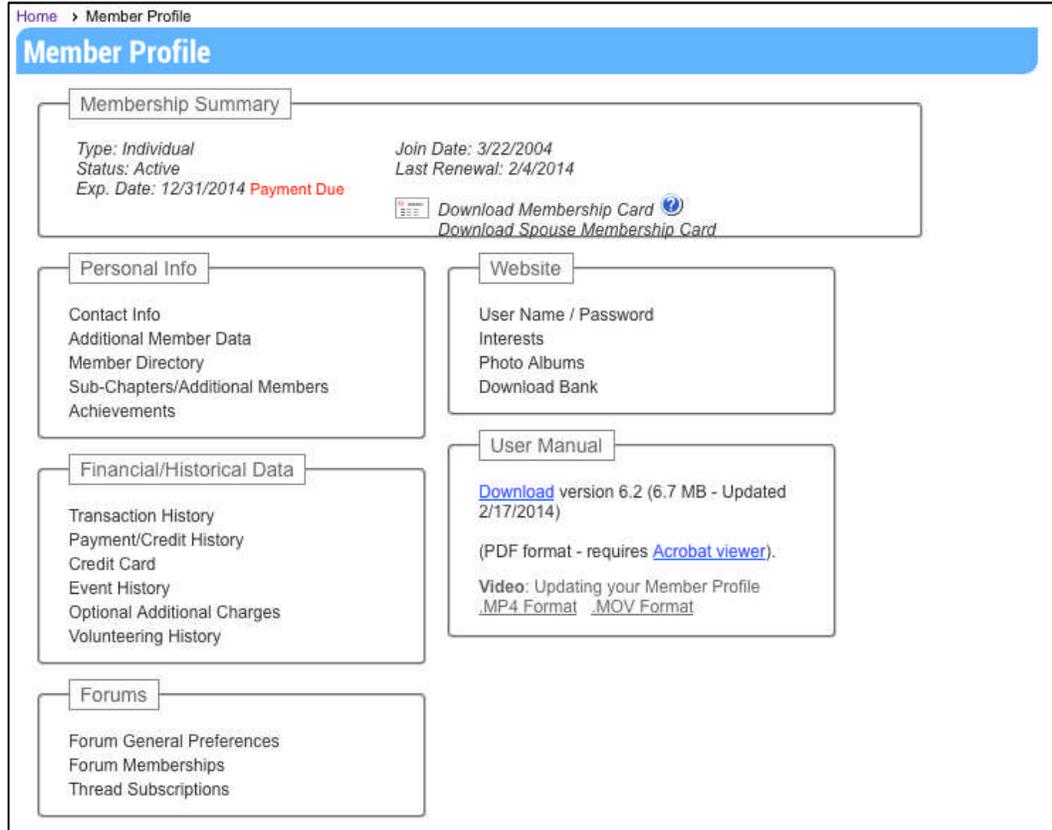


Figure 4.1 – Member Profile

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

If your club or association has enabled the virtual membership card feature, you will also see one or two links to generate and download a virtual membership card, customized with your information. This card can be printed on a local printer, or downloaded to your smartphone!

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

Automated Membership Renewal/Payment

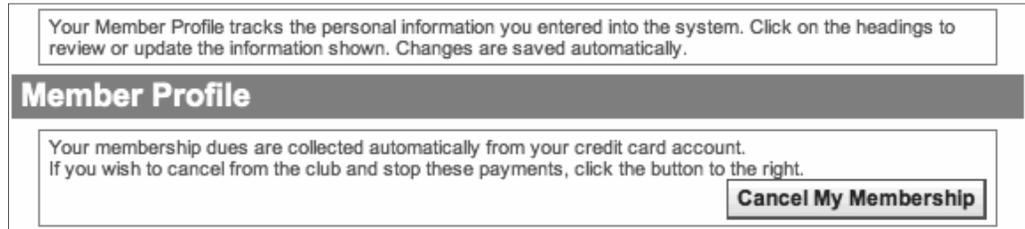


Figure 4.1a – Member Profile with Automated Renewal and Payment

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

OVERVIEW OF PROFILE OPTIONS

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

Personal Info

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

Financial/Historical Data

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

Forums

- Select **Forum General Preferences** to specify your general preferences for participation in discussion forums. This option is only shown if your club or association has enabled the Forums module.
- Select **Forum Memberships** to specify your preferences for individual forums, including whether you are subscribed to the forum and how or whether emails should be delivered.
- Select **Thread Subscriptions** to view current subscriptions and to unsubscribe from any threads from which you no longer wish to receive updates.

Website

- Select **User Name / Password** to modify the user name and password used to log into the system. On the administrator version of the profile, this option is replaced with **Reset Password**.
- Select **Interests** to let other members know what expertise and interests you have within your club. This option is only shown if your club or association has enabled the Interests module.
- Select **Photo Albums** to upload photos and organize them into personal photo albums. This option will only appear if your club or association has enabled member-level photo albums.
- Select **Download Bank** to view any documents in your download bank. This option will only appear if your club or association has enabled the Storefront module, from which digital content can be purchased and downloaded.

User Manual

Select this option to download a user's manual for ClubExpress. This manual is in Adobe Portable Document Format (PDF); there is also a link to a free Adobe reader. You can also view a video tutorial explaining the various Profile options.

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

RENEW

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

Home • Membership Renewal

Membership Renewal for Jon Harrison Step 1 of 3

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

Membership Status Expired 7/1/2004

Membership Type ▼

All people living in a household.

New Expiration Date

Current Total \$40.00

Figure 4.2 – Renewal

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

Payment

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

Home • Control Panel • Pending Payments • Make Payment

Make Payment for dan j nitzel (89)

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

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

Fields marked require an entry. Click to change amount.

[Print Invoice](#)

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

Adult	30.00
Season Ticket Pass	25.00
Transaction Total:	55.00

Total Selected For Payment **\$ 55.00**

Select Payment Method < Select Payment Method >

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

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

Cancel

Figure 4.3 – Pending Payments

This screen shows one or more payments pending, including the detail for each. If there is only one payment shown, it will be checked. If multiple payments are shown, none of them will be checked; you must check at least one to pay.

Credits

If you have any pending credits, they will be automatically applied, up to the amount of the pending payment. Any additional amount is available to be used for a future transaction.

Discount Coupons

If you have a discount coupon, it can also be applied on the Payments page. If there are published coupons that apply to the transaction(s) on the page, you will see a field to enter the coupon code:

Total Selected For Payment	\$ 50.00
Have a coupon? Enter the code: <input type="text"/>	
	<input type="button" value="Apply"/>

Figure 4.4 – Enter the Coupon Code

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

Total Selected For Payment	\$ 50.00
<i>Any event</i> Coupon Applied	\$ 5.00
Net Payment	\$ 45.00

Figure 4.5 – After a Coupon Code was Entered

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 Method

There are generally two payment options:

1. Pay online by credit card. With this option, you are presented with a credit card payment screen, including the option to store the card in the system. You must explicitly authorize ClubExpress to charge your card. Click the **Submit** button to process your transaction, after which a summary screen is presented.
2. Print an invoice and mail a check. An invoice is displayed in a popup screen together with the Print dialog allowing you to print the invoice. When you are done, click the **Done** button on the main screen to exit the Renewal wizard.

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

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

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

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

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 and Send a Check” option is not shown.

CONTACT INFORMATION

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

.home • Member Profile • Contact Information

Contact Information

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

General Information

Member Number 3
 Title Mr
 *First Name Martin
 Middle Initial
 * Last Name Smith
 Nickname Skippy
 Spouse First Name Mary
 Spouse Last Name

Primary Address

* Address 1 123 Main Street
 Address 2 Apt 612
 * City Chicago
 * State/Province Illinois
 * Zip/Postal Code 60601
 * Country UNITED STATES
 * Home Phone 312-555-3456

Figure 4.6 – Contact Information

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

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

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

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

ADDITIONAL MEMBER DATA

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

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

Home • Member Profile • Additional Member Data

Additional Member Data

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

What is your ABA Number?

How many years have you been flying balloons?

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

Save ✓ Cancel ✕

Figure 4.7 – Additional Member Data

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

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

MEMBER DIRECTORY

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

Home > Member Profile > Member Directory

Member Directory - Martin Smith

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

Visibility:

Social Networking

Copy and paste the URL from your personal social networking site to the respective text box below. Make sure to copy the entire URL from your browser address bar (i.e. <https://www.facebook.com/yoursite>)

Figure 4.8a – Membership Directory (top part)

This screen may vary slightly based on which options have been enabled.

Visibility

The **Visibility** drop-down list allows you to control what information is shown to other members in the Membership Directory (this module is normally not visible to non-members.) If members join the club through their personal lives, the following options are available:

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

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

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

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

other information is provided. This is the default when your account is created unless your club or association has specified a different level.

- *Do not list me in the directory.* With this option, other members do not see you in the directory at all.

Birthdays and Anniversary

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

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

Social Networking

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

- FaceBook
- LinkedIn
- Twitter
- Pinterest
- Etc.

For each service, copy and paste the complete URL pointing to your public profile page. For example, a typical Facebook URL looks like this:

<http://www.facebook.com/martin.smith>

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

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

The Profile – Membership Directory screen continues below.

Figure 4.8b – Membership Directory (bottom part)

Biography

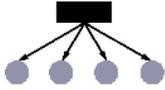
The biography field allows you to enter personal or biographical information about yourself. This will help other members get to know you better, including your background, interests and expertise. This information is entered using the advanced content editor built into ClubExpress. This editor provides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

Photo

You may upload a photo to be included in your Member Directory entry. We recommend that the photo be no more than 80 x 80 pixels.

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

CHAPTERS / ADDITIONAL MEMBERS



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

Chapters Only

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

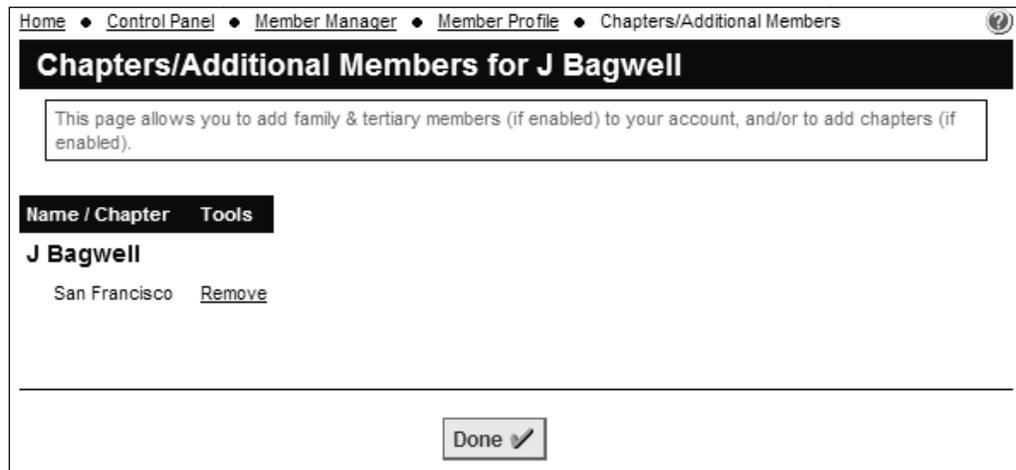


Figure 4.9 – Joining Chapter(s)

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

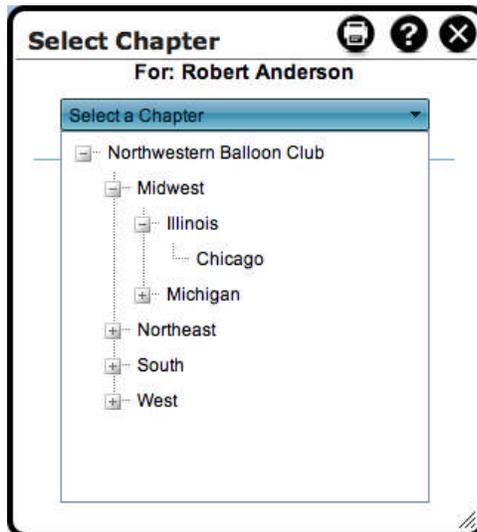


Figure 4.10 – Add Chapter

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

Secondary/Tertiary Members Only

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

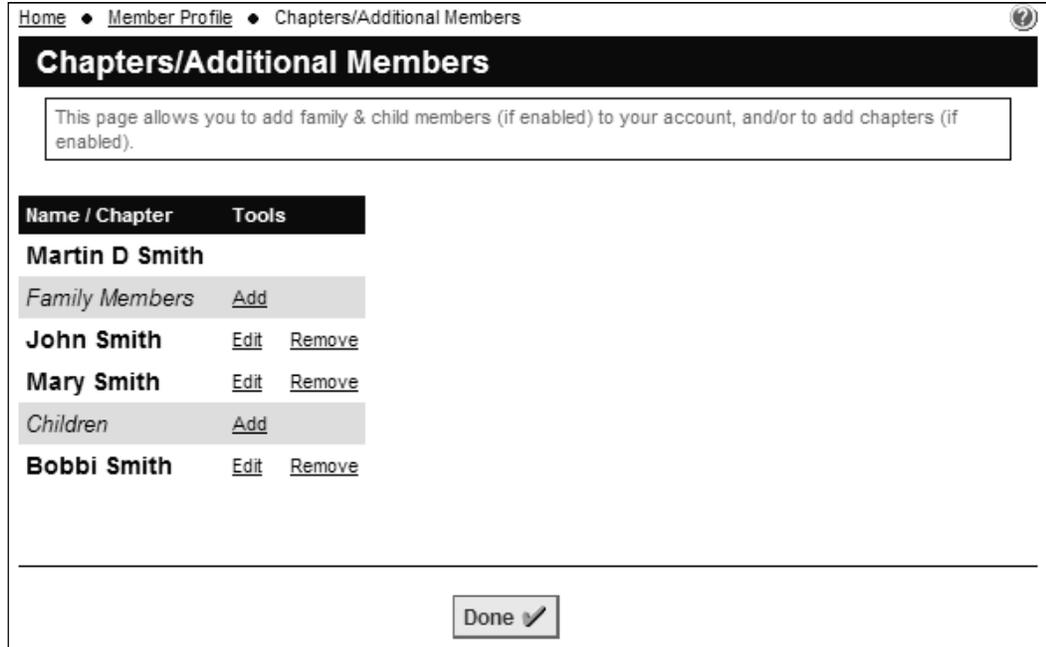


Figure 4.11 – Secondary and/or Tertiary Members

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

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

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

Figure 4.12 – Add Secondary and/or Tertiary Member – Simple Version

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

Figure 4.13 – Add Secondary and/or Tertiary Member – Full Version

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

Chapters and Secondary/Tertiary Members

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

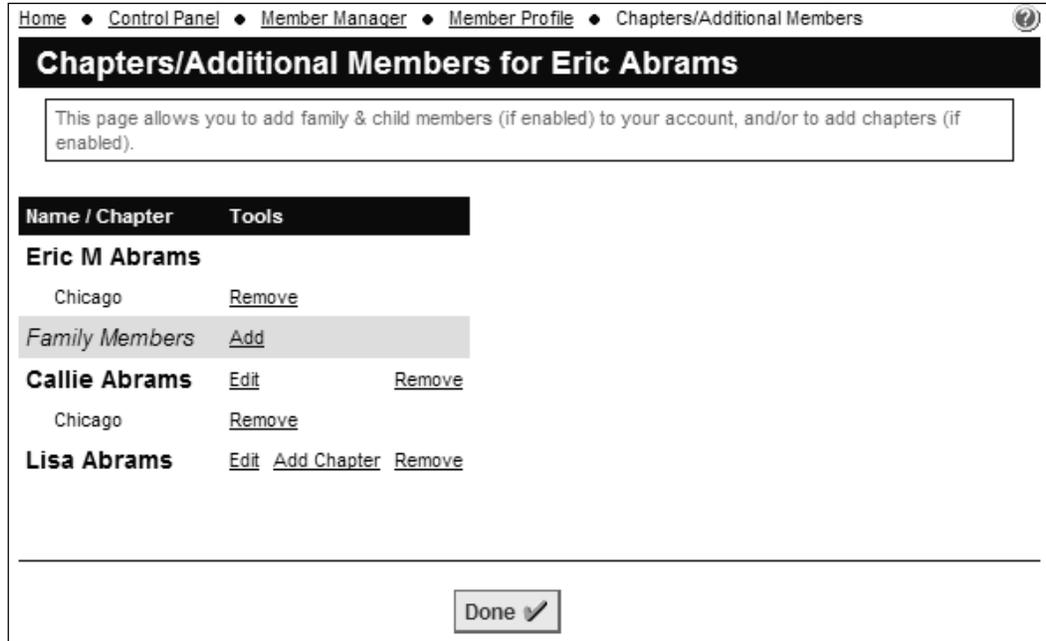


Figure 4.14 – Add Chapter(s) and Secondary/Tertiary Members

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

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 Member Manager coordinator can edit this data. You will see a screen similar to the following:

Home > Member Profile > Member Achievements

Member Achievements

This screen shows the member's achievements. These will be listed on the member's profile. Use the links in the Maintain column to Edit or Delete an achievement. Press the Add Achievement button to add an achievement, and the Display Sequence button to change the order in which the Achievements are displayed here and on the Member's profile.

Add Achievement **Display Sequence**

Dates	Achievement	Maintain
2009-2010	President	
2008-2009	President Elect	
2007-2008	Club Treasurer	

Return to Previous Page

Figure 4.15 – Achievements

Click **Add Achievement** to create a new achievement. You will see the following screen.

Add/Edit Achievement for Martin Smith

Enter the Achievement dates and description. Click "Save" or "Cancel" to return to the member's Achievements list.

Dates: 2009-2010

Description: President

Max 300 characters - 291 characters left

Save **Cancel**

Figure 4.16 – Add/Edit Achievement

Enter a free form date and description, then click **Save** to save your change, or **Cancel** to cancel without saving.

Click the **Edit** link to modify an existing achievement or the **Delete** link to remove one. You can also click the **Display Sequence** button to reorder achievements already entered; the standard dialog is displayed.

TRANSACTION HISTORY

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

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

Figure 4.17 – Transaction History

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

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

⤴ 6/1/2012	Event Registration Print	\$ 110.00	Paid in Full
	6/15/2012 - Banquet		
Item(s):	Ann Smith - Banquet	\$ 60.00	
	Martin Smith - Banquet	\$ 50.00	
Payment(s):	6/1/2012 Cash	\$ 110.00	
	Note: the total payment was \$ 450.00 - the amount applied to this transaction was \$ 110.00		

Figure 4.18 – Transaction History showing expanded details

You will see the individual line item(s) making up the transaction, and the individual payment(s) used to complete this transaction. Click the blue *Print* link to print a receipt of this transaction only and the payment method(s) used to cover it. Click the blue payment date link to print a receipt of this payment and the transaction(s) that it covered.

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

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

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

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

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

PAYMENT/CREDIT HISTORY

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

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

Figure 4.19 – Payment History

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

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

Administrator Options

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

Figure 4.20 – Edit Payment

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

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

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

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

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

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

Edit Credit

Credit Issued To: Martin Smith
 Status: Available
 Amount \$ 50.00 Balance \$ 50.00

Select Action: Edit

Date: 4/22/2013

Amount \$: 50.00

Credit Type: For Services

Description: Membership credit

Account: Master Membership Dues

QuickBooks Item Name:

Save Cancel

Figure 4.21 – Edit Credit

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

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

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

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

CREDIT CARD

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

Home • Member Profile • Edit Credit Card

Edit Credit Card Information

Use this page to maintain your credit card information.

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

Credit Card Type

Card Number

Expiration

Name on Card

Validation Code How do I find this?

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

Figure 4.22 – Credit Card Information

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

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

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

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

Automated Payments

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

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

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

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

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

EVENT HISTORY

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

Home • Member Profile • Event History

Event History

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

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

Figure 4.23 – Event History

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

Cancellations

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

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

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

OPTIONAL ADDITIONAL CHARGES

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

Home • Member Profile • Additional Charges

Additional Charges

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

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

Figure 4.24 – Optional Additional Charges

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

VOLUNTEERING HISTORY

Select this option to see a screen similar to the following:

Home > Member Profile > Volunteering History

My Volunteering History

Future Opportunities

⌵ Mountain Rally 05/02/2014 - 05/04/2014

slot	Date	Time	Volunteer Name	Maintain
Registration Desk	05/02/2014	06:15 AM - 10:00 AM	Barbara C Jones	

Past Opportunities

No past volunteering signups found.

[Return to Previous Page](#)

Figure 4.25 – Volunteering History

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.

FORUM GENERAL PREFERENCES

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

Home > Member Profile > Forum General Preferences

Forum General Preferences

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

Viewing Messages and Threads

Threads Per Page

Preferred Message View Threaded Flat

Msgs Per Page (Threaded)

Msgs Per Page (Flat)

Email Address

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

Allow Private Replies Allow forum members to send replies directly to me via email
 [Check this box to apply the email address choice to all my forums](#)

Message Delivery

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

Email Links Remove additional links and info text from my forum emails
NOTE: Forum emails include some identifying text and useful links after the message(s). Check this box if you wish to remove this text.

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

Frequency

[Check this box to apply these message delivery options to all my forums](#)

Figure 4.26a – Forum General Preferences (top part)

The following options are available:

Viewing Messages and Threads

- **Threads Per Page** controls how many threads are shown in the initial list of threads when a forum is first opened. You can specify any number, but we recommend not going higher than about 100.
- 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

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

Message Signature Attach the following signature to each message

Full Steam Ahead, Jonesy
 Chicago, IL
 mailto:dan@clubexpress.com

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

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

Identification

Forum Handle

Show Name Display my full name with my messages

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

Show Location Display my location with my messages

Location:

Local Time Offset The current server date & time is 3/28/2014 4:35 PM.
 Specify your offset time in hours (+/-).

Show Picture Display this picture with my messages



Select Picture no file selected

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

Figure 4.26b – Forum General Preferences (bottom part)

Authoring Messages

- The default **Text Editor** is a simple, text only input field that is suitable for the majority of users. However, more experienced users can switch to an advanced editor which includes support for text formatting, fonts, colors, tables and other options. (This is the same editor used to create custom pages within ClubExpress; it is explained in Chapter 17.)
- If you want to attach a standard **Message Signature** to each message, check the box and specify the sig. in the field provided. This saves you from typing a standard set of characters at the end of each message. Forum users often include their name, location or a catchy phrase in a signature, although forum etiquette suggests that signatures should not be excessively long.
- The check box allows you to propagate these settings into every forum that you've subscribed to that requires such configuration.

Identification

- **Forum Handle** allows you to specify a name to use within forums. This does not need to be your login name, although this is the default choice. If you are known within your club for a particular area of expertise or interest, you might select a name 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 Central Time Zone, so messages are normally tagged with their date/time of posting based on this time.) For example, if you are located on the west coast, specify “-2” for this option. Then, when you are viewing a message posted on our servers at 10:45 AM CST, it will show 8:45 AM as your local time when the message was posted.
- If you want to display a small picture beside each message, check the **Show Picture** checkbox then specify a local file to upload. We recommend that this picture be no more than 80 x 80 pixels in size; you can use the same or a different picture from the one you uploaded with your directory entry.
- The check box allows you to propagate these settings into every forum that you’ve subscribed to that requires such configuration.

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

FORUM MEMBERSHIPS

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

Home > Member Profile > Forum Memberships

Forum Memberships

This page lists all the forums you belong to, along with an 'Edit' icon to modify your forum settings, and a 'Quit' icon to resign from optional forums. There is also a list of optional forums you may join if you wish. You can set preference for all forums at once on your [general preferences page](#).

Stop All Forum Emails Click this button to stop emails for all forums. This is useful if, for example, you will be away for a while, and cannot access your email. Your individual forum settings will not be changed.

Legend

Automatic Forums

You are a member of these forums automatically based on your activity in Northwestern Balloon Club. You cannot resign from these forums, but you can turn off emails if you are not interested. Click the 'Edit' icon to set your preferences for each forum.

- General Interest Forums > Let's talk Forum** *All Club Members*

Post messages on the [website](#) only
Read forum messages on the [website](#) only (this forum does not send emails)
- General Interest Forums > Safety** *All Club Members*

Post messages on the [website](#) only
You are receiving messages as they are posted at support@clubexpress.com
- Private Forums > Maintenance** *All Club Members*

Post messages on the [website](#) only
You are receiving messages as they are posted at info@gembrook.com

Optional Forums

You are a member of these forums because you joined, or a forum moderator added you. Click the 'Edit' icon to set your preferences for each forum. Click the 'Quit' icon to resign from the forum (or 'Quit All' to resign from all optional forums).

Quit All

- General Interest Forums > Day Trips** *Member Opt-in*

Post messages on the [website](#) or by email to bjones@demoforums.org
Read forum messages on the [website](#) only (this forum does not send emails)

Available Forums

These are other forums which are available to you to join. Click the 'Join' icon to join a forum.

- Equipment**

This forum focuses on equipment, including what to buy for different skill levels and needs, how to assemble and how to maintain. Safety issues are handled in the safety forum

Return to Previous Page

Figure 4.27 – Forum Memberships

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:

Home > Member Profile > Member Forums > Forum Preferences

Forum Preferences for Safety

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

Email Address

This forum sends new messages via email, but will not accept incoming email posts.

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

Allow Private Replies Allow forum members to send replies directly to me via email
NOTE: This setting applies only to online replies to messages. Since this forum is set up as a listserv, members will be able to reply directly to you via email.

Message Delivery

Send Email Send Forum Messages To Me Via Email
NOTE: Your forum emails are turned off. You will not receive emails from any of your forums, regardless of the individual settings made on this page. To turn your messages back on, click the "Resume" button on the "Forum Memberships" page, or check the "Send Email" checkbox on the "Forum General Preferences" page.

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

Frequency

Authoring Messages

Forum Handle

Message Signature Attach the following signature to each message

Full Steam Ahead, Jonesy
 Chicago, IL
 mailto:dan@clubexpress.com

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

Identification

Show Name Display my name with my messages
 Link to Bio Display a link to my directory listing (bio) with my messages
 Show Location Display my location with my messages
 Show Picture Display my picture with my messages

Figure 4.28 – My Preferences for a Forum

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:



Figure 4.29 – Thread Subscriptions

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.

USER NAME / PASSWORD

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

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

- Navigation: Home > Member Profile > User Name and Password
- Section Header: **User Name and Password**
- Message: "Some areas of our web site are only available to members. Your username and password allow you to log into the site to access these features. The name you choose must be unique within the club."
- User Name: Input field containing "msmith", with a red dot indicating a warning. Below it, "6 of 50 characters used".
- Password: Input field with masked characters "*****", with a red dot and a "Weak" indicator. Below it, "5 of 50 characters used".
- Re-enter Password: Input field with masked characters "*****", with a red dot.
- Remember me: Remember me on this computer
- Section Header: **Password Info**
- Text: "A password strength indicator will give you a score on your selected password as you type. Note that this is for your information only - this web site does not enforce specific password rules."
- Section Header: **Some tips for a strong password:**
 - Do not use common, obvious passwords like 'password' or '123'
 - Do not use easily guessed passwords like your first name or your birthday
 - Include a mix of upper- and lower-case letters and numbers
 - Add punctuation and other special characters
 - Longer is better
 - A 'passphrase' is often better than a complex password. For example, 'My favorite color is ecru' is a very strong password; it is easy to remember and hard to guess
- Buttons: Save (with checkmark icon) and Cancel (with X icon)

Figure 4.30 – User Name and Password

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.

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.

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:

Home > Member Profile > Interests

Interests

Select the interests in which you would like to participate.

X Uncheck All

Maintenance

You may select up to 3 interests in this category

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

Safety

Teaching and reinforcing the important safety considerations in our hobby/pastime.
You may select any number of interests in this category

- Safety Education and Inspection
We support the club's vital safety activities, ensuring that every balloon is fully inspected and certified before lift-off. We also help with safety education, within the club and general community.

Flying

For everyone who enjoys riding in a balloon
You may select any number of interests in this category

- Long Rides
over 40 miles
- Racing

Save **Cancel**

Figure 4.31 – Interests

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

Home > Member Profile > Photo Album Manager for Martin Smith

Photo Album Manager for Martin Smith

This screen shows your individual photo albums. Click 'Add Photo Album' to create a new photo album. In the list of photo albums, click 'Configure' to modify the properties of that album. Click 'Edit Content' to add photos to a album or update the photos in an album. Click 'Description' to modify preamble text that will be placed at the top of your album.

[Add Photo Album](#)

Title	Type	Category	Status	Maintain
Spring Ride, 2012	Member	Member Photo Albums	Visible	
Summer Races	Member	Member Photo Albums	Visible	

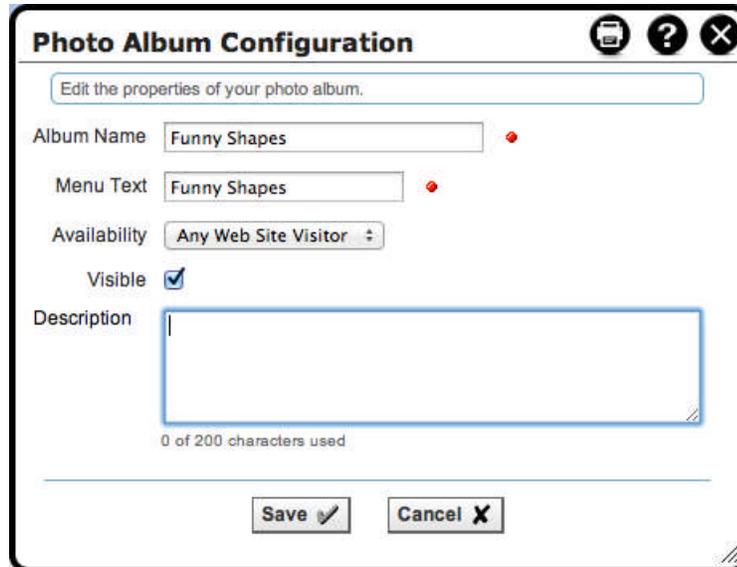
[Return to Previous Page](#)

Figure 4.32 – Member Photo Albums

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. The following options are available:

Add Photo Album

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



The screenshot shows a window titled "Photo Album Configuration" with standard window controls (minimize, maximize, close) in the top right. Below the title bar is a text input field containing "Edit the properties of your photo album." The main area contains several form elements: "Album Name" and "Menu Text" are text input fields, both containing "Funny Shapes" and each with a small red error icon to its right. "Availability" is a dropdown menu currently set to "Any Web Site Visitor". "Visible" is a checked checkbox. Below these is a large text area for "Description", which is currently empty. At the bottom of the description area, it says "0 of 200 characters used". At the bottom of the dialog are two buttons: "Save" with a checkmark icon and "Cancel" with an X icon.

Figure 4.33 – Add/Edit Photo Album

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.

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:



(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.



(Coordinators)

Click the **Manage Coordinators** icon to add one or more coordinators who have administrative rights over this album. You will see the same screen described above for built-in functions.



(Configure)

Click the **Edit Configuration** icon to display the dialog described above, 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.



(Share)

Share this new or updated photo album on your club's social networks, including Facebook, Twitter, and LinkedIn. (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.

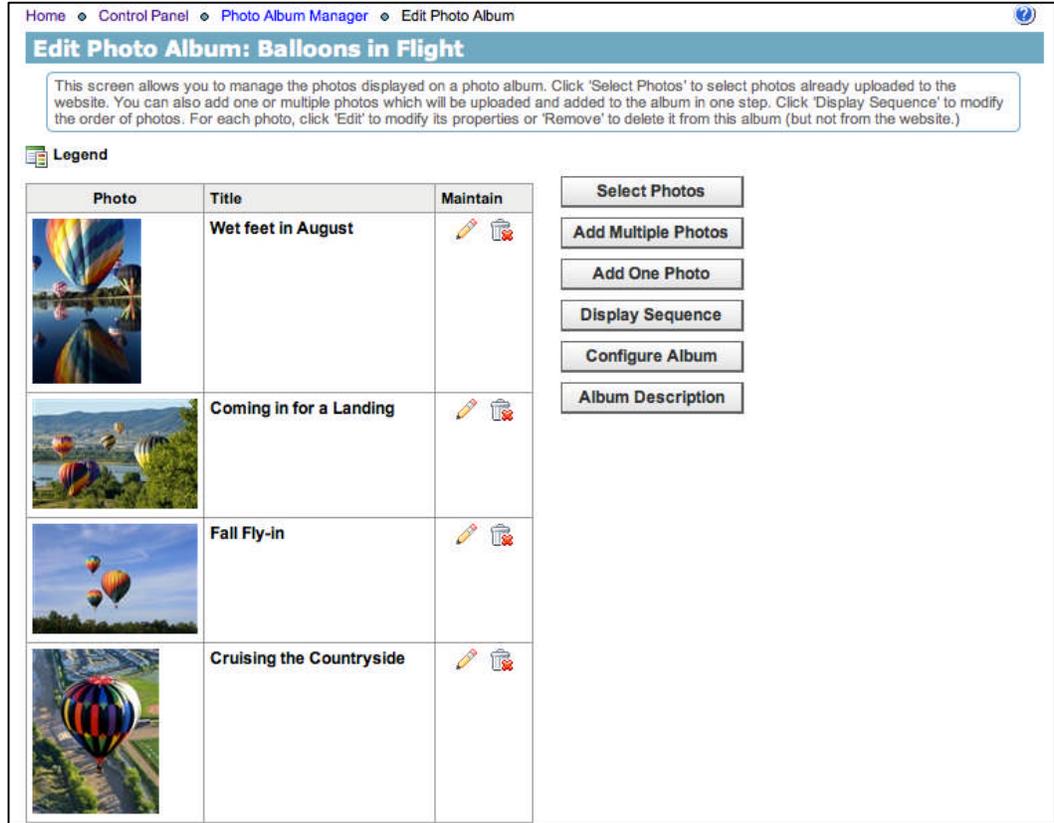


(Delete)

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.

EDITING PHOTO ALBUM CONTENT

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



Home > Control Panel > Photo Album Manager > Edit Photo Album

Edit Photo Album: Balloons in Flight

This screen allows you to manage the photos displayed on a photo album. Click 'Select Photos' to select photos already uploaded to the website. You can also add one or multiple photos which will be uploaded and added to the album in one step. Click 'Display Sequence' to modify the order of photos. For each photo, click 'Edit' to modify its properties or 'Remove' to delete it from this album (but not from the website.)

Legend

Photo	Title	Maintain
	Wet feet in August	 
	Coming in for a Landing	 
	Fall Fly-in	 
	Cruising the Countryside	 

Figure 4.35 – Edit Photo Album Content

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

 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.

 Click the Remove link 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.

The following buttons are available:

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:

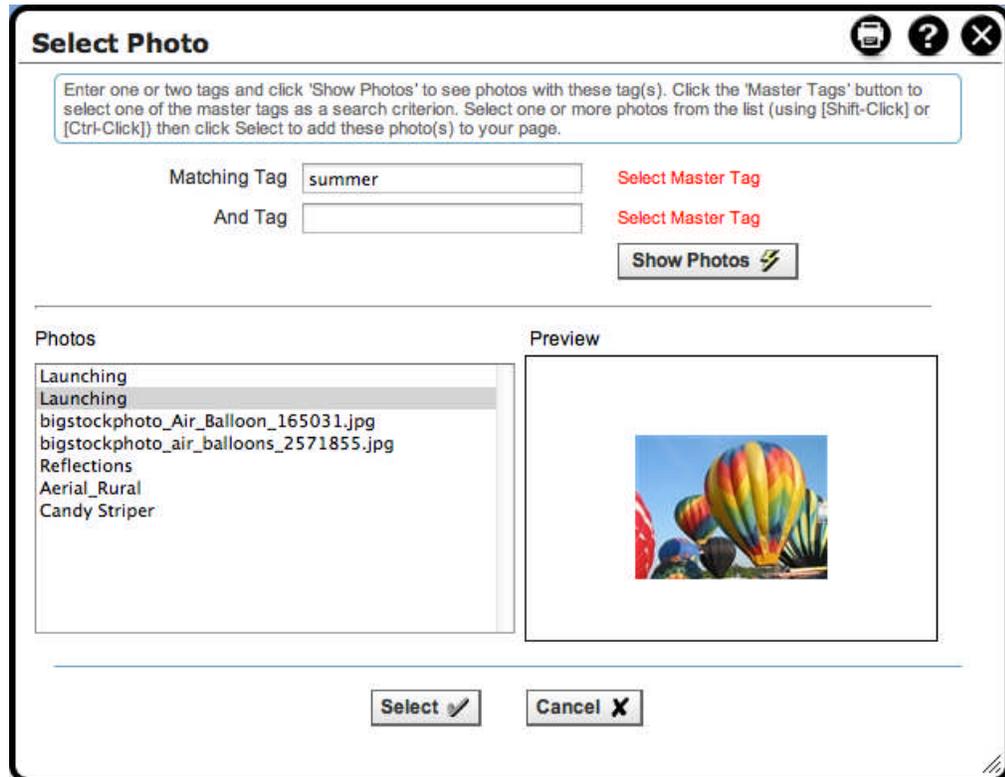


Figure 4.36 – Select Photos

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

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

Add Multiple Photos

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

Add Multiple Photos

Use this screen to upload multiple photos. Click the 'Select Files' button to select one or more files from a local hard disk directory or network. Use [Shift-Click] to select a contiguous group of files or [Ctrl-Click] to select multiple individual files. Then fill out the other information below and click Save to begin the upload process.

	FileName	Title	Status
Select Files	bigstockphoto__Aug__Day_Trip__232829.jpg	<input type="text" value="Reflections"/>	Remove
	bigstockphoto_Aerial_Rural_Hot_Air_Balloonin_641929.jpg	<input type="text" value="Aerial_Rural"/>	Remove
	bigstockphoto_Air_Balloon_165031.jpg	<input type="text" value="Candy Striper"/>	Remove

Photographer

Date Taken

Allow Download of Hi-Res Versions

Select Master Tag(s)

Tags

Enter one or more tags that will be used to categorize these photos, one per line. Click the "Select Master Tag(s)" link to select tags from the master list.

Figure 4.37 – Add Multiple Photos

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

When you click the **Open** button you will see a list of selected photos, 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.

Note that you should not attempt to upload more than 100 photos into an album at a time.

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

Add One Photo

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

Figure 4.38 – Add Photo

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

Tags are used to index and reference photos. Enter tags into the text box, one per line. Your club has also created “master” tags that may be appropriate for your photo. Click **Select Master Tags** to add one or more of these tags to your photo.

Click **Save** to upload your photo 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.

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 Page Configuration dialog described above.

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.

SHARE THIS PHOTO ALBUM

Click the **Share this Photo Album** icon to share a new or updated on your club’s Facebook page, LinkedIn Group page, or Twitter feed. You will see a dialog similar to the following:

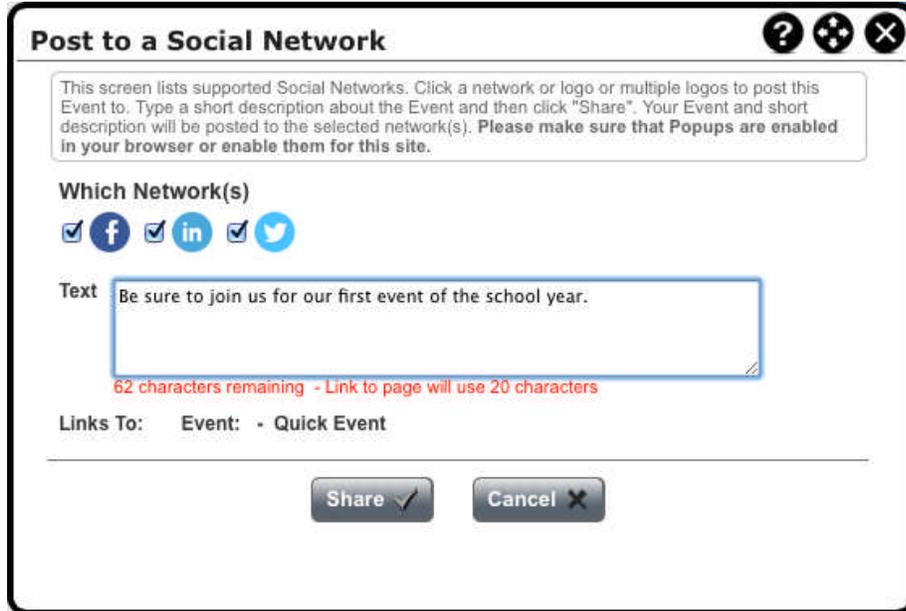


Figure 4.39 – Sharing a Photo Album

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 tab – Setup section – Social Networking screen (see chapter 19.)

The Text dialog will change depending on which social network(s) you select. Facebook allows up to 300 characters, LinkedIn up to 250 and Twitter up to 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 a link to this photo album to your club’s social network(s), or **Cancel** to close the dialog without posting.

Important 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. For more information, see Appendix G of this manual.

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:

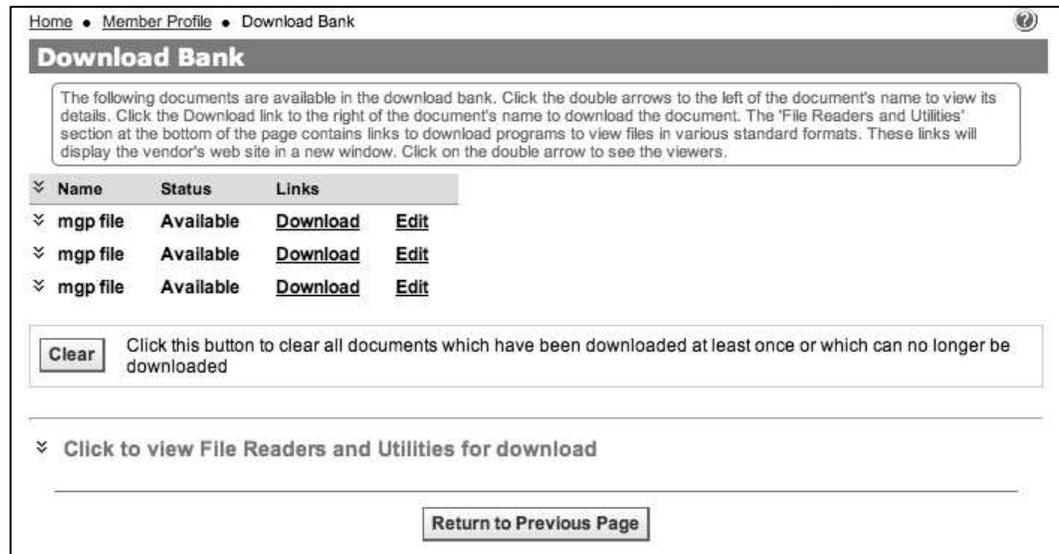


Figure 4.40 – Download Bank

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.

USER MANUAL

Select this option to download a user manual, which explains the features of ClubExpress that are available to members who do not have any administrator rights. You can also view a video that describes the major options on this Profile screen.

BAD EMAIL ADDRESS(ES)

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

Figure 4.41 – Bad Email Notification

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

Home • Member Profile • Bad Emails

Bad Emails

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

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

You have several options for fixing these problems:

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

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

Figure 4.42 – Handling bad email address(es)

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

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

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

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

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

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

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

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

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

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

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

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

Chapter 5 – Blogs

INTRODUCTION

ClubExpress includes a powerful Blogs (“weB LOG”) module that allows knowledgeable club or association members to publish periodic articles of interest. The system maintains a history and allows readers to navigate through all published articles. RSS is fully supported, allowing readers to subscribe to a blog feed so that they are notified when a new blog entry is published.

The system includes a full set of blog management and authoring tools, using the advanced content editor to allow blogs that include formatting, images, videos, links, etc.

In the ClubExpress model, an administrator or blogs module coordinator creates a blog and then hands it over to a blog author to manage. So if you want to author a blog on the club’s website, contact an administrator.

Blogs will generally be accessed via a choice on the menu. A typical Blog opening screen is shown below:

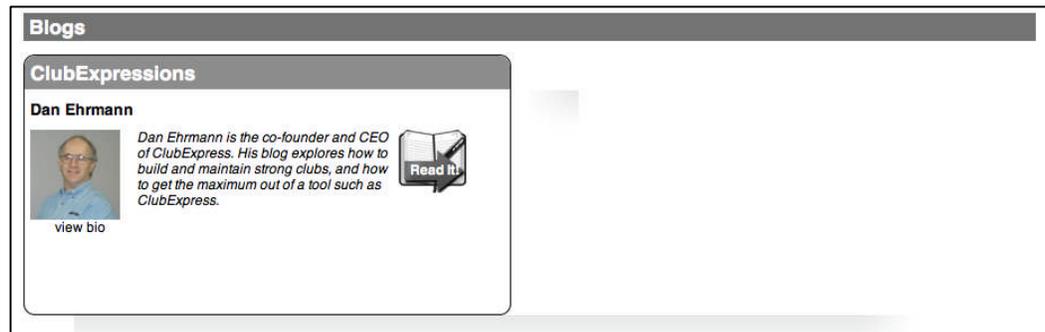
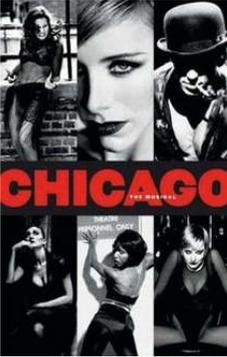


Figure 5.1 – Blogs main screen

For non-members, this screen will show all blogs that are flagged as visible to the public. Members-only blogs are not shown unless you are logged in. Click the **Read Blog** button to read the most recent entry for a blog. You will see a screen similar to the following:

Is the show getting tired?

4/16/2013 4:06 PM



Been very busy here at ClubExpress, moving to a new office, then my wife and I visited New York for the engagement of my nephew. Apologies for the break in posting.

While in New York, we naturally took in a Broadway show, specifically Chicago! Having seen and loved the movie, which won multiple Oscars including Best Picture, we thought it would be a good choice. The musical has been running on Broadway continuously since 1996, holding the record for the longest-running revival at more than 6700 performances and counting.

And, frankly, it shows! The musical was a big disappointment for us. The staging is minimal since the orchestra occupies most of the stage, leaving just a narrow area in front. There are no sets to speak of and minimal props. Some of the actors were great but others really seemed to just be going through the motions.

Of course, Broadway is mobbed every night and they have no trouble filling the house for \$120 to \$200 a night. But after the movie came out, I expect that many people's expectations changed. They could have done a much better job of staging the prison scenes and courtroom.

If my point is not yet obvious, clubs and associations can take lessons from Broadway musicals. Just because something has worked for years and years doesn't mean it should always be done the same way! Have circumstances changed? Have expectations changed? Have "customers" changed?

One way to keep members and visitors interested and participating is to periodically look at your major programs to see how they could be restaged. Perhaps hand them over to a different "director" instead of the same team doing the same thing, year after year.

Subscribe

Author Tools

Maintain Posts
Add Post

Recent Posts

Is the show getting tired?
4/16/2013 4:06 PM

Charge Reasonable Dues
2/18/2013 10:27 AM

Renewal and Expiration Not...
2/15/2013 10:22 AM

Blog Archive

- ▼ April 2013
- ▼ February 2013
- ▼ January 2013

0 Comments

Click here to view or add comments

[Return to Previous Page](#)

Figure 5.2 – Reading blog entries

The most recent blog entry is shown with its title and the date-time it was posted.

Comments

0 Comments
Click here to view or add comments

Comments are subject to editing or deletion at the blog author's or club's discretion.

Handle Theater Fan

I agree; the show is tired and needs a complete revamping.

Max 500 characters - 442 characters left

Save ✓ Cancel ✕

▲ top of page

Figure 5.3 – Adding a comment

If the blog allows comments, you will see a comments panel below the blog entry, with the most recent comment at the top. Click the **Add Comment** link to display a panel that prompts for a handle and your comment. Click **Save** to post your comment or **Cancel** to cancel without posting.

About this Blog

Membership Directory

Dan Ehmann (#15)



Title President
Company ClubExpress
Company Website www.clubexpress.com

Dan has 25 years of experience developing custom software solutions designed to fit client needs. ClubExpress is his fifth startup venture; of the previous four, two were successful and two were not and he learned as much from the latter as from the former. Dan previously served as Managing Partner of the Chicago office of USWeb, and as founder and President of Kallista, Inc., a custom application development firm that he ran for 11 years before selling it to USWeb. During his career, Dan has spoken at more than 30 software conferences in 10 countries. He is the author of two books and over 100 articles on database programming topics. Dan was formerly an Adjunct Professor at DePaul University in Chicago, teaching graduate classes. He is also the past-president of a Chicago car club. Dan is married with three children.

[What is this?](#)

Blogs
[ClubExpressions](#)

Figure 5.4 – About this Blog

Click the author's photo and you are taken to the author's Bio page.

Recent Posts

Below the photo is a listing of recent posts and below that is a month-by-month archive. Click the arrow beside each month to expand or collapse that month.



Figure 5.5 – Recent Posts

RSS Support



The blogs function fully supports RSS (Really Simple Syndication). Your browser will detect that the current page supports RSS and will display its standard RSS toolbar icon, which can be clicked to subscribe. Use your RSS reader's management tools to unsubscribe from a blog.

You can also click the **Subscribe** link at the top to subscribe to the RSS feed of this blog.

BLOG MANAGEMENT FOR AUTHORS

If you are a blog author, and logged in to the website, a panel showing Author Tools replaces your photo:

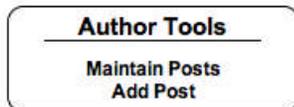


Figure 5.6 – Blog Author Tools

When you click the **Add Post** link, you will see a popup window showing the advanced content editor. See below for more information.

When you click the **Maintain Posts** link, you will see a screen similar to the following:

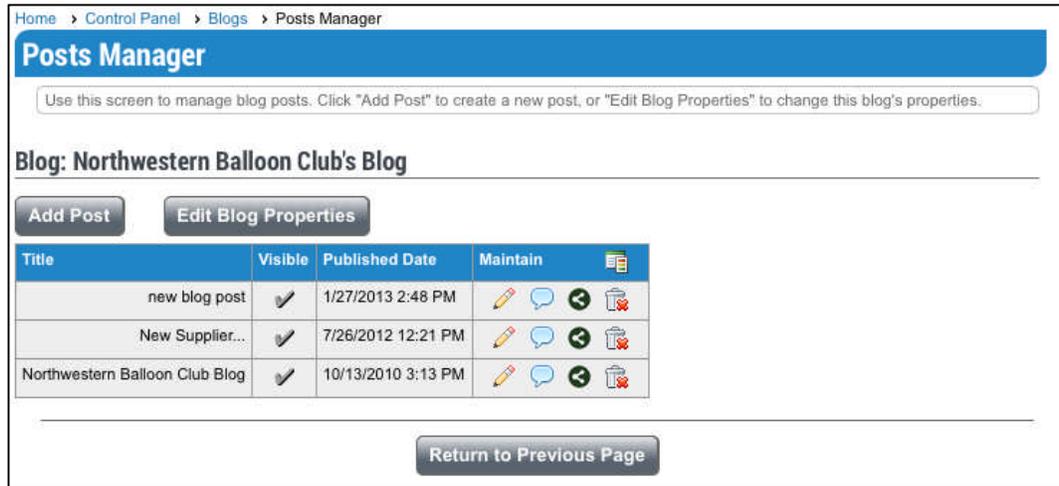


Figure 5.7 – Posts Manager

The grid lists each post in descending date order, showing the post title and date of publication, and whether the post is currently visible.

Maintain Options

The following options can be found in the Maintain column:



(Edit)

Edit this blog entry. You will see the Add/Edit screen described below.



(Comments)

View and edit **Comments** posted on this blog entry.



(Share)

Share this post on your club's social networks, including Facebook, Twitter, and LinkedIn. 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.

Click the **Add Post** button to create a new post. You will see the following screen:

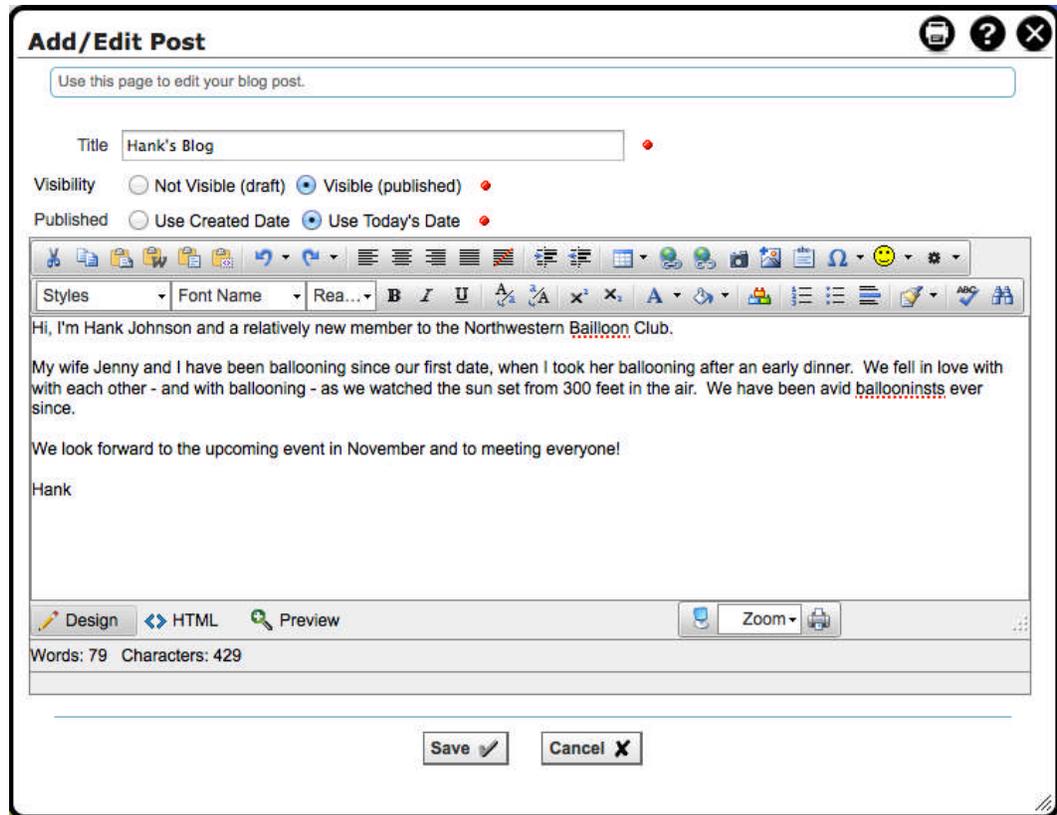


Figure 5.8 – Add Blog Post

Specify the title for your post and whether it should initially be hidden (perhaps because it's a draft) or immediately visible. If you choose to make the post immediately visible, you can also specify which date should be assigned to the post:

- The original creation date;
- The date you are making it visible (today).

Below is the standard ClubExpress advanced content editor, with all its available tools for creating web content, including formatting and layout tools, the link builder and the ability to insert photos and videos. Click **Save** to save your new blog post, or **Cancel** to close the dialog without creating a new post.

Click the **Edit** link to modify an existing blog post. The same dialog will be displayed. Click **Delete** to delete a blog post. You will be asked to confirm this operation. If you select **OK**, the blog post will be completely deleted and cannot be recovered.

Share this Post

Click the **Share this Post** icon to share a blog post on your club's Facebook page, LinkedIn Group page, or Twitter feed. You will see a dialog similar to the following:

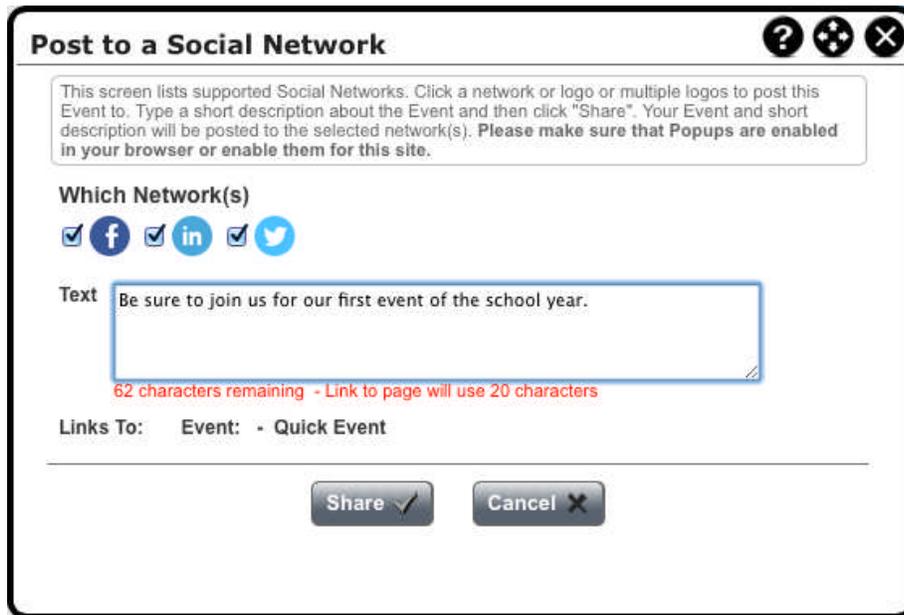


Figure 5.9 – Sharing a Blog Post

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 tab – Setup section – Social Networking screen (see chapter 19.)

The Text dialog will change depending on which social network(s) you select. Facebook allows up to 300 characters, LinkedIn up to 250 and Twitter up to 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.

Important 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. For more information, see Appendix A of this manual.

Viewing and Editing Comments

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

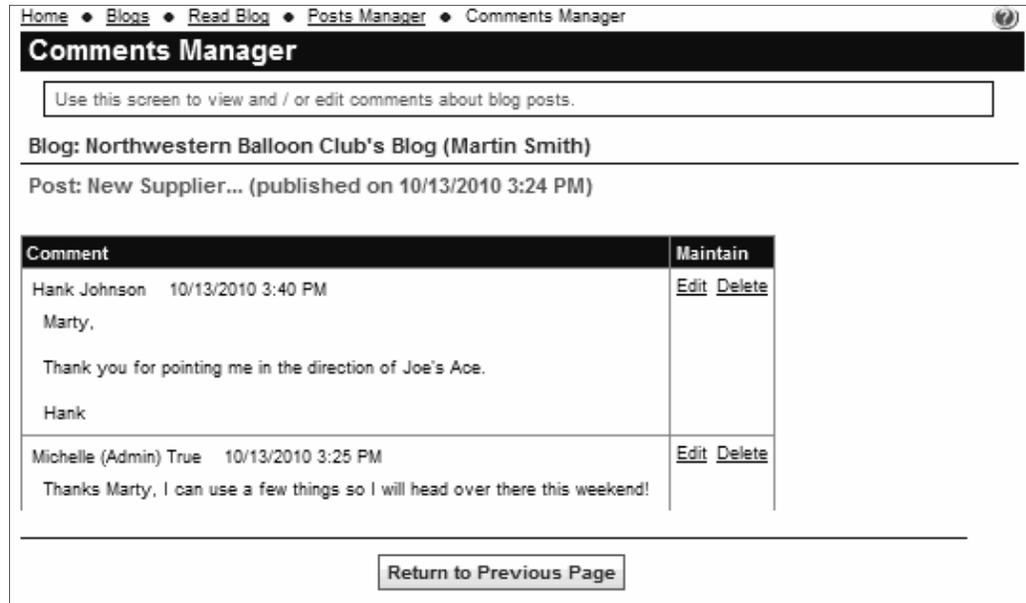
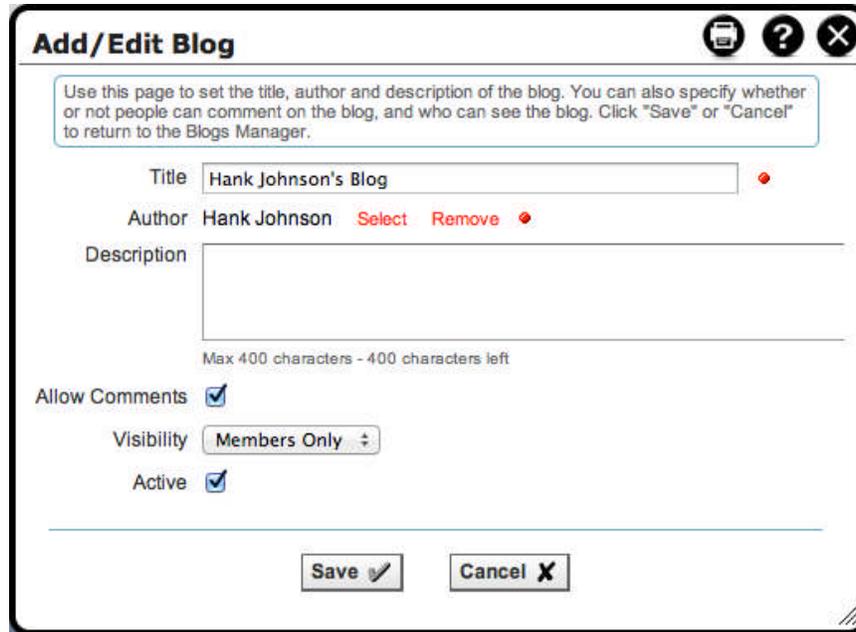


Figure 5.10 – Post Comments

Comments are listed in descending date order. Click the **Edit** link to modify a comment that might be inappropriate. Click the **Delete** link to remove it completely; you will be asked to confirm this action.

Add/Edit Blog

Click the **Edit Blog Properties** button to modify the settings of your blog. You will see the following dialog:



Add/Edit Blog

Use this page to set the title, author and description of the blog. You can also specify whether or not people can comment on the blog, and who can see the blog. Click "Save" or "Cancel" to return to the Blogs Manager.

Title

Author [Select](#) [Remove](#)

Description

Max 400 characters - 400 characters left

Allow Comments

Visibility

Active

Figure 5.11 – Edit Blog Properties

You can modify the title and description of your blog, whether comments are allowed, who can see the blog and whether it's currently active. Click **Save** to save your changes or **Cancel** to close the dialog without saving.

The **Add Post** button is also available to blog authors on the main blog page.

Chapter 6 – Chapter Finder

INTRODUCTION

If your club or association is configured as a Parent club with local chapters, the Chapter Finder module allows website visitors and members to locate chapters. Selecting this option from the menu displays one of the following four options (based on how the club has configured this module):

[US Map](#)

[US/Canada Map](#)

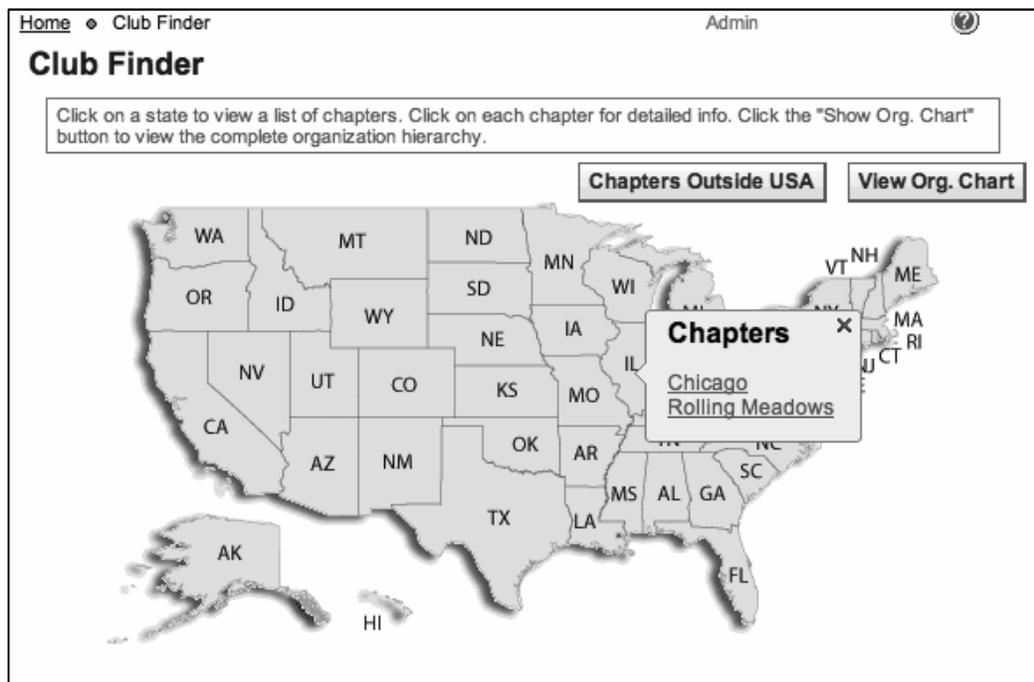


Figure 6.1 – Chapter Finder using Standard Map

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



Figure 6.2 – Chapter Finder using 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

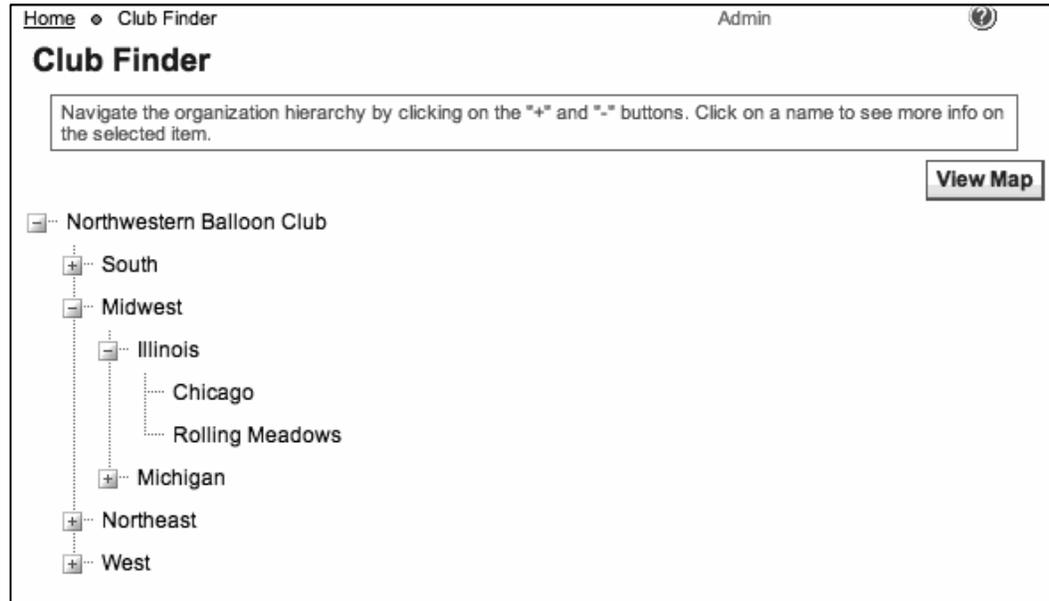


Figure 6.3 – Chapter Finder using Organization Chart

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.

Chapter 7 – 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:

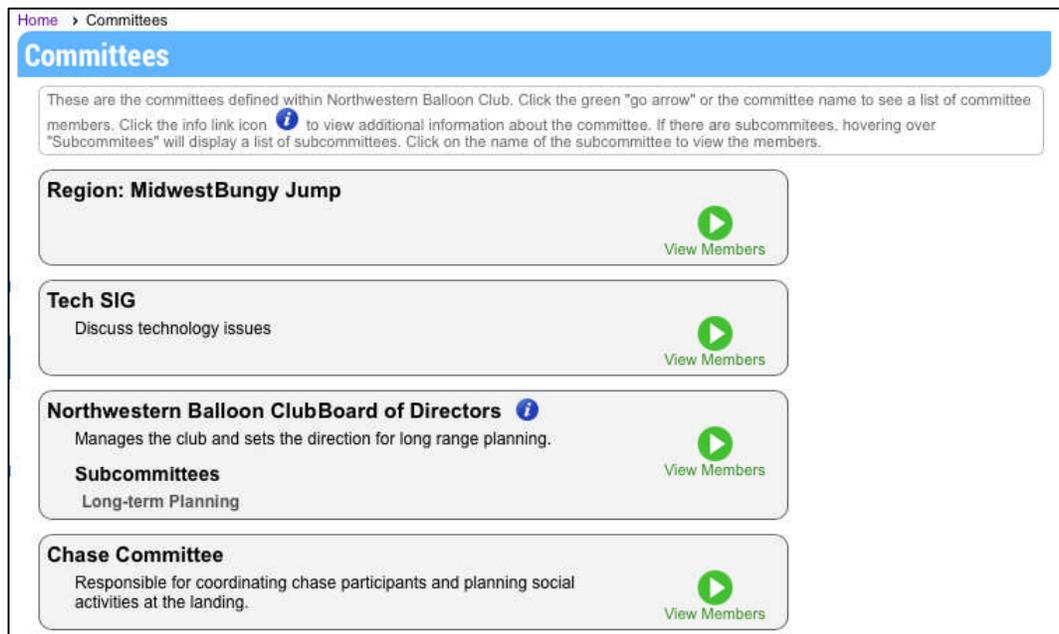


Figure 7.1 – Committees

Each committee is listed, with its description. If the committee has subcommittees, they are also listed with a link. You can also define a custom page to hold more information about a committee; click the **More Info...** link to jump to the page. Click the **View Members** button to see a list of members:

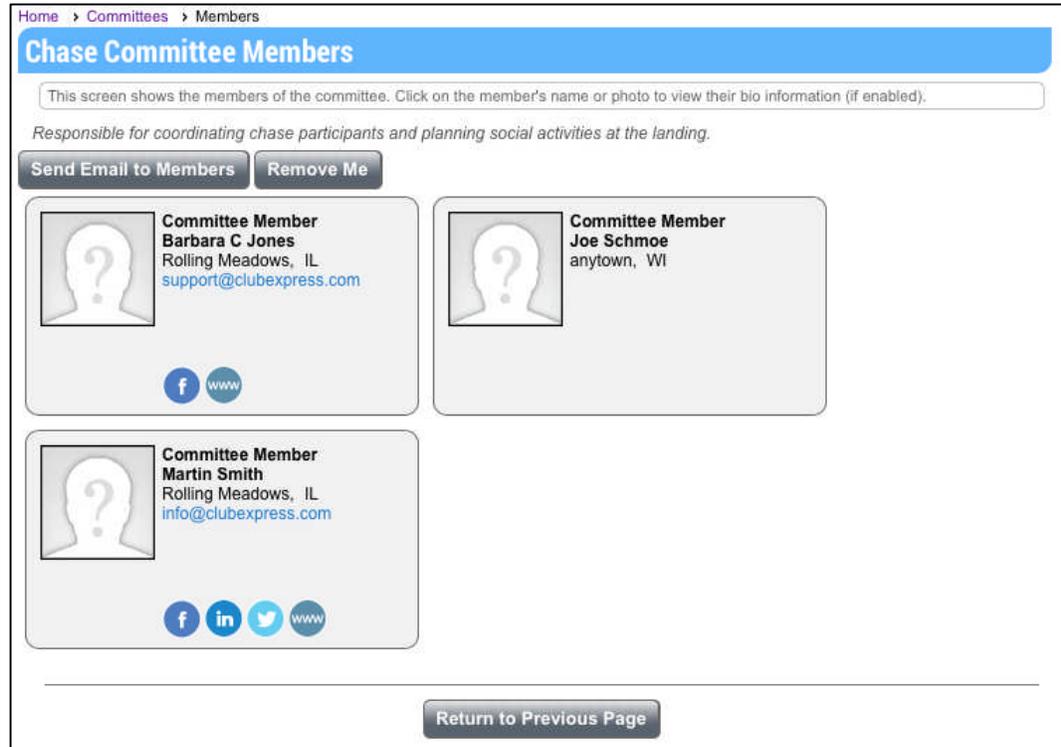


Figure 7.2 – Committee Members

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.

Chapter 8 – Discussion Forums

INTRODUCTION

ClubExpress includes a powerful discussion forums module, allowing members to participate in online discussions on a variety of topics. Original messages and their replies are organized into threads that are listed within a forum. Forums in turn are grouped into categories, allowing a club or association to organize forums for different purposes.

Forums configured as an email list (“listserver”) push messages out to forum members’ email boxes and allow members to reply via email. The reply is posted to the forum and then sent back out to every forum member. But these forums can also viewed online like any other forum and are fully integrated into the rest of ClubExpress.

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.

NAVIGATING FORUMS

The screenshot shows the 'Discussion Forums' page. At the top, there is a breadcrumb trail 'Home > Discussion Forums' and a blue header with the title 'Discussion Forums'. Below the header, there is a notification 'You have message(s) awaiting approval' and two buttons: 'Search' and 'Our Discussion Forums Policy'. The main content area is titled 'General Interest Forums' and includes a category description: 'This is a category description.' Below this is a table listing four forum categories: 'Equipment', 'Board of Directors', 'Day Trips', and 'Member Buy/Sell/Trade'. Each row in the table includes a brief description, the forum's visibility and status settings, and a summary of threads, posts, and the last post date and time.

	threads	posts	last post
Equipment Public Active <i>This forum focuses on equipment, including what to buy for different skill levels and needs, how to assemble and how to maintain. Safety issues are handled in the safety forum</i>	18	31	12/18/2013 1:50 PM
Board of Directors Public Active <i>Anything to do with the operation of the club, including board meetings, finances, bylaws, facilities, etc.</i>	5	19	10/13/2013 9:25 PM
Day Trips Public Active <i>Discussion forum for arrange Day Trips with other club members.</i>	2	17	3/23/2013 12:26 PM
Member Buy/Sell/Trade Public Active <i>Forum for members looking to buy, sell or trade items with other members. NW Balloon Club is not involved with these transactions, which are between members directly. All transactions are at the member's own risk.</i>	3	5	7/14/2013 11:56 PM

Figure 8.1 – Forum categories and forums

This screen shows the forum categories and forums defined by your organization. Each forum includes a brief description of the forum's purpose, the number of threads and posts in the forum and the date and time of the last post.

Next to a forum's name 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.

Click **Search** to search for specific messages. Click **Our Discussion Forums Policy** (if shown) to view the club's policies for maintaining harmonious and smoothly-running forums. These options are described in more detail below.

Drilling into a Forum – Threads of Messages

Clicking the forum name displays a list of threads in the forum, as shown in the following screen:

The screenshot shows the 'Equipment' forum page. At the top, there is a breadcrumb trail: Home > Discussion Forums > Equipment. Below this is a blue header with the word 'Equipment'. A message box states: 'This is a list of the threads in the forum you selected. Click on "Subject" or "Last Post" to sort the threads into the corresponding sequence. Click on a thread name to view the messages in that thread.' Below the message box are two buttons: 'Start New Thread' and 'My Forum Preferences'. To the right, there is a search box labeled 'Search This Forum' and a 'Go To Forum:' dropdown menu currently set to 'Equipment'. Below these elements is a table of threads. The table has columns for 'Started By', 'Subject', 'Posts', 'Views', and 'Last Post'. The first thread is 'Used basket and frame' by msmith, with 3 posts and 74 views, last posted on 12/18/2013 3:43 PM by Marty. The second thread is 'Test message' by Marty, with 1 post and 8 views, last posted on 5/15/2013 11:59 AM by Marty. The third thread is 'Sticky Release Valve' by Marty, with 1 post and 13 views, last posted on 5/1/2013 10:41 AM by Marty. The 'Last Post' column for the first thread has a small yellow smiley face icon.

Started By	Subject	Posts	Views	Last Post
 msmith	Used basket and frame 😊	3	74	12/18/2013 3:43 PM by Marty
 Marty	Test message	1	8	5/15/2013 11:59 AM by Marty
 Marty	Sticky Release Valve 😊	1	13	5/1/2013 10:41 AM by Marty

Figure 8.2 – Forum threads

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

A thread can be “pinned” to the top of a forum so that it’s always visible. Pinned threads are shown with a different background color and a pin icon.

If messages were posted to a forum since your last visit, a special symbol is displayed 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 select a different forum, click the **Go To Forum** drop-down in the top right corner. To start a new thread, click **Start New Thread** in the top left corner.

To modify your individual preferences for this forum, click the **My Forum Preferences** button. You will be taken to the preferences screen in your Profile, described in detail in Chapter 8.

If you’re configured as a Moderator of this forum, the **Members** button allows you to view and update “special” members in the forum, including those who are banned from posting in the forum and those whose messages must be moderated. You may also see a **Forum Admin** button, which allows you to change the properties of the forum. See below for more details.

You can also 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. For 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.)

CREATING MESSAGES

Click the **Start New Thread** button to start a new thread. You will initially see the simple message editor, shown below.

Figure 8.3 – Post Message – basic editor

Specify the subject and optionally, a message icon from the drop-down list (the icon is displayed beside the drop-down). Then enter the message text and click **Post Message**. The message will be added to the forum.

In your profile, you can also set an option to use a version of the advanced content editor, described in detail in Chapter 20.

If you are moderated in the forum or the forum as a whole is moderated, you will see this message displayed after you create and save the post. (Note that if you are also a moderator, your message will post immediately.)

Figure 8.4 – Message if member or forum is Moderated

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:

Attachments (up to five allowed)

Browse... Remove

Add

Figure 8.5 – Adding an attachment to a message

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

Attachments (up to five allowed)

Browse... Remove

Browse... Remove

Browse... Remove

Add

Figure 8.6 – Adding multiple attachments to a message

You can attach up to 5 files to each message and the maximum size of each message, including attachments, is 2MB. If you want to remove a file, click the **Remove** button beside that filename.

When you post the message, the files are not physically attached. Instead, the message includes links back to each file. Clicking the link gives you the option of opening the file or saving it to your local hard disk. You must be connected to the Internet to view or save attachments.

VIEWING MESSAGES WITHIN A THREAD

In the Thread List screen, clicking a thread subject allows you to view the individual messages within the thread. There are two views, shown in the following two screens.

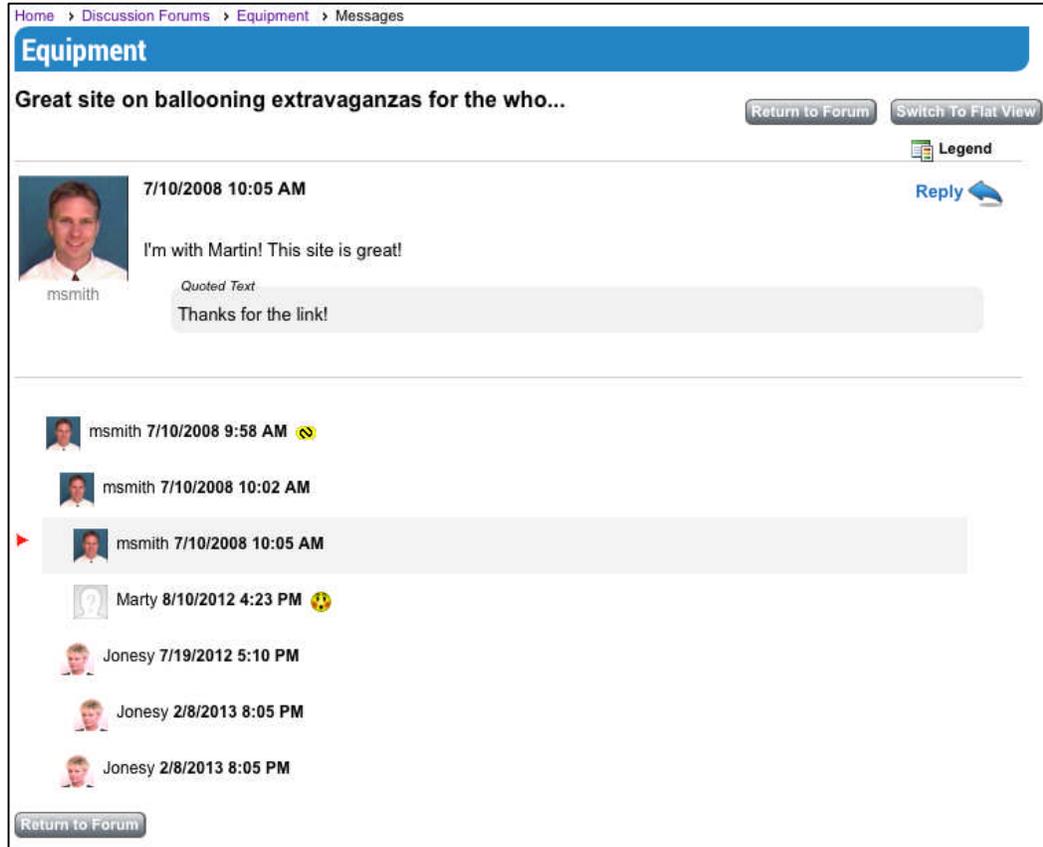


Figure 8.7 – Messages in a Thread: Thread View

“Thread View” shows the current message at the top of the screen with a thread list underneath showing the hierarchy of messages and replies. If the current message has attachments, they are listed below the body of the message. Clicking the link allows you to open or save the file.

In the tree, the current message is indicated with a red arrow in the Author column. New messages since your last visit are flagged with a special symbol. Messages with attachments have a paperclip indicator. To view a different message in the thread, click the message’s **Subject** in the tree view.

If the member who posted a message has enabled this option, you can click his or her name to display his or her bio in a popup window. This view respects the author’s pre-defined visibility settings. Administrators can click the **Status** link to display a popup with the member’s actual name and email address, as well as message handling options.

You can also view messages in “Flat View”, similar to the sample below:

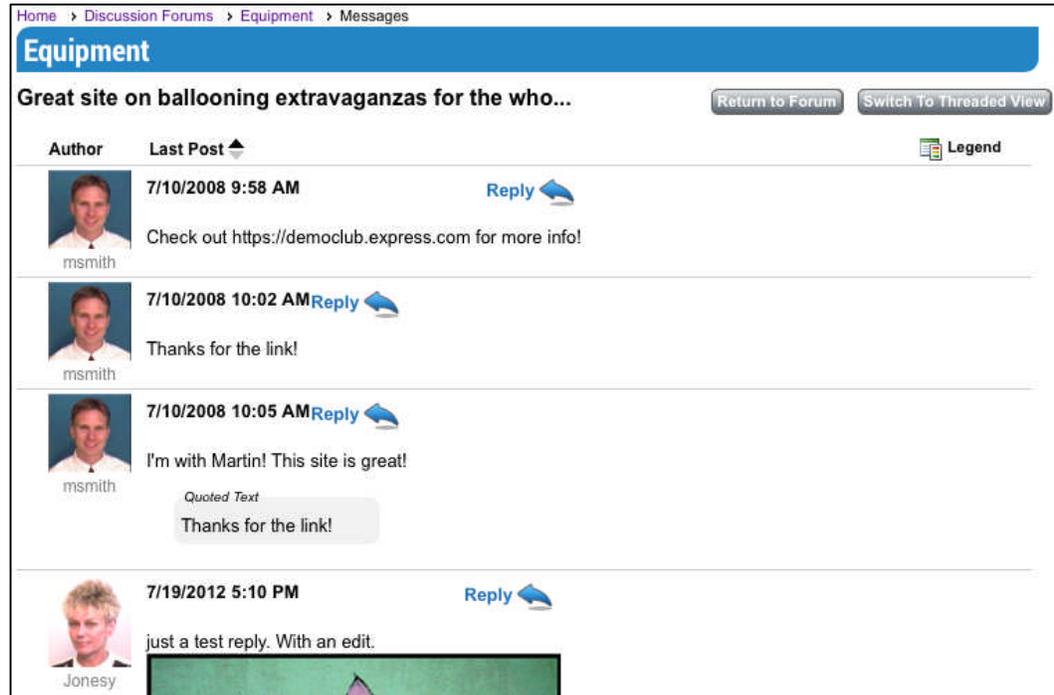


Figure 8.8 – Messages in a Thread: Flat View

This view shows every thread message fully expanded. You cannot see the hierarchy of messages, but it is easier to browse and read everything without having to continually click to a new message. New messages since your last visit are flagged with a special symbol. Messages with attachments have an attachment section below the body of the message. Flat view can also be sorted by Post Date.

For each view, users can separately configure the number of messages to show. If there are more messages than can be shown on one page, the **Prev**, **Next**, and paging controls will be active, allowing you to move to any page of messages within the current thread. To return to the list of forum threads, click the **Return to Forum** button in the top right corner.

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.

Replying to a Message



Click the **Reply** icon to reply to a specific message. You will see a screen similar to the following:

Figure 8.9 – Replying to a message

This screen displays either the basic message editor or a version of the advanced content editor, depending on how your profile is configured.

If the sender of the message to which you are replying allows private replies, you will see a **Reply Type** option at the top of the screen. You can either reply as a public message to the forum or send a private reply via email. If you 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.

If you click the [Quote Previous Message](#) link, the system inserts the contents of the message you are replying to, using a GroupBox control. You can edit the quotation by double clicking inside the GroupBox, perhaps to remove parts of the reply that are not relevant to your comments. (Please do not modify or delete the container of the quoted text. This helps us manage the quotes and display them nicely in discussion forums.)

When you click **Post Message**, the message is saved and sent, either to the forum or, if you clicked “Private Reply”, as an email to the other member.

FORUM POSTING VIA EMAIL

In addition to posting a thread by clicking the **Start a Thread** button, forum members can start new threads by sending an email to the forum's email address, if the forum has been set up to allow posting via email.

Forum members can also reply to messages sent from the forum via email. There is a footer included in each message that includes a link to the thread that the message belongs to.

To start a new thread via email, 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.

Important Notes: when you post a message to one or more forums via email, our server will look at all addresses in the To: and CC: fields to see if any match a forum that the server is managing. Unknown email addresses are ignored. In addition, the "From:" address will be verified against the forum's membership list to ensure that you are allowed to post. You must send the message from the email account associated with your forum membership in order for the message to be posted into the forum.

If an incoming message has more than five attachments, it is posted with the first five, and a note is sent back to the sender that this was done. If a forum does not allow attachments and an incoming message has them, it is posted without its attachments, and a similar note is sent back to the sender.

The email list options, especially being able to send new messages to a forum via email or reply to existing messages by email, require that ClubExpress be hosting your club's email accounts. If you currently have email for a domain pointing to a 3rd party email server, configuring this domain for a listserve will not work. But you can also buy a second domain (for example, "*MyClubForums.org*" for use just with discussion forums.)

MEMBER PROFILE

When discussion forums are available, a **Forums General Preferences** choice is added to the user Profile screen. This choice allows you to control your individual preferences for viewing messages and threads, authoring messages, and the personal information displayed.

A second choice, **Forum Memberships**, allows you to subscribe to forums (and unsubscribe as well) and to customize your preferences in each forum that you are a member of. For more information, see Chapter 8 – Member Profile.

SEARCHING THROUGH MESSAGES

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

Figure 8.10 – Forum Search

Type in one or more words for which to search and specify a search type, date range and forum:

All Words

The system will find every message that includes all of the specified words. For 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.

Any Word

The system will find every message that includes any of the specified words. For 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. For 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:

Home » Discussion Forums » Search

Search

Search for messages by entering text in the "Search For" field, and pressing the "Search" button. Optionally you may select a specific forum to search. Note that no more than 100 messages will be returned.
Fields marked ♦ require an entry.

Search For Messages

Search For

Search Type All Words Any Words Exact Phrase
 Advanced (Boolean) Fuzzy

Post Date Range

Select Forum

Search Results (3 messages found)

Subject	Author	Posted	Forum
Merchandise and Shipping Cost	Tulio	12/22/2011 11:27 AM	ClubExpress Administrators
<i>Need to see if we can have the ability to ship and charge shipping by weight as opposed to by \$\$. We understand they packaging and boxes may differ in size and weigh. We would be glas to adjust that in our shipping price.. We have some items that cost \$7 and weight less than an envelope. We have other items that cost the about same and weight much, much more. Using weight will</i>			
New Harness	Marty	12/18/2013 1:50 PM	Equipment
<i>I recently read about the new Harvest Harness for inflating balloon without tangling or damaging the envelope or ropes. Has anyone had any experience with this kind of harness? Regards, Marty Balloons R. Us.</i>			
re: Storefront and shipping	Dan, ClubExpress	12/13/2011 1:53 PM	ClubExpress Administrators
<i>Tulio, you can create multiple shipping methods based on carrier (UPS, FedEx, USPS, etc.), based on value (low range to high range - which often correlates well to the number of items), and shipping speed (for example, surface, 2day, overnight, etc.) You can create as many methods as you need. The problem with weight-based shipping is that we could calculate a weight based on the number of item</i>			

Figure 8.11 – Forum Search Results

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.

Chapter 9 – Documents

INTRODUCTION

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.

A typical document folder screen is shown below.

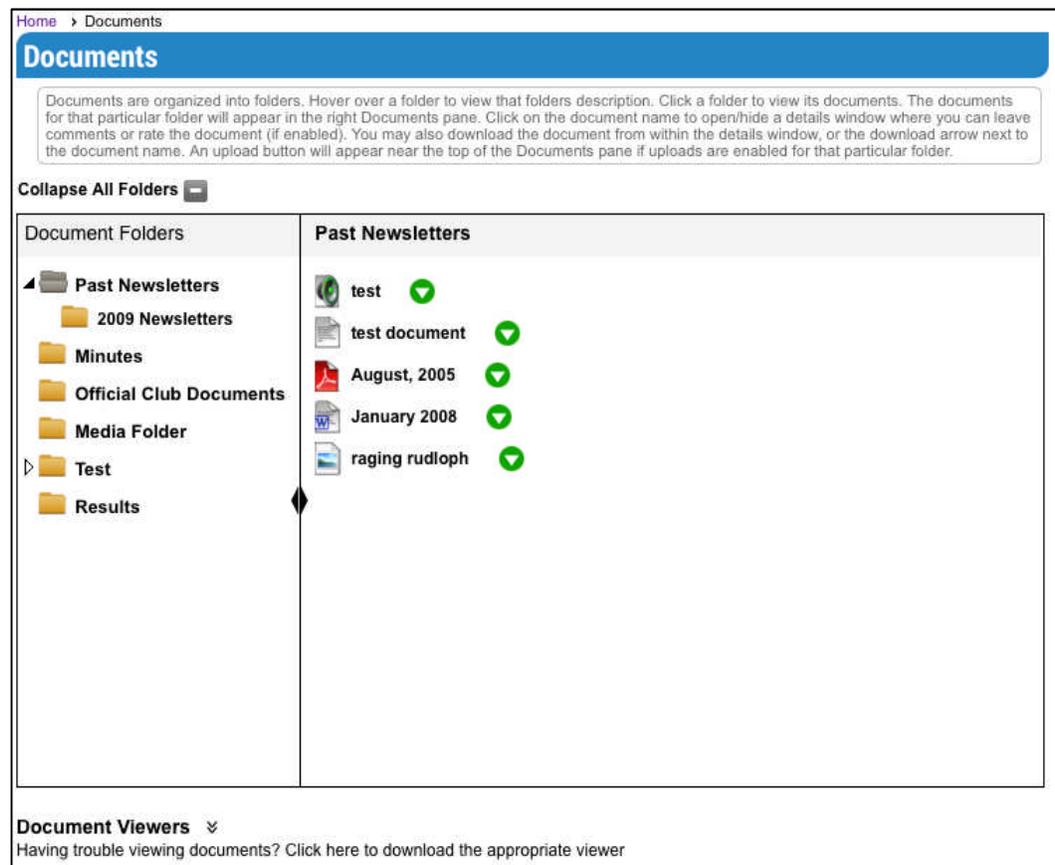


Figure 9.1 – Document Folders and Documents

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.

When you hover over a folder name, its folder description is shown.

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

To display links to popular file readers, click the double-down arrow near the bottom of the screen.

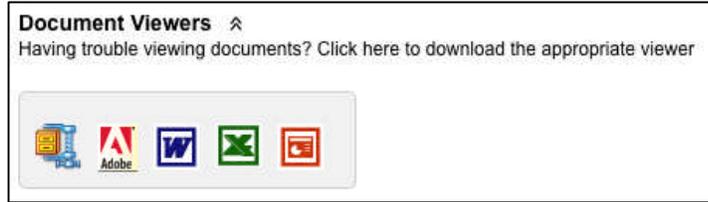


Figure 9.2 – Viewing file readers and utilities

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:

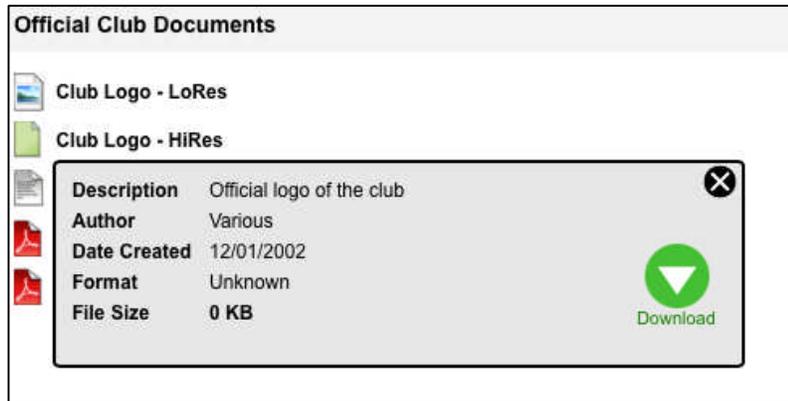


Figure 9.3a – Viewing Document Details

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:

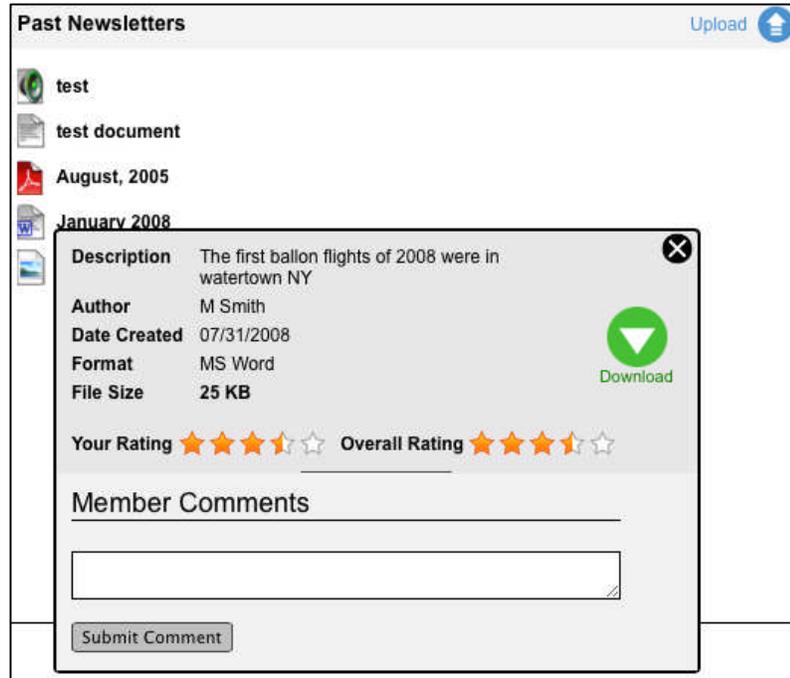


Figure 9.3b – Viewing Document Details with Ratings/Comments

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.

UPLOADING 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:

Add/Edit Documents

This dialog allows you to add a document to your web site. Most fields should be self-explanatory. If you are editing an existing document, you can change its Folder. The Document Type is advisory, to tell users what type of document to expect. Click the "Browse" button to select the actual document from your local hard disk or network. Click "Save" or "Cancel" to return to the Manage Documents screen.

Title: Updated Flying Rules

Description: Provided by the FAA, these rules were updated in 2013.
Max 1000 characters - 946 characters left

Author(s): Various

Create Date: Revision Date:

Select Document: no file selected
Max file size 80 MB

Figure 9.4 – Upload document dialog

Enter the requested information and specify a filename from your local hard disk. Click **Save** to upload the document or **Cancel** to close the dialog without uploading.

Documents are uploaded with a special *Pending* status. They are not visible until an administrator or module coordinator has approved them.

Chapter 10 – Donations

INTRODUCTION

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, target and whether anonymous donations are allowed. Donations are processed through the same payments processing module that's used for memberships and event registrations.

A typical Donations screen is shown below:

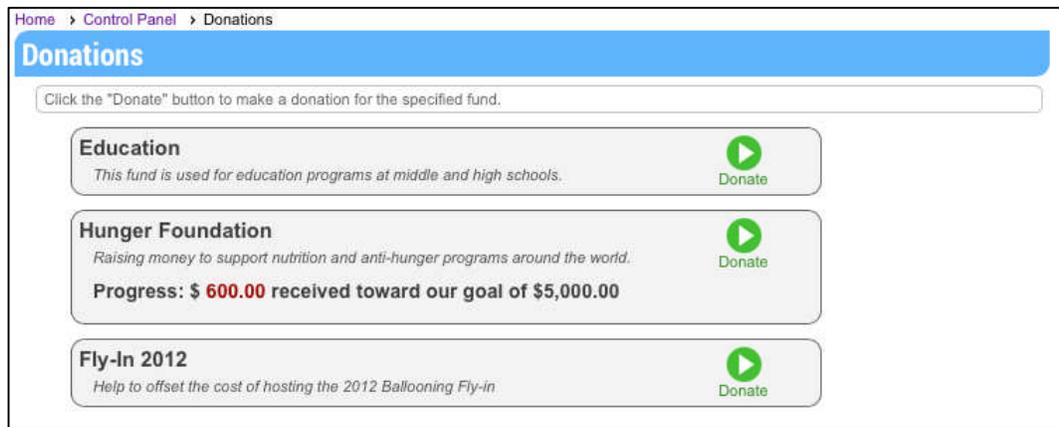


Figure 10.1 – Donations screen

Each fund has a title and description plus, optionally, progress towards a target amount. Click the **Donate** button to make a donation. You will see a screen similar to the following:

Home > Donations > Make a Donation

Contribute to Education

Enter the amount of your contribution and an optional comment. Depending on the configuration, you may also be able to specify if this should be reported as anonymous (although the administrator will still know who made the contribution.) Click Proceed to Payment to finalize and pay by credit card or by printing an invoice and mailing a check.

Contribution Details

Contribution Date: 08/19/2014

Amount \$: 100

Contribution in: < Select >

Comment:

Do you want this to be reported as an anonymous contribution? Yes No

How do you want your name to appear in the Contribution Records? Barbara & Cliff C Jones

Notify

Do you want the Club to notify someone about your contribution? Yes No

Matching Gifts

Does your employer or your spouse's employer match gifts? Yes No Not Sure

Figure 10.2 – Making a Donation into a fund

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.

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. For example:

We specifically want to support the club's efforts to educate the community about hot air ballooning.

The **Contribution In** option allows you to make a donation in honor of, in memory of, in thanks to, etc., another person or organization.

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.

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:

Figure 10.3 – Notify someone about a contribution

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:

Figure 10.4 – Recording matching gift information

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.

Chapter 11 – Events Calendar & Registration

INTRODUCTION

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;
- Registrant categories with color coding;
- Allowing companions to be signed up;
- Adding non-member registrants to the non-member database;
- Maximum capacity;
- Fees which change after a certain date;
- Fees which are different for non-members and/or companions;
- Payment by credit card or check;
- Event specific questions at multiple levels of the registration;
- Track attendance and whether an event is eligible for attendance credit;
- Optional event release agreement, including default;
- A special printable version of the month grid with more details;
- Optionally display public holidays and other significant days;

VIEWING EVENTS

When users open the events module, the first thing they generally see is the Month Grid view, shown below. (Clubs can configure a different default view on the event calendar admin screen.)

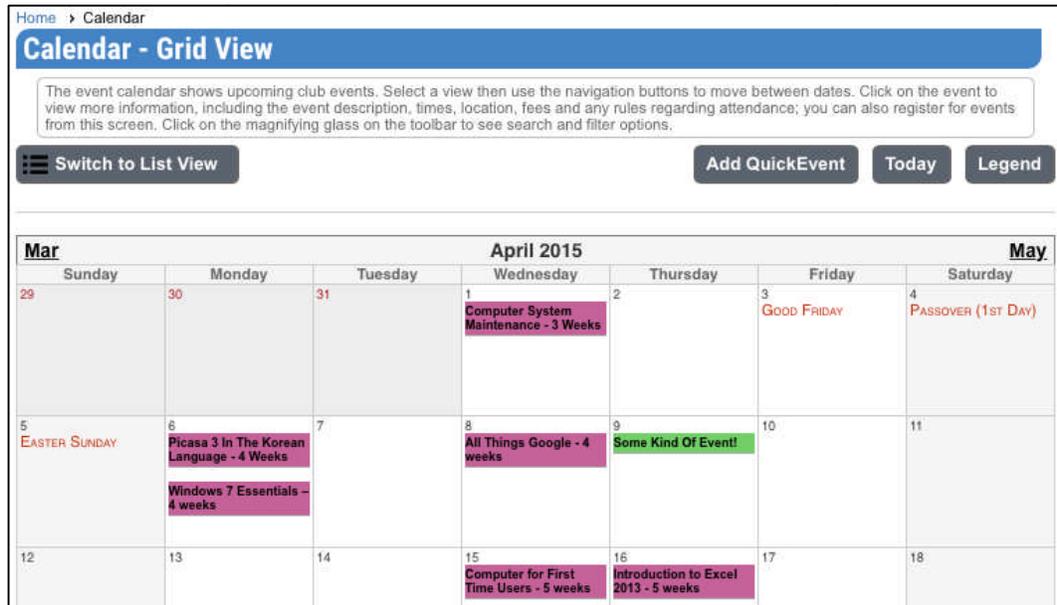


Figure 11.1 – Event Calendar in Grid View

This view shows a traditional month grid, with events shown on the day scheduled. Today is highlighted in a special color. Links allow users to scroll to the previous or next month.

Events are color-coded based on the event category. Click the **Legend** button to see a list of categories and the color associated with each. Click 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., if a special option is enabled.

The **View:** panel at the top of the screen appears in all views but its contents are different depending on the current view:



Figure 11.2a – View panel in Grid View

- Click **Switch to List View** to change view. See below.
- Click **Add QuickEvent** to create a Quick Event. See below.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.

Here is what List View looks like:

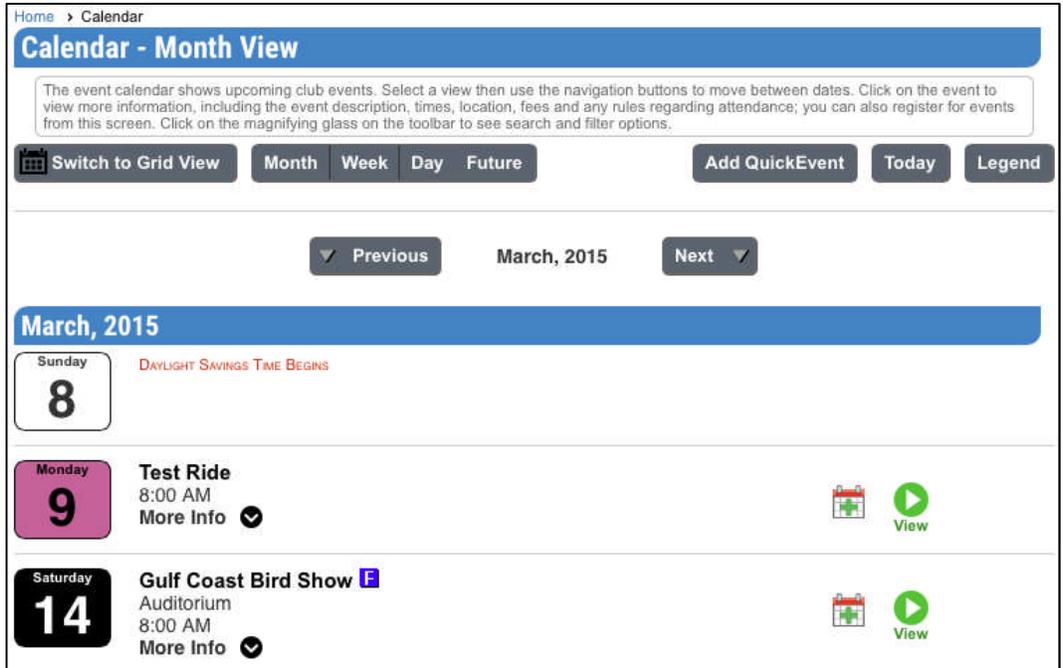


Figure 11.3 – Event Calendar in List View

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

- Click **Switch to Grid View** to change view. See above.
- Click **Month** to see a list of events in the current month. Use the navigation buttons to move forward or backward by months at a time.
- Click **Week** to see a list of events in the current week. Use the navigation buttons to move forward or backward by weeks at a time.
- Click **Day** to see a list of today’s events. Use the navigation buttons to move forward or backward by up to six days at a time.
- Click **Future** to see all events past today.
- Click **Add QuickEvent** to create a Quick Event. See below.
- Click **Today** to jump the grid back to the current month.
- Click **Legend** to display a drop-down legend of the color-coding.



In List View, entries are grouped by month. Each entry has a color-coded date panel that can be clicked to jump to the event detail view. The event title and green “View” icon can also be clicked to jump to the same place.

Click the **More Info** text or the arrow icon to display the event's short description field.

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. 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. 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.

For more information on this option, see the special section below.

Searching and Filtering



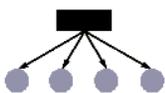
Clicking the **Search** icon on the Page Tools Widget displays the following panel:

Figure 11.4 – Search / Filter panel for events

Using this panel, you can filter the current view to show only events that match your specified criteria. Select a category or metro area, or enter part of the title or event description. Click **Search** to display a Search Results panel that is similar to a List View and that shows all events that match your specified criteria. Click 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 you have defined metro areas (on the Control Panel.)



The **Show Events For** subgroup option will only be displayed if your club or association as subgroups (chapters, districts, regions). By default, the calendar shows members the events in their hierarchy (the chapter(s) they belong to, plus the districts and regions that these chapters belong to, plus the parent club.) But members can select a specific subgroup at any level to change this view (perhaps if they are traveling to a different part of the country.)

Event Details

To view the details for an event, click the event title in the current view. You will see a display similar to the following:

The screenshot shows a web interface for an event titled "Balloon Maintenance". At the top, there is a breadcrumb trail: "Home > Calendar > Balloon Maintenance". Below this is a blue header bar with the text "Calendar - Event View". A message box states: "This is the 'Event Detail' view, showing all available information for this event. If registration is required or recommended, click the 'Register Now' button to start the process. If the event has passed, click the 'Event Report' button to read a report and view photos that were uploaded." Below the message are two buttons: "Return to Grid View" and "Today".

The main content area has a blue header bar with the text "Balloon Maintenance". Below this, the event details are displayed in a light gray box:

- When:** Friday, May 1, 2015, 9:00 AM until 5:00 PM
- Where:** Flying Field
1000 Forest Drive
Anywhere, IL 60101 (with a Google Maps icon)
- Category:** Education/Training

To the right of these details are three buttons: "Register Now", "Registrants", and "Add to my Calendar".

Below the details box, there are three more light gray boxes:

- Registration is Required**
Payment In Advance Only
- Capacity:** 25
Available Slots: 25
- Registrants & Fees**

The "Registrants & Fees" box contains a table:

Members & Guest(s)	\$ 50.00
Non-Members & Guest(s)	\$ 80.00

At the bottom of the event view, there is a light gray box containing the text: "Introductory class on maintaining your ballooning equipment".

Figure 11.5 – Events – Event View

This view shows the event title, location, description and rules (registration, attendance and fee, if any.) If the event is in the future and registration is required or recommended, the **Register Now** button allows users to begin the registration process.

If the Show Map option was enabled for the event, clicking the Google Maps icon opens a new window showing the event's location (where attendees can also get directions to the event location.)

The system also supports a detailed, fully formatted description. In the above example, this panel is at the bottom of the event view screen. It can also be displayed at the top of the screen, immediately below the event title.

Note that the **Register Now** button will not appear if registration is not required, or if the event is for members only and you are not logged in, or if the event is full or has passed, or if registration is closed for some other reason. For a multi-day, multi-activity event, the button will appear until the last day of the event, to allow 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 coming. For members, you can then click their **Bio** link to jump to each member's Bio / Directory page.

If an event needs volunteers, you may also see a **Volunteer!** button. Clicking it jumps 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 Personal Information Manager (PIM) 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. Clicking Open creates a new appointment/meeting in your PIM calendar. You can also Save the file then share it with others. It can be opened at any time to create the appointment/meeting.

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

(ClubExpress does not currently support the iCal standard but we will be adding this support in the near future.)

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:

▼ **Activities/Items** (Click the down-arrow to the left of the activity/item to view the details)

▲ **Base Trip**
Details: Includes lodging, parties, etc. Does not include air. Includes transfers if arriving with main group. Discuss with Trip Leader

When: Monday, Apr 20, 2015, 12:00 AM to 5:00 PM
Where: Same as event

Registration is Required
Capacity: 24
Available Slots: 21

Registration Types & Fees:

Member	\$ 895.00
--------	-----------

▼ **5 Day Lift Ticket**

▼ **3 Day Lift Ticket**

▼ **Visit Mormon Tabernacle**

Figure 11.6 – Events – Event Activities

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.)

EVENT REGISTRATION

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 the event is configured to handle registration on your ClubExpress website, a page similar to the following will be shown:

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

Note that registering for a “QuickEvent” is a much simpler process. See the separate explanation below.

The Registration wizard may have up to 6 different screens, depending on how the event is configured and which options are enabled:

1. Who is registering
2. Adding guests to the registration (if allowed)
3. For a multi-activity event, selecting which activities the registrant and each guest wants to attend
4. Answering event-specific questions (if configured)
5. Signing the release/waiver agreement (if required)
6. Viewing the Summary page

These screens are described in detail below.

1. Who is Registering

The first section of this page varies according to the following rules:

If the event is open to non-members and you are not a member, the following screen will be displayed.

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Personal Information

To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

Are you a Club Member?

Personal Information

[Have you previously registered for an event or are you on our mailing list? Click here to search](#)

First Name

Middle Initial

Last Name

Address Line 1

Address Line 2

City

State/Province

Zip/Postal Code

Country [Show All Countries](#)

Phone

Email Address

Registrant Type

Non-Members & Guest(s)
 I'm Not Attending and I'm Registering Someone Else
 I'm Already Registered and I'm Registering Someone Else

Figure 11.7a – Event Registration Wizard – Non-Member

Members are invited to login. Non-members are asked if they have previously registered for an event. If not, they are prompted to enter their contact information. Some information may be required depending on the event configuration.

Clicking the [Click here to search](#) link displays the following panel:

Search for your information - enter the following

Email Address

First Name

Last Name

Search ⚡

Figure 11.7b – Event Registration Wizard – Searching for a non-member

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

If you are a member and have logged in, you will see the following screen:

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Personal Information

To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

Registrant Type

Members & Guest(s)
 I'm Not Attending and I'm Registering Someone Else
 I'm Already Registered and I'm Registering Someone Else

Cancel ✕ **Next** ▶

Figure 11.7c – Event Registration Wizard – Member

The system already knows who you are. All you have to do is select a registrant type. Multiple registrant types may be listed.

For single activity events that also allow you to bring guests, two additional options allow you to register someone else if you are personally not attending or if you have already registered. These options are useful when you are signing up family members or professional associates.

2. Adding Guests to the Registration

If the event allows guests to be signed up, the next wizard screen provides a place for this to happen. The following screen is displayed:

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Add Guests to Registration

Add the names of the guests (if any) who will be attending the event with you by clicking the 'Add Guests to Registration' button. *Note: If nothing happens when you click the button, your popup blocker may be preventing the page from appearing. Click 'Edit' to change information for a specific guest; click "Remove" to remove a companion previously added.*

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

24 Slots Remaining

Guests included in your registration

! No Guests have been added to this registration yet

+ Add Guest to Registration

Cancel X Next >

Figure 11.8a – Event Registration Wizard – Entering Guests

Click the **Add Guest to Registration** text or icon. A dialog similar to one of the following examples is displayed:

Add Guest ? + X

Add Guest Add Another Member

Add or edit companion information. Fill in the information, and select the registrant type. Click the "Save" button when finished.

First Name

Last Name

Reg. Type ▾

Save ✓ Cancel X

Add Guest ? + X

Add Guest Add Another Member

Add or edit companion information. Fill in the information, and select the registrant type. Click the "Save" button when finished.

First Name

Last Name

Reg. Type ▾

Title

Company

Address 1

Address 2

City

State ▾

Zip

Country ▾ [Show All Countries](#)

Email *

Phone *

Save ✓ Cancel X

Figure 11.9a – Two version of the Add Guest dialog

The “Add Guest” tab allows users to add a Non-Member as a guest.

The “Add Another Member” tab allows users to add a member to their registration, either someone who is part of their membership (a secondary or tertiary member) or a completely different member if this option has been enabled.

For each event, clubs can decide what information to collect from guests and which of these fields should be required. So the Add Guest dialog can vary considerably in what is shown.

Clicking the **Add Another Member** tab displays a dialog similar to the following:

Figure 11.9b – Add Another Member

The bottom part of the dialog shows the primary, secondary, and tertiary members in the main registrant’s membership. Select Default Registrant Type to change the registrant type for all secondary and tertiary members. You can also change their registrant type or “unregister” individual members by selecting the appropriate option.

Click the link at the top to another another member to the registration. The dialog changes as follows:

Add Guest

Add/Select Guest **Add Another Member**

Select the registrant type for individuals who are attending this event. Select 'Not Attending or Already Registered' if the person is not attending. To change the registrant type for everyone, make a selection in the Default Registrant Type.

You are adding a member (not in your membership)

This section will allow you to add a member that is not in your membership (a secondary or tertiary member). If you want to add a secondary or tertiary member, select the names below this form and choose the registrant type. To add another member, click the **Red** select a member link. The name of the member and details will fill in the form.

First Name **Select Another Member**

Last Name

Reg. Type

Address 1

Address 2

City

State

Figure 11.9c – Add a Member (not in your registration)

When the event is configured, admins can optionally allow members to select any other member as their guest for this registration. When this option is enabled, a **Select Another Member** link will appear beside the name. Clicking it displays the standard member selector, allowing the member to find another active member. (Note that this option may have privacy implications, since it allows members to see the names of every other active member.)

You can move freely between tabs. When you click **Save** at the bottom of the dialog, guests and members will both be added to the registration. Or click **Cancel** to close the dialog without adding anyone.

The Add Guests screen will now look similar to the following:

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Add Guests to Registration

Add the names of the guests (if any) who will be attending the event with you by clicking the 'Add Guests to Registration' button. *Note: If nothing happens when you click the button, your popup blocker may be preventing the page from appearing. Click 'Edit' to change information for a specific guest; click "Remove" to remove a companion previously added.*

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

You have reached the maximum number of guests allowed

Guests included in your registration

First Name	Mary		
Last Name	Smith		
Reg. Type	Members & Guest(s)		
First Name	Bobby		
Last Name	Smith		
Reg. Type	Members & Guest(s)		
First Name	Mary		
Last Name	Chen		
Reg. Type	Members & Guest(s)		

You cannot add more Guests.

Cancel Next

Figure 11.8b – Add Guests to Registration

The system lists basic information each guest. An **Edit** (pencil) icon allows you to modify the information for each guest. The **Delete** (trashcan) icon allows you to remove a guest.

The system will track the maximum number of guests you are allowed to add. If you add more than the maximum, you will see an error message and cannot proceed until guests are removed and you under or at the defined limit.

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.

3. Specifying Activities for Multi-Activity Events

After the initial registrant information page, for a multi-activity event, you are taken to a page similar to the following, which lists the individual activities for the event and allows separate registration for each activity.

Home > Calendar > Snowbird Ski Trip (Practice) > Registration

Event Registration - Activities

Check the box next to each activity that this person will be attending. Also check the box next to any items that this person would like.

Event: Snowbird Ski Trip (Practice)
When: Monday, Apr 20, 2015 to Friday, Apr 24, 2015
Where: Snowbird, Utah
Contact: Martin Smith
 847-255-0210
testing@test.com
Payment: Payment In Advance Only

Activities for Martin Smith

Activities/Items (Click the down-arrow to the left of the activity/item to view the details)

Base Trip	\$ 895.00 <input checked="" type="checkbox"/>
5 Day Lift Ticket	\$ 400.00 <input type="checkbox"/>
3 Day Lift Ticket	\$ 250.00 <input type="checkbox"/>
Visit Mormon Tabernacle	\$ 40.00 <input checked="" type="checkbox"/>

Details: Will be going Wednesday evening to hear the Mormon Tabernacle sing in Salt Lake, City
When: Monday, Apr 20, 2015, 8:00 AM to 5:00 PM
Where: Same as event
Registration: Required

Registrant Total: \$935.00
 Registration Total: \$935.00

Figure 11.10 – Event Registration Wizard – Event Activities

This wizard screen will be displayed once for each person who is part of the registration, first the primary registrant and then each of your 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.

The event activities page keeps a running total of registered activities and fees. When you finish registering for individual activities, 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.

4. Answering Event-Specific Questions

If the event has event-specific questions, a page similar to the following is shown:

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Additional Information

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

Registration Questions

* What is the highest level of certification you have achieved?

Registrant Questions

Questions for Martin Smith
 * What kind of sandwich do you want for lunch?

Questions for Mary Smith
 * What kind of sandwich do you want for lunch?

Figure 11.11 – Event Registration Wizard – Event-Specific Questions

Questions can be defined at any of three levels:

- For the registration as a whole;
- For each registrant including 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.

5. 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.

6. Summary Page

The Summary page is always 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. And if there is no fee, the summary page will confirm this fact.

Home > Calendar > Balloon Maintenance > Registration

Event Registration - Summary

Review the registration info shown below.

Event Information

Event: Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Payment: Payment In Advance Only

Registrant Information

👤 **Barbara & Cliff Jones (Primary Registrant)**
 👤 **Cliff Jones (Companion)**

Activity/Item Information

Balloon Maintenance
When: Friday, May 1, 2015, 9:00 AM until 5:00 PM
Where: Same as event

👤 Barbara & Cliff Jones	\$ 50.00
👤 Cliff Jones	\$ 50.00

Registration Total: \$100.00

Payment Information

Payment must be made in advance for this registration. Click the "Complete Registration" button to reserve your place and go to the Payment page. Depending on which options this organization has configured, you may be able to pay with a credit card online or print an invoice and pay with a check. Please note that your registration will not be confirmed until payment is received.

Figure 11.12 – Event Registration Wizard – Summary Screen

At this point, you 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 you to the payment module to complete payment. You 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.

Home > Make Payment

Make Payment for Martin Smith (1015)

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

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

Fields marked ♦ require an entry. Click to change amount.

Event Registration (4/27/2015 Ref # 2872) Due \$ 935.00 Pay \$ 935.00

4/20/2015 - Snowbird Ski Trip (Practice)

Martin Smith - Base Trip	895.00
Martin Smith - Visit Mormon Tabernacle	40.00
Transaction Total: 935.00	

Total Selected For Payment \$ 935.00

Available Credit \$ 80.03 **Credit Applied** \$ 80.03

Net Payment \$ 854.97

Have a coupon? Enter the code:

Select Payment Method < Select Payment Method > ♦

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

Refund Policy

All payments are final. We do not provide refunds for membership signups and renewals, event registrations, storefront purchases, or other misc. charges. Please carefully review the charge(s) checked above and be sure you know what you are paying for.

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

Figure 11.13 – Make Payment

This screen will show the final payment for the event, including the details of each line item (registrant, companion(s) and activities. If you have other pending transactions, such as a membership renewal or registration for another event, these will also be listed and you can pay for them all with one payment.

Select the payment type and enter any additional information that's required. For a credit card payment, this is your credit card information. For a check payment, a print function is available to generate an invoice for mailing with the check. Administrators have access to additional payment options (credit card outside ClubExpress, cash, complimentary, etc.)

The system maintains a Payment Status flag for event registrations. If you choose to pay by check, your registration is stored in the database but it's not

confirmed until the check is received (and may be deleted by an event coordinator if there is a capacity limit and others are willing to pay immediately.)

Important Note: when non-members register for events and pay by credit card, an additional “Technology Convenience Fee” may be added to the transaction. This fee is charged by ClubExpress, not your club or association, and is retained by us.

Partial Payments

Some events may be configured to allow partial payments. For example, a ski club may organize a multi-day trip to a distant ski resort, and members will have the option of making progress payments until the total has been paid.



If you see a pencil icon beside the event total and you wish to pay less than the full amount, click it. The amount to be paid will change to a text box allowing you to edit this amount. The system may suggest a recommended amount and it will enforce a minimum payment. Press *[Tab]* to move off the field and post your change; the total selected for payment will be updated.

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.

Home > Calendar > Test Quickevent > Registration

Event Registration - Personal Information

To begin the registration process, select one of the following options. If you are a club member, you must first log in before registering. If you are not a club member and the event is open to non-members, select this option and specify your name. Then proceed to the next step.

Event: Test Quickevent
When: Thursday, Apr 30, 2015, 8:00 AM until 12:00 PM
Where: Flying Field
 1000 Forest Drive
 Anywhere, IL
Contact: Martin Smith

Members & Guest(s)

Figure 11.14 – Registering for a QuickEvent as a member

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

If the QuickEvent allows guests, the wizard will have a second screen. Click the **Next** button to see the Add Guests screen described above. 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.

CREATING QUICKEVENTS

Some clubs and associations allow members to create their own QuickEvents. To create a QuickEvent, click the **Add QuickEvent** button on the main Event Calendar page (either in Grid View or List View.) You will see a single page of options to define the event.

Home > Calendar > Calendar Manager > Create QuickEvent

Create QuickEvent

Use this screen to create your QuickEvent, including its title and visibility, date and time, and whether or not it requires registration. Once you're finished, click Save to add it to the calendar of events. You will be able to edit it later from the event details page.

Basic Info

Title

Short Description

Used for the vCalendar description and as a tooltip in the Calendar

Category *A* Club Ride

Event Is For ▼

Visibility Visible to everyone

Contact Person Smith, Martin (1015) Select Remove

Show Email? No Everyone Members Only

Show Phone? No Everyone Members Only

Notify on Registration

Event Date/Time From 8:00 AM To 5:00 PM

Registration

Registration Temporarily Unavailable

Maximum companions (If companions are allowed)

Location

Location Locations ▼

Address

City

State/Province < Select >

Zip/Postal Code

Country UNITED STATES Show All Countries

Metro Area < Not Specified >

Show Map Link

Location Phone

Location Website Select

Save ✓
Cancel ✕

Figure 11.15 – Defining 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 companions
- No event-specific questions
- No event page or photos (can be added afterwards)
- No release/waiver agreement

The fields shown on the above screen should be self-evident.

- You will only have limited event categories available; select the most appropriate one.
- The “Event is For” option will only appear if your club or association has chapters, districts or regions; select the appropriate level for the event.
- Select a Visibility to control who can see the event: members or everyone.
- To give yourself the ability to edit the event and view registrations, make yourself the event coordinator. You can optionally show you your email address and/or phone number, and have the system notify you via email whenever someone registers for your event.
- Select a Registration option. Registration is either Required, Recommended, or not necessary. If registration is required or recommended, you will be asked to specify a Registrant Type. If the selected registrant type allows companions or guests, you will be asked to specify the maximum number allowed.
 - If that registrant type is for members only, then only members can register; no companions or non-members allowed.
 - If that registrant type is for members and member companions only, then non-members cannot register for the event.
 - If that registrant type is for members and non-members only, then each person must register individually; companions are not allowed.
- Select a standard location or enter a custom location and address.

Click **Save** to save the QuickEvent and return to the Event Calendar, or **Cancel** to return without saving.

EDITING QUICKEVENTS

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:

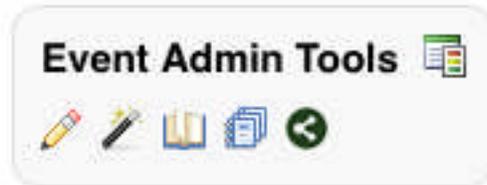


Figure 11.16 – Event Admin Tools for a QuickEvent

Hover over the Legend icon to see the meaning of each option:

- | | |
|--|---|
|  (Edit) | Select Edit to edit the QuickEvent. You will see the Add/Edit QuickEvent screen, described above. |
|  (Convert) | Convert this QuickEvent to a Single Activity Event. You will be asked to confirm this step because it cannot be reversed. |
|  (Registrations) | 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. For more information, see the special section below. |

SHARE THIS EVENT

Click the **Share** link to share an event on your club’s Facebook page, LinkedIn Group page, or Twitter feed. You will see a dialog similar to the following:

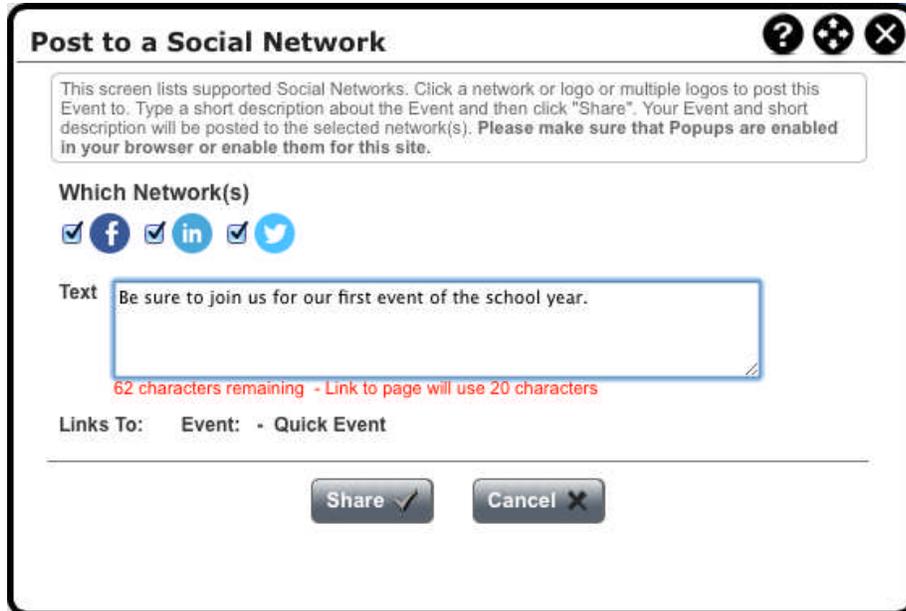


Figure 11.17 – Sharing an Event

At the top will be on or more checkboxes, representing the social networks where your club has a presence.

The Text dialog will change depending on which social network(s) you select. Facebook allows up to 300 characters, LinkedIn up to 250 and Twitter up to 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 event to your club’s social network(s), or **Cancel** to close the dialog without posting.

Important 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. For more information, see Appendix A of this manual.

Chapter 12 – FAQ (Frequently Asked Questions)

INTRODUCTION

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. For example, a vintage car club might have a library of how-to articles on various aspects of restoration, while a sailing club has similar articles on equipment, racing techniques, safety issues and certifications.

The FAQ 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.

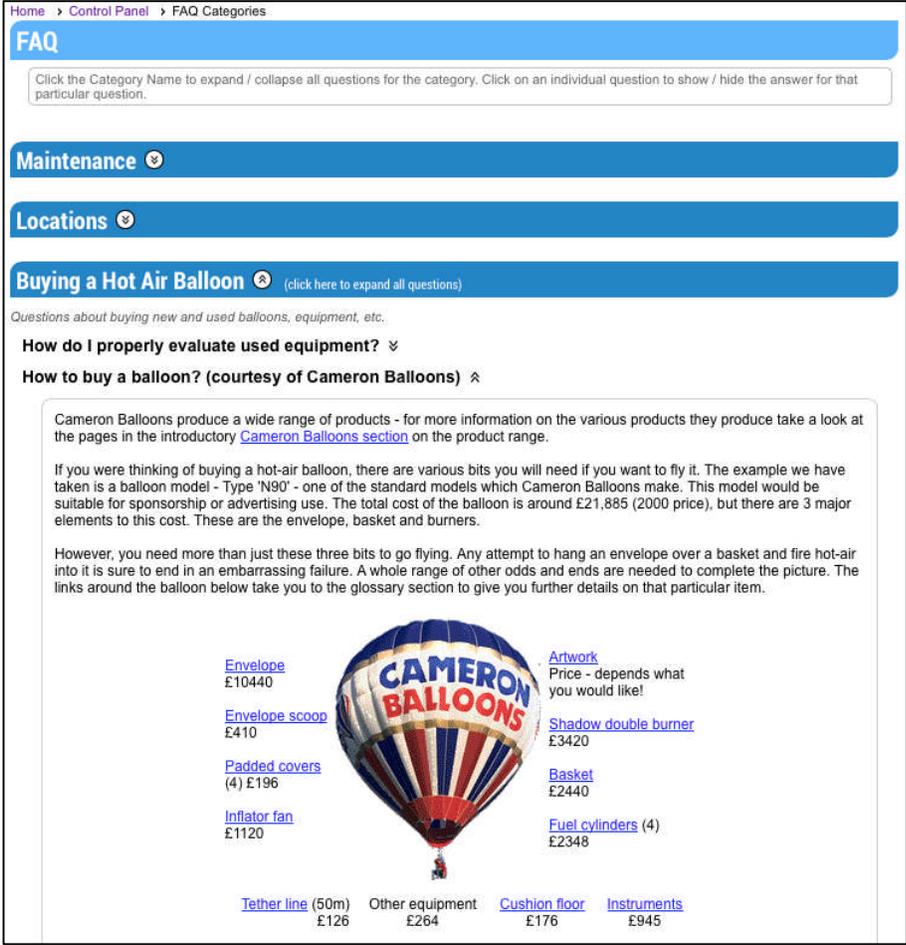


Figure 12.1 – FAQ Category screen

Click the double-down arrows to view the questions within a category and then the answer to a specific question.

Chapter 13 – 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.

When the Interests module is enabled, and a user clicks the menu choice, a screen like the following is displayed:

The screenshot shows a web interface for the 'Interests' module. At the top, there is a breadcrumb 'Home > Interests' and a blue header 'Interests'. Below the header is a text box explaining the list of interest categories and how to view more information. The main content is organized into two categories: 'Maintenance Everyone' and 'Safety Everyone'. Under 'Maintenance', there are four interest items: 'Burners' (3 members), 'Envelope' (5 members), 'Baskets' (5 members), and 'Support Equipment' (7 members). Under 'Safety', there is one interest item: 'Safety Education and Inspection' (10 members). Each item includes a description and a 'View Members' button with a play icon.

Figure 13.1 – Interests

This screen lists each interest category in the display sequence specified, with its description. Within each category are its interests, together with the Interest Coordinator and the number of members who have registered for that Interest.

Each interest on this screen is a link that will display the members who have registered for the interest. However, this list is available to members only. If the current user is logged in, the following screen will be displayed. If 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.

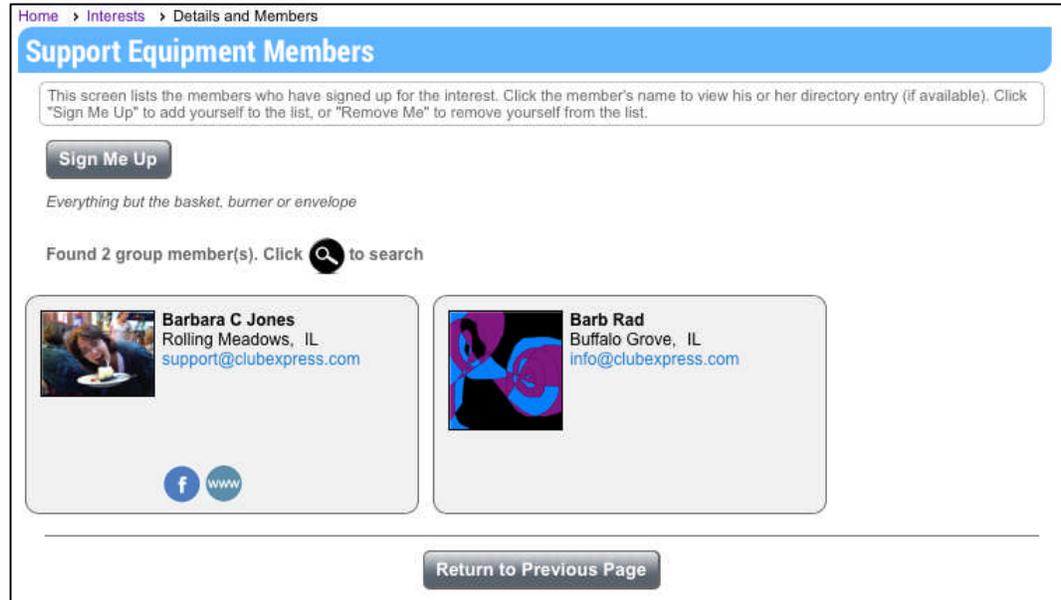


Figure 13.2 – Interest Members

This screen shows the members who have registered for the Interest. Each member is shown with his or her name, city, state and email address. The name is a link that will display that member’s Directory entry.

If 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.

INTEREST COORDINATOR SPECIAL FUNCTIONS

When an interest coordinator goes to the main Interest members *user* page, he or she will see two special functions:

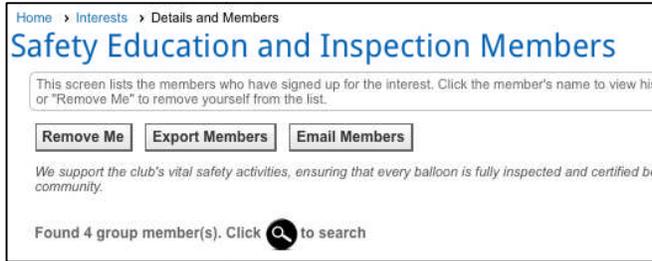


Figure 13.3 – Interest Coordinator Special Functions

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.

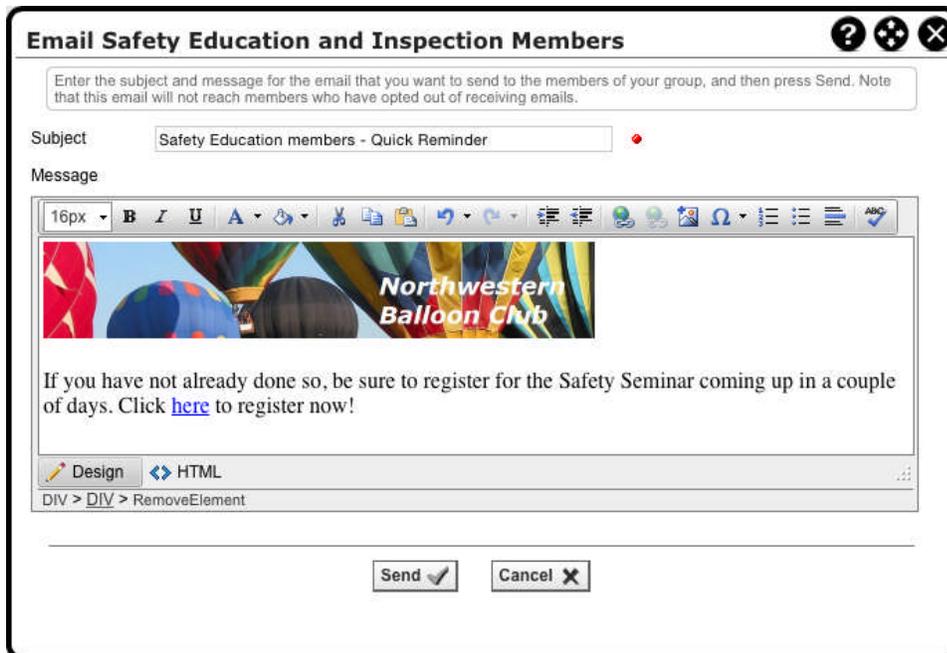


Figure 13.4 – Email Interest Group members

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.

Chapter 14 – Membership Directory

INTRODUCTION

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:

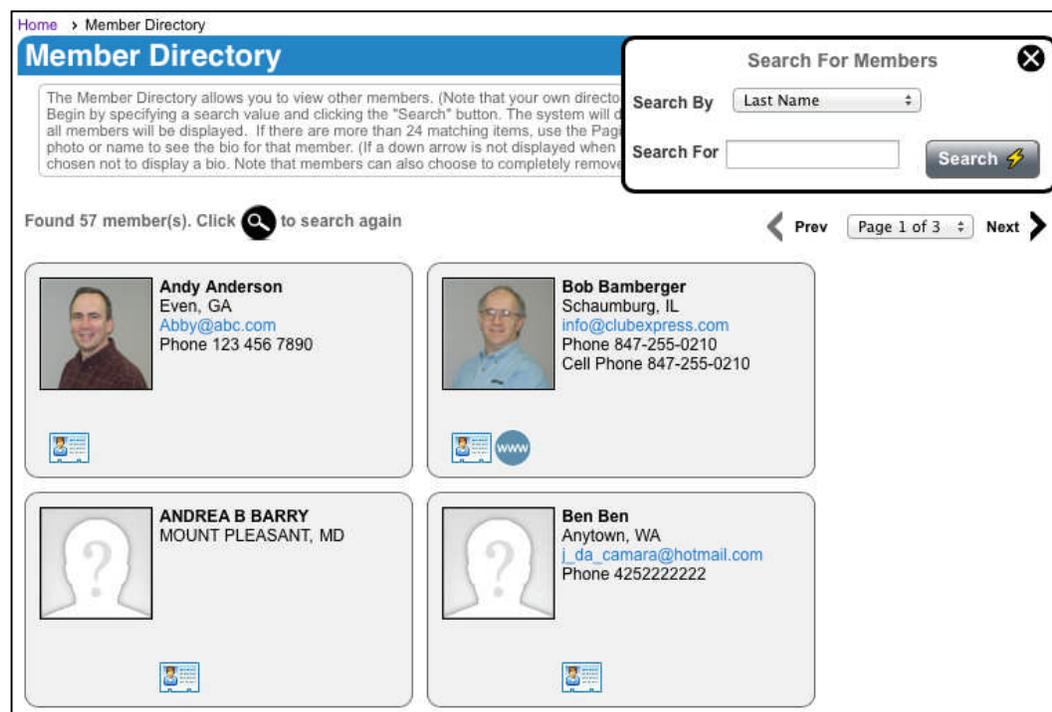


Figure 14.1 – Member Directory List

When you first come to the screen, the search panel will be displayed. Select a search field and enter a value, then click **Search**. The search panel will disappear but it can be shown at any time by clicking the Search icon (magnifying glass) at the top of the directory or on the Page Tools Widget. If no search value is specified, all members will be shown. The results are sorted by the search field.

Members are shown 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.

Note that the “Company” option is only visible in the “Search By” section if members join through the business or professional lives, or if your club or association is collecting work information. And 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 on the People Options page. Otherwise, the system will respect a member’s preference.

Members are displayed in pages of 24 members at a time. Click the **Prev** and **Next** buttons or the drop-down list to select a specific page.

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.)

Home > Member Directory > Membership Directory Bio

Member Directory



Bob Bamberger (#213)

Basic Information ✎

Location	Schaumburg, IL
Email Address	info@clubexpress.com
Home Phone	847-255-0210
Mobile Phone	847-255-0210
Fax	847-221-8046
Address	1930 Thoreau Drive Apt 155 Schaumburg, IL 60173

Personal Information

Biography ✎

Social Networking

Photo Albums ⌵

Blogs ⌵

Interests ⌵

Achievements ⌵

Return to Previous Page

Figure 14.2 – Member Directory Detail

The information shown on this screen will vary based on the Visibility level chosen by the member. Individual members who have specified not to be listed in the directory will not be shown. However, if you are an Admin, the visibility settings are ignored and all members will be visible with a **View** button.

There are two versions of this screen, one for clubs where members join as part of their personal lives and one where members join as part of their business or professional lives. The appropriate version can be selected on the **Control Panel – People tab – Setup panel – People Options** screen.

Some clubs may also have custom versions of this module and screen, showing different fields and/or a different layout.

vCard Link



What is this?

Below the member's photo is an icon that allows you to add this person to the personal address book on your computer. This feature uses another Internet standard called a "vCard" file which is supported by most Personal Information Manager (PIM) programs, including Outlook, Eudora, Mozilla Thunderbird, Palm Desktop, Appleworks, Entourage, etc. When you click the icon, a standard dialog will be shown, asking if you want to Open or Save the file. Clicking Open creates a new contact record. You can also save the file to your local hard disk and share it with others, or open it at any time to create the contact record.

This feature is sensitive to the visibility settings chosen by the member; it will only include contact information that the member has chosen to show.

Social Networking Links

If the club has enabled social networking links, and the member has configured their profile information for any of these links, the appropriate logos will be displayed in the Social Networking section. Click a logo and a new window will open with that member's public profile on the appropriate service.

Photo Albums

If the club has enabled member-level photo albums, the system will place links to these photo albums in the appropriate section. Click the down arrow to view this section then click an album name to view it.

Blogs

If the member authors one or more blogs on the club's website, you will also see links for each blog. Click the down arrow to view this section then click a blog name to view it.

Interests

If the club or association has enabled the Interests function, a member's interests will be shown in the Bio. Click the down arrow to view this section.

Achievements

If the club or association has enabled the Achievements function, a member's listed achievements will also be shown in the Bio. Click the down arrow to view this section.

Edit Links



When members view their own directory entry and when administrators view any entry, small **Edit** links are placed in each section of the bio. Clicking one of these links displays the appropriate page from that member's Profile, allowing immediate changes to be made and saved to the directory entry. Members can also click the photo to upload a new one, including a hi-res photo.

Click **Return to Previous Page** to go back to the listing screen.

Chapter 15 – News

The News module is used for announcements and other information that should be communicated to members and visitors. News items can be entered with an active date (when the item will appear) and an expiration date (when the item will no longer be displayed.) Each item includes a heading, summary and detailed news release or report, which can include any HTML formatting and even images.

A typical news screen is shown below:



Figure 15.1 – News main screen

Each item is shown with a heading, the date of posting and a summary. Clicking the **Read Article** link displays the complete news item, as shown in the following example:

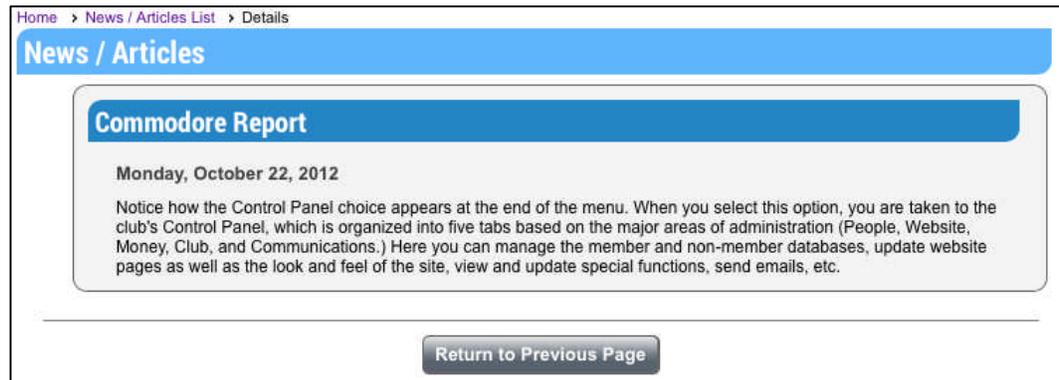


Figure 15.2 – News item screen

Click **Return to Previous Page** to return to the main News screen.

Chapter 16 – Photo Albums

INTRODUCTION

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.

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 also 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:

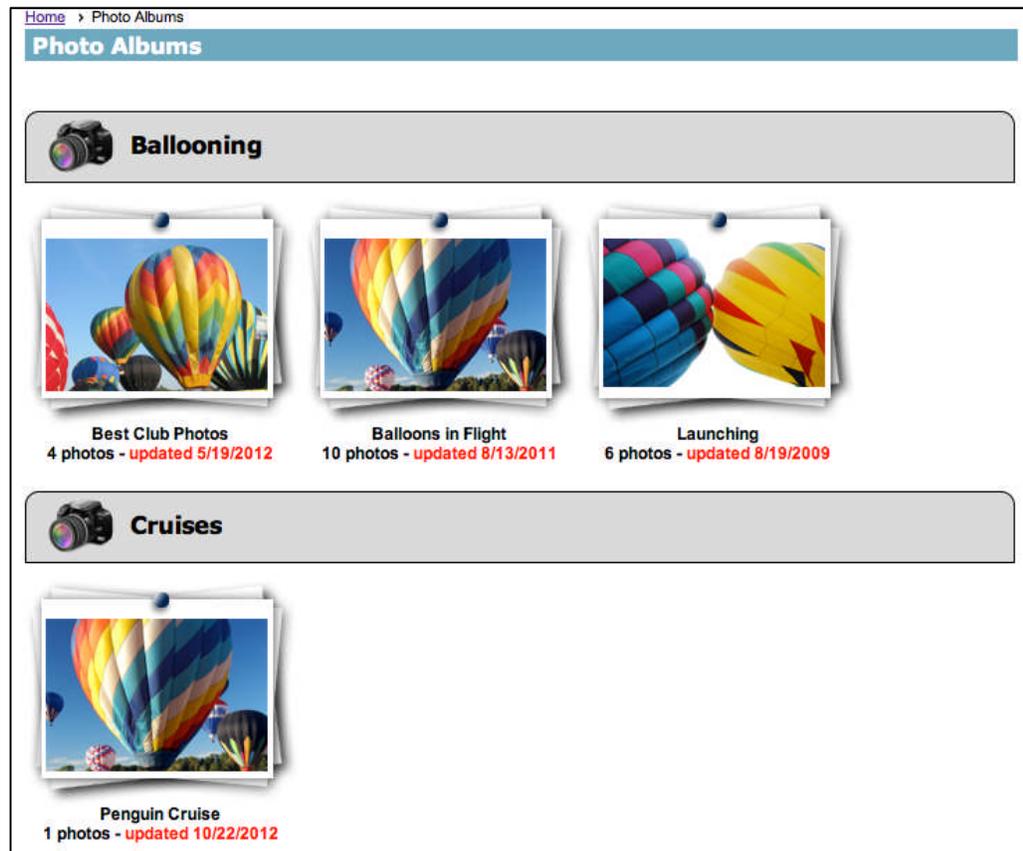


Figure 16.1 – Photo Album Index



The initial view shows the 30 newest and most recently changed photo pages. When you first visit the page in a session, the **Search Tools** panel will appear. On subsequent visits, click the “magnifying glass” icon on the Page Tools Widget to re-display this panel. You will see the following drop-down:

Figure 16.2 – Photo Album Search Tools

Select one of the radio buttons. If appropriate, a text box or drop-down selector will appear at the bottom to enter or select the filter value. Click the **Search** button to apply your search. Note that the Album Title, Photographer Name, Photo Tag, and Member Name options will find the specified text *anywhere* in the field.

Search results are displayed 30 albums at a time and grouped by category, with paging controls to move through each page. Within each category, albums can be displayed in alphabetical order or in descending order by when the album was last updated. Member photo albums comprise their own category that can be placed at the beginning or end of the list.

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:

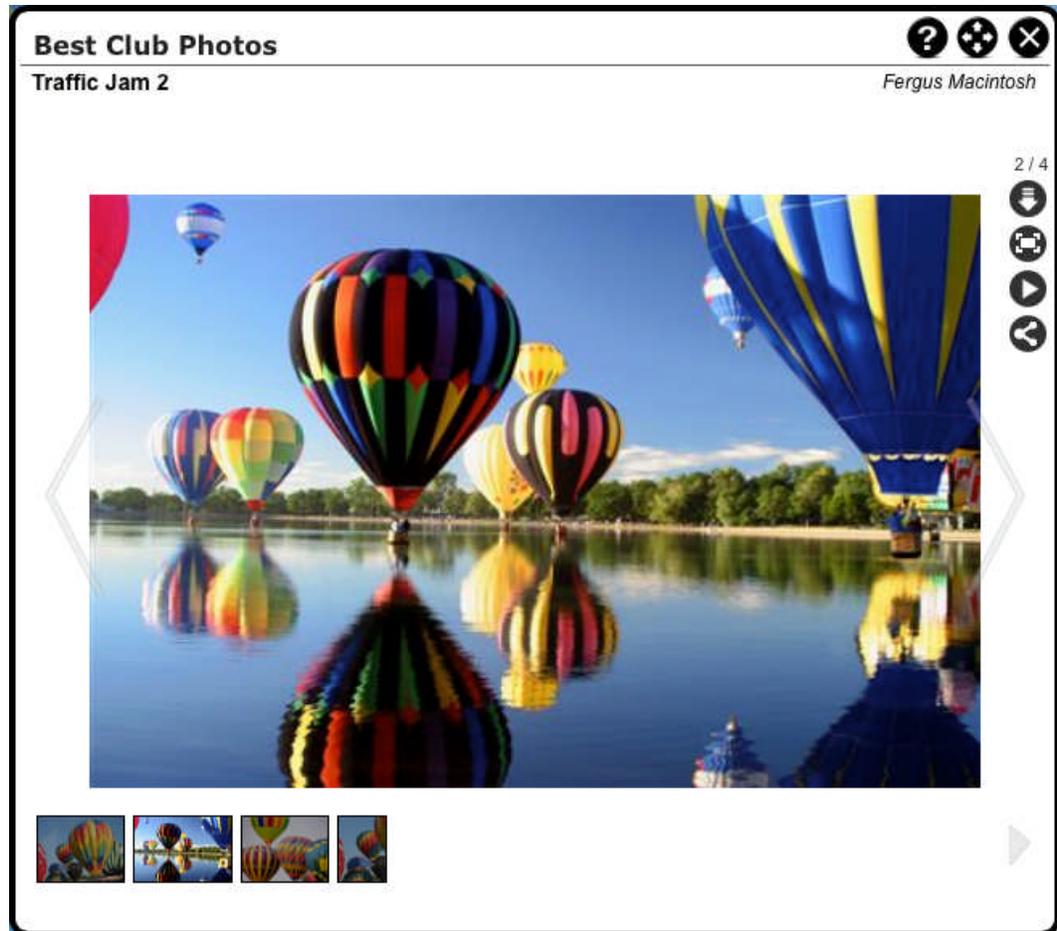


Figure 16.3 – A Typical Photo Page

The photo album title and description are displayed at the top. For longer descriptions, click the More Info... prompt.

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.

The photo title, photographer and caption are displayed at the bottom.

Photo Album Options

2 / 4



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 (see below)

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:

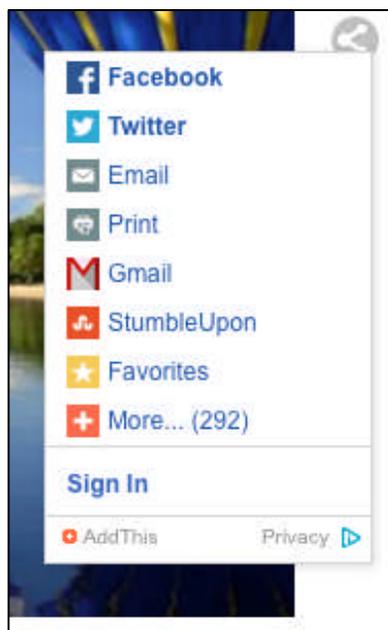


Figure 16.4 – Sharing a photo

These options allow you to share a photo to your Facebook or Twitter feeds or via other services.

Chapter 17 – Storefront

INTRODUCTION

The ClubExpress Storefront is a powerful E-Commerce module which allows you to purchase club and association merchandise through the website. The module includes the following features:

- Featured products, Specials, Search by category;
- Display product title, photo, description, variations;
- Display appropriate prices based on whether the user is logged in;
- Add to shopping cart;
- View shopping cart, adjust quantities, remove product;
- Checkout process;
- Gift option;
- Shipping address and shipping method options;
- Full integration with ClubExpress payment page;
- For digital content, a “digital bank” to download paid products.

VIEWING AND PURCHASING PRODUCTS

When users open the storefront, they will usually see a screen similar to the following **Featured Products** display:

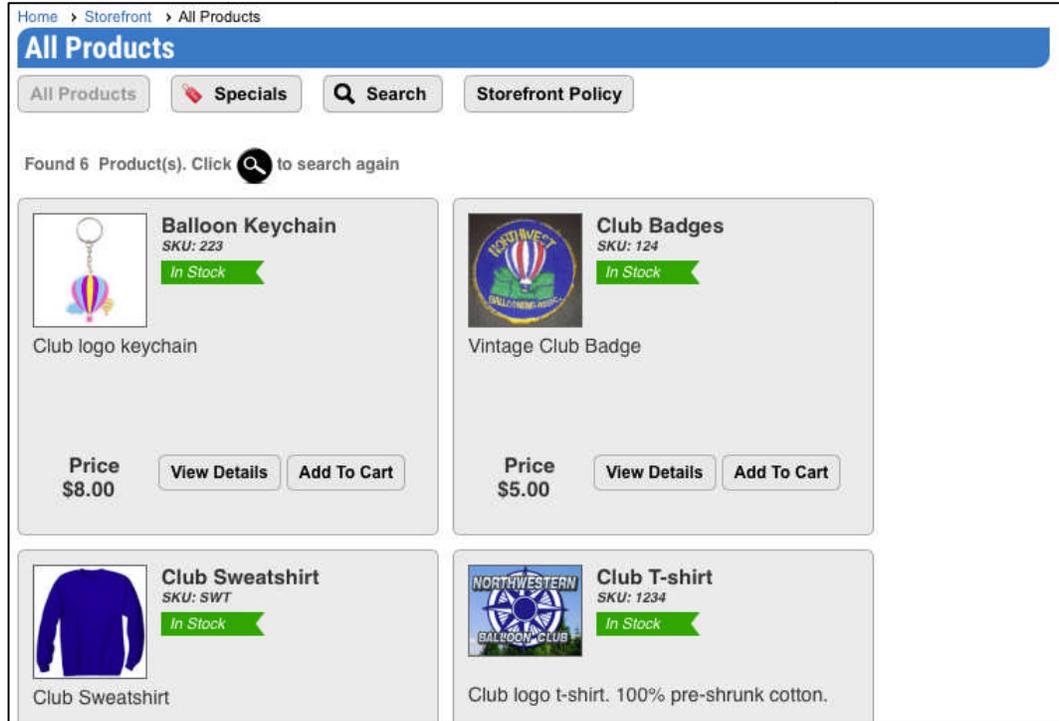


Figure 17.1 – Storefront opening screen

The starting page can be configured to be any of the following:

- Featured Products
- Specials
- Categories
- Product Search Page

(There is also a “limited” storefront option that just shows a list of products with a separate list of specials; it’s defined for catalogs with a maximum of 10-15 products.)

The first four buttons across the top allow you to move through the four opening screen options, providing different ways to find products. There is also a **Storefront Policy** button to display your standard policies in a pop-up window.

Featured Products have been specially flagged by an administrator to put them *front-and-center*. Click the Search icon or **Search all Products** button to display a search panel that allows you to view the complete list of products or search for products matching a specific set of criteria.

Each product includes a title, photo, short description and price or price range if the product has variations. Note that prices may be different for members and non-members; members must login to receive member pricing. Click the **View Details** button to display more information about the product, including product variations (for example, clothing in different sizes and/or colors.) A screen similar to the following will be displayed:

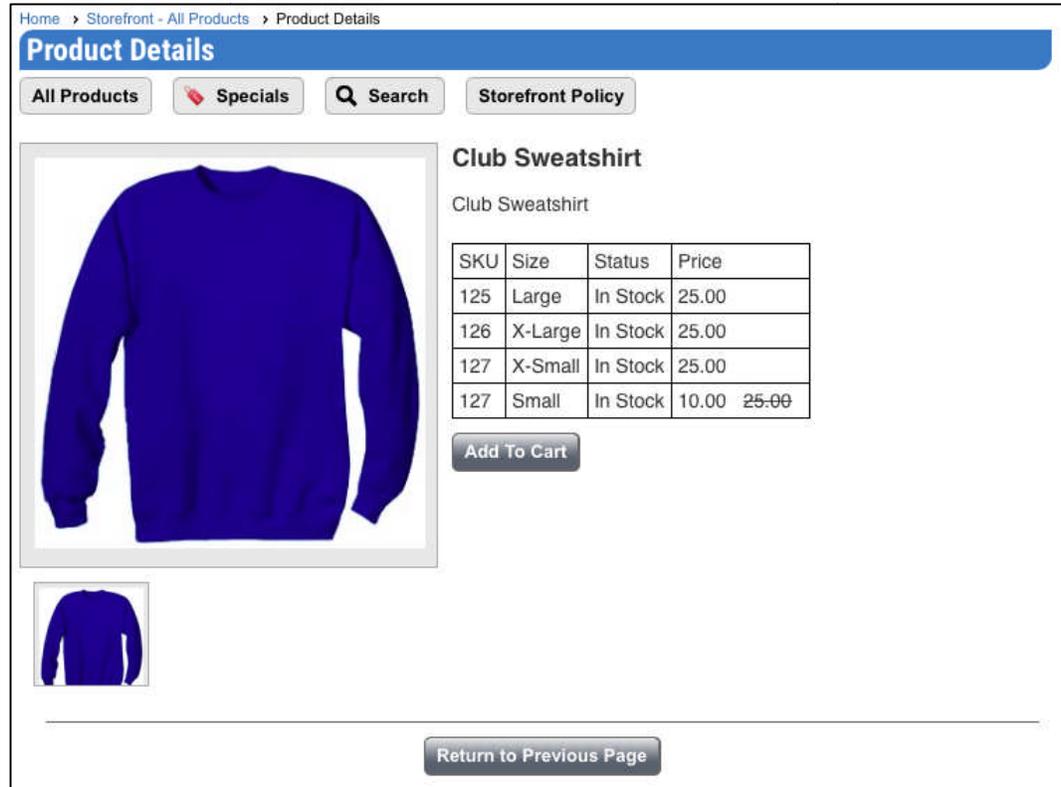


Figure 17.2 – View Product Details

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 grid below the description. Variations can be by color, size or other property.

Click the **Add to Cart** button to add this product to your shopping cart. You will see a screen similar to the following:

Club Sweatshirt [?] [X]

Choose the option you want, and fill in the quantity and additional information (if any), and press Order Now to order the item.

Option: Large (\$25.00) [v]

Quantity: 1 [red dot]

Total Cost: \$25.00

[Add To Cart ✓] [Cancel X]

Figure 17.3a – Add Product to Cart

Select a variation and specify a quantity; the Total Cost will adjust automatically. Click **Add to Cart** 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. For 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:

Club Sweatshirt [?] [X]

Choose the option you want, and fill in the quantity and additional information (if any), and press Order Now to order the item.

Option: Large (\$25.00) [v]

Quantity: 1 [red dot]

Add-on? Yes please No thanks

Specify up to 3 letters to be embroidered on your sweatshirt.
Additional \$10.00 per item

DHE|

3 of 3 characters used

Total Cost: \$35.00

[Add To Cart ✓] [Cancel X]

Figure 17.3b – Add Product with Add-on to Cart

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.

If you know what product you want to order, you can click **Add to Cart** directly from the product listing screen, without drilling down to view details. The same popup forms described above will be displayed.

When you have added at least one product to your shopping cart, a **Proceed to Checkout** button will be added to the button bar shown on the screens above.

Note that prices may be different for members and non-members. Members must login to receive member pricing.

Also note that for digital content that is downloaded rather than shipped, the Quantity field is grayed out; you cannot buy multiple copies of a digital product.

Finally, note that for digital content that is downloaded rather than shipped, the Quantity field is grayed out; you cannot buy multiple copies of a digital product.

Clicking the **Specials** button displays a similar screen but this time showing specials only. Specials are product inventory items that have been marked down for special clearance, perhaps because the club ordered too many of them. They may only be available in limited sizes or colors:

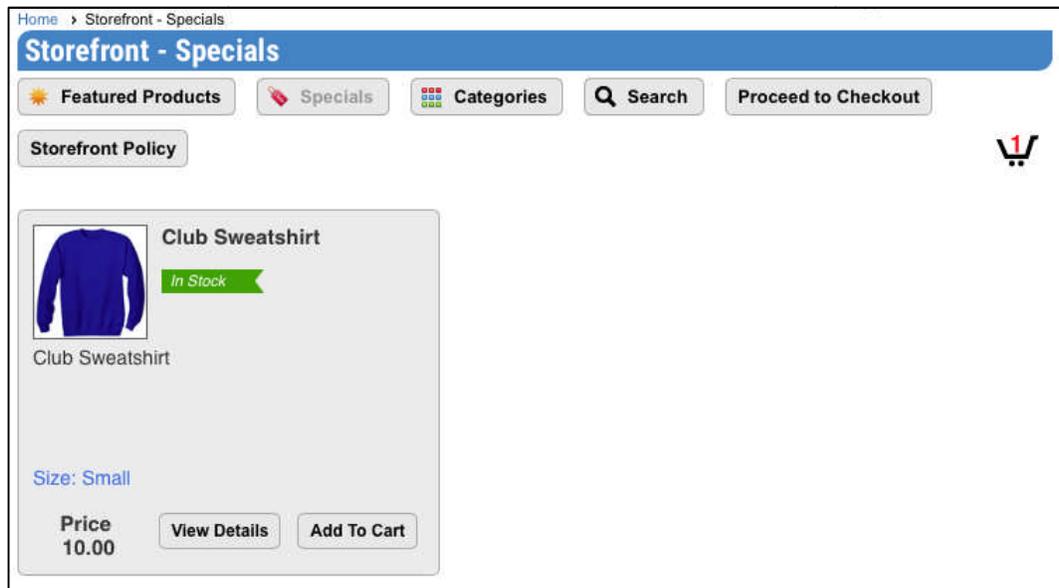


Figure 17.4 – Storefront Specials

In the above example, note how the size is shown. Only this variation is available with a special price.

Clicking the **Categories** button displays a list of product categories, each with a photo defining that category:

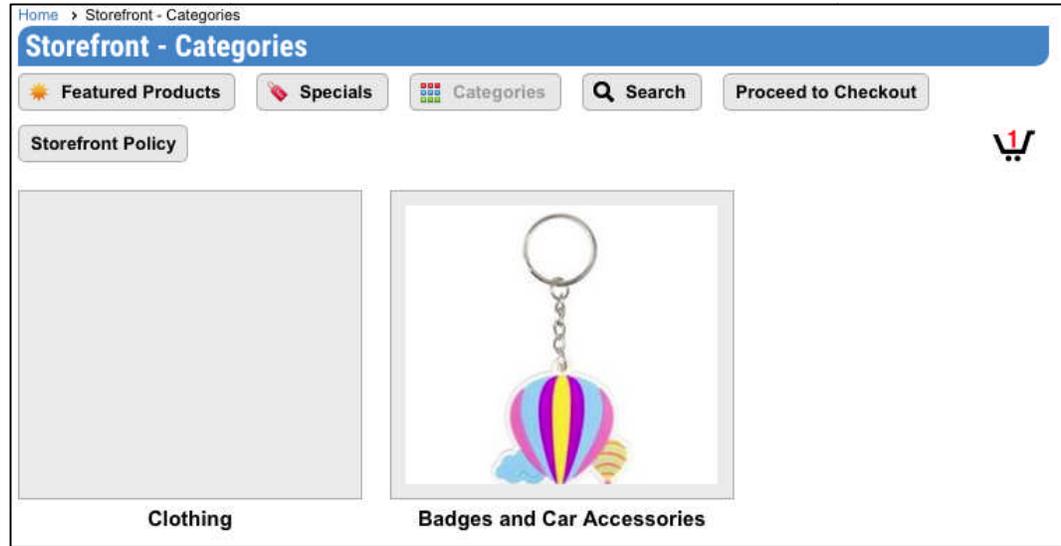


Figure 17.5 – Storefront Categories

Click the Category image to show only products in that category.



Clicking the **Search** button or magnifying glass icon displays the following popup:

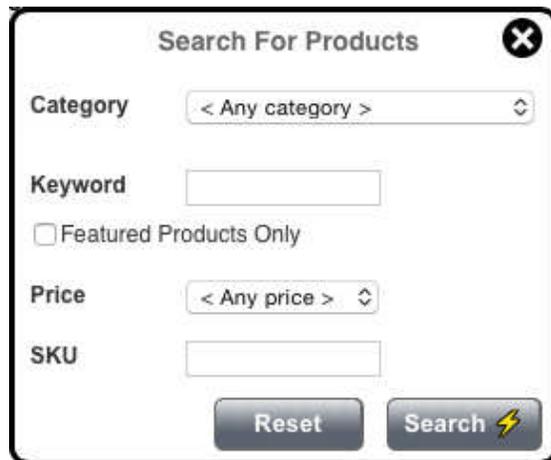


Figure 17.6 – Product Search

You can search by any combination of Category, Keyword, price range or SKU (Stock Keeping Unit, if known.) Click **Search** to display a list of matching products or **Reset** to clear the search criteria. Click the black X icon in the top right corner to close the dialog.

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.

The shopping cart will indicate how many products it contains, from 1 up to 9+.

Hover your mouse over the shopping cart icon beside your name and you will see a popup version of your shopping cart:



Figure 17.7 – Shopping Cart Popup

Click the **Edit Cart** button to jump to the full shopping cart, or the **Checkout** button to begin the checkout process. Click the gray X icon in the top right corner to close the popup window.

Clicking the shopping cart icon in the module or on your personal drop-down menu has the same effect as clicking the **Edit Cart** button above. You are taken to the full shopping cart screen with update capabilities:

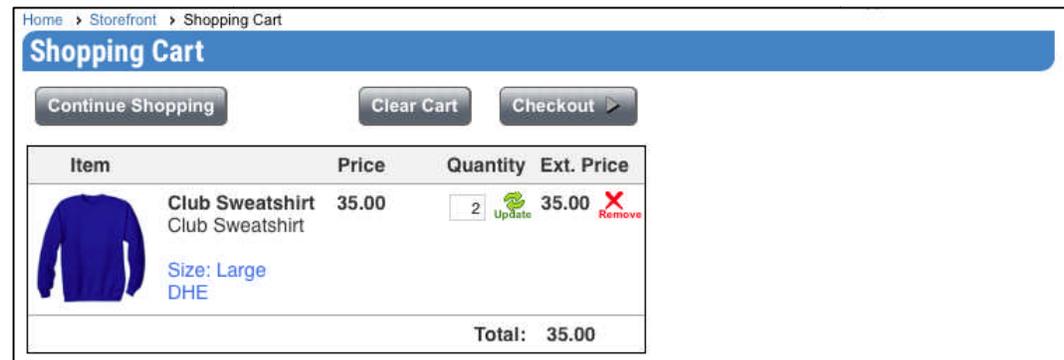


Figure 17.8 – Shopping Cart

Products are listed in a series of vertical panels. Click the **Remove** icon to remove the product from your shopping cart. When you change the quantity shown, a green **Update** icon appears; click it to update the extended and total prices.

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.

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. The process has three screens:

Figure 17.9 – Member Checkout Step 1 – Shipping Address

The first step is to 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.

Clicking **Next** allows you to specify whether or not this is a gift:

Figure 17.10 – Member Checkout Step 2 – Gift Info

If this is a gift, check Yes then enter the gift message.

Clicking **Next** displays a summary screen:

Home > Storefront > Shopping Cart > Checkout

Order Summary

Shipping Information Personalized Gift Message **Order Summary and Payment**

Please verify that the below information is correct. If you wish to change the items in your cart, please click the edit button

Contact Information and Address

Barbara & Cliff Jones
1930 Thoreau Drive North
Suite 155
Schaumburg, IL 60173
USA

support@clubexpress.com

847-255-0210

Shipping Information

Barbara & Cliff Jones
1930 Thoreau Drive North
Suite 155
Schaumburg, IL 60173
USA

Gift Message

Congratulations on a wonderful achievement

Products in Cart

Item	Price	Options	Quantity	Ext. Price
 Club T-shirt Club logo t-shirt. 100% pre-shrunk cotton. Medium Blue	12.50	Medium Blue	1	12.50
 Club Badges Vintage Club Badge In Stock	5.00		1	5.00
Total:				17.50
Sales Tax				1.22
Shipping & Handling				9.50
Final Cost				28.22

Back < Cancel Checkout ✕ Continue To Payment >

Figure 17.11 – Member Checkout Step 3 – Order Summary

This screen shows the contact information (which cannot be changed since it comes from the member’s database record); the shipping information; a gift message if appropriate; the products in the cart; and the total cost including sales tax and shipping & handling if appropriate. Clicking the **Edit** (pencil) icon beside shipping information or the gift message jumps back to these wizard pages.

Clicking the **Back** button at the bottom of the screen allows the user to navigate back through the wizard.

Clicking the **Cancel Checkout** button cancels the checkout process but leaves the shopping cart intact, perhaps because the member wants to add more products before checking out.

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:

The screenshot shows the checkout process for a non-member. At the top, there is a breadcrumb trail: Home > Storefront > Shopping Cart > Checkout. Below this is a blue header with the word "Checkout" in white. Underneath the header is a progress bar with four steps: "Customer Information" (highlighted in black), "Shipping Information", "Personalized Gift Message", and "Order Summary and Payment".

Below the progress bar is a text box with instructions: "Please enter your contact information, then click the 'Continue with Checkout' button. On the next page, you will be able to use this address for shipping, or ship to different address if you wish." Below this is a link: "Club Member? [Login to check out with member pricing](#)".

Next is another text box: "Have you previously placed an order or are you on our mailing list? [Click here to search](#)". Below this is another text box: "In addition to your name, please enter your address, phone number and email address. This will allow us to contact you if necessary."

The main section is titled "Contact Information" and contains a form with the following fields:

- First Name: (with a red error icon)
- Middle Initial:
- Last Name: (with a red error icon)
- Address 1: (with a red error icon)
- Address 2:
- City: (with a red error icon)
- State/Province: - Zip/Postal Code: (with a red error icon)
- Country: Show All Countries
- Phone: (with a red error icon)
- Email Address:
- Organization:
- Title:

At the bottom of the form are two buttons: "Cancel Checkout" with a red 'X' icon and "Next" with a right-pointing arrow icon.

Figure 17.12 – Non-Member Checkout Step 1 – Contact Info

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:

A rectangular form with a light gray border. At the top left, it says "Enter the following". Below this, there are two input fields: "Email Address" and "Last Name". To the right of the "Last Name" field is a "Search" button with a lightning bolt icon.

Figure 17.13 – Search Non-member Database

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**. The remainder of the Checkout wizard behaves as described above.

Payment Screen

When you click **Continue to Payment**, you will see the standard ClubExpress Payment screen, similar to the following:

Home > Make Payment

Make Payment for Martin Smith (1015)

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

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

Fields marked ♦ require an entry.

<input checked="" type="checkbox"/> Purchase Product (2/4/2015 Ref # 2847)	Due \$ 46.60	Pay \$ 46.60
Club T-shirt (Small, Blue) (2 @ 12.50)	25.00	
How to Build & Fly Hydrogen & Hot Air Balloons	10.00	
Sales Tax	2.10	
Shipping/Handling	9.50	
Transaction Total:		46.60

Total Selected For Payment \$ 46.60

Select Payment Method < Select Payment Method >

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

Refund Policy

All payments are final. We do not provide refunds for membership signups and renewals, event registrations, donations, storefront purchases, or other misc. charges. Please carefully review the charge(s) checked above and be sure you know what you are paying for.

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

Figure 17.14 – Payment Screen

Each order is a single transaction. This transaction will have multiple line items, one for each item in the order, as well as items for shipping/handling (based on your chosen shipping method) and sales tax (if charged).

Select a payment method then follow the instructions to enter the required information and submit the payment for processing. If you pay immediately by credit card, your order is flagged as "Ready to ship". If you choose to print an invoice and mail a check, your order cannot be shipped until the check is received and recorded in the system.

DOWNLOADING DIGITAL CONTENT

If you have ordered digital content, the confirmation email you receive will include a link to your **Download Bank**. This is a list of documents that you can download. It is also available as a link from your member Profile. You will see a screen similar to the following:

The screenshot shows a web interface for a 'Download Bank'. At the top, there is a breadcrumb trail: Home > Member Profile > Download Bank. Below this is a blue header bar with the text 'Download Bank'. A text box explains that users can click double arrows to view details and 'Download' links to download documents. Below this is a table with columns for Name, Status, and Links. The first row is 'Club Bylaws', with status 'Available' and links for 'Download' and 'Edit'. A detailed view for 'Club Bylaws' is shown below the table, including a description, format (Acrobat PDF), file size (22), and download count (0). At the bottom of the table area is a 'Clear' button with a tooltip: 'Click this button to clear all documents which can no longer be downloaded'. Below the table area is a section titled 'Click to view File Readers and Utilities for download' with a horizontal line underneath. At the very bottom of the interface is a 'Return to Previous Page' button.

Figure 17.15 – Download Bank

Click the **Download** link to download a document. Click the double-arrow on the left of the title to view details of a document. Click the **Clear** button to remove any document from the list that has already been downloaded at least once or which can no longer be downloaded.

Chapter 18 – Surveys

INTRODUCTION

The Surveys module allows you to take surveys organized by your club or association. Surveys are 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. They can even be used to vote in elections.

Surveys can be spread across multiple pages and can have any number of questions. Each question can be displayed in one of 15+ formats, and certain types of questions can be grouped together under a single heading.

A typical Surveys screen is shown below:

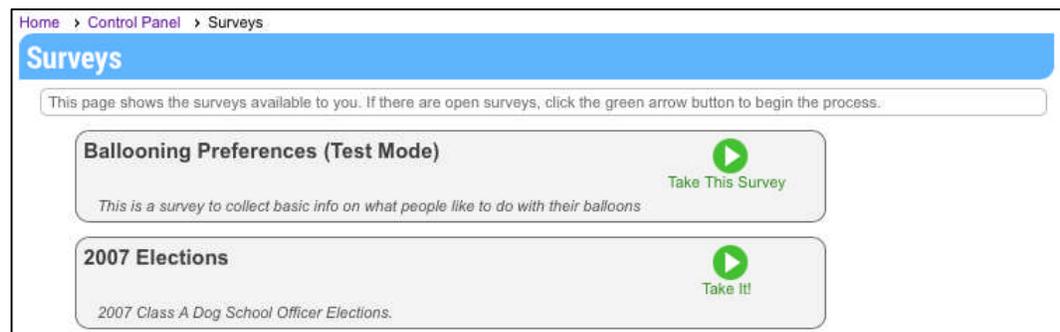


Figure 18.1 – Surveys screen

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.

TAKING A SURVEY

Surveys typically begin with a preamble page that explains the purpose 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.

Chapter 19 – Volunteering

INTRODUCTION

The Volunteering function allows a club to post volunteering opportunities for which members (and optionally, non-members) can sign up. These could be any of the following:

- Helping out at club events
- Cleanup or maintenance at the club's facilities
- Performing periodic or seasonal tasks
- Helping in the office

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. For 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.

A volunteering opportunity might be linked 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.
- A **Event** link appears 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.

ACCESSING VOLUNTEERING OPPORTUNITIES

When you click Volunteering on the menu or a link, you will see a screen similar to the following:

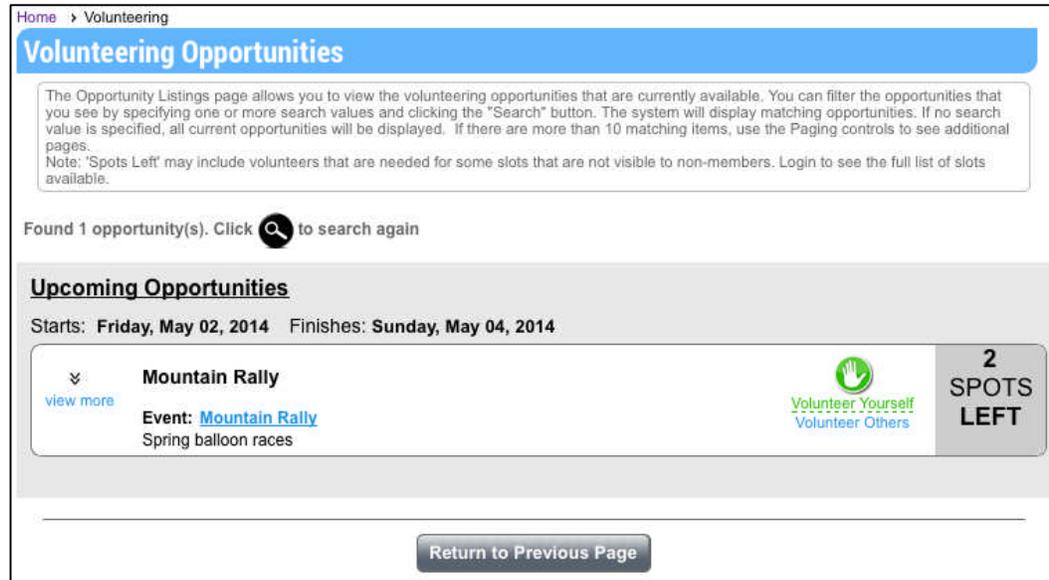


Figure 19.1 – Volunteering Opportunities

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:

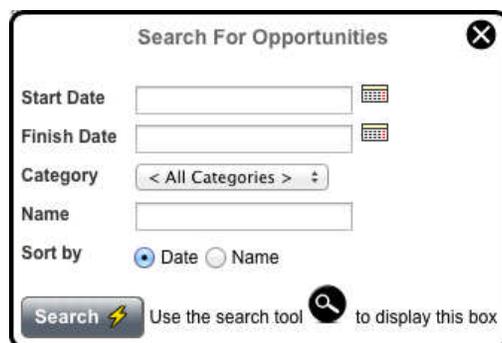


Figure 19.2 – Search for Opportunities

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:

Upcoming Opportunities

Starts: **Friday, May 02, 2014** Finishes: **Sunday, May 04, 2014**

[^](#) **Mountain Rally**

[view less](#)

Event: [Mountain Rally](#)
Spring balloon races

Location: [Flying Field](#)
1000 Forest Drive Anywhere, IL 60101 UNITED STATES
Contact: [Lee Clancy 343-345-3456](#) rwcons@comcast.net

Date	Time	Task	Required	Assigned
05/02/2014	06:15 AM - 10:00 AM	Registration Desk	3	2
05/02/2014	10:00 AM - 12:00 PM	Refreshment Tent	3	2 Who



**2
SPOTS
LEFT**

Figure 19.3 – Slots for an Opportunity

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.

Volunteers ? + X

Opportunity: Mountain Rally

Slot: Refreshment Tent

When: 05/02/2014 10:00 AM - 12:00 PM

Who:

Barb Rad

Mary Johnston

[Done](#)

Figure 19.4 – Volunteers for a Slot

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:

Home > Volunteer signup

I want to Volunteer!

Enter your information, including a preferred phone number and email where we can reach you regarding this opportunity.

First Name

Last Name

Preferred Phone

Preferred Number

Preferred Email

What is your T-shirt size?

Answer

Date	Time	Task	Register
05/02/2014	06:15 AM - 10:00 AM	Registration Desk	<input type="checkbox"/>
05/02/2014	10:00 AM - 12:00 PM	Refreshment Tent	<input type="checkbox"/>

Cancel X Next >

Figure 19.5 – I want to Volunteer!

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:

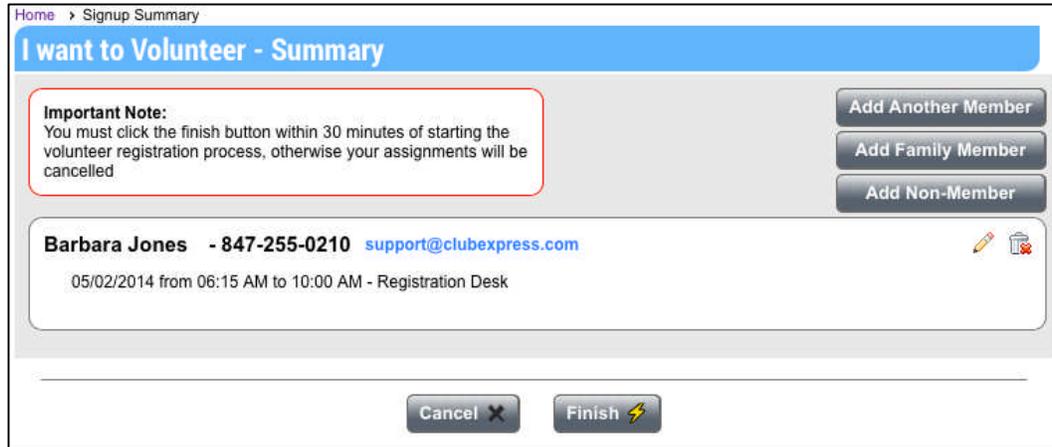


Figure 19.6 – I want to Volunteer - Summary

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.

Chapter 20 – Content Editor

INTRODUCTION

In a number of places within ClubExpress, you have the opportunity to create a custom web page or part of a page. Two examples are when you are building the website home page and when you are specifying custom web pages.

Instead of forcing you to learn complex HTML coding, ClubExpress makes it easy to build this page, using a software tool called a *content editor* that is similar to a word processor.

The ClubExpress Content Editor allows you to perform the following tasks:

- Select text 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;

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

USER INTERFACE

When you view the Content Editor on the Profile – Membership Directory screen, or when you create or edit a forum message in the Discussion Forums module, you will see a window similar to the one below:

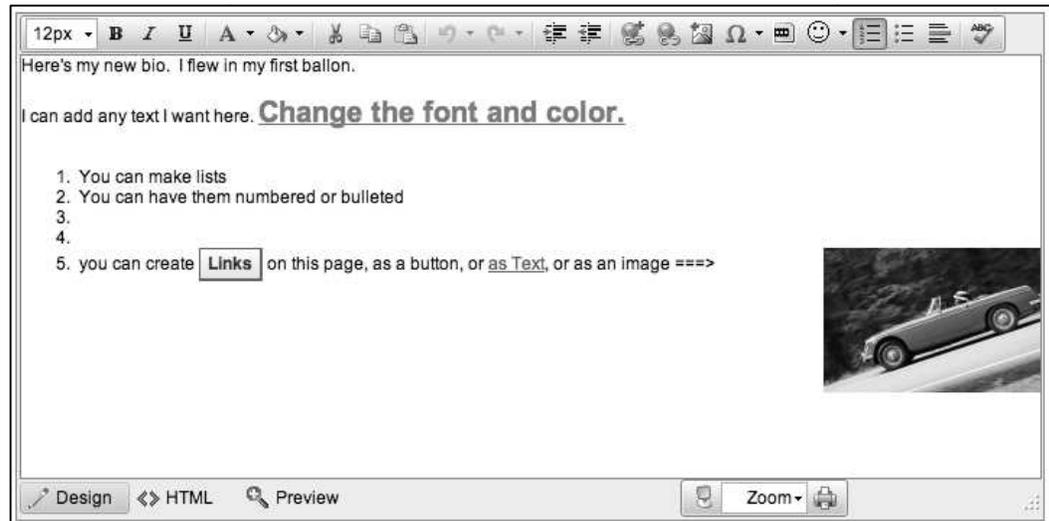


Figure 20.1 – Editing your Member Bio or a Forum Message

At the top of the screen is a toolbar of buttons, with similar functions grouped logically. The meaning and behavior of each button is described below. Underneath is the edit area, where you type text, highlight blocks, manipulate tables and images and perform other editing functions. At the bottom of edit area is another toolbar with special functions, then a word and character count.

Many functions work on a block of text that has been highlighted by dragging the mouse cursor over the text. The editor also supports “Drag-and-Drop” to move highlighted text from one part of the page to another.

Click **Save** to save your changes or **Cancel** to discard them. You will be asked to confirm a Cancel operation. Both buttons close the window and return you to the previous screen.

Important Note: You should save your work every 15-20 minutes to maintain the currently logged in session. If you don’t do this, the system may close the active session and you risk losing all your work. This session timeout varies based on your level of access (for administrators, it’s 60 minutes.) The system will give you a warning approx. 5 minutes before a session is due to expire.

TOOLBAR FUNCTIONS

The following table explains each toolbar button. Many use the same icon and perform the same function as a typical word processor such as MS Word. Some functions require a more detailed explanation; these are described in the following sections:

The following table explains each toolbar button. Many use the same icon and perform the same function as a typical word processor. Some functions require a more detailed explanation; these are described in the following sections:

Top Row

	Cut the highlighted text to your computer's clipboard. The shortcut key <i>[Ctrl-X]</i> performs the same function.
	Copy the highlighted text to your computer's clipboard. The shortcut key <i>[Ctrl-C]</i> performs the same function.
	<p>Paste text from your computer's clipboard at the current cursor position. The shortcut key <i>[Ctrl-V]</i> performs the same function.</p> <p>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.</p>
	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 <i>[Ctrl-Z]</i> and <i>[Alt-Backspace]</i> perform the same function. Click the reverse arrow to undo the last change or the small down arrow to select which changes to undo.

	<p>Redo the previous Undo. The shortcut key <i>[Ctrl-Y]</i> performs the same function. Click the forward arrow to redo the last undo, or the small down arrow to select which undo point to reverse.</p>
	<p>Strip selected formatting options from the highlighted text. A small drop-down menu will appear, allowing you to choose exactly what should be stripped.</p>
	<p>Left Align the current line or block.</p>
	<p>Center Align the current line or block.</p>
	<p>Right Align the current line or block.</p>
	<p>Fully Justify the current line or block. The editor will insert additional spaces to line up both the left and right margins.</p>
	<p>Unjustify the current line or block. The editor will revert to left justified text, removing any spaces inserted to create fully justified text.</p>
	<p>Indent the current line or block 1 tab stop.</p>
	<p>Outdent the current line or block 1 tab stop.</p>
	<p>Insert or format a table at the current cursor position. A drop-down menu will appear allowing you to paint the rows and columns in the table and to specify other options. For more information on all table functions, see the special section below.</p>
	<p>Click to insert a hyperlink to another ClubExpress module, an external website, an email address or an anchor (bookmark within a page.) The shortcut key <i>[Ctrl-K]</i> performs the same function. For more information, see the special section below.</p>
	<p>Break the current hyperlink, removing the special linking code behind the scenes, The current hyperlink will revert to standard text. The shortcut key <i>[Ctrl-Shift-K]</i> performs the same function.</p>
	<p>Insert a photo from among photos uploaded to the site. For more information, see the special section below.</p>

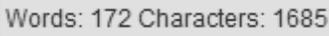
	Insert an image from your graphics library and other club-level photos (for example, logos). For more information, see the special section below.
	Insert a Group Box (FieldSet). This is a special HTML element that allows you to collect and organize other elements. See the special section below.
	Insert 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 text.
	Create and insert a widget.

Second Row

	<p>Click the drop-down arrow to see a list of built-in styles. Selecting a style ensures that your headings match the styles used elsewhere in ClubExpress. The change applies to the current line or block.</p> <p>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. For more information, see page Error! Bookmark not defined..</p>
	<p>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.</p>
	<p>Click the drop-down arrow to select a text size. You will see a list of sizes based on pixels; 12px is the standard size.</p>
	<p>Click to bold the current block of text or to start bolding from the cursor position. <i>[Ctrl-B]</i> also works.</p>

	<p>Click to <i>italicize</i> the current block of text or to start italicizing from the cursor position. <i>[Ctrl-I]</i> also works.</p>
	<p>Click to <u>underline</u> the current block of text or to start underlining from the cursor. <i>[Ctrl-U]</i> also works.</p>
	<p>Click to convert the highlighted text to lower case.</p>
	<p>Click to convert the highlighted text to UPPER case</p>
	<p>Click to convert the highlighted text to ^{superscript}</p>
	<p>Click to convert the highlighted text to _{subscript}</p>
	<p>Click to select the text (foreground) color. A color picker showing standard colors will be displayed. You can also define custom colors and add them to the palette. Your change applies to the current block of text or at the cursor position.</p>
	<p>Click to select the background color. The same color picker described above is displayed.</p>
	<p>Click to display a popup Style Builder dialog. This dialog allows you to specify complex style information for the selected text. For more information, see the special section below.</p>
	<p>Click to begin a numbered list of items.</p>
	<p>Click to begin a bulleted list of items.</p>
	<p>Click to insert a horizontal rule across the page.</p>
	<p>Spellcheck your text. A popup dialog will appear to highlight misspellings and other errors. See the section below for more details. The shortcut key <i>[F7]</i> performs the same function.</p>
	<p>Find text on the current page or find and replace. The shortcut key <i>[Ctrl-F]</i> performs the same function.</p>

Options at the Bottom

	<p>Design View. This is the normal view where you write your text and use the shortcut keys and toolbar buttons to insert options and format your text.</p>
	<p>HTML View. This view allows you to see and edit the underlying HTML source code.</p>
	<p>Preview. This view allows you to see the page as it will generally look when it's being viewed.</p>
	<p>Full Screen Mode. This mode makes the edit box slightly larger by hiding all non-editor controls.</p>
	<p>Zoom. Click the drop-down arrow to zoom your text in to see more detail or out to see more of the page.</p>
	<p>Print. Click this icon to print the current page being edited.</p>
	<p>Displays an approximate word and character count for the current document.</p>

Summary of Shortcut Keys

Ctrl-X	Cut the highlighted text to the Clipboard
Ctrl-C	Copy the highlighted text to the Clipboard
Ctrl-V	Paste from the Clipboard at the cursor position
Ctrl-B	Bold the highlighted text or start/stop bolding
Ctrl-I	Italicize the highlighted text or start/stop italics
Ctrl-U	Underline the highlighted text or start/stop underline
Ctrl-Z	Undo the last operation
Ctrl-Y	Redo the last operation
Ctrl-F	Find or Find and Replace
Ctrl-A	Select All - highlight everything
Ctrl-P	Print the text in the window
Ctrl-K	Insert Hyperlink at the cursor
Ctrl-Shift-K	Break the hyperlink at the cursor
F7	Launch the Spellchecker
F1	Display popup help for the editor
Ctrl-W	Close the editor window

HYPERLINKS

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



Figure 20.2 – Build a Link

The link builder supports five types of links:

1. **Document** – This is a 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.
2. **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.
3. **Email Address** – The next field will prompt for the Email Address.
4. **Anchor** – Place a named anchor at the cursor.
5. **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.)

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 editor.

INSERT PHOTO

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

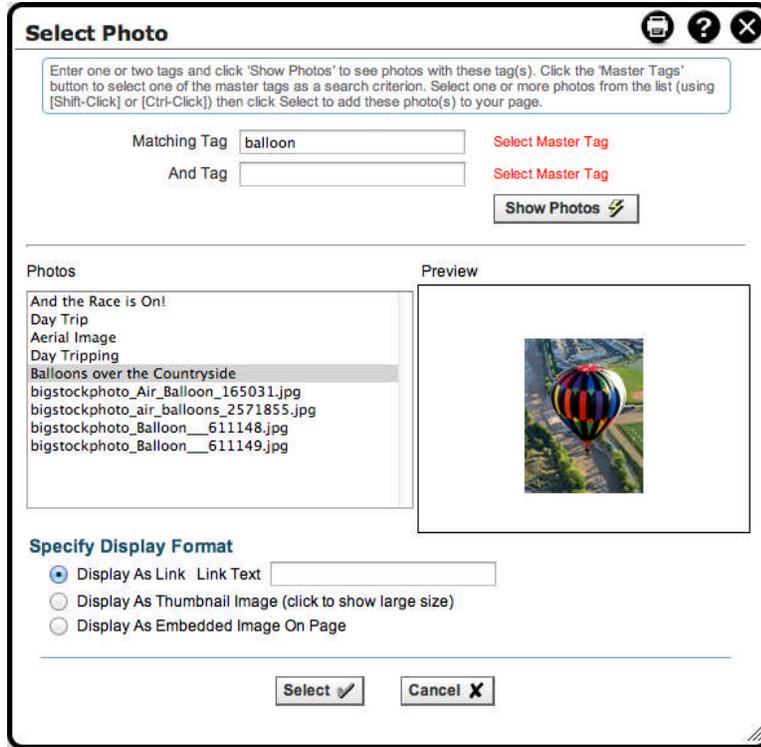


Figure 20.3 – Insert Photo

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

- As a hypertext link. You have the option of specifying the text to use. When the link is clicked, a popup window will appear showing a larger version of the photo.
- As a thumbnail image (with the longest dimension set to 120 pixels). When the image is clicked, a popup window will appear showing a larger version of the photo.
- As an embedded image on the page (with the longest dimension set initially to 450 pixels.) You can adjust the size of the image using the handles provided.

Click **Select** to insert the image(s) as defined, or **Cancel** to close the dialog without inserting any images.

INSERT IMAGE

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



Figure 20.4 – Insert Image

From this window, you can select graphics files already uploaded (“Club Web Graphics”) or standard graphics within the current theme (“Theme Graphics”), or you can upload a new image.

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

To upload an image, click the **Browse...** button and navigate to the file on your local hard disk or network. Select the file, 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.

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

Editing Image Properties

To edit the properties of an image, click it so that selection handles appear. Then right click and select **Properties**. You will see the following dialog:

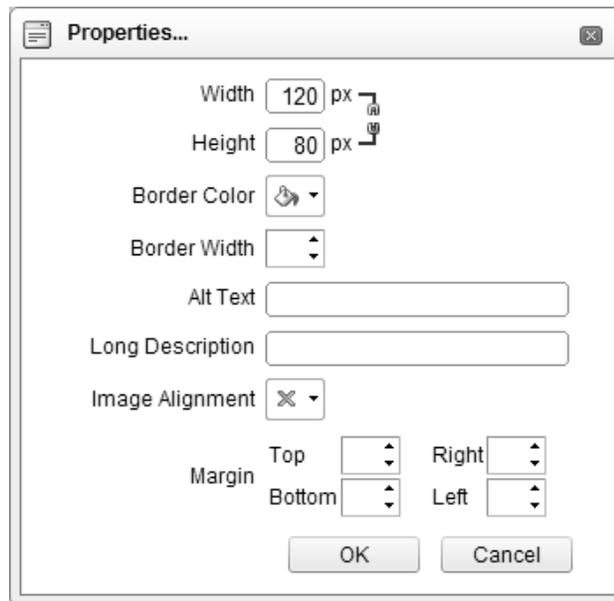


Figure 20.5 – Set Image Properties

From this window, you can perform the following functions:

- Specify the width and height of the image in pixels. The system does not maintain the relative dimensions of an image unless you first click the broken “chain” image to 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.

INSERT AUDIO/VIDEO/FLASH

When you click the **Insert Audio/Video/Flash** icon, you will see a small drop-down menu. The first choice allows you to insert an audio, video, or Flash file uploaded to the website at the cursor position, while the second choice allows you to insert a link to a YouTube or Vimeo video which will then play within your website.

Uploading and Playing Media Files

Selecting the first choice displays the following dialog:

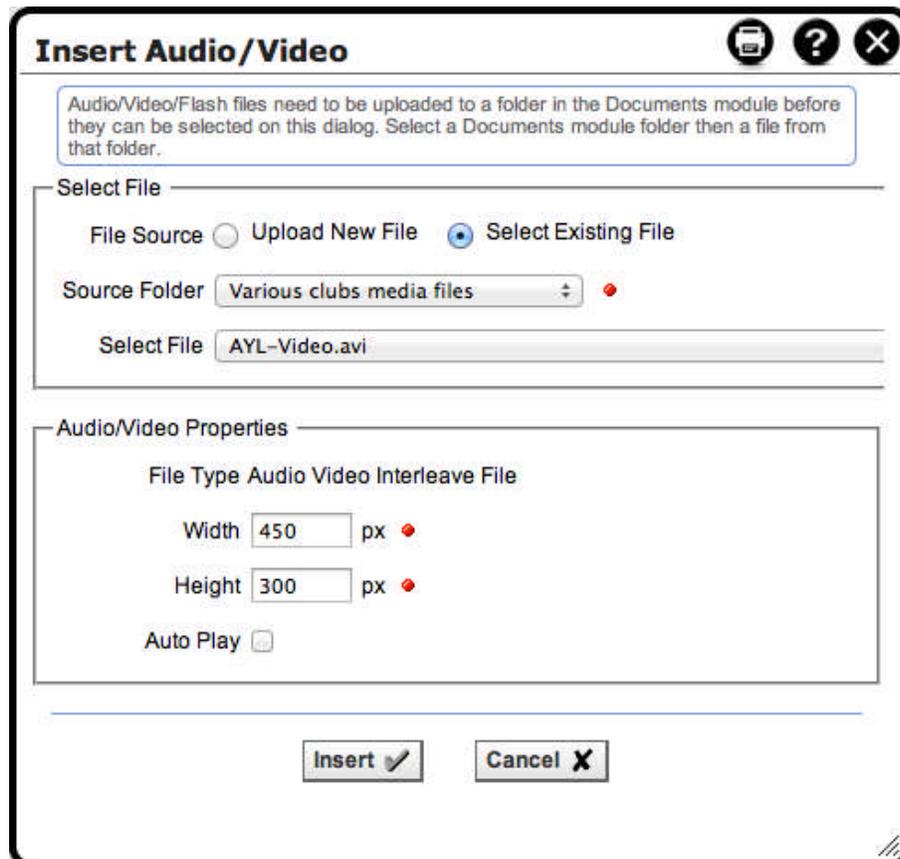


Figure 20.6 – Insert Audio, Video, Flash

Select the first radio button to upload a new file and store it in a folder within the Documents module. Select the destination folder and the file from your local hard disk. Click the second radio button to select a folder and a file from that folder that was previously uploaded.

The system will detect the file type and give you an error if a non-supported file was uploaded. For video and Flash files, specify the width and height for the panel; this information can often be found in the file properties window of the file on your local hard disk. For audio files, specify the width of the audio control panel only. You can also check the **Auto Play** box so that when the page is displayed, the sound or movie file will start playing automatically, instead of waiting for the user to click a Play button.

Click **Save** to place the media file on the page, or **Cancel** to return to page editing without placing the media file.

The following file formats are supported. However, please note that some browsers and platforms (PC, Mac and Linux) may require special add-ins to support certain file types. For example, Mac users will not be able to view Windows-based formats without a special QuickTime add-in.

- SWF (Flash movie)
- FLV (Flash video)
- WMV / WMA / AVI (Windows Media video/audio)
- MPG / M2V (older style MPEG video)
- QT / MOV (Quicktime movies)
- MP3 (Audio file standard)
- WAV (Windows sound file)
- AAC (Apple Audio Codec, used by iTunes)

Embedding a Linked YouTube or Vimeo File

Select the second radio button to display a simple text box into which you can paste code copied from YouTube or Vimeo (or any other website which supports embedded links and which allows you to copy a code block into your clipboard.)

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

In Vimeo, the `</>` Embed button appears when you move the mouse over the video panel itself. Click the button to display a popup dialog. Highlight the code block directly and use the computer’s Copy function.

Paste in the code block then click **Save** to save your change, or **Cancel** to close the dialog and return to the editor without saving.

SPELL CHECKING

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

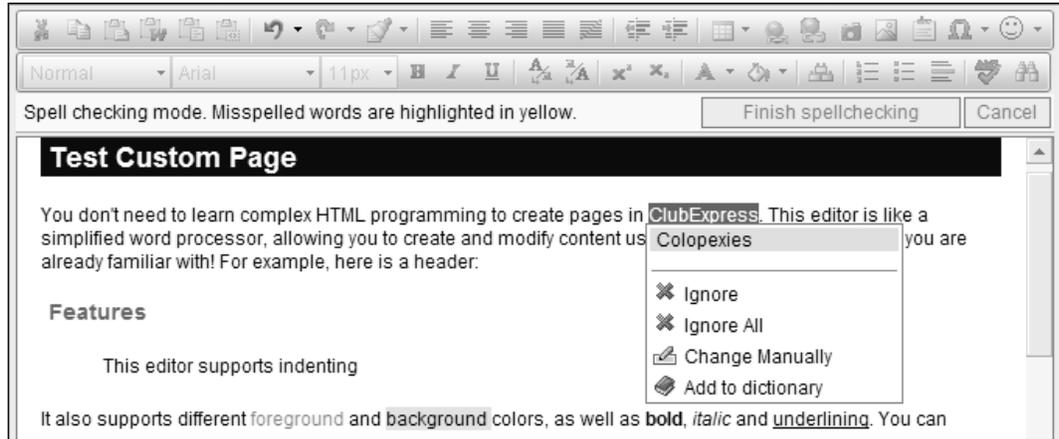


Figure 20.7 – Spell Check Dialog

Misspelled words are highlighted in yellow. There is a small popup menu below the first misspelled word, showing available options:

- Other words which might be what you intended to write;
- Ignore just this occurrence;
- Ignore all occurrences;
- Change manually. A small window will appear to edit the word.
- Add to dictionary, so that this spelling will be OK from now on.

Click the **Finish spellchecking** button to exit from spellchecking mode. Click the **Cancel** button to cancel your changes and exit spellchecking mode.

Appendix A – Posting to Social Networks

INTRODUCTION

Members who are blog authors or who have the ability to create QuickEvents can also push content to your club's social networking pages, including Facebook, Twitter and LinkedIn.

In order to do this, 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 and LinkedIn, this only needs to be done once. For Twitter, it needs to be done in each session (by Twitter policy.)

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:

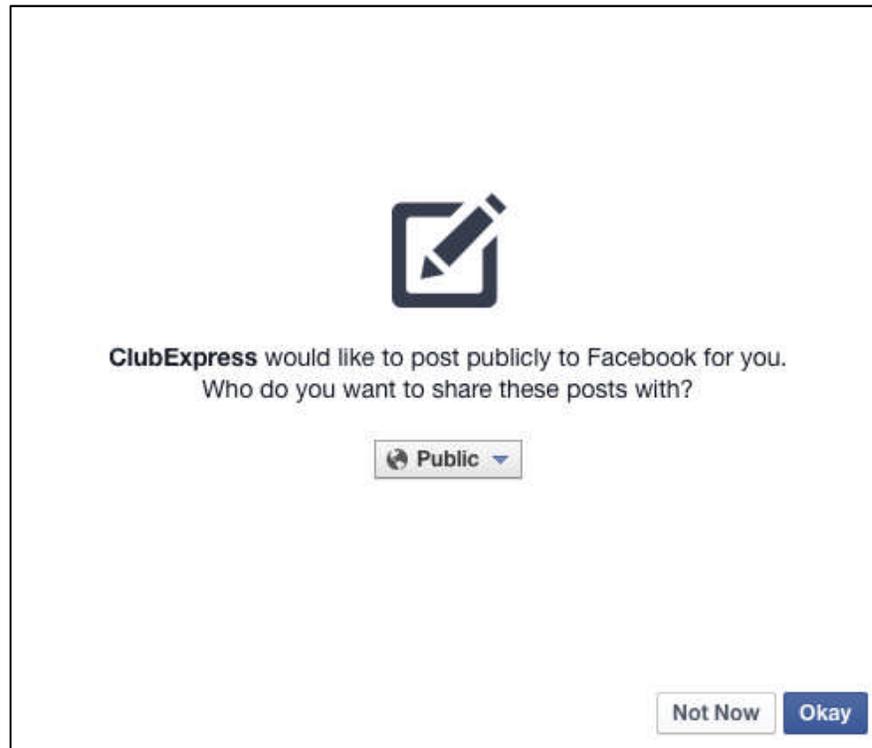


Figure A.1 – Authorizing ClubExpress to post to Facebook

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:

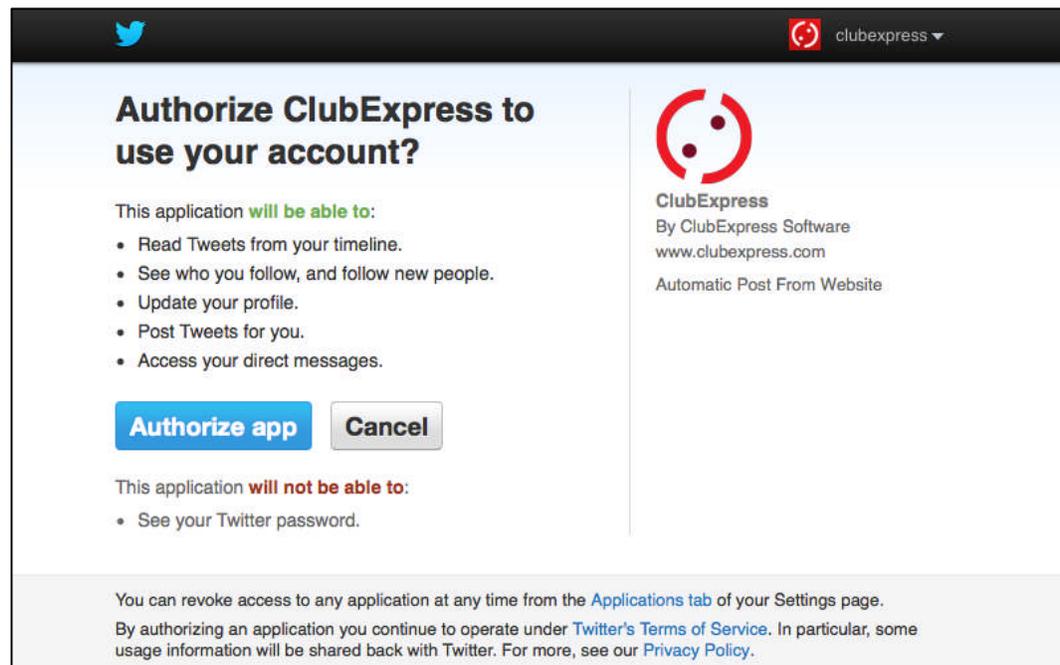


Figure A.2 – Authorizing ClubExpress to post to Twitter

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 that of the five bullets listed, the only one ClubExpress actually does is “Post Tweets for you.”

LINKEDIN

LinkedIn offers different types of pages for its members, including Personal, Company and Groups. ClubExpress is only able to work with Group pages so be sure your club is configured as a Group on LinkedIn.

When you try to post to LinkedIn the first time, you will see the following dialog:

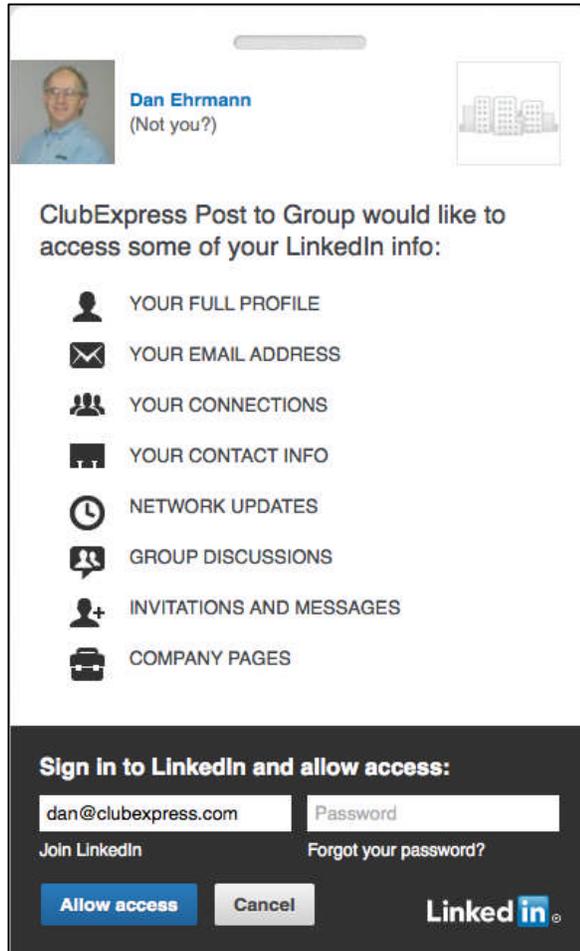


Figure A.3 – Authorizing ClubExpress to post to LinkedIn

Your LinkedIn group name and logo will be shown in the top left corner. Enter your username and password, then click **Allow access** to complete the authorization, or **Cancel** to close the window without authorizing.

Posting to a LinkedIn Group requires that the group is set to open posting, or that the admin who is making the post on the club's behalf has admin/post privileges for the group.

For all Services

Note that 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.