



User Manual

Version 5.2

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1 About Clublink

Clublink makes information easily accessible and provides the necessary tools for the operations of your club. This program is designed to simplify the day-to-day administration of your club with the ability to import and export data to your Central Office (governing body) if you have one.

More specifically, you can use Clublink to record all of your member's personal information, registration details and fees (which may be determined by your Central Office) and payments. Complete schedules for your club can also be created allowing you to register members in classes, assign teachers and charge appropriate fees for each class. Extensive reporting options are also available for detailed reports on your membership data.



1.1 This Manual

This manual contains complete step-by-step instructions for all aspects of Clublink and includes descriptions or explanations of each feature.

This information has been divided into five main sections as follows:

Introduction

Setting Up Your Clublink – customizing Clublink to suit your needs

Day-to-Day Clublink Operations – Clublink functions used on a regular (daily) basis

Special Clublink Operations – Not as frequently used functions

For Central Offices Only – Instruction for functions used by Central Offices

Conventions used in this manual:

⇒ Indicates step-by-step instructions for Clublink.

Bold Bold text indicates Clublink specific terms.

+Note+: Indicates an important tip in a set of instructions.

1.2 Minimum System Requirements

- ⇒ Any Microsoft® Pentium operating system with Windows® 98 or newer.
- ⇒ A minimum of 15 MB of available hard drive space.
- ⇒ 64 MB RAM.

1.3 Recommended System Requirements

- ⇒ Windows® XP or Windows® 2000.
- ⇒ 100 MB of available hard drive space.
- ⇒ 256 MB RAM.

1.4 Installation Procedure

If the Clublink 30-day evaluation is already installed:

- ⇒ Insert the CD and install the Unlock Evaluation Mode.
- ⇒ Run Clublink and enter your serial number using your Installation Key.

If Clublink is not already installed:

- ⇒ Insert the CD and install the Clublink Full Installation.
- ⇒ Remove the CD and reboot your computer.
- ⇒ Run Clublink and enter your serial number using your Installation Key.

+Note+: If you have a Central Office Setup Disk or you are Importing Data see [Receive Central Office Setup Disk](#) and [Import Club Data](#).

2 Clublink Application Launcher

Application Launcher is used to start the various Clublink Applications available to you. Access Clublink **Application Launcher** by double clicking on your Clublink icon on your desktop or by selecting Clublink on your Start Menu and then selecting **Application Launcher**. You can choose to Close Automatically, Minimize Automatically or Leave Open Application Launcher after you have opened a program. Use the **Options menu** in Application Launcher to indicate your preference. Below is a brief description of each program selection in Application Launcher.



Clublink – Click on **Clublink – The Leader in Integrated Sports** to open Clublink

Setup Wizard – A 7 step process that allows you to quickly set-up many defaults for your Clublink program. We suggest that you use Setup Wizard as the first step to getting started with Clublink.

+Note+: Clublink must be closed when using Setup Wizard.

One Step Backup – allows you to backup all of your Clublink data with the click of one button.

Utilities – allows you to perform various maintenance tasks on your Clublink database.

+Note+: Clublink must be closed when using Clublink Utilities.

Task Manager – allows you to perform specific tasks such as importing or exporting data to the web, creating a web page that includes your class schedules, generating an email list from a group of members, etc.

Chit System – designed for quick assessments of fees. Primarily designed for social clubs that use a chit system rather than accepting cash.

Cue Card Tour – a brief overview of Member Level, Class Level, finances and advanced features of Clublink.

Features Tour – a visual tour of Clublink's features that includes screen shots.

3 Setup Wizard

- ⇒ Ensure Clublink is not running.
- ⇒ From the Application Launcher, choose Setup Wizard.

See

[Page 2 - General Settings](#)

[Page 3 - Data Disks](#)

[Page 4 - Data Fields](#)

[Page 5 - Custom Drop Down Lists](#)

[Page 6 - Linked Registration Options](#)

[Page 7 - Miscellaneous](#)

3.1 Page 2 - General Settings

- ⇒ Enter your default area code, province, country and sport.

3.2 Page 3 - Data Disks

See

[Central Office Setup Disk](#)

[Import Club Data](#)

3.2.1 Central Office Setup Disk

If you have a governing body using Clublink, they will provide you with a setup disk/file that includes registration categories and fees for your members. This disk/file will also setup your Clublink to show which data fields are required and requested by your Central Office.

- ⇒ If you have a setup disk, choose **Have Disk** and proceed with the on screen instructions. Detailed instructions for [Receiving Central Office Setup Disk](#) can be found later in this manual.
- ⇒ If you do not have a setup disk, contact your Central Office.

3.2.2 Import Club Data

You may import your existing club from your Central Office.

- ⇒ If you have a data disk, choose **Have Disk** and proceed with the on screen instructions. Detailed instructions for [Importing Club Data from your Central Office](#) can be found later in this manual.
- ⇒ If you do not have a data disk, proceed to page 4.

3.3 Page 4 - Data Fields

The tabs across the top show you the 5 roles of members in Clublink (Competitive, Recreational, Coach, Judge, Member)



At this point you have the opportunity to specify which data fields you would like to use for each role of members. Don't worry if you aren't sure yet, you can always come back to the Setup Wizard and make changes.

By placing a in the box you will make that data field available to enter information. If you do not have a in the box, that data field will not be visible when using Clublink.

If you see a that is greyed out, you cannot remove it as it is a data field required by your Central Office.

Clicking on a ? beside the data field will give you a brief description of what the data field is used for.

- ⇒ Click on each of the five tabbed pages and select the data fields that you wish to use.

See

[Data Fields](#)

3.4 Page 5 - Custom Drop Down Lists

Two [Custom Drop Down Lists](#) are provided for each **Role**. The General Tab page for each member will have the Custom Drop Boxes. Here you can track specific items for each member. This will assist you with reporting and management of your members. (ex: how the member found your club).

+Note+: If a Custom Drop Down List is yellow, it has been defined by your Central Office and cannot be modified.

- ⇒ Select a **Role**.
- ⇒ Enter a title for each **Custom List Title Box**.



See

- [Adding a list item](#)
- [Modifying a list item](#)
- [Deleting a list item](#)

3.4.1 Adding a list item

- ⇒ Click **Add**.
- ⇒ Type the list item name in the box.
- ⇒ Click **Add** again to add another list item.

3.4.2 Modifying a list item

- ⇒ Select the list item you wish to change.
- ⇒ Click **Modify**.
- ⇒ Type the new list item name.
- ⇒ Choose **Yes** when asked if you would like to update all members.

3.4.3 Deleting a list item

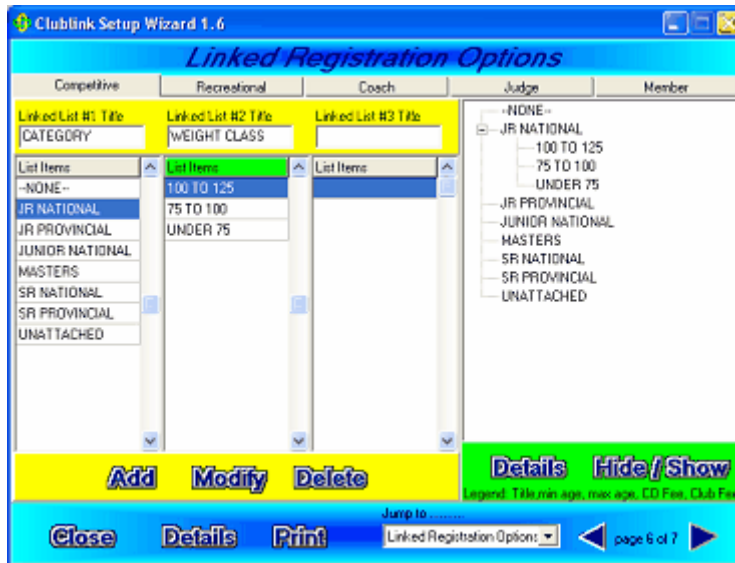
- ⇒ Select the list item you wish to delete.
- ⇒ Click **Delete**.
- ⇒ Choose **Yes** when asked if you would like to update all members.

3.5 Page 6 - Linked Registration Options

[Linked Registration Options](#) gives your Central Office the opportunity to create categories for your members, assign fees to those categories and assign minimum and maximum age requirements for those categories. If a Lined Registration Option List is yellow, it has been defined by your Central Office and cannot be modified. You can assign your own club fees to compliment your Central Office fees, you can also assign sub categories if they are unused by your Central Office. If you do not have a Central Office, you can setup your own categories,

fees and age requirements.

Each **Role** can have categories (linked list #1), sub categories (linked list #2) and sub sub categories (linked list #3).



+Note+: Each selection in Linked List #2 and #3 will be dependant on the selection in Linked List #1. When determining registration fees, Clublink will look for the first non-zero registration fee moving from right to left.

Linked List #1

- ⇒ Select a **Role**.
- ⇒ Type the title of Linked List #1 in the Title box (even if your Central Office has set up this list, you can type in your own title).
- ⇒ Click in the **List Items** column under Linked List #1.
- ⇒ Click **Add** to add a category to the list (if your Central Office has set up this list, you will not be able to add another category).
- ⇒ Type the **List Item** name and enter the appropriate ages and fees in the boxes.

+Note+: You can view the structure of your linked lists by clicking the **Hide/Show** button at the bottom right of the screen. You can also view the details of your linked lists by clicking the **Details** button.

Linked List #2

You can set up sub categories for each category in your Linked List #1.

- ⇒ Select a **Role**.
- ⇒ Click on a category in Linked List #1 for which you want to create sub-categories.
- ⇒ Click on the Linked List #2 column and then click **Add** near the bottom of the screen.
- ⇒ Enter the name, ages, and fees and click OK. You will notice the your new sub category on the tree diagram to the right of your linked lists.

Linked List #3

You can add sub categories to your Linked List #2 categories in the Linked List #3 column. Follow the same steps as you did for Linked List #2.

3.6 Page 7 - Miscellaneous

See

[Accounts](#)

[Custom Edit, Check and Date Boxes](#)

[Payment Types](#)

[Credit Card Types](#)

3.6.1 Accounts

Clublink allows you to track financial information in 3 different accounts for each member (ex. General, Travel, Fundraising).

⇒ Type the name of each account in the boxes provided at the top left of the screen.

+Note+: You do not have to name all 3 if you won't be using them all.

3.6.2 Custom Edit, Check and Date Boxes

For each **Role**, you have six custom boxes available on your registration form.

Custom Edit Boxes are used to type any information you would like to include for your members that you haven't already recorded in the data fields. (ex. Cell phone number)

Custom Check Boxes give you the opportunity to create your own check boxes for each role. (ex. Preferred membership status)

Custom Date Boxes are used to record dates that are not already recorded in the data fields. (ex. Anniversary date)

⇒ To set up your custom boxes first select the appropriate **Role** from the tabbed pages.

⇒ Decide on the type of boxes you want to create and then enter their names in the boxes.

+Note+: Select these Extra Boxes on Page 4 of the Setup Wizard in order for them to show up on your registration form in Clublink. They are located under the Miscellaneous section on the Data Fields page of Setup Wizard.

3.6.3 Payment Types

Under [Payment Types](#) you must setup which methods of payments you will be accepting from your members. (ex. Cash, Cheque, Credit Card, Debit)

- ⇒ To add a payment type click the **Add** button and type the name of the payment in the list item box.
- ⇒ If you wish to record a credit card type, number and expiry for this payment type, put a ✓ in the **Use Credit Card List** box. If this is not a credit card, leave the checkbox blank and click **OK**.
- ⇒ Click **Add** again to enter another payment type.

3.6.4 Credit Card Types

Under [Credit Card Types](#) you can add the types of credit cards you will be accepting (ex. VISA, MasterCard, American Express). This selection will appear in Clublink only when you have selected **Use Credit Card List** when entering the payment type.

- ⇒ You can add your credit card types by clicking the **Add** button and typing the name of the credit card.
- ⇒ Click **Add** again to enter another credit card type.

4 Setup Options - Found in Clublink

Under System Setup you can make font selections and colour selections.

- ⇒ From the **Options** menu on the Clublink [Opening Screen](#) select **System Setup**.
- ⇒ Select each of the menu items to customize Clublink's appearance to your liking.

See

[Administrator Password](#)

[Read-Only Password](#)

[Language](#)

[Tax System](#)

[Member Reports – Waiver Forms](#)

4.1 Administrator Password

The administrator password protects your data by only allowing those who know the password to access Clublink on your computer.

Setting the Administrator Password

- ⇒ From the **Options** menu on the Clublink [Opening Screen](#) select **Administrator Password**.
- ⇒ Select **Set**.

- ⇒ Enter the Password and click **OK**.
- ⇒ Re-enter the Password and click **OK**.

Turning the Administrator Password On or Off

- ⇒ From the **Options** menu on the Clublink **Opening Screen** select **Administrator Password**.
- ⇒ Select **Enable** to turn the Password **ON**, select **Disable** to turn the Password **Off**.

+Note+: To enable the password you must re-enter your password or set a new password.

4.2 Read-Only Password

The read-only password is used in conjunction with the administrator password. The read-only password allows users to view Clublink data but does not allow them to change any data. The **Add/Modify/Delete** buttons are disabled when a user accesses Clublink with the read-only password.

Setting the Read-Only Password

- ⇒ From the **Options** menu on the Clublink **Opening Screen** select **Read-Only Password**.
- ⇒ Select **Set**.
- ⇒ Enter the Password and click **OK**.
- ⇒ Re-enter the Password and click **OK**.

Turning the Read-Only Password On or Off

- ⇒ From the **Options** menu on the Clublink **Opening Screen** select **Read-Only Password**.
- ⇒ Select **Enable** to turn the Password **ON**, select **Disable** to turn the Password **Off**.

+Note+: To enable the password you must re-enter your password or set a new password.

4.3 Language

You can select English, French or German for operating Clublink.

- ⇒ From the **Options** menu on the Clublink **Opening Screen** select **Language**.
- ⇒ Select a language.
- ⇒ Click **OK**.

4.4 Tax System


The tax system is used to set the default tax for each financial edit box in Clublink. Taxes can be individually changed when required by double clicking the financial edit box and overriding the **Tax System** settings.

- ⇒ From the **Options** menu on the Clublink **Opening Screen** select **Tax System**.
- ⇒ Begin at the top left of the **Tax System** screen and enter the appropriate details.


Tax Structure		Example	
<input type="radio"/> No Taxes		\$100.00	\$100.00
<input type="radio"/> One Tax			
<input checked="" type="radio"/> Two Taxes			
Tax Style			
<input checked="" type="radio"/> Tax 1 on Cost + Tax 2 on Cost		\$107.00	\$7.00
<input type="radio"/> Tax 1 on Cost + Tax 2 on Tax 1		\$100.00	
Taxes			
Name: Gst/Tps	Percentage: 7 %		
Name: Pst/Tvq	Percentage: 8 %		
		\$108.00	\$8.00
			\$115.00

+Note+: An example of a \$100 purchase using the tax codes that you have selected is shown in the right side of the **Tax System** window.

4.5 Member Reports - Waiver Forms

Use the **Member Reports** button  to select one report to be associated with each **Role** in Clublink and one with **Class Level**. If you have a membership waiver form, this can be assigned and printed for any member with just one button click. We can make a custom waiver form for your club. Visit www.integratedsports.net for samples and ordering information.

- ⇒ Select **Member Reports** from the **Options menu** on the **Opening screen**.
- ⇒ Select an appropriate report from each drop box for each Role and for Class level report.
- ⇒ Click **OK** to save your changes.

To use the Member Reports, select a member in **Member Level** or **Class Level** and click the **Member Report** button  on the toolbar. This will generate the report that has been linked to the current Role.

5 Day to Day Operations

See
[Opening Screen](#)
[Clubs](#)
[Members](#)

5.1 Opening Screen

The Clublink opening screen is your access to each of the three levels of Clublink – Classes, Members and Clubs.

- ⇒ The **Classes** button gives you direct access to your schedules and the class information in those schedules.
- ⇒ The **Members** button takes you directly to all of your member data for each of the five roles.
- ⇒ The **Clubs** button allows you to view or edit your club information including mailing address, phone numbers, your logo and other club details.

The opening screen also gives you access to a list of upcoming birthdays and a quick way to backup your data.



See

[Administrator Password](#)

[Read-Only Password](#)

[Language](#)

[Tax System](#)

[Member Reports – Waiver Forms](#)


[Receive Central Office Setup Disk](#)

[Import Club Data](#)

[Export Club Data](#)

5.2 Clubs



⇒ From the opening screen, click the **Clubs** button  to view or edit your club information.

Postal

⇒ Click on the **Postal** tab to enter your club name, address, phone numbers.

+Note+: The club mailing address can be included on member invoices.

The screenshot shows the Clublink software interface with the 'Postal' tab selected. The form contains the following data:

Club Name	ACROBATS		
Address Line 1	412 WESTON ROAD		
Address Line 2			
City	VICTORIA		
Province	Postal Code	Club Number	
BC	V8Z 3G9	011	
Phone Number	Fax Number	Satellite	Next Card n°
(250)479-5555	(250)479-5555	<input checked="" type="checkbox"/>	25

The Registration Status section shows a green traffic light icon, the word 'Registered', and an Expiry date of 2003-08-31. The interface includes OK and Cancel buttons at the bottom.

Registration Status

Located on the **Postal** tab **Registration Status** will show you your current affiliation with your Central Office (or governing body). A green light indicates that your club registration with your Central Office is in good standing and a red light indicates that you are not currently registered with your Central Office. The **Expiry** lets you know when your registration will expire. Your registration status will automatically update when your Central Office sends you confirmation of your registration.

Club Number

A number assigned to your club by your Central Office.


Next Card No.

Clublink generates membership card numbers automatically for new members. They are sequentially numbered with additional information depending on your sport and location. Consult your Central Office for your membership numbering method.

+Note+: If you **do not have a Central Office**, you can ignore the Registration Status and Club Number section of the Postal tab page.

- ⇒ Click the **Contact** tab and enter the e-mail address, name and phone number for your club's primary contact person.
- ⇒ Click the **General** tab and enter any additional information that pertains to your club.

Club Logo

- ⇒ Save your club logo (bmp or jpeg file) to Clublink\Images folder.
- ⇒ From the Opening Screen click the **Clubs** button.
- ⇒ Select the **Logo** tab.
- ⇒ Click the **See File List** button  at the bottom of the window.
- ⇒ Select a file.

5.3 Members

The **Members** section of Clublink includes all your member data organized into five **Roles**. The roles are pre-defined as Recreational, Competitive, Coach, Judge and Member. When you begin using Clublink, you will either have Member data in your system (as described in Page 5 (data disks) of Setup Wizard) or you will need to enter your current Member data.

See

[View Order of Members](#)

[Active Members](#)

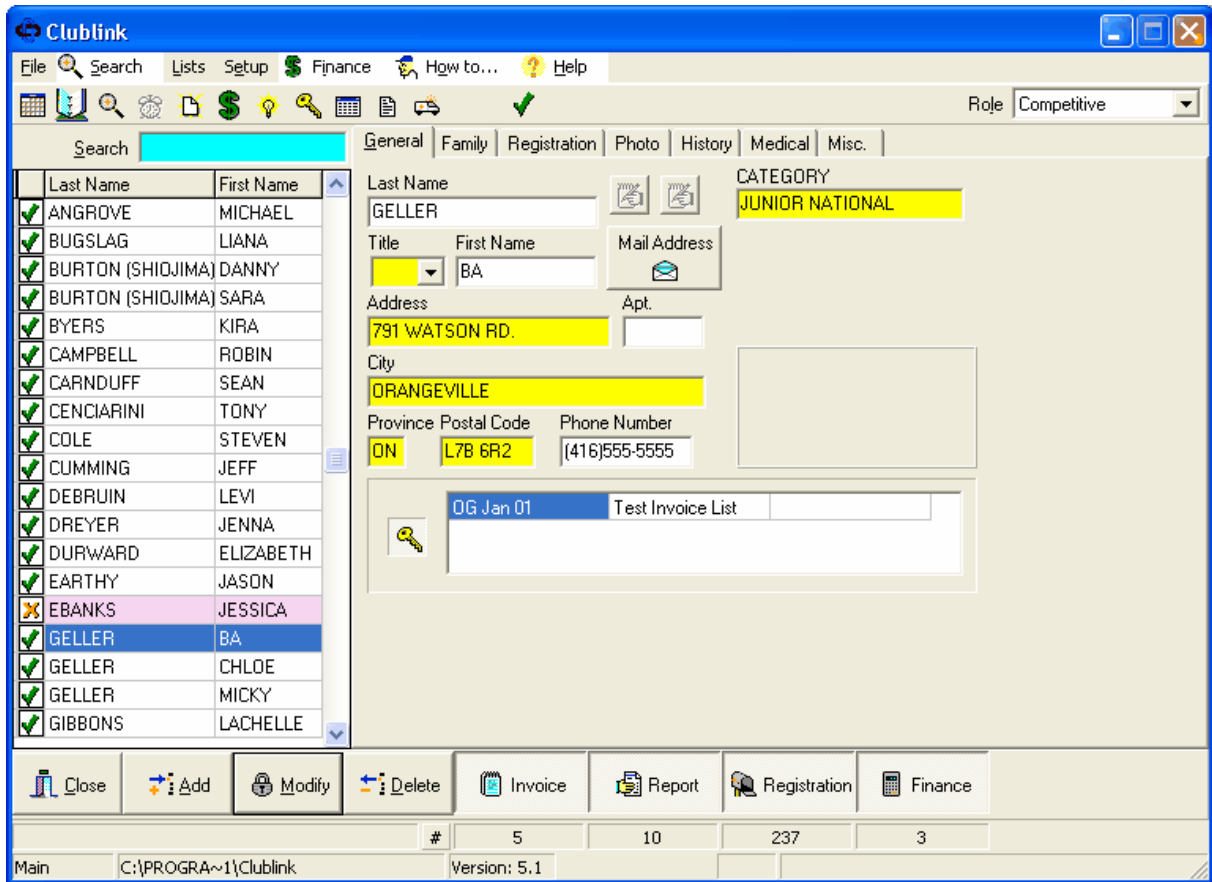
[Financial Mode](#)


[Registration Form](#)

5.3.1 Viewing





- ⇒ Click on the **Members** button on the Opening Screen.
- ⇒ In the top right corner of the screen, select the **Role** that you wish to view from the drop down list. The member list will appear on the left side of your screen.
- ⇒ Click on the name of the member you want to view. If you don't see the name on your screen, type the last name in the **Search** box above the member list.
- ⇒ Click on each of the seven **Tabbed Pages** to view all of the member's information.



+Note+: If you aren't sure which **Role** the member is in, you can click the **Search All Roles** button  on the toolbar and type the last name of the member. When you have found the right member, click **Select** to view that member's details. If you think you may have lost a member, there are many other search options from the **Search All Roles** button (ex. Phone number).

5.3.2 Active Members

When viewing the member list, you will notice green ✓ or red ✗ to the left of the member list. These symbols indicate whether or not the member is active in your club.

- ⇒ To view **Active Members Only** click on the  on the toolbar.
- ⇒ To switch back to viewing all members, click on the  again.


5.3.3 Financial Mode

You can also choose to view your members in **Financial Mode**. This will allow you to see which members have outstanding fees at a glance.

+Note+: We recommend that you use Financial Mode only when it is necessary as it slows down the program operation.

- ⇒ From the Clublink **Opening Screen** choose the **Options** menu.
- ⇒ Click **Financial Mode**.

- ⇒ Click the checkbox to turn Financial Mode on.
- ⇒ Select which accounts you would like to recognize.
- ⇒ Select where you would like to be able to see the financial indicator.
- ⇒ Click **OK**.

When you view your Member List, Phone Lookup, or Class Lookup, you will see a  beside the members who have outstanding account balances.

5.3.4 Registration Form

See

[Adding Members](#)

[Editing Members](#)

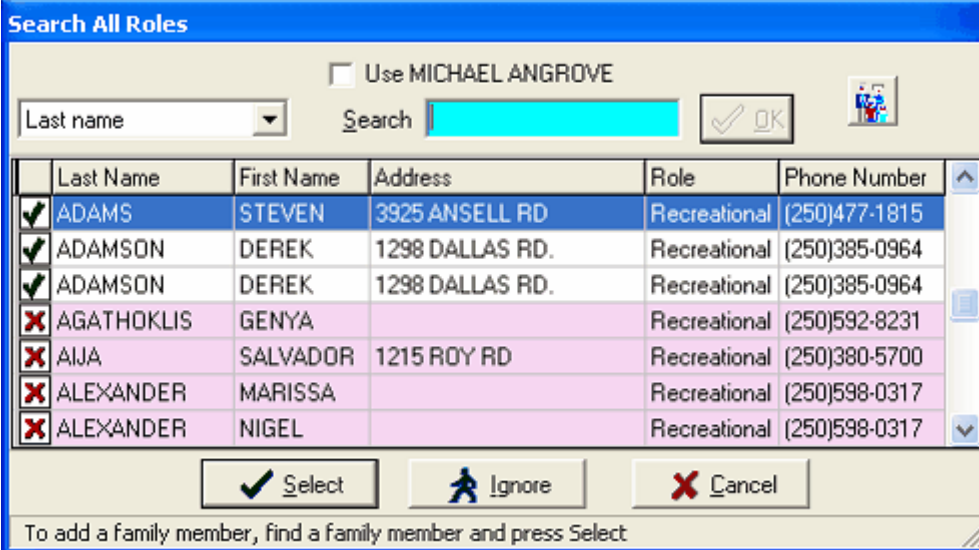
5.3.4.1 Adding Members

The Registration Form is a two-page form that includes the selected Data Fields (see Page 4 – Data Fields in Setup Wizard). It is used when adding a new member to your database and is also used to edit existing member information.

+Note+: You can also add new members directly from Class level. See Classes/Adding Members.

- ⇒ In the top right corner of the Member screen, select the **Role** that you want to add the member to. (ex. competitive, recreational, coach, etc.)
- ⇒ From the bottom of the Member screen click the **Add** button.
- ⇒ Type the last name of the person you are adding in the search box to ensure they are not already in your system.

+Note+: You can choose not to search by clicking the **Ignore** button at the bottom of the search window if you are certain the member does not already exist in the system.



	Last Name	First Name	Address	Role	Phone Number
✓	ADAMS	STEVEN	3925 ANSELL RD	Recreational	(250)477-1815
✓	ADAMSON	DEREK	1298 DALLAS RD.	Recreational	(250)385-0964
✓	ADAMSON	DEREK	1298 DALLAS RD.	Recreational	(250)385-0964
✗	AGATHOKLIS	GENYA		Recreational	(250)592-8231
✗	AJJA	SALVADOR	1215 ROY RD	Recreational	(250)380-5700
✗	ALEXANDER	MARISSA		Recreational	(250)598-0317
✗	ALEXANDER	NIGEL		Recreational	(250)598-0317

- ⇒ If you do not find the person click the **Ignore** button **or** if you find a family member of the person you are adding, you can click **Select** and then choose **No** to indicate that you found a family member. This will allow you to enter the new member's information with much of it automatically filled in.
- ⇒ Members should not exist in a role more than one time. If you found the member in the role where they are

- to be added, then **Select** the member and press **No to Add Again**.
- ⇒ Fill in the first page of the Registration Form by typing in the necessary information (highlighted areas are **Required Information** and should not be left blank).

The screenshot shows a registration form for 'BA GELLER'. The form is divided into several sections:

- Main Information:** Last Name (GELLER), Title (BA), First Name (BA), Address (791 WATSON RD.), City (ORANGEVILLE), Province (ON), Postal Code (L7B 6R2), Phone Number ((416)555-5555), and CATEGORY (JUNIOR NATIONAL).
- Contact n° 1:** Last Name (GELLER), First Name (MITCH), Phone Number ((250)333-3333), and Relationship (SPOUSE).
- Contact n° 2:** Last Name, First Name, Phone Number ((250) -), and Relationship.
- Registration:** Age (30), Sex (F), CLUB (2000-10-01), Start (2000-10-01), End (2004-10-31), Birthdate (1974-02-06), Current, Photo Name, and Date. There are checkboxes for Active and Renewal.
- Bottom:** Role (Competitive), OK, Cancel, and a legend for Required Information (F8 = Paste from clipboard ???).

- ⇒ Click **Next** at the bottom right of the screen to proceed to the second page of the form and fill in the remaining information.

BA GELLER

Medical

Medical Number
444 555 66689

Misc.

Work Number [416]222-3333 Fax Number [416]333-2222 Employee

On Board

Cell Phone # 613-555-4444

e-mail address bag@telus.net

Emergency

Last Name WHITE

First Name CHRISTOPHER

Doctor

Phone Number (250) -

Role Competitive

OK Cancel

Required Information
F8 = Paste from clipboard ???


Previous

- ⇒ Check the bottom left corner of the screen to ensure that you are adding the member to the correct **Role**. This can also be used in the case that a member changes roles during the season.
- ⇒ Click **OK** to close the form.
- ⇒ You can choose to see the [Member Worksheet](#) by clicking **OK** or click **NO** to skip.

5.3.4.2 Editing Members

- ⇒ Click on the member you want to edit in the Member List or use the **Search** feature to find the member.
- ⇒ Click the **Modify** button at the bottom of the screen. Alternately, you can double click the member.
- ⇒ The [Registration Form](#) will come up for you to edit the Member details.
- ⇒ Click **Next** to make changes on the second page of the registration form.
- ⇒ Click **OK** when you are finished making changes.
- ⇒ You can choose to see the **Member Worksheet** by clicking **OK** or click **NO** to skip.

5.3.5 Member Mailing Address

The member's mailing address  is often the same as the address entered on the **General** tabbed page. You can specify an alternate mailing address for a member.


Ex: Change the name on the mailing address to mail invoices to the parent rather than the child.

Some reports use the information on the General tabbed page whereas some other reports will use the Mailing Address. If you make a change to the member's address, you will be asked if you would like to update the mailing

address too.

+Note+: Labels can be printed using either address. There is an Avery 5160, 5161 and 5162 reports setup for mailing address.

6 Member Worksheet

The **Member Worksheet**  assesses the member's file to determine which automated actions (ex. charge registration fees, assign a membership card, prepare member for export to central office, charge class fees) need to be performed.

- ⇒ Check the **Active** box to indicate a member is active. This should already be checked.
- ⇒ Check the **Registration** box to add the member to the **Registration Drop Button** and have them prepared for export to the **Central Office**. Adding members to the **Registration Drop Button** is also a handy way to know how many members you have registered during your session.
- ⇒ Check the box for your **Central Office Registration Fee** (ex. Ontario Gymnastics Fee). This fee is defined in your **Linked Registration Options** (selected on the Registration Form) and is usually assessed once per season.

+Note+: If you do not have a Central Office, you don't need to check this box.

- ⇒ Check the box for your **Club Registration Fee** if you have one. This fee is defined in your **Linked Registration Options** (selected on the Registration Form) and is usually assessed once per season.
- ⇒ Check the **Next Card Number** box to have the next membership card created for this member.
- ⇒ Click **OK** to save the changes and leave the **Member Worksheet** or **Cancel** to leave without applying the changes.

RANDY WALKER

Active

Registration

?

Program Reg'n

Next Card n°


\$75.00 Total

The **Restore** button at the bottom of the Member Worksheet can be used to restore the original selections in the Member Worksheet and recalculate the Registration Fees.

The **Uncheck All** button will remove the checks from all boxes except the **Active** box.

+Note+: When registering a member in the [Member Level](#), class fees, pro-rated fees and discount options will not be visible on the Member Worksheet. These options are available when you add a member to a specific class. (see using the **Member Worksheet** in [Class Level](#)).

7 Fees

Fees can be viewed by clicking the **Fees** button  on the toolbar. You will also be prompted to view the **Fees** for a member after closing the [Member Worksheet](#).

There are three tabbed pages in the **Fees** section of Clublink.

[Payments](#) - includes a detailed list of all payments made to the club by the Member.

[Summary](#) - is a quick view of all three of the member's accounts.

[Fee Assessments](#) - is a list of all fees charged to the member with a record of what is due, what's been paid and what the balance is for each assessment.

7.1 Fee Assessments

Fees are assessed by member and may be viewed for an **individual member** or for the entire **family** by selecting individual or family in the bottom right corner.

+Note+: Family is defined as individuals with the same phone number.

Details	Due	Paid	Balance	Name
Registration	\$50.00	\$0.00	\$50.00	RANDY
Program Reg'n	\$25.00	\$0.00	\$25.00	RANDY

Current: \$75.00
 Past 30: \$0.00
 Past 60: \$0.00
 Past 90: \$0.00

Balance: \$75.00

Individual (selected)
 Family

See

[Fees](#)

[Adding a Fee](#)

[Modifying a Fee](#)

[Deleting a Fee](#)

7.1.1 Adding a Fee

- ⇒ Click the **Add** button at the lower left of the screen.
- ⇒ Click the **drop down box** at the bottom of the window to select the **type of fee** you want to add. If the type you want is not in your system yet, you can add it by typing the name of the fee in the **details** box.

+Note+: It is important to be consistent with fee naming to facilitate financial reporting.

- ⇒ Enter the **amount** of the fee.
- ⇒ Click **OK** to complete the fee assessment.

+Note+: There is an on screen calculator for your convenience.

See

[Fees](#)

[Fee Assessments](#)

7.1.2 Modifying a Fee

- ⇒ Click on the fee you wish to modify.
- ⇒ Click the **Modify** button at the lower left of the screen.
- ⇒ Change the name and/or amount of the fee.
- ⇒ Click **OK**.

See

[Fees](#)

[Fee Assessments](#)

7.1.3 Deleting a Fee

- ⇒ Click on the fee you wish to delete.
- ⇒ Click the **Delete** button in the lower part of the screen.
- ⇒ Click **OK** to delete the fee assessment.

+Note+: It is a good idea to only delete fees that have been assessed in error or if the amount due is equal to the amount paid. You can delete any fee but this can sometimes confuse the member on their invoice.

See

[Fees](#)

[Fee Assessments](#)

7.2 Payments

See

[Fees](#)


[Applying a Payment](#)

[Modifying a Payment](#)

[Deleting a Payment](#)

7.2.1 Applying a Payment

You can apply a payment to outstanding fees from the **Fee Assessments** tab, the **Summary** tab or the **Payments** tab.

- ⇒ Click on the **Payments** button  located near the upper right of the window.

RANDY WALKER

Receipt N^o 0410011 Date: 2004-10-01

pay to the order of **BOARDWORKS**

Amount \$50.00

Payment type Credit Card

Credit Card

Visa

Expiry 08/07

Credit Card N^o 5656787897975789

Name on card Randy Walker

Receipt #	Amount	Date
0410011	50.00	2004-10-01
0410012	50.00	2004-11-01
0410013	50.00	2004-12-01

RANDY WALKER

OK Cancel

Cancel Multiple Payments Next

Close Balance \$75.00

- ⇒ Select the **date** of the payment (or the date of the first payment if you are entering multiple payments).
- ⇒ Enter the **Amount** of the payment. Enter the amount of the most common payment for multiple payments.
- ⇒ Select the appropriate **Payment Type** from the drop box.
- ⇒ If the payment type is a **Credit Card**, enter all requested details.
- ⇒ For a **single payment**, click **Next**, click on the fee or fees the member is paying, then click the **Apply** button. Click the **OK** button to save the changes.

For multiple payments, click **Multiple Payments**, enter the number of payments being made and click **OK**, review the dates and amounts of the payments (you can edit the dates and the amounts as necessary by double clicking on the list of payments shown in the top right corner of your screen), click **OK**, then apply each payment to the corresponding fee by selecting the fee and then clicking **Apply**. Click the **OK** button to save the changes.

See

[Fees](#)

[Payments](#)

7.2.2 Modifying a Payment

You can **modify** the date of a payment from the **Payments** tab in the Fees window. You **cannot** modify a payment that has been deposited.

- ⇒ Click on the **Payments** tab in the Fees window.
- ⇒ Select the **payment** you want to modify.
- ⇒ Click **Modify**.
- ⇒ Change the date of the payment.
- ⇒ Click **OK**.

See

[Fees](#)

[Payments](#)

7.2.3 Deleting a Payment

You can **delete** a payment from the **Payments** tab in the Fees window. You **cannot** delete a payment that has been deposited.

- ⇒ Click on the **Payments** tab in the Fees window.
- ⇒ Select the **payment** you want to delete.
- ⇒ Click **Delete**.
- ⇒ In the **Details** window ensure that you are deleting the correct payment.
- ⇒ Click **OK**. You will notice that the **Balance** in the bottom centre of your screen has changed to reflect the deletion.

See


[Fees](#)

[Payments](#)

8 Accident Reports

Accident Reports are used to record the details of any accident or injury that may occur at your club. Your Central Office may have sent you a template for recording accident details (the template would have been received on your [Central Office Setup Disk](#)). If you do not have a template for your Accident Reports, you can create one using the [Medical Template](#) feature (see creating a Medical Template).

8.1 Completing an Accident Report

- ⇒ In [Member level](#) select the appropriate member from the member list.
- ⇒ Click the [Accident Report](#) button .
- ⇒ Click the **Add** button.

- ⇒ Enter a description of the accident in the **Description** box.
- ⇒ Edit the date in the **Date** box if necessary.
- ⇒ Press **F3** on your keyboard to proceed to the first **Data Entry Area** (data entry areas are enclosed in < >).
- ⇒ Enter the appropriate information and press **F3** again to proceed to the next **Data Entry Area**.
- ⇒ Complete the form.
- ⇒ To print the **Accident Report**, select **Print** from the **File menu** or click **Close** to close the report and save your changes.
- ⇒ Close the Accident Reports window.

+Note+: When you are preparing your data to export to your Central Office, you will be given an option to include Accident Reports.

See
[Accident Reports](#)

9 Classes

In **Class Level** you have the ability to create an unlimited number of schedules for all of your classes and programs. Within each schedule you can create classes, assign teachers and times, add members to each class and setup class costs to automatically charge fees when a member is put into a class. **Class Level** is accessed by

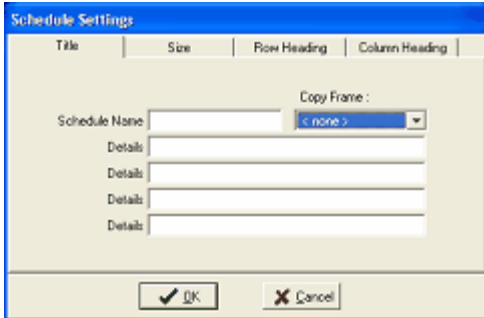
clicking the **Classes** button  from the [Opening Screen](#).

See

[Creating a Schedule](#)
[Modifying a Schedule](#)
[Creating Classes](#)
[Copy/Paste a Class Structure](#)
[Moving a Class](#)
[Adding to a Class](#)
[Make-up Class](#)
[Searching all Schedules](#)
[Attendance](#)

9.1 Creating a Schedule


⇒ Use the scroll buttons in the top right of the [Class Level](#) screen to scroll right until you see a tab called **NEW OR** from the **Tools** menu, select **Schedules** then select **Add** then click **OK**.

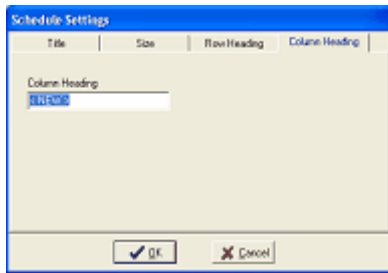


- ⇒ On the tabbed page called **Title** enter the **Schedule Name**. This name will appear on the tab for this schedule and in the drop list of schedules.
- ⇒ Use the **Details** boxes for a description of the schedule (ex. dates that the schedule is in effect, days the classes are offered, location of the classes). The **Details** of the schedule name will be included on all Class reports.
- ⇒ In the **Copy Frame** drop box, you can select an existing schedule and copy it's frame (row headings, column headings, class structures and fees) to create your new schedule.
- ⇒ On the tabbed page called **Size**, enter the number of columns and rows you would like to use in your schedule.

+Note+: You can adjust the schedule size later if necessary.

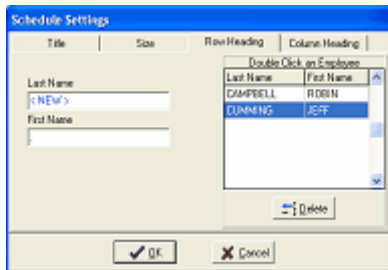
- ⇒ Click **OK** when you have completed the **Title** and **Size** tab pages.
- ⇒ On the new schedule, double click on a column heading to name the column. Enter the name of the column in the **Column Heading** box (column headings are often the times the class is offered). Repeat this step for each column.





⇒ On the new schedule, double click on each row heading to name the row. You will be given the option to select from your employee list for your row headings.

+Note+: You are not obligated to use employees or teachers for your row headings. You may simply put any heading you like in the **Last Name** box. Members marked as **Employees** on the **Miscellaneous** registration tabbed page will appear in the Employee list.



See
[Classes](#)

9.2 Modifying a Schedule

Schedule Name

- ⇒ To modify the **name** of a schedule, click the **Tools menu**, select **schedule**, then select **modify**. Alternately, double click the cell at the top left of the schedule.
- ⇒ Edit the name of the schedule.
- ⇒ Click **OK**.

Rows - Add, Modify, Delete

- ⇒ From the **Tools menu**, select **Rows**.
- ⇒ Select **Add** to add a row to your current schedule, then enter the **Teacher(Row Name)**, click **OK**.
- ⇒ Select **Modify** to change the name of an existing row. Alternately, double click the yellow row heading.
- ⇒ Select **Delete** to delete an existing row.

+Note+: Deleting a row will delete all class data in that row.

Columns - Add, Modify, Delete

- ⇒ From the **Tools menu**, select **Column**.
- ⇒ Select **Add** to add a column to your current schedule, then enter the **Column Name**, click **OK**.
- ⇒ Select **Modify** to change the name of an existing column. Alternately, double click the yellow column

heading.

⇒ Select **Delete** to delete an existing column.

+Note+: Deleting a column will delete all class data in that column.

Adjusting Column Width

⇒ Put your cursor on the line between two column headings.

⇒ When cursor changes to a double arrow, click and drag to desired width.

+Note+: Adjusting the column width is only temporary and is often used for preferred printing results.

See

[Classes](#)

9.3 Creating Classes

In the **Class level** you can add new classes, add members to those classes, code the classes for easy reference and automatically charge fees to members registering in a class.

See

[Classes](#)

[Adding a New Class](#)

[Modify a Class](#)

[Deleting a Class](#)

9.3.1 Adding a New Class

⇒ From the **Schedule** view, double click on the cell where you want to add a class.

⇒ Click on the **Advanced** button in the bottom right of the open class screen.

The screenshot shows the 'Advanced Class Settings' dialog box. It contains the following sections:

- Additional Teachers:** A table with columns 'Last Name' and 'First Name' and rows 1 through 5.
- Prices:** A table with columns 'Name' and 'Cost' and rows 1 through 6, each with a '\$0.00' value.
- Pro Rated Prices:** A table with columns 'Name' and 'Cost' and rows 1 through 2, each with a '\$0.00' value.
- Font:** A section with 'Font' (Black) and 'Color' (White) dropdown menus, a 'Sample' button, and a 'Class Description' dropdown menu.
- Class Description:** A text box containing '000000' and a 'Maximum' spinner set to '0'.
- Buttons:** 'Clear All' buttons for each section, 'OK', and 'Cancel' buttons at the bottom.

⇒ Enter a **Class Description** in the class description box.

+Note+: This description will appear in the cell on your schedule.

⇒ You may **Colour code** the class by selecting a colour for the font and a colour for the background.

⇒ Enter the **maximum number** of participants for the class.

- ⇒ Add the names of any **Additional Teachers**.
- ⇒ Add the names of the **prices** you will be charging for the class and the amounts.
- ⇒ Add **pro-rated fees**.

+Note+: The pro-rated fee usually is the amount that will be discounted if a member is absent from one class or registers late.

- ⇒ Click **OK** to save your settings.

See

[Classes](#)
[Creating Classes](#)

9.3.2 Modifying a Class

- ⇒ From the **Schedule** view, double click on the **Class** that you wish to modify.
- ⇒ Click on the **Advanced** button in the bottom right of the class screen.
- ⇒ Edit the class settings.
- ⇒ Click **OK** to save the new settings.

See

[Classes](#)
[Creating Classes](#)

9.3.3 Deleting a Class

- ⇒ Select the **Class** that you want to **Delete**.
- ⇒ Press the **Delete** button on your keyboard.
- ⇒ Click **OK** to confirm the delete.



See

[Classes](#)
[Creating Classes](#)

9.4 Copy/Paste a Class Structure

Copying and pasting a class structure will result in a new class with the exact settings of the class you copied however, the new class will be empty (no members in it).

+Note+: You can copy a class structure from one schedule to another.

- ⇒ To **Copy a Class Structure**, select the class you want to copy.
- ⇒ Click on the **Copy Class** button  on the Class level toolbar.
- ⇒ Select the cell where you want the new class to be.
- ⇒ Click on the **Paste Class** button  on the Class level toolbar.

See

[Classes](#)

9.5 Moving a Class

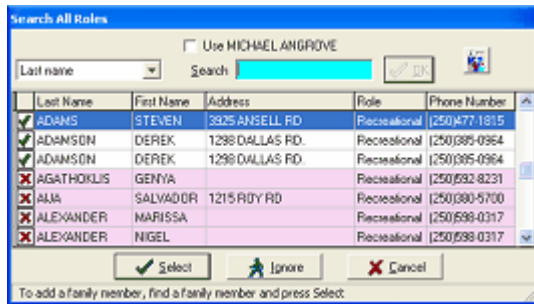
⇒ Drag any class to a new location in the schedule. Drag a class onto an existing class to swap them.

See
[Classes](#)

9.6 Adding Members to a Class Method 1

It is best to add members to a class after you have used the **Advanced** button to adjust all the settings for the class (particularly the prices for the class).

- ⇒ Double click the **Class** that you will be adding the member to.
- ⇒ Click the **Add** button.
- ⇒ From the **Search All Roles** window, type the last name of the member you wish to add. If you found the member, select them and then click the **Select** button, then choose **Yes**. If you are adding a new member to the class, click **Ignore**.



- ⇒ Update the member's information or add the new members information to both pages of the [Registration Form](#) then Click **OK**.
- ⇒ Click **Yes** when asked if you would like to see the [Member Worksheet](#).
- ⇒ On the **Member Worksheet** ensure that the **Active** box is checked, check the **Registration** box if this is a new member or if you have updated any member information that should be passed on to your Central Office. This box will be checked automatically if the member is not already on the Registration Drop Button.
- ⇒ For a new member, the **Registration** boxes will be checked (ex. **Central Office Fee**) For an existing member, the **Registration** boxes will only be checked if the member has not yet been charged these fees for the current season.

The screenshot shows a software window titled 'DANIELLA HALLAM'. It contains several sections for configuring fees:

- Active:** Active
- Registration:** Registration
- Registration Fee:** \$70.00
- Program Reg'n:** \$0.00
- Rest Cost:** Rest Cost
- Prices:** \$175.00, Camp 4
- Fee Options:** A list of months from September to May, each with an unchecked checkbox.
- Pro Rated Prices:** Pro Rated Prices, 1, \$25.00, Missed Class
- Total:** \$245.00
- Discount:** 0%

Buttons at the bottom include OK, Restore, Uncheck all, and Cancel.

⇒ Select the appropriate **Price** to charge.

+Note+: You can use the **Fee Options** section to charge monthly fees rather than a one time class fee (ex. a member registers with your club for the entire season but pays their fees monthly). See setting up **Fee Options**.

- ⇒ If desired, check the **Pro-rated** box and enter a number for the **number of pro-rated fees** to be calculated. (ex. a member is injured and will miss the first three classes of the session)
- ⇒ If desired, check the **Discount** box and enter a discount amount as a percent of the total price (ex. the second family member registered for the same class may receive a 10% discount).

+Note+: Discounts do not apply to Registration Fees.


- ⇒ Click **OK** to save changes to the **Member Worksheet**.
- ⇒ Click **Yes** to view the **Fees** page or click **No** to go back to **Class level**. Normally we view the **Fees** page if we have a payment ready to apply.

+Note+: You can use the **Restore** button at bottom of the Member Worksheet to restore the original settings. You can use the **Uncheck All** button to uncheck all the boxes on the Member Worksheet except the **Active** box.

9.7 Adding Members to a Class Method 2

- ⇒ Open the **Search All Roles** window.
- ⇒ Drag a member directly into an open class.

+Note+: You will not be prompted to see the **Registration Form**, **Member Worksheet** or **Fees window**. These can be opened manually with their respective speed button.

+Note+: Dragging a member directly into a class will place the member in Pending Mode, to remind you that you have not processed them yet. Pending mode can be turned on and off via the Pending  speed button.

See
[Classes](#)

9.8 Moving a Member to a Different Class

- ⇒ Open the **Class** the member is registered in.
- ⇒ Open the **Class** the member is switching to.
- ⇒ Drag and drop the member from the current class to the new class.
- ⇒ Click **OK** to confirm the move.

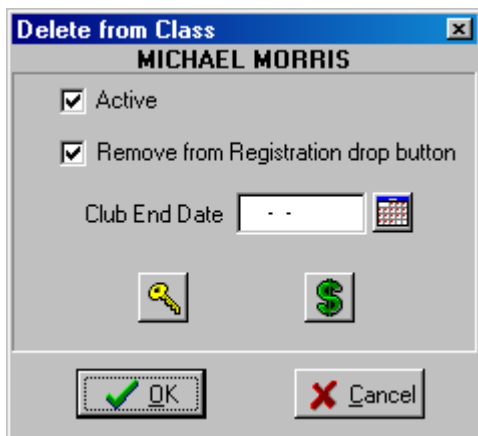
+Note+: If the new class has a different fee structure you will be notified. However, you will have to make any necessary adjustments on the members Fee Assessments page in the Fees window manually.(see Fee Assessments).

See
[Classes](#)

9.9 Removing a Member from a Class


- ⇒ Open the **Class**.
- ⇒ Select the member.
- ⇒ Click the **Delete** button at the bottom of the Class window.
- ⇒ Make the necessary **Delete from Class** selections.

+Note+: If you uncheck the **Active** box in the **Delete from Class** window, the member will become inactive. If the **Remove from [Registration Drop Button](#)** is checked, the member will be taken off the Registration Drop Button.



See
[Classes](#)

9.10 Searching all Schedules

- ⇒ From the **View menu** in Class level select **Search**. Alternately click the **Search All Schedules** button  on the toolbar.
- ⇒ Type the last name of the member in the **Search** box.

+Note+: You have the option to search the current schedule only by checking the **This Schedule Only** box.






- ⇒ Select a member to view the class information on the right side of the **Search Results** window.
- ⇒ To open a particular class, click the **Show Class** button at the bottom of the **Search Results** window.

See
[Classes](#)

9.11 Member Status in a Class

You can change a **members status** in a class to **Pending** (ex. has signed up for the class but has not paid yet), **Wait List** (ex. wants to register in the class but the class is full so they have to wait for someone to drop out), or **Trial Class** (ex. will try the class once then the member or the teacher will decide about registering for the class). The **members status** is shown by the indicator to the left of the **Age** column in the class list.

- ⇒ To indicate **Pending** , **Wait List**  or **Trial Class**  status for a member in a class, select the member, then select the appropriate status button from the Class level toolbar.
- ⇒ To turn off a status indicator, select the member, and then select the appropriate status button from the Class level toolbar.

See
[Classes](#)

9.12 Make-up Class

A member can be temporarily placed in another class for a **Make-up Class** and will automatically be removed after the date specified. You can also credit a member with a make-up class (for a missed class) using the **Make-up Class List**.

- ⇒ Open the class that the member is currently in.
- ⇒ Open the class that the member will be doing his/her make-up in.
- ⇒ Drag and drop the member from the current class to the make-up class.
- ⇒ When prompted, click **No** to indicate that this move is for a make-up class only.
- ⇒ In the **Make-up Class** window, set the date for the member to return to his/her regular class and set the date for the member to leave the make-up class. The member will be added to the **Make-up Class List** and removed automatically.

+Note+: If the date is unknown, check the **None** box.

- ⇒ Click **OK**.

See

[Classes](#)

[Credit a Make-up](#)

[Modifying Return Dates](#)

[Restoring a Member](#)

9.12.1 Credit a Make-up

⇒ To **credit** a member with a **Make-up Class** when a member has missed a class, select the member in the class.



⇒ Click the **Make-up Class List** button .

⇒ Set the date for the member to return to the original class.

+Note+: If the date is unknown, check the **None** box.

⇒ When the makeup class is determined, drag the member from the **Make-up Class List** into the make-up class and schedule the return date.

See

[Make-up Class](#)

9.12.2 Modifying Return Dates

⇒ From the **View** menu select **Make-up Class List**.

⇒ Select the member you want to modify.

⇒ Click **Modify**.

⇒ Make necessary changes to dates.

⇒ Click **OK**.

9.12.3 Restoring a Member

⇒ From the **View** menu select **Make-up Class List**.

⇒ Select the member.

⇒ Click **Resotre**.


9.13 Attendance

Clublink has a built in Attendance Module as well as close to 100 attendance reports.


See

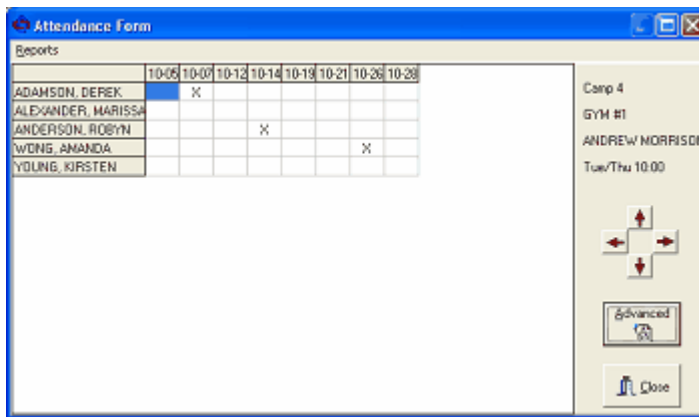
[Creating an Attendance Form](#)
[Completing an Attendance Form](#)
[Classes](#)

9.13.1 Creating an Attendance Form

- ⇒ Select the **Class**.
- ⇒ Click the [Attendance](#) button  on the Class level toolbar.
- ⇒ In the **Attendance Advanced** window, select the days of the week that the class runs.
- ⇒ Select a **Start Date** and **End Date**.
- ⇒ Click **OK**, then close the attendance form.

9.13.2 Completing an Attendance Form

- ⇒ Select the **Class**.
- ⇒ Click the [Attendance](#) button  on the Class level toolbar.
- ⇒ In the **Attendance** window click to place an **X** in each cell corresponding to an absence. (ex. cells that are empty indicate that the member attended the class that day, cells with an **X** indicate that the member was absent)



The screenshot shows the 'Attendance Form' window. It features a grid with columns for dates (10-08 to 10-28) and rows for member names. The grid shows 'X' marks indicating absences for ADAMSON, DEREK (10-09), ANDERSON, ROBYN (10-14), and YOUNG, KIRSTEN (10-21). The right side of the window displays class details: Camp 4, GYM #1, ANDREW MORRISON, and Tue/Thu 10:00. Navigation buttons (Advanced and Close) are visible at the bottom right.

Reports	10-08	10-09	10-12	10-14	10-19	10-21	10-28
ADAMSON, DEREK		X					
ALEXANDER, MARISSA							
ANDERSON, ROBYN				X			
WONG, AMANDA						X	
YOUNG, KIRSTEN							

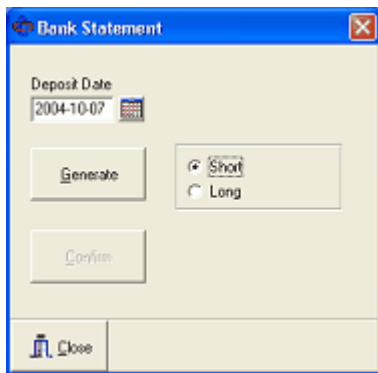
10 Finances

See
[Bank Statements and Deposits](#)

10.1 Bank Statements and Deposits

Viewing and printing your bank statement before you go to the bank to make your deposit will help you to organize your deposit. You will be able to reconcile the transactions entered in Clublink with the payments you will be depositing to ensure that nothing is missed.

- ⇒ In [Member Level](#) select **Bank Statement** from the [Finances](#) menu.



- ⇒ Select your **Deposit Date**.
- ⇒ Select **Short** for a bank statement that includes name, date, amount and payment type **OR** select **Long** for a statement that also includes receipt number, credit card type, name on credit card, expiry date and credit card number.
- ⇒ Click the **Generate** button.
- ⇒ Review the statement to ensure that it matches for your deposit. If it doesn't match, you can close the bank statement and make the necessary adjustments in each member's **Fees** window and regenerate the bank statement after your changes are complete.

+Note+: You can not regenerate a bank statement that has been **confirmed** so it is a good idea to **print** the bank statement or **save** it as a text or MS Excel file for future reference. Use the **File menu** in your report preview window to select save or print. Daily Bank Statements can be recreated from the Financial Reports windows.

Last Name	First Name	Date	Amount	Pays	Receipt n°	Name on Card	Expiry	Credit Card n°
ADAMS	STEVEN	2003-08-27	\$300.00	VISA	03082711	Linda Adams	05/05	4520848001
BERNA	MORGAN	2003-08-28	\$77.00	VISA	03082812	MARGOT BERNA	03/04	4512421011
BERTRAM	KATIE	2003-09-02	\$12.00	VISA	03090212	Catherine Bertram	09/06	4500600005
GOODMAN	AUSTEN	2003-09-02	\$250.50	VISA	03090213	Heather Goodman	02/06	4500600001
KEEVIL	RORY	2003-09-05	\$77.00	VISA	03090512	Heather E. Keevil	08/05	4500600233
KEEVIL	TREVOR	2003-09-05	\$77.00	VISA	03090513	Heather E. Keevil	08/05	4500600233
LENS	ANDRE	2003-09-05	\$308.00	VISA	03090514	Wendy Lens	11/05	4514099508
REEDER	KRESTA	2003-09-05	\$142.00	VISA	03090515	Jenica Brisdon	06/06	4516014288
		Total	\$1,243.50					
		VISA(8)	\$1,243.50					

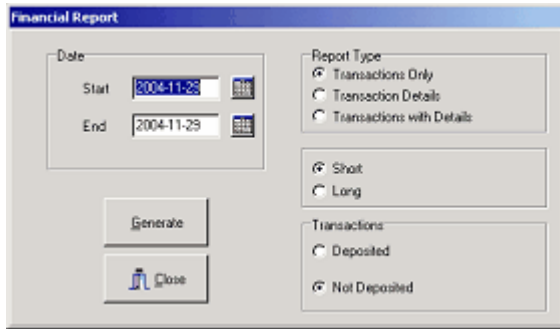
- ⇒ When your bank statement matches your deposit, you can close the bank statement **report preview** window and click **Confirm** in the bank statement window.
- ⇒ Once you have **Confirmed** the bank statement, all transactions included in the statement will show as **Deposited** in the **Payments** section of each members **Fees** window.

+Note+: This process cannot be reversed. If you are uncertain, be sure to backup your data before Confirming your bank statement.

10.2 Financial Reports

Financial reports can be done to provide information on previous transactions (deposited) and future transactions (not deposited). You can choose the report output to show transactions listed by member (Transactions Only), by Transaction Details (the breakdown of the payments ex. t-shirts, club fees, track suits) or Transactions with Details (payments with the breakdown of where the money went). Select a date range for your report and whether you want minimum information (short) or maximum information (long).

⇒ In **Member level** select **Financial Reports** from the **Finances menu**.



- ⇒ Select a **Start Date** and **End Date** for your report.
- ⇒ In the **Transactions** section select either **Deposited** transactions or **Not Deposited** transactions for your report.
- ⇒ In the **Report Type** section choose **Transactions Only** for transactions listed by member.

+Note+: For **Transactions Only** you can select **Short** for a report that includes name, date and amount **OR** select **Long** for a report that also includes payment type, receipt number, credit card type, name on credit card, expiry date and credit card number.

Example (Long option):

Last Name	First Name	Date	Amount	Payment	Receipt n°	Name on Card	Expiry
Transactions: Not Deposited							
Report Type: Transactions Only							
ADAMS	STEVEN	2003-08-27	\$300.00	VISA	03082711	Linda Adams	05/05
BERNA	MORGAN	2003-08-28	\$77.00	VISA	0308282	MARGDT BERNA	03/04
BERTRAM	KATIE	2003-09-02	\$12.00	VISA	0309022	Catherine Bertram	09/06
GOODMAN	AUSTEN	2003-09-02	\$290.50	VISA	0309023	Heather Goodman	02/06
KEEVIL	RORY	2003-09-05	\$77.00	VISA	0309052	Heather E. Keevil	08/05
KEEVIL	TREVOR	2003-09-05	\$77.00	VISA	0309053	Heather E. Keevil	08/05
LENS	ANDRE	2003-09-05	\$308.00	VISA	0309054	Wendy/Lens	11/05
REEDER	KRESTA	2003-09-05	\$142.00	VISA	0309055	Jenica Brisdon	06/06
Total			\$1,243.50				

OR select **Transaction Details** for transactions listed by type.

Example:

Details	Amount
Transactions: Not Deposited	
Report Type: Transaction Details	
Dive BC Reg	\$40.00
Program Reg'n	\$56.00
City/Gar Fee	\$809.50
T-Shirt	\$13.00
FD Fee	\$195.00
1 Day/week	\$130.00
Total	\$1,243.50

⇒ Click the **Generate** button to create the report.

+Note+: Use the **File** menu to print the report or to save it as a text or Microsoft® Excel file.

10.3 Group Fees

You can view/assess and modify fees to members in a group using the **Group Fees** window. Group Fees can be assessed to a group using the **Finance Drop Button** or by selecting **Group Fees** from the **Finances menu** in Member level.

See
[Finances](#)

10.3.1 Finance Menu

⇒ Select **Group Fees** from the **Finances** menu.

Last Name	First Name	Role
CENCIARINI	TONY	Competitive
COLE	STEVEN	Competitive
DREYER	JENNA	Competitive
DURWARD	ELIZABETH	Competitive
GELLER	BA	Competitive
GIBBONS	NAKITA	Competitive

Account

General

Account 2

Account 3

Details

OG two Days

OG two Days

Delete Clear All Add All

OK Cancel Next

- ⇒ Drag and drop each member (for whom you would like to assess fees) from the **Member List** into the Group Fees window.
- ⇒ Select the **Account** you would like to charge the fees to.
- ⇒ Use the drop box to select an existing **Fee Assessment** **OR** enter a new **Fee Assessment** in the **Details** box.
- ⇒ Click **Next**.

The screenshot shows a window titled "Finances" with a "Remove" tab. It contains a table with the following data:

Last Name	First Name	Due	Paid	Balance
CENCIARINI	TONY	85.00	0.00	85.00
COLE	STEVEN	85.00	0.00	85.00
DREYER	JENNA	60.00	0.00	60.00
DURWARD	ELIZABETH	0.00	0.00	0.00
GELLER	BA	0.00	0.00	0.00
GIBBONS	NAKITA	0.00	0.00	0.00

Below the table, a "Total" row shows: **Total : 230.00 0.00 230.00**

On the right side, there is a "General" section with "OG two Days" and an "Amount" input field containing "75". Below this are buttons for "Apply", "Apply to All" (with a double-dollar icon), a calculator icon, and "Print". At the bottom of the window are "OK", "Cancel", "Previous", and "Next" buttons.

⇒ Enter the **amount** of the fee.

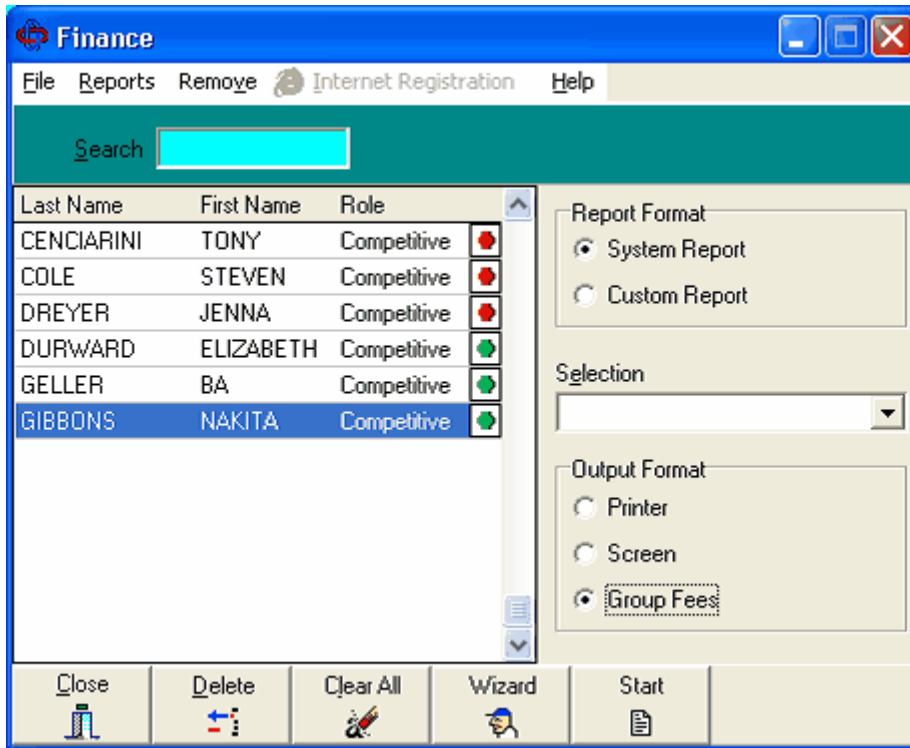
Click **Apply to All** to apply the same fee amount to all members listed. **OR** Click **Apply** to apply the amount to the highlighted member.

See

[Finances](#)
[Group Fees](#)

10.3.2 Finance Drop Button

⇒ **Add** the members to the Finance Drop Button  (see Drop Buttons)



- ⇒ In the **Output Format** section select **Group Fees**.
 - ⇒ Click **Start**.
 - ⇒ Select the **Account** you would like to charge the fees to. (see screen shots in the *Group Fees from Finances Menu* section above.)
 - ⇒ Use the drop box to select an existing **Fee Assessment** **OR** enter a new **Fee Assessment** in the **Details** box.
 - ⇒ Click **Next**.
 - ⇒ Enter the **amount** of the fee.
- Click **Apply to All** to apply the same fee amount to all members listed. **OR** Click **Apply** to apply the amount to the highlighted member.

See

[Finances](#)
[Group Fees](#)



10.4 Invoices

Invoices are a statement of account listing Fee Assessments with amounts due, amounts paid and a balance. A list of undeposited (post-dated) payments can also be included. You can invoice individual members or families from the **Fees** window **OR** you can use the [Invoice Drop Button](#) to invoice individuals or groups of members.

See

[Finances](#)
[Fees Window](#)
[Invoice Window](#)

10.4.1 Fees Window


- ⇒ Select the **member** from the member list in [Member Level](#) or from a [Classes](#).
- ⇒ Click the **Fees**  button on the toolbar.
- ⇒ Click the **Invoice**  button in the Fees window.
- ⇒ Check the appropriate boxes in the **Invoice** window (see [Invoice Window](#) for descriptions of each checkbox).
- ⇒ Click **OK** to print the invoice.

+Note+: To E-mail the invoice, generate the invoice as a PDF file and attach it to an email.

See

[Finances](#)
[Invoices](#)

10.4.2 Invoice Drop Button

- ⇒ Open the **Invoice Drop Button Window**  in Member level.
- ⇒ Add the members that you want to invoice to the **Invoice Drop Button**. (see [adding members to drop buttons](#))
- ⇒ Select **Invoice** in the **Output Format** section.
- ⇒ Click **Start**.
- ⇒ Check the appropriate boxes in the **Invoice** window. (see [Invoice Window](#) for descriptions of each checkbox)
- ⇒ Click **OK** to print the invoices.

See

[Finances](#)
[Invoices](#)

10.4.3 Invoice Window

Invoice accounts – select one, two or all three accounts to be included on the invoices.

Language – select a language for heading on the invoice.

Not Deposited Payments – shows a list of Payments that have not been deposited (ex. post-dated cheques)

Balance = 0 – only prints an invoice if the total balance due for the member or family is zero.

Outstanding Details Only – shows Fee Assessment Details for fee assessments with a non-zero balance only (ex. if the amount due is equal to the amount paid, the details will not appear on the invoice)

Note – shows a special note on the bottom of the Invoice (ex. No practice Dec. 25th and 26th.)

Family Invoice – prints Fee Assessment Details and Payments for all family members on the same invoice.

Invoice Summary Only – displays a summary report of the invoices but does not print the actual invoices.

Current, Past 30, Past 60, Past 90 – shows the amount due for specified time periods.

Club Return Address – prints the club's return address in the top right of the invoice.

Page Offset – allows you to shift the printing of the invoice down the page to accommodate your club letterhead (every page offset is equal to one inch)

Payment Details (page 2) – shows details of when payments were made, how they were made and how the payments were applied.

Print to PDF Document(s) – prepares invoices to print to a PDF file.

Invoice

Account

General
 Account 2
 Account 3

Language

Bilingual
 English
 French
 German

Print Options

Not Deposited Payments
 Balance = 0
 Outstanding Details Only
 Note
 Family Invoice
 Invoice Summary Only
 Current, Past 30, Past 60, Past 90
 Club return address
 Payment Details (Page 2)
 Print to PDF Document(s)

0 Page Offset

Example

Mr. Mann Club
 123 Happy Trail 456 Corner St.

General

Details	Due	Paid	Balance
Current	Past 30	Past 60	Past 90

Not Deposited Payments

Date	Amount	Date	Amount
------	--------	------	--------

Balance Due Upon Receipt

Note

Balance Due Upon Receipt

OK Cancel

See

[Finances](#)

[Invoices](#)

11 Certifications


You can use the certifications window to track a member's certifications (ex. levels completed, dates completed). You can have up to seven certification charts for each of the five roles. Some of these charts may be locked by your Central Office, the others are available for you to customize. Certifications can be viewed and updated from Member Level or Class Level.

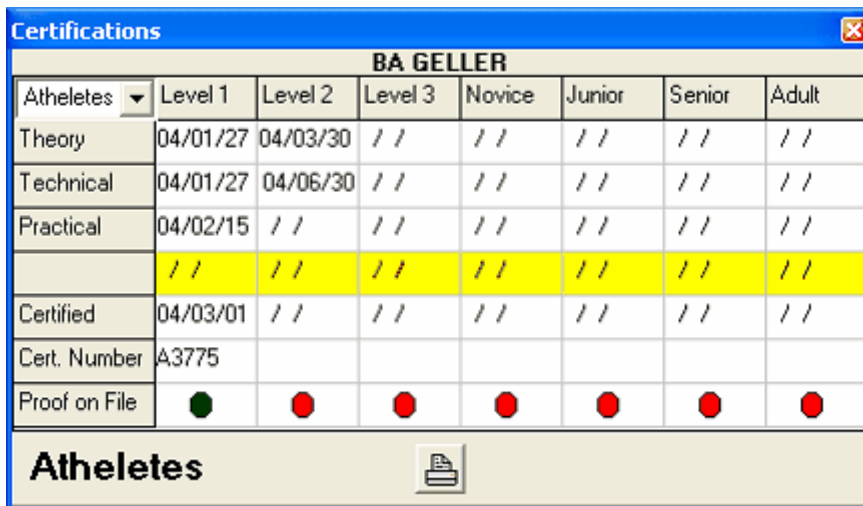
See

[Updating Certifications](#)


Customizing Certification Charts

11.1 Updating Certifications

- ⇒ Select the Member.
- ⇒ Click the **Certifications** button  on the toolbar.
- ⇒ From the drop box in the top left of the certifications window, select the chart you want to update.
- ⇒ Update the dates and/or certificate numbers.
- ⇒ If you have **proof of the certification** on file, click the circle at the bottom of the appropriate column to change it to green to indicate proof on file.



BA GELLER							
Atheletes ▾	Level 1	Level 2	Level 3	Novice	Junior	Senior	Adult
Theory	04/01/27	04/03/30	//	//	//	//	//
Technical	04/01/27	04/06/30	//	//	//	//	//
Practical	04/02/15	//	//	//	//	//	//
	//	//	//	//	//	//	//
Certified	04/03/01	//	//	//	//	//	//
Cert. Number	A3775						
Proof on File	●	●	●	●	●	●	●

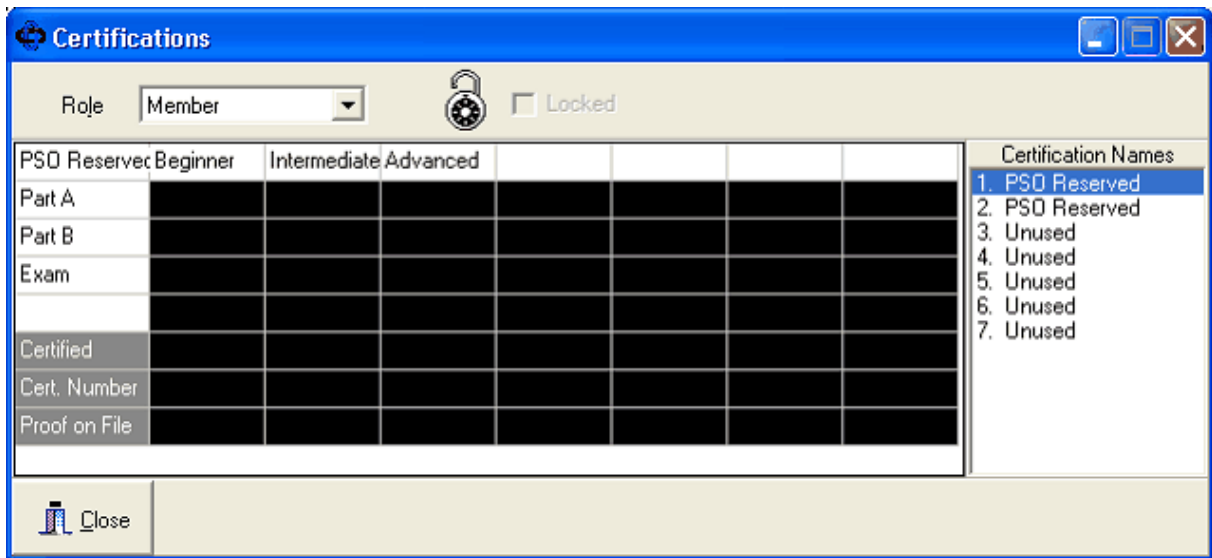
Atheletes 

- ⇒ Close the window when complete.

See [Certifications](#)

11.2 Customizing Certification Charts

- ⇒ In **Member Level** select **Certifications** from the **Setup** menu.
- ⇒ In the **Certifications** window, select the appropriate **Role**.
- ⇒ Select a chart to customize from the right side of the window.
- ⇒ In the upper left corner of the chart enter the **name of the chart**.
- ⇒ Edit the **column and row headings**. (ex. change level 1, 2 and 3 to Beginner, Intermediate and Advanced)



⇒ Close the window to save your changes.

+Note+: Row headings that are in grey can not be changed.

See

[Certifications](#)

12 Keywords

Keywords are an effective method of assigning attributes to a member. Keywords assist you in reporting on members and finding groups of members (ex. you can assign a keyword to all members who attended provincial championships on a May 1/04). You can recall the list and report on those members by dragging the keyword onto any **Drop Button** (see [Drop Button Lists](#)).


12.1 Assigning Keywords - Individual Members

⇒ Select the member in the [Member List](#) or in a [Classes](#).

⇒ Click the [Keywords](#) button  on the toolbar.



⇒ Click the **Complete Keyword List** drop down list.

⇒ Select a **Keyword** from the list, then click the red arrow  and click **Add**.

OR if you want to use a new keyword

⇒ Enter the **Keyword** in the **enter a new keyword here** box and click **Add**.

See

[Keywords](#)

12.2 Assigning Keywords - Group of Members

⇒ Drag and drop all the members who need the keyword onto any **Drop Button** (see [Drop Button Lists](#)).

+Note+: You can also assign a keyword to groups of members that already exist in **Class level** by right clicking on a class, select **add to drop button list**, select a drop button, select the group you want to assign the keyword to. Then proceed with the instructions below.

⇒ From Member level open the appropriate Drop Button window.

⇒ From the **File** menu select **Assign a Keyword**.



⇒ Use the **Drop Box** to select a **Keyword**.

⇒ Click **OK** to add the keyword to all members on the Drop Button.

OR

⇒ Type the new keyword in the upper box.


⇒ Click **OK** to add the keyword to all members on the Drop Button.

See

[Keywords](#)

12.3 Deleting Keywords

⇒ Select the member in the [Member List](#) or in a [Classes](#).

⇒ Click the **Keywords** button  on the toolbar .

⇒ Select the **Keyword** that you want to delete from the **top drop box**.

⇒ Click **Delete**.

⇒ Click **OK** to confirm the delete.

+Note+: To delete a keyword from all members, select **Keyword List** from the **Lists** menu in Member Level. Select the keyword you want to delete then click **Delete** then click **OK** to confirm.

See

[Keywords](#)

12.4 Reporting with Keywords

- ⇒ Select **Keyword List** from the **Lists** menu in Member Level.
- ⇒ Select a **Keyword**.
- ⇒ Drag and drop the **Keyword** on to the drop button you want to use for reporting.


+Note+: All members who have been assigned this keyword will be added to the drop button list.


See


[Keywords](#)

13 Drop Button Lists

Drop Buttons are used to organize members for reporting purposes. There are four **Drop Buttons** in the **Member level** of Clublink. Members can be individually dragged and dropped onto these buttons **OR** groups of members can be put on the drop buttons for reporting.

Invoice Drop Button  Invoice used to create invoices to be viewed or printed.

Report Drop Button  Report this is a general button for reporting on any type of member data.

Registration Drop Button  Registration used to prepare members for export to your central office.

Finance Drop Button  Finance used for Group Fee assessments.

+Note+: Each of the above Drop Buttons has a selection of **System Reports** that relate to the type of drop button. (See **Reporting**)

See

[Adding Members to Drop Buttons](#)
[Reporting](#)

13.1 Adding Members to Drop Buttons

The following methods can be used to add members to any of the four drop buttons:

- ⇒ Drag and drop **Individual members** from the **Member level** member list.
 - ⇒ Drag a **Keyword** from the **Keyword List** (from the Lists menu in Member level select Keyword List) to add all members with the selected keyword.
 - ⇒ Drag a **Linked Registration Option** (from the Lists menu in Member level select [Linked Registration Options](#)) to add all members with the selected Linked Registration Option.
 - ⇒ Drag a **Custom Drop Box** selection (from the Lists menu in Member level select [Custom Drop Boxes](#)) to add all members with the selected Custom Drop Box item.
 - ⇒ Drag a **Fee Assessment Detail** (from the Lists menu in Member level select [Fee Assessments](#) List) to add all members with the selected Fee Assessment Detail.
 - ⇒ Add a **schedule, row, column or class** (from [Class level](#) select the appropriate schedule, from the Tools menu select Add to Drop Button, choose a drop button then select what you want added to the drop button).
 - ⇒ Use the **File menu** in the drop button window and make a selection from the list.
- Use the **Wizard button** for an **advanced selection** of members to be added to the Drop Button.

See

[Drop Button Lists](#)
[Reporting](#)

14 Reporting

Reporting is done from any of the four [Drop Buttons](#) in [Member level](#) and from the Reports menu in [Class level](#). There are ready to use System Reports as well as a large selection of Custom Reports available for you to register in your system.

There are many ways to get members onto the drop buttons for reporting.

There is a tutorial installed in the How To section on the [Opening Screen](#) showing many of the methods to get members onto the **Drop Buttons**.

The File menu in the Drop Button Window is a good place to start. Depending on which members you are currently looking at in Clublink, will affect the menu option.

Ex: If you are looking at Active Only Recreational members, then select "Add all of this Role", then only active recreational members will be added to the button.

Ex: Select all members all roles on one button, select a single role on another button, subtract the two lists and be left with 4 of the 5 roles.

- ⇒ Drag n Drop a single member
- ⇒ Drag n Drop any [Linked Registration Option](#)
- ⇒ Drag n Drop any [Custom Drop Box List](#)
- ⇒ Drag n Drop any [City](#)
- ⇒ Drag n Drop any [Fee Assessment](#)

+Note+: Any time the cursor turns into a Clublink, that item can be dragged onto a report button.

+Note+: Drag any item into the open Drop Button window or directly onto the button

Though Clublink stores all information in uppercase, you may choose not to "Output Info Completely in Uppercase" from the file menu in the Drop Button window. Clublink will convert all applicable information to Title case.

Ex: MCDONALD --> McDonald

See

[Drop Button Lists](#)
[Class Level Reporting](#)
[Schedule Statistics](#)
[Class Reports](#)
[Drop Button Reports](#)
[Registering Reports](#)
[Report Wizard](#)

14.1 Class Level Reporting

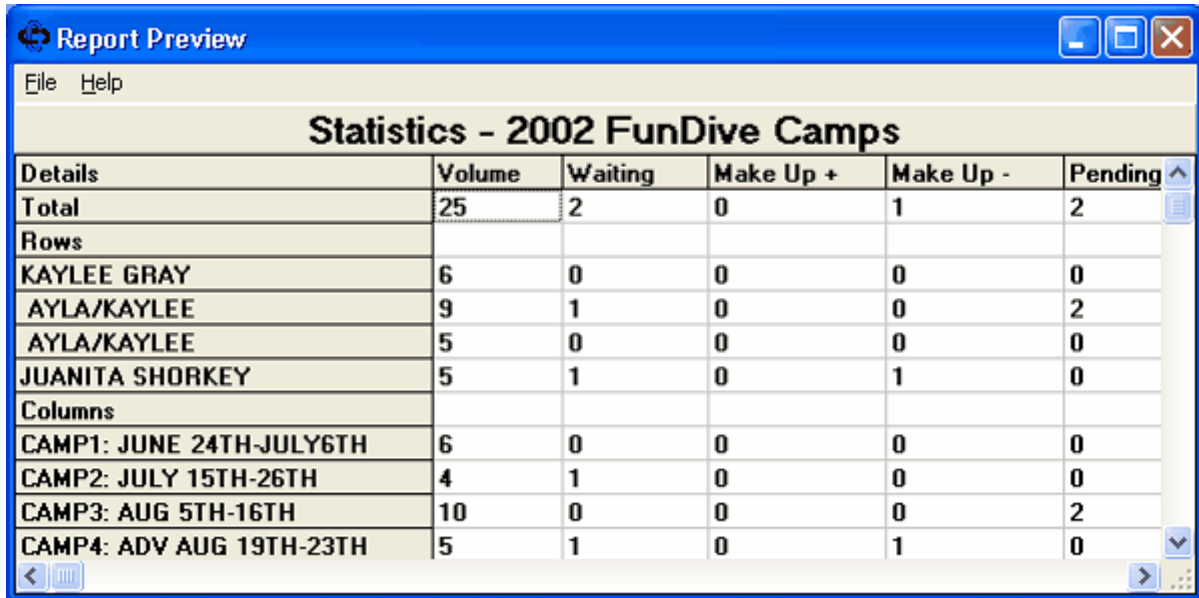
In Class level you can choose to report on the statistics of a [Schedule](#) (summarizes information about each of the classes in the schedule) or you can select various types of reports to report on a **Class**.

See

[Drop Button Lists](#)
[Reporting](#)

14.2 Schedule Statistics

- ⇒ Select the [schedule](#) you want to report on.
- ⇒ From the **Reports menu**, select **Statistics**.



The screenshot shows a window titled 'Report Preview' with a menu bar containing 'File' and 'Help'. The main content area displays a table titled 'Statistics - 2002 FunDive Camps'. The table has six columns: 'Details', 'Volume', 'Waiting', 'Make Up +', 'Make Up -', and 'Pending'. The data is organized into sections: 'Total', 'Rows' (listing individuals), and 'Columns' (listing camps).

Details	Volume	Waiting	Make Up +	Make Up -	Pending
Total	25	2	0	1	2
Rows					
KAYLEE GRAY	6	0	0	0	0
AYLA/KAYLEE	9	1	0	0	2
AYLA/KAYLEE	5	0	0	0	0
JUANITA SHORKEY	5	1	0	1	0
Columns					
CAMP1: JUNE 24TH-JULY6TH	6	0	0	0	0
CAMP2: JULY 15TH-26TH	4	1	0	0	0
CAMP3: AUG 5TH-16TH	10	0	0	0	2
CAMP4: ADV AUG 19TH-23TH	5	1	0	1	0

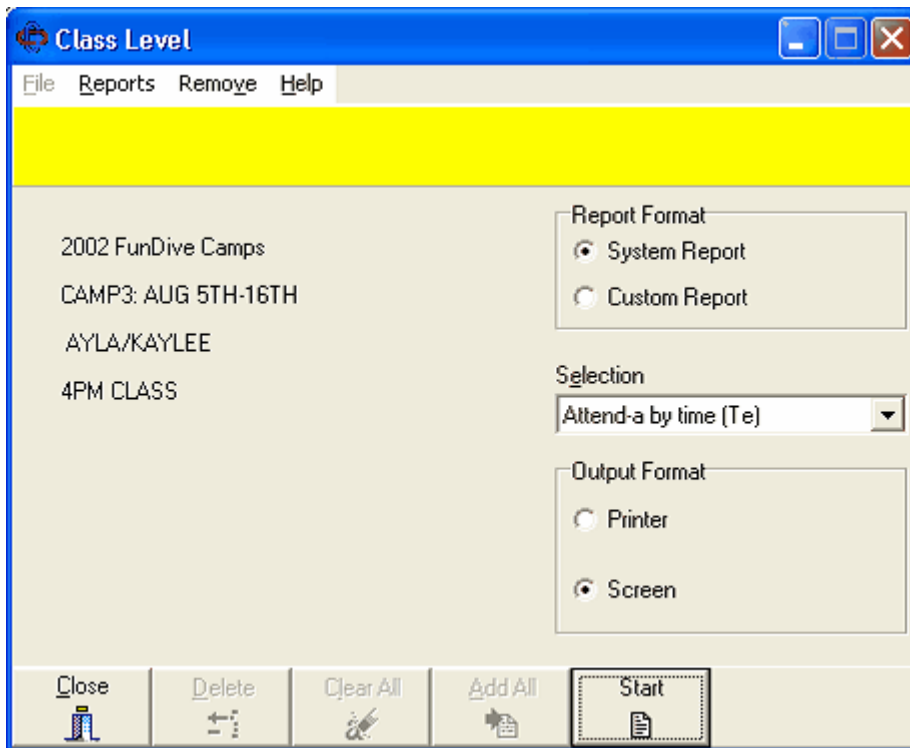
From the **File menu** you can choose to save or print the report.

See

[Drop Button Lists Reporting](#)

14.3 Class Reports

- ⇒ Select the Class you want to report on.
- ⇒ From the **Reports menu**, select **Reports**.



- ⇒ Select the **Report Format** (system or custom).
- ⇒ Select a **Report** from the drop box **OR** register a **new report**. (see **Registering Reports**)
- ⇒ Select an **Output Format**.
- ⇒ Click **Start**.

+Note+: If you select **Screen** as your output format, you can print or save your report once you have viewed it by selecting **Print** or **Save As** from the **File menu**.

See

[Drop Button Lists Reporting](#)

14.4 Drop Button Reports

- ⇒ Select a **Drop Button** to report from.
- ⇒ Add members to the drop button. (See [Adding Members to Drop Buttons](#))
- ⇒ Select the **Report Format**. (system or custom)
- ⇒ Select a **Report** from the drop box **OR** register a **new report**. (see [Registering Reports](#))
- ⇒ Select an **Output Format**.
- ⇒ Click **Start**.

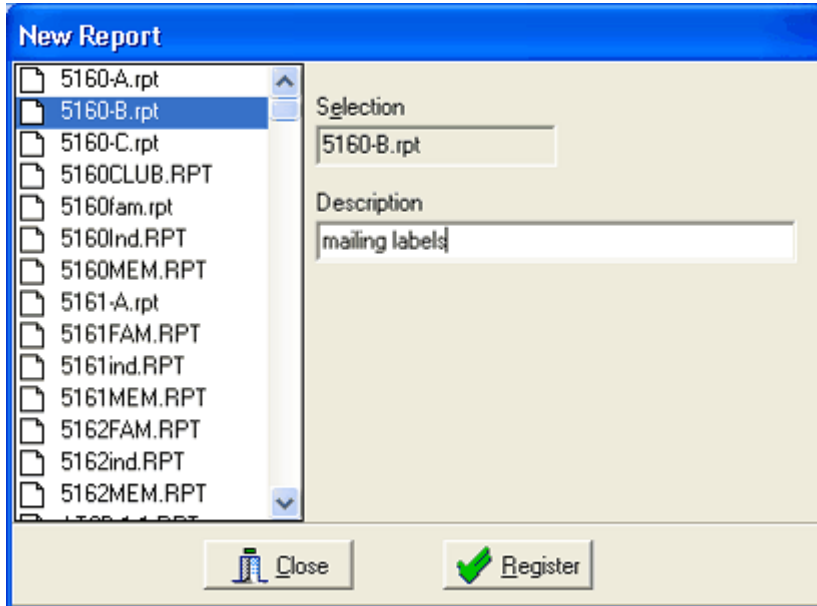
+Note+: If you select **Screen** as your output format, you can print or save your report once you have viewed it by selecting **Print** or **Save As** from the **File menu**.

See

[Drop Button Lists Reporting](#)

14.5 Registering Reports

- ⇒ Open the appropriate **Drop Button**.
- ⇒ From the **Reports menu** select **Register**.
- ⇒ In the **Registered Reports** window click the **Add** button.



- ⇒ Select a report from the list in the **New Report** window.
- ⇒ Type a description of the report in the **Description** box.
- ⇒ Click the **Register** button.
- ⇒ Click **OK**.
- ⇒ Close the **New Report** window or select another report to register.

+Note+: You can also **Modify** report descriptions or **Delete** registered reports from the [Registering Reports](#) window.

If you have downloaded the report from our website or received the report as an email attachment, save the report to your desktop, then drag n drop the report from your desktop into the appropriate drop button window.

See
[Drop Button Lists](#)
[Reporting](#)

14.6 Report Wizard

The Report Wizard is a great way to select a group of members using the user-defined checkboxes, edit boxes and dates and the built in checkboxes and dates.

Role	With	From	To	With	Value
<input type="checkbox"/> Competitive	<input checked="" type="checkbox"/> Birthdate	2005-02-06	2005-02-06	<input checked="" type="checkbox"/> Renewal	<input checked="" type="checkbox"/> Checked
<input checked="" type="checkbox"/> Recreational	<input checked="" type="checkbox"/> Start	2005-02-06	2005-02-06	<input checked="" type="checkbox"/> Employee	<input checked="" type="checkbox"/> Checked
<input type="checkbox"/> Coach	<input checked="" type="checkbox"/> Current	2005-02-06	2005-02-06	<input checked="" type="checkbox"/> Check Box #1	<input type="checkbox"/> Checked
<input type="checkbox"/> Judge	<input checked="" type="checkbox"/> End	2005-02-06	2005-02-06	<input checked="" type="checkbox"/> Check Box #2	<input type="checkbox"/> Checked
<input type="checkbox"/> Member	<input checked="" type="checkbox"/> Expiry	2005-02-06	2005-02-06		
	<input checked="" type="checkbox"/> Date #1	2005-02-06	2005-02-06		
	<input checked="" type="checkbox"/> Date #2	2005-02-06	2005-02-06		

15 Mail Merge

You can use your Clublink data to create a mail merge document in Microsoft® Word.

See

[Preparing your Clublink Data](#)

[Preparing your Microsoft Word Document](#)

15.1 Preparing your Clublink Data

- ⇒ In **Member Level** select one of the four **Drop Buttons**.
 - ⇒ Add all of the members that you would like included in the mail merge to the **Drop Button list**.
 - ⇒ From the **File menu** select **Create Tempmain.dbf for Export**.
- Click **Yes** if you wish to view the folder containing the **Tempmain.dbf** file, otherwise, click **NO**.

See

[Mail Merge](#)

[Preparing your Microsoft Word Document](#)

15.2 Preparing your Microsoft Word Document

- ⇒ Open Microsoft Word.

+Note+: You can open an existing letter, create a new letter now or create the letter later.

- ⇒ From the **Tools menu** select **Mail Merge**.
- ⇒ In the **Main Document** section click **Create**.
- ⇒ Select **Form Letter**.

+Note+: You can select any of the mail merge types on the list however, the steps for creating the document may differ slightly from the instructions below.

- ⇒ Click **Active Window** if your form letter is in the active window, otherwise, click **New Main Document**.
- ⇒ Click **Get Data**.
- ⇒ Select **Open Data Source**.

- ⇒ Go to your **Clublink\Athlete** folder.
- ⇒ In the **Files of Type** box select **dBase (*.dbf)**.
- ⇒ Select **Tempmain.DBF** from the list of files and click **Open**.
- ⇒ Click **Edit Main Document**.
- ⇒ On the Mail Merge toolbar click **Insert Merge Fields**.
- ⇒ Select the appropriate merge fields and insert them into your main document where you want the data to appear.
- ⇒ When you have completed setting up the main document, click the **Merge** button on the Mail Merge toolbar and make the appropriate selections.

See

[Mail Merge](#)

[Preparing your Clublink Data](#)

16 Periodic or Infrequent Activities

See

[List Items](#)

[Custom Drop Box Lists](#)

[Linked Registration Options](#)

16.1 List Items

The items that appear on the [Keywords List](#), [City List](#) and [Fee Assessments List](#) can all be managed using the following steps:

See

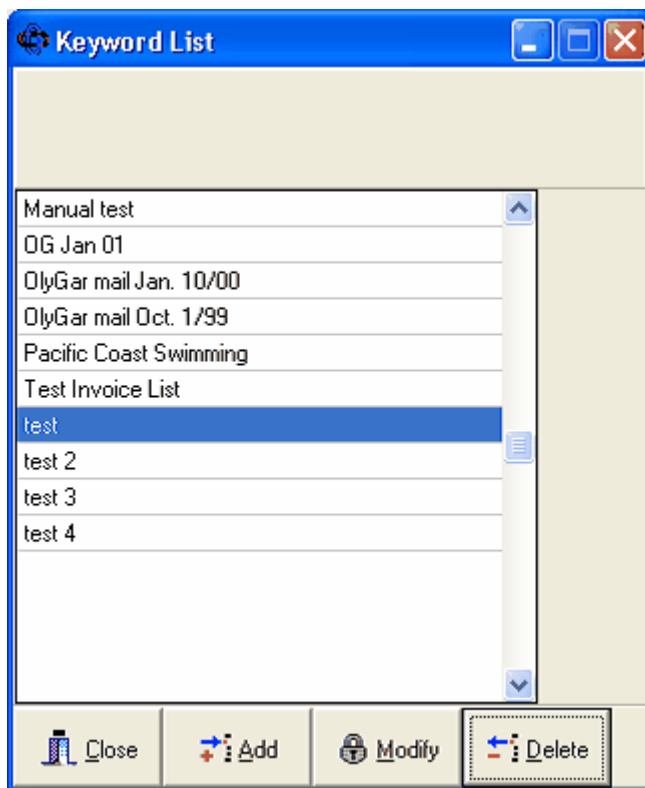
[Adding](#)

[Modifying](#)

[Deleting](#)

16.1.1 Adding

- ⇒ From the **Lists** menu in [Member level](#) select the appropriate list.



Click the **Add** button to add a new item to the list and type the new list name, then click **OK**.

See

[List Items](#)

16.1.2 Modifying

- ⇒ From the **Lists menu** in **Member level** select the appropriate list.
- ⇒ Select a list item and click the **Modify** button to edit the list item.

+Note+: This will modify all instances of the list item in Clublink.

See

[List Items](#)

16.1.3 Deleting

- ⇒ From the **Lists menu** in **Member level** select the appropriate list.
- ⇒ Select a list item and click the **Delete** button to delete the list item.

+Note+: This will delete all instances of the list item in Clublink.

See

[List Items](#)

16.2 Custom Drop Box Lists

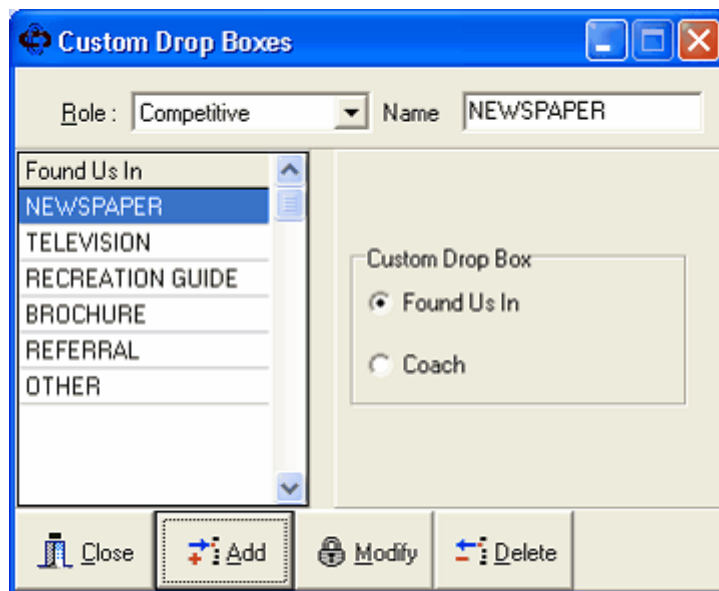
From the **Custom Drop Boxes** window, you can add, modify and delete items that will appear in your Custom Drop Boxes for each role. (This can also be done from Setup Wizard.)

See

[Adding](#)
[Modifying](#)
[Deleting](#)

16.2.1 Adding

⇒ From the **Lists** menu in [Member level](#) select **Custom Drop Boxes**.



- ⇒ Select the appropriate **Role**.
- ⇒ Select the appropriate **Drop Box**.
- ⇒ Click the **Add** button.
- ⇒ Type the name of the new list item in the **Name** box.
- ⇒ Click **OK**.

See

[Custom Drop Box Lists](#)

16.2.2 Modifying

- ⇒ From the **Lists** menu in [Member level](#) select **Custom Drop Boxes**.
- ⇒ Select the appropriate **Role**.
- ⇒ Select the appropriate **Drop Box**.
- ⇒ Select the list item you want to change.
- ⇒ Click the **Modify** button.
- ⇒ Type the new name of the list item in the **Name** box.
- ⇒ Click **OK**.

See

[Custom Drop Box Lists](#)

16.2.3 Deleting

- ⇒ From the **Lists menu** in [Member level](#) select **Custom Drop Boxes**.
- ⇒ Select the appropriate **Role**.
- ⇒ Select the appropriate **Drop Box**.
- ⇒ Select the list item you want to delete.
- ⇒ Click the **Delete** button.
- ⇒ Click **OK** to confirm the delete.

See

[Custom Drop Box Lists](#)

16.3 Linked Registration Options

Understanding Linked Registration Options is probably the most complex aspect of Clublink. This is only due to the fact that sports organizations tend to have many categories for their members and many different fees associated with the categories. Below is an example of how Linked Registration Options can be used to register your members each season. (See the Setup Wizard section for a more detailed description of how Linked Registration Options work.)

From the **Linked Registration Options** window you can add, modify or delete your club's registration fees. (This can also be done using the Setup Wizard). Your Central Office registration fees can be viewed from this window but you can not make any changes to them. Registration fees that have been setup by your Central Office appear in yellow.

See

[Adding](#)

[Modifying](#)

[Deleting](#)

[Central Office Only](#)

16.3.1 Adding

- ⇒ From the **Lists menu** in [Member level](#) select [Linked Registration Options](#).

- ⇒ Select the appropriate **Role**.
- ⇒ Select **Member level** from the drop box below the Role drop box.
- ⇒ Select the appropriate column (category or sub-category).
- ⇒ Click the **Add** button.
- ⇒ Type the **Name** of the fee, the **Fee** amount and **Min.** and **Max. Ages** in the boxes at the top of the window .
- ⇒ Click **OK**.

See

[Linked Registration Options](#)

16.3.2 Modifying

- ⇒ From the **Lists menu** in **Member level** select **Linked Registration Options**.
- ⇒ Select the appropriate **Role**.
- ⇒ Select **Member level** from the drop box below the Role drop box.
- ⇒ Select the **Registration Option** that you want to change.
- ⇒ Click the **Modify** button.
- ⇒ Edit the **Fee** amount.
- ⇒ Click **OK** to save your changes.

+Note+: You can only modify the name of a Linked Registration Option if your club has set it up. Any name set up by your Central Office is locked.

See

[Linked Registration Options](#)

16.3.3 Deleting

- ⇒ From the **Lists menu** in **Member level** select **Linked Registration Options**.
- ⇒ Select the appropriate **Role**.
- ⇒ Select **Member level** from the drop box below the Role drop box.
- ⇒ Select the **Registration Option** that you want to delete.

- ⇒ Click the **Delete** button.
- ⇒ Click **OK** to confirm the delete.
- ⇒ Click **OK** to delete all references.

See

[Linked Registration Options](#)

17 Setup Menu - Member Level

See

[Data Field Options](#)

[Medical Template](#)

[Payment Types and Credit Card Types](#)

[Fee Options](#)

[Central Office Data Field Options](#)

17.1 Data Field Options

Data field options can also be selected from the Setup Wizard however the method shown below allows you to make data field changes without closing Clublink. Hiding unused Data Fields will help customize Clublink to your specific club requirements, helping to streamline the registration process by only showing information that your club requires.

- ⇒ From the **Setup menu** in [Member level](#) select **Data Field Options**.

The screenshot shows the 'Data Field Options' dialog box with the following details:

- Role:** Competitive
- General Tab:**
 - Title
 - Address
 - Apt.
 - City
 - Province
 - Postal Code
- Title:**
 - CATEGORY
 - WEIGHT CLASS
 - [Empty]
 - FOUND US IN
 - COACH
- Country:** Canada
- Default Province:** QC
- Default Area Code:** 514

- ⇒ From the drop box select the appropriate **Role**.
- ⇒ Select the appropriate tabbed page.
- ⇒ Make the necessary changes.

⇒ Close the **Data Field Options** window.

+Note+: When you un-select a data field, the data is not lost, it's just not visible in Clublink.

See

[Setup Menu - Member Level](#)

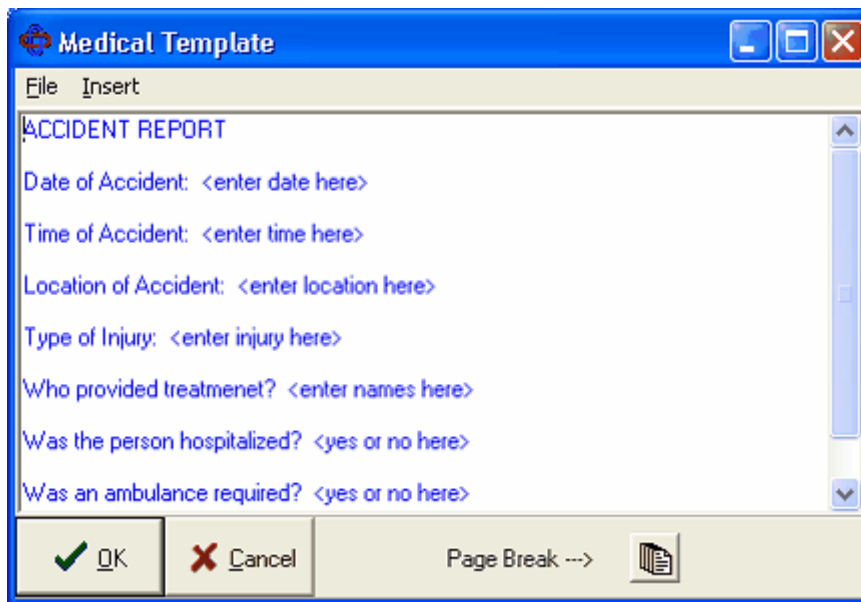
17.2 Medical Template

The **Medical Template** is a tool used to create customized [Accident Reports](#) for your Club. The **Medical Template** will appear when you click the **Accident Report** button for any member. If you have a Central Office, you may already have received a template on your [Central Office Setup Disk](#).

Creating a Medical Template

- ⇒ From the **Setup menu** in [Member level](#) select **Medical Template**.
- ⇒ Type a heading or title for your accident report in the **Medical Template** window.
- ⇒ Type the first **Required Information Title** in the **Medical Template** window. (ex. Date of Accident)
- ⇒ Add a **Data Entry Area** beside the **Required Information Title**.

+Note+: Data Entry Areas need to be enclosed by Lesser Than and Greater Than symbols. (ex. <enter date here>)



⇒ Continue typing all of your Required Information Titles followed by Data Entry Areas on each line of the template.

+Note+: You can insert a page break by clicking the **Page Break** button at the bottom of the template window.

⇒ Click **OK** to save your changes.

+Note+: The user will be able to automatically proceed through the data entry areas by using the F3 key on their keyboard.

See

[Setup Menu - Member Level](#)

17.3 Payment Types and Credit Card Types

Payment types and **credit card types** are selections used when receiving payments from your members. These selections can also be set up using the [Setup Wizard](#).

See

[Setup Menu - Member Level](#)

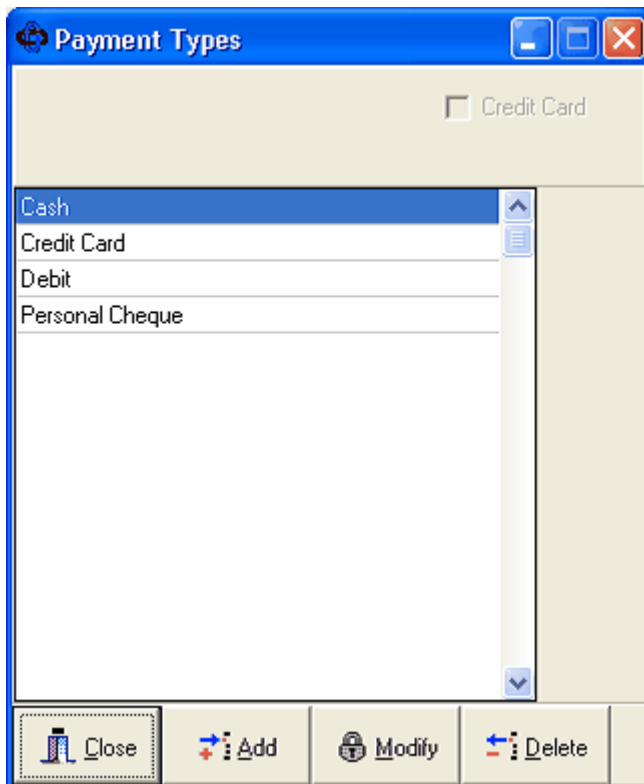
[Adding](#)

[Modifying](#)

[Deleting](#)

17.3.1 Adding

⇒ From the **Setup menu** in [Member level](#) select **Payment Types** or **Credit Card Types**.



⇒ Click the **Add** button.

⇒ Type the name in the **Title** box.

+Note+: When entering a new payment type, check the **credit card** box if the payment type is a credit card.

⇒ Click **OK**.

See

[Payment Types and Credit Card Types](#)

17.3.2 Modifying

- ⇒ From the **Setup menu** in [Member level](#) select **Payment Types** or **Credit Card Types**.
- ⇒ Select a list item to **Modify**.
- ⇒ Click the **Modify** button.
- ⇒ Type the new name in the **Title** box.
- ⇒ Click **OK**.

See

[Payment Types and Credit Card Types](#)

17.3.3 Deleting

- ⇒ From the **Setup menu** in [Member level](#) select **Payment Types** or **Credit Card Types**.
- ⇒ Select a list item to **Delete**.
- ⇒ Click the **Delete** button.
- ⇒ Click **OK**.

See

[Payment Types and Credit Card Types](#)

17.4 Fee Options

Fee Options is a method of pre-defining fee assessments to be assessed in Class level. (ex. Many clubs register their members for the year but charge fees on a monthly basis. In this case, the months of the year should be used for Fee Options.) You will have the opportunity to select the appropriate **Fee Options** on the [Member Worksheet](#) in [Class level](#).

See

[Setup Menu - Member Level](#)

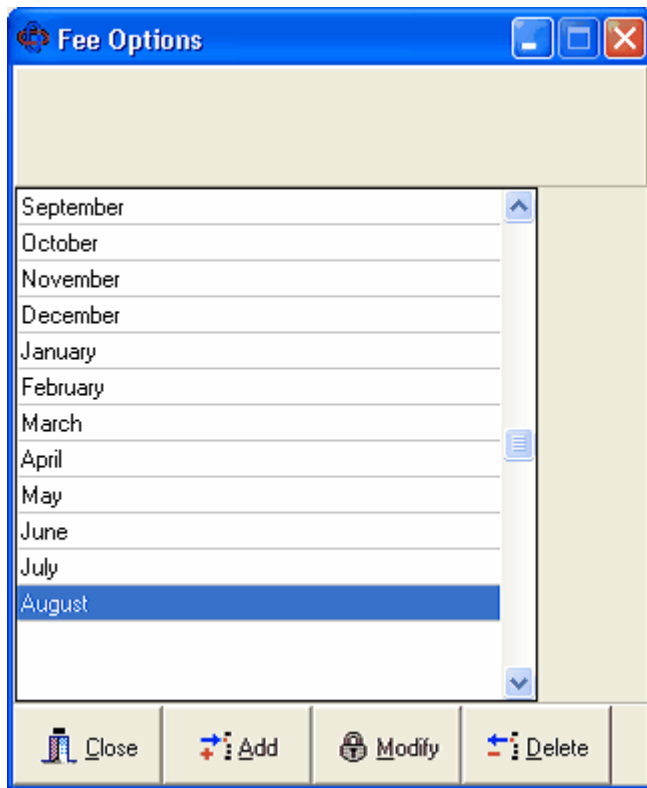
[Adding](#)

[Modifying](#)

[Deleting](#)

17.4.1 Adding

- ⇒ From the **Setup menu** in [Member level](#) select **Fee Options**.



- ⇒ In the Fee Options window click **Add**.
- ⇒ Type the new Fee Option in the **Title** box.
- ⇒ Click **OK**.

See
[Fee Options](#)

17.4.2 Modifying

- ⇒ From the **Setup menu** in [Member level](#) select **Fee Options**.
- ⇒ In the Fee Options window select the Fee Option you want to change.
- ⇒ Click **Modify**.
- ⇒ Type the new Fee Option in the **Title** box.
- ⇒ Click **OK**.

See
[Fee Options](#)

17.4.3 Deleting

- ⇒ From the **Setup menu** in [Member level](#) select **Fee Options**.
- ⇒ In the Fee Options window select the Fee Option you want to **Delete**.
- ⇒ Click **Delete**.
- ⇒ Click **OK** to confirm **Delete**.

See
[Fee Options](#)

17.5 Central Office Data Field Options

Central Office Data Field Options allows you to view which fields are **Required** by your central office and which fields are **Requested**.

- ⇒ From the **Setup** menu in **Member level** select **Central Office Data Field Options**.
 - ⇒ Select the **Role** you want to view.
 - ⇒ Select **Requested** or **Required** from the top right of the screen.
- Click through the tabbed pages to view the data fields.

See

[Setup Menu - Member Level](#)

18 Saving Schedules in Other Formats

From the Tools menu in Class level you can save a schedule as an Excel file or as a Web page. You can also build a web site using selected schedules. (See Task Manager)

See

[Microsoft Excel](#)

[HTML Web Page](#)

[Home Page Generator](#)

18.1 Microsoft Excel

- ⇒ In Class level select a **schedule**.
- ⇒ From the Tools menu in Class level select **save schedule to excel**.
- ⇒ Select **Yes** to have the class volumes (number of members registered in class) show in excel or select **No** if you don't want the class volumes.
- ⇒ Select the folder that you would like to save the file in.
- ⇒ Name the file.
- ⇒ Click **Save**.
- ⇒ Click **OK**.

See

[Saving Schedules in Other Formats](#)

18.2 HTML Web Page

- ⇒ Select a **schedule**.
- ⇒ From the Tools menu in Class level select **Web site (html)**.
- ⇒ Select **save this schedule as a web page OR** select **save this schedule and all classes as a web page**.
- ⇒ Select the folder that you would like to save the file in.
- ⇒ Name the file.
- ⇒ Click **Save**.
- ⇒ Click **OK** to see the Web page now or click **Cancel**.

2002 FunDive Camps

FunDive Camp
sep - dec
4:00-5.30

2002 FunDive Camps	CAMP1: JUNE 24TH-JULY6TH	CAMP2: JULY 15TH-26TH	CAMP3: AUG 5TH-16TH	CAMP4: ADV AUG 19TH-23TH
KAYLEE GRAY	5pm Class			
AYLA/KAYLEE		4pm Class	4PM CLASS	
AYLA/KAYLEE		5pm Class	5PM CLASS	
JUANITA SHORKEY				5:30 PM

Last Updated on : 2004-10-11 by Integrated Sports Systems (ISS) Inc.

See

[Saving Schedules in Other Formats](#)

19 Central Office Communication

See

[Receive Central Office Setup Disk](#)

[Import Club Data](#)

[Export Club Data](#)

19.1 Receive Central Office Setup Disk

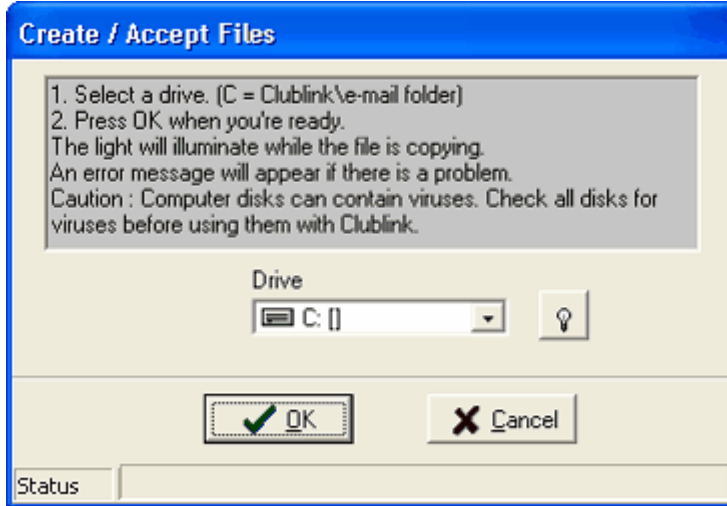
When you first begin using Clublink, your **Central Office** will send you a setup disk. This disk contains important information that sets up Clublink on your computer to work smoothly with your Central Office.

This disk will update Clublink with:

- ✓ **Required Data Field Options** (yellow boxes on member Registration Forms).
- ✓ **Requested Data Field Options.**
- ✓ **Linked Registration Options** for the current season.
- ✓ **Registration Fees** for the current season.

This disk may update Clublink with:

- √ Central Office [Certification](#) charts.
- √ A [Medical Template](#) (used for accident reports).
- ⇒ In the [Opening Screen](#) select **Receive Central Office Setup Disk** from the **Options menu**.




- ⇒ In the **Create/Accept Files** window, select the location of the setup files.
- ⇒ Click **OK**.
- ⇒ When the operation is successful, close the **Accept/Create Files** window.

+Note+: Receiving Central Office Setup Disk can also be performed from the [Setup Wizard](#).

See

[Central Office Communication](#)

19.1.1 Fixing Members Entered Early

- ⇒ Install the [Central Office Setup Disk](#).
- ⇒ In [Member Level](#) access the [Registration Form](#)  for each member.
- ⇒ Make the correct selections from the [Linked Registration Options](#) drop boxes.
- ⇒ Click **OK** to show the [Member Worksheet](#).
- ⇒ Click **Restore** on the **Member Worksheet** to restore the not assessed registration fees.

BA GELLER

Active

Registration

? \$50.00

? \$25.00 Program Reg'n

26 Next Card n°

\$75.00 Total

OK Restore Uncheck all Cancel

⇒ Click **OK** to assess the new **Registration Fees** and **Membership Card**.


See

[Central Office Communication](#)

Receive [Central Office Setup Disk](#)

19.1.2 Fixing Members Entered with Wrong Disk

⇒ Install the [Central Office Setup Disk](#).

⇒ In **Member Level** access the **Fees** window  for each member and delete the registration fee from the **Fee Assessment Details** page. (See Deleting [Fee Assessments](#))

⇒ Access the **Registration Form** for each member.

⇒ Make the correct selections from the **Linked Registration Options** drop boxes.

⇒ Click **OK** to show the **Member Worksheet**.

⇒ Click **Restore** from the **Member Worksheet** to restore the not assessed registration fees.

⇒ Click **OK** to assess the new **Registration Fees** and **Membership Card**.

See

[Central Office Communication](#)

Receive [Central Office Setup Disk](#)

19.2 Import Club Data from Your Central Office

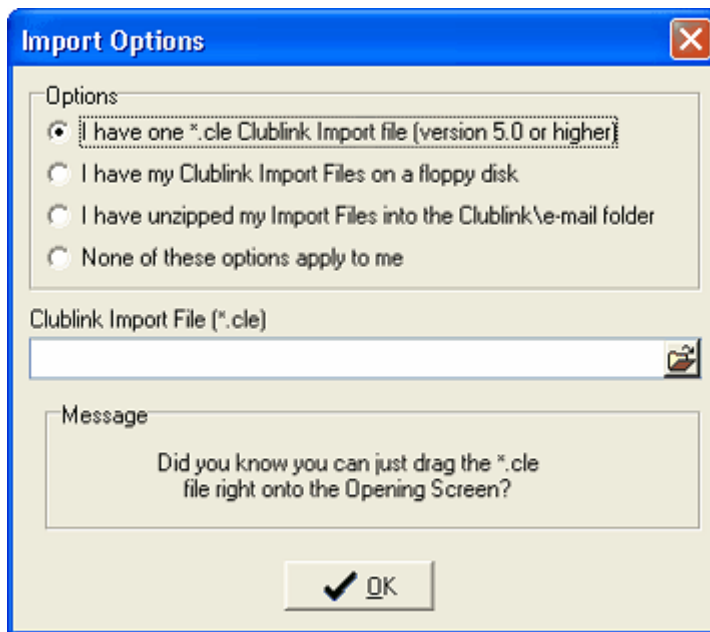
Importing Club Data will update your Clublink system with **Central Office required information** and adds new members to your system who have been added by your **Central Office**. A list of changes will be created for your verification.

Importing Central Office Data will:


- √ Update member information with current Central Office member information.
- √ Update **registration status** of members.
- √ Update the **Club mailing information**.
- √ Copy all imported members onto the **Registration Drop Button List**.

To Import Your Data

⇒ On the **Opening screen** select **Import Club Data** from the **Options menu**.



⇒ From the **Import Options** window select the location of the import file.

+Note+: If you have selected the *.cle option, you must click the Open File button  and select the appropriate file from the Open window.

⇒ Click **OK**.

⇒ The Error Report is automatically opened. Review the **Error Report** (you can print it by selecting print from the file menu) then close the Error Report.

Report Preview																	
Error Report																	
Last Name	First Name	Role	Level 1	Level 2	Level 3	Cost	1	2	3	4	5	6	7	8	9	10	
BOARDWORKS																	
412 WEST SAANICH ROAD	Total \$	\$0.00															
VICTORIA, BC	Gst/Tps	\$0.00															
V8Z 3G4	Pst/Tvq	\$0.00															
(250)479-0330	Cost	\$0.00															
S/N	CL677686BW/C																
Version	5.0 - 1																
Last Revision Date	2004-09-22																
Not Registered	0																
Pending	0																
Registered	237																
Total	237	Errors : 360															
Competitive	51																
Recreational	176																
Coach	10																
Judge	0																
Member	0																
Total	237																
Fees																	
1. ADAMS	STEVEN	Recreational	LEARN TO DIVE														
2. ADAMSON	DEREK	Recreational	LEARN TO DIVE														
3. ADAMSON	DEREK	Recreational	LEARN TO DIVE														
4. ALGER	BRITTANY	Recreational	LEARN TO DIVE														
5. ALLEN	ELIZABETH	Recreational	RECREATIONAL														
6. ALLEN	VANESSA	Recreational	RECREATIONAL														
7. ALMENDARES	JESSICA	Recreational															
8. ANDERSON	ROBYN	Recreational	RECREATIONAL														
9. ANGROVE	GILLIAN	Coach	COACH/INST														
10. ANGROVE	MICHAEL	Competitive	JR NATIONAL								X	X	X	X			
11. ANN	FROBEEN	Recreational	RECREATIONAL														
12. ANTOINE MARANDA	ETIENNE	Recreational	RECREATIONAL														
13. ANTOINE MIRANDA	CHARLES	Recreational	RECREATIONAL														
14. BECKETT	JOHNATHAN	Recreational															
15. BELLJOL-DUGUAY	MARION	Recreational															
16. BELLJOL-DUGUAY	MAXEMCE	Recreational	RECREATIONAL														
17. BELZIL	TONY	Recreational	LEARN TO DIVE														

- ⇒ In the **Import Club Data** window, click **Show** to view the **Verification** window.
- ⇒ In the **Verification** window, you may choose to view the details of the members that you are importing by selecting **On** from the **Details** menu.

Verification
View Details Central Office

Import Data				Clublink			
<input checked="" type="checkbox"/>	ADAMS	STEVEN	Recreatic	<input checked="" type="checkbox"/>	ADAMS	STEVEN	Recreatic
<input checked="" type="checkbox"/>	ADAMSON	DEREK	Recreatic	<input checked="" type="checkbox"/>	ADAMSON	DEREK	Recreatic
<input checked="" type="checkbox"/>	ADAMSON	DEREK	Recreatic	<input checked="" type="checkbox"/>	ADAMSON	DEREK	Recreatic
<input checked="" type="checkbox"/>	ALGER	BRITTANY	Recreatic	<input checked="" type="checkbox"/>	ALGER	BRITTANY	Recreatic
<input checked="" type="checkbox"/>	ALLEN	ELIZABETH	Recreatic	<input checked="" type="checkbox"/>	ALLEN	ELIZABETH	Recreatic
<input checked="" type="checkbox"/>	ALLEN	VANESSA	Recreatic	<input checked="" type="checkbox"/>	ALLEN	VANESSA	Recreatic
<input checked="" type="checkbox"/>	ALMENDARES	JESSICA	Recreatic	<input checked="" type="checkbox"/>	ALMENDARES	JESSICA	Recreatic
<input checked="" type="checkbox"/>	ANDERSON	ROBYN	Recreatic	<input checked="" type="checkbox"/>	ANDERSON	ROBYN	Recreatic
<input checked="" type="checkbox"/>	ANGROVE	GILLIAN	Coach	<input checked="" type="checkbox"/>	ANGROVE	GILLIAN	Coach
<input checked="" type="checkbox"/>	ANGROVE	MICHAEL	Competit	<input checked="" type="checkbox"/>	ANGROVE	MICHAEL	Competit
<input checked="" type="checkbox"/>	ANN	FROBEEN	Recreatic	<input checked="" type="checkbox"/>	ANN	FROBEEN	Recreatic
<input checked="" type="checkbox"/>	ANTOINE MARAND	ETIENNE	Recreatic	<input checked="" type="checkbox"/>	ANTOINE MARAND	ETIENNE	Recreatic
<input checked="" type="checkbox"/>	ANTOINE-MIRAND	CHARLES	Recreatic	<input checked="" type="checkbox"/>	ANTOINE-MIRAND	CHARLES	Recreatic

Update

Action --->>>

Update

New

No action

Change?

LEARN TO DIVE	(250)477-1815	LEARN TO DIVE	(250)477-1815
	1998-02-23		1998-02-23
	011		011
3925 ANSELL RD		3925 ANSELL RD	

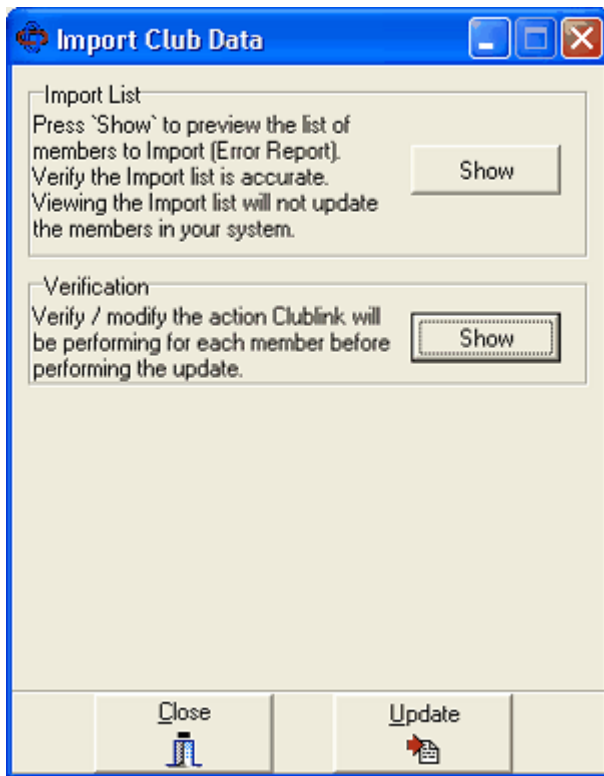
Member Updates: 236 No Action: 0
New Members: 1 Total: 237

Close

⇒ Highlight each member in the **Import Data** list to see what **Update** will take place for each member (the type of **Update Action** is displayed between the Import Data list and the Clublink list)

+Note+: This is an optional step. You do not have to view the changes before completing the Import.

- ⇒ If you would like to override the **Action** that will be performed on a member, click the **Change** button and select the desired Action for that member.
- ⇒ Click the **Close** button after you have made any necessary changes in the **Verification** window.
- ⇒ In the **Import Club Data** window, click the **Update** button to update your Clublink data.



⇒ You may print the list of Import Changes for your files by selecting **Print** from the **File menu** in the Import Changes window.

See

[Central Office Communication](#)

19.3 Export Club Data to Your Central Office

Exporting club data to your Central Office will update your central office with new members and changes to existing members' information. This process sends the **required** and **requested** information of all members who are on the **Registration Drop Button** to the central office. Once the export is complete, Clublink changes all new members (on the Registration Drop Button) to **Pending** (have a yellow light on the Registration Tab page in Member Level) until a confirmation file is sent by central office and imported to your Clublink (see Importing Club Data from Your Central Office). You also have the option to export certifications and accident reports.

See

[Central Office Communication](#)

[Exporting Club Data](#)

[Export Wizard Options](#)

[Drop Button Lists](#)

19.3.1 Exporting Club Data

⇒ From the **Options** menu on the [Opening Screen](#) select **Export Club Data**.

⇒ In the **Wizard** screen select the appropriate data options for export.

See

[Central Office Communication](#)

Exporting Club Data

19.3.2 Export Wizard Options

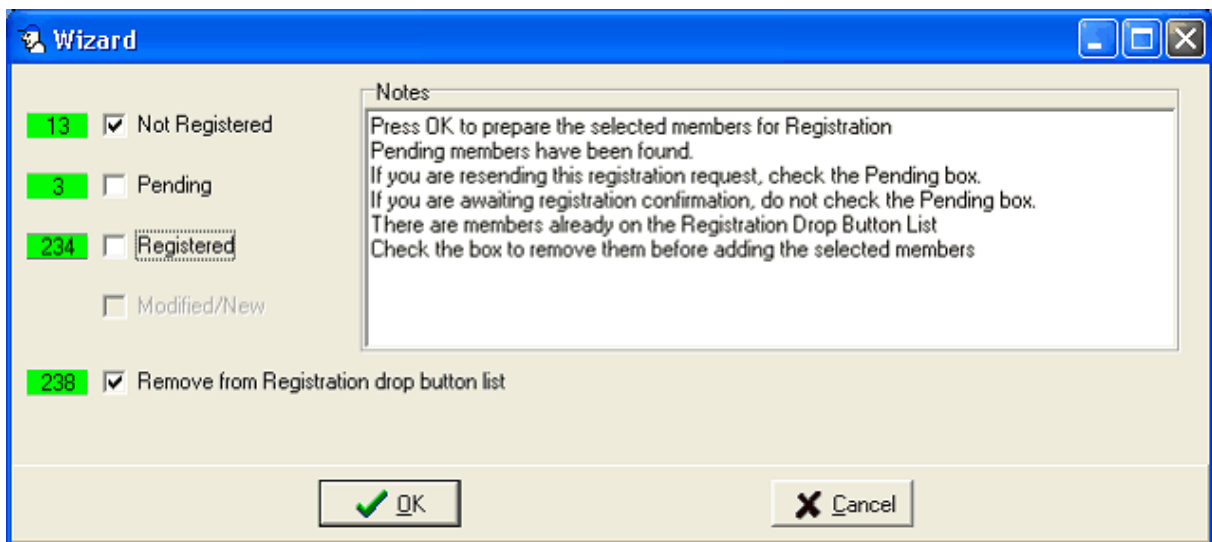
Not Registered – shows you the number of members in your system that are not registered and should be exported to your Central Office.

Pending – shows you the number of pending members in your system. This box should only be checked if you wish to re-send the pending members information to your Central Office. If you do not wish to re-send and are just awaiting registration confirmation for them, leave the box unchecked.

Registered – This box shows you how many members are already registered, and there is no need to send them to your Central Office unless requested.

Modified/New – shows you which members have been added to Clublink or which members have had their required information changed since registration. It is recommended that you include these members with your registration. This option only applies to the Clublink On-Line Registration module.

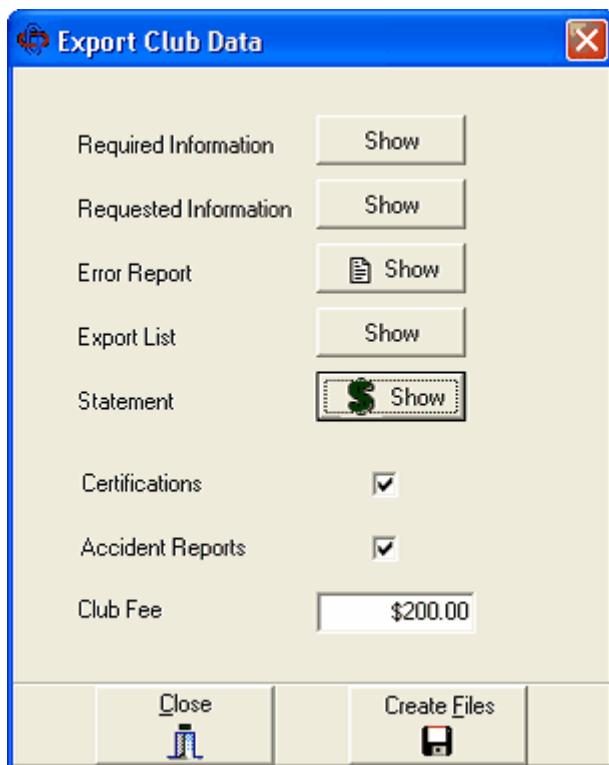
Remove from the Registration Drop Button List – shows you how many members are on the Registration Drop Button List. Check this box to remove the members from the drop button and only add the members you have selected above (i.e. not registered, pending, registered).



⇒ Click **OK** when you have finished your selections in the export wizard.

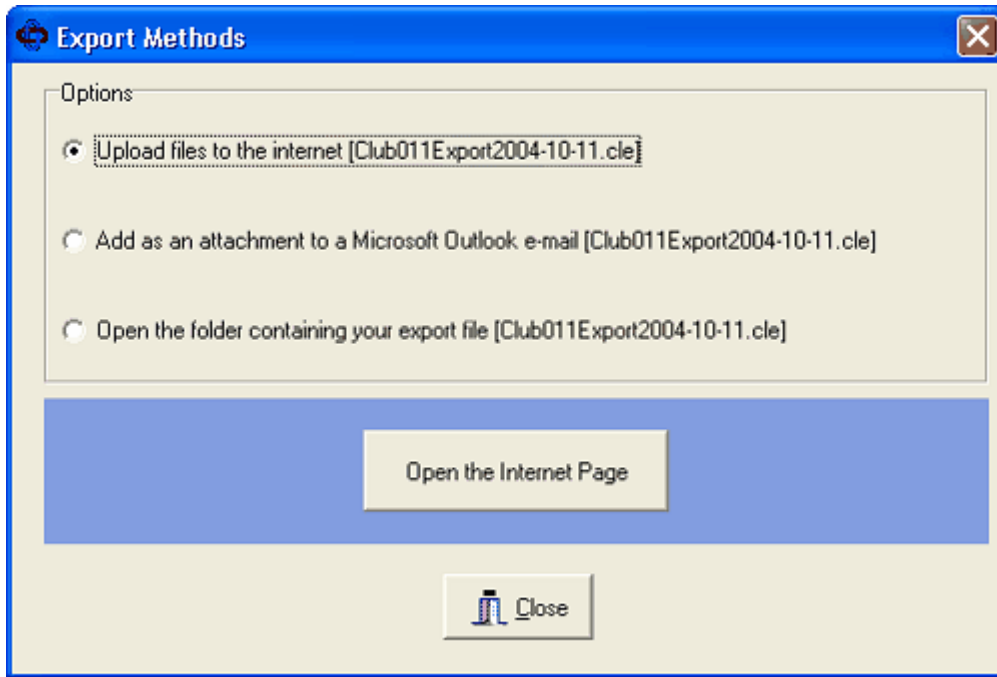
⇒ In the **Export Club Data** window, click each **Show** button to view any of the export information.

+Note+: You will not be able to create your export files until you have viewed the **Error Report**. You may also **Print** the Error Report and the Statement by selecting Print from the File menu when viewing each report. The Statement is an estimate of your registration fees. Your Central Office will determine the exact amount due.



- ⇒ Check the **Certifications** box if you wish to update your members certifications with your Central Office. If this box is unchecked, then your Central Office does not require your Certifications.
- ⇒ Check the **Accident Reports** box if you wish to update your accident reports with your Central Office. If this box is unchecked, then your Central Office does not require your Accident Reports.
- ⇒ Enter the amount of your **Club Fee** if you are paying a Club Fee to your Central Office at this time.
- ⇒ Click the **Create Files** button once you have completed the Exporting Club Data window.
- ⇒ In the **Export Methods** window, select the method you wish to use to send your Export Files then click the large rectangular button in the grey box (the details of this button will change according to your export method selection).

+Note+: If you prefer a different export method, select the option to "Open the folder containing your export files". From the explorer window, select the current export file and copy it to the desired location (i.e. a floppy disk or an email other than Microsoft Outlook).



- ⇒ **Close** the **Export Club Data** window.
- ⇒ Select the appropriate option in the **Confirm** window.

See

[Central Office Communication
Exporting Club Data](#)

20 New Season

New Season is a very important feature of Clublink and should be performed at the start of each registration year. Performing New Season will reset many aspects of Clublink to be ready for a New Season. Failure to run New Season could result in incorrect **fee assessments** and inaccurate recording of **Active** members.

See

[When to Perform a New Season](#)
[What you Need to Perform a New Season](#)
[Early Registration](#)
[Performing New Season](#)
[New Season Options Descriptions](#)

20.1 When to Perform a New Season

Perform a **New Season** close to the expiry date of membership cards before entering members for the upcoming registration season. (If you would like to enter members for the upcoming season before you have received the new Central Office Setup Disk, see Early Registration)

+Note+: The system will change the registration status of members from **Registered** to **Not Registered** when their expiry date has been surpassed, but it is better to do it manually via **New Season**.

See

[New Season](#)

20.2 What you Need to Perform a New Season

1. The [Central Office Setup Disk](#) for the upcoming registration season.
2. Create a backup disk of Clublink via **Clublink** – [Utilities](#) and store it in a safe place away from your hard drive.
3. Make note of any [Linked Registration Options](#) you have created for your club. If you have created **Linked Registration Options**, they are linked to the **Central Office Linked Registration Options** and may disappear if your **Central Office** makes changes (this can be easily seen in the Setup Wizard). Review any changes made to the **Linked Registration Options** before accepting your **Central Office Setup Disk** for the new registration season.

See

[New Season](#)

20.3 Early Registration

If you would like to perform early registration (entering members before you have received the new Central Office Setup Disk), we suggest the following method:

1. Assign a keyword to the new member (see Assigning Keywords).
2. Do not access the [Member Worksheet](#) when registering the member.
3. Do not make any [Linked Registration Option](#) selections when registering the member.

When the new [Central Office Setup Disk](#) is received,

1. Perform **New Season**. (See Performing a New Season)
2. Install the **Central Office Setup Disk** into the system. (See Receiving Central Office Setup Disk)
3. Place all early registration members onto a Drop Button by dragging the keyword from the [Keyword List](#) onto one of the four Drop Buttons.
4. Access the [Registration Form](#) for each member on the Drop Button.
5. Make the correct selections from the **Linked Registration Options**.
6. Press **OK** and show the **Member Worksheet**.
7. Press **Restore** from the **Member Worksheet** to restore the not assessed **Registration Fees**.
8. Assess the new **Registration Fees** and **Membership Card**.

See

[New Season](#)

20.4 Performing New Season

⇒ On the [Opening screen](#) select **New Season** from the **Options menu**.

- ⇒ Select the items you want completed for your new season. (see description of New Season items below)
- ⇒ Select which members you want to perform New Season on.
- ⇒ When prompted to **set next card number to 1** choose **Yes** to do it now.

See

[New Season](#)

20.4.1 New Season Options Descriptions

Set all members to not Active – will change all members from a green check mark to a red 'X'. Instead of deleting members at the start of each season, make them **Not Active**. To activate a member that returns for the new registration season, follow the instructions for [Adding a New Member](#) and select the correct member from the **Search All Roles** list.

Assign a keyword to all Active members... – will enable you to recall all members from a season and perform statistical analysis.

Set all members to Not Affiliated – will change all affiliation status lights from Green or Yellow to Red and clear the expiry date.

Delete all paid transactions – will erase all transactions where the amount due is exactly equal to the amount paid. This process will remove unwanted financial information for the **New Season** and can be run throughout the season (see example).

Delete deposited receipts before... – a given date will remove all transactions that have been acknowledged as deposited (have a deposit date) before a specified date. Deleting deposited receipts will enhance the performance of Clublink and remove unwanted receipts. Set a deletion date to a reasonable date where you would not have to justify a payment and it's details. Keeping receipts in Clublink for one year is reasonable provided you perform

annual backups of your software.

Rename transaction details... – will rename fee descriptions by adding in the year of the fee to differentiate old fee descriptions from current fees.

See

[New Season](#)

21 Task Manager

Task Manager can be accessed from Clublink **Application Launcher**. Task manager allows you to perform tasks that are not included in Clublink. If there is something you would like to see added to Task Manager, please contact us with your suggestion or request. Once the task manager methods are tested and approved, they will be incorporated into future releases of Clublink.

See

[Fee Replicator](#)

[History Query](#)

[Export Data to the Web](#)

[Import Data from the Web](#)

[Home Page Generator](#)

[Email List Maker](#)

21.1 Fee Replicator

The Fee Replicator is a tool used for recurring fees (ex: monthly membership fees). This option is particularly useful when you want to charge new fees to everyone on a particular schedule without entering them into new classes on a new schedule.

- ⇒ Make sure you have the appropriate members on one of the [Drop Buttons](#) in Member level. (See adding members to a Drop Button)
- ⇒ Select **Fee Replicator** from the Task Manager list.
- ⇒ Click **Launch** at the bottom of the Task Manager window.

- ⇒ Select the appropriate **Drop Button List**.
- ⇒ Select the **From Fee** and **To Fee**. (ex. From January, To February)
- ⇒ Click **Next**.

Name	OG two Days	Paid	4 months
CENCIARINI, TONY	80.00	0.00	120.00
COLE, STEVEN	80.00	0.00	120.00
DREYER, JENNA	80.00	0.00	120.00
DURWARD, ELIZABETH	80.00	0.00	120.00
GELLER, BA	80.00	0.00	120.00
GIBBONS, NAKITA	80.00	0.00	120.00

⇒ To replicate the original fees for all members click **Replicate All OR** to apply different amounts, use the **Custom Fees** selections.

+Note+: You can save this report by clicking **Save As**.

⇒ Click **Next** when you are finished in the **Fee Replicator** window.
Click **OK** to confirm.

See
[Task Manager](#)

21.2 History Query

Using the History Query you can create a report based on History information. History information is found on the History tab page of each member in Member level. (ex. who changed levels between Sep 1/03 and June 30/04)

- ⇒ Make sure you have the appropriate members on one of the **Drop Buttons** in Member level. (See adding members to a Drop Button)
- ⇒ Select **History Query** from the Task Manager list.
- ⇒ Click **Launch** at the bottom of the Task Manager window.

The screenshot shows a window titled "History Quiz" with two main sections: "Step 1" and "Step 2".

Step 1: Select a Drop Button List

- Invoice 5 members
- Report 10 members
- Affiliate 13 members
- Finance 6 members

Below the list is a "Refresh" button.

Step 2: Select a History Description

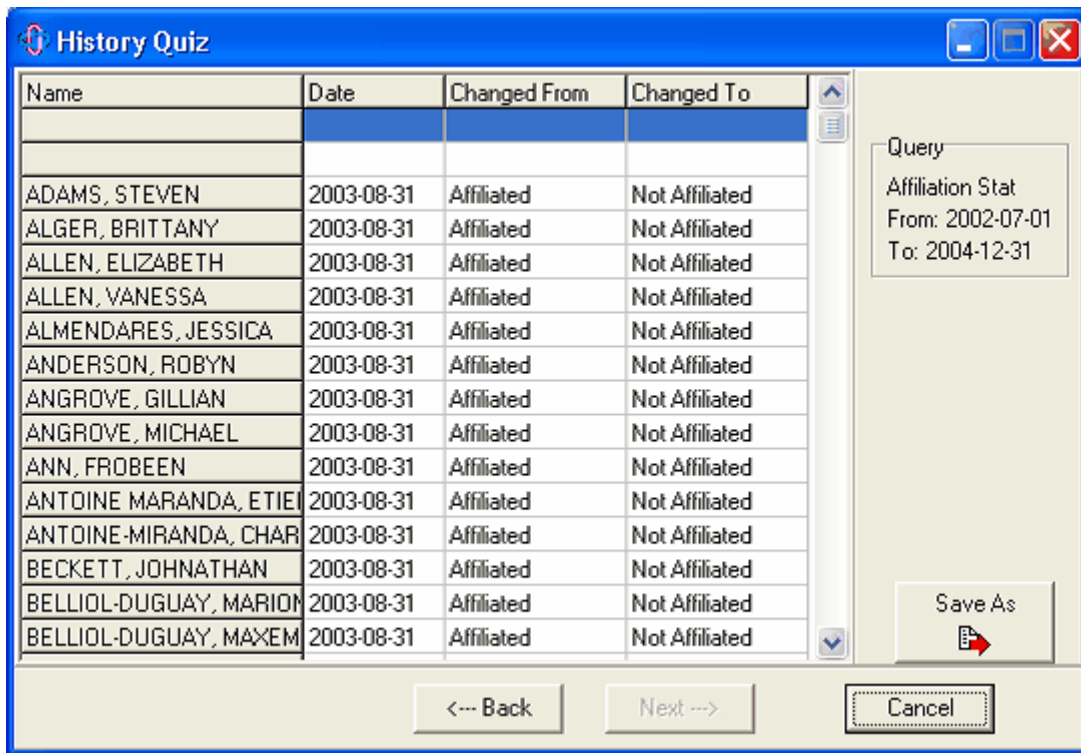
Description: CATEGORY (dropdown menu)

Start Date: 2002-07-01 (dropdown menu)

End Date: 2004-12-31 (dropdown menu)

At the bottom of the window are three buttons: "<-- Back", "Next -->", and "Cancel".

- ⇒ Select the appropriate **Drop Button List**.
- ⇒ Select a **History** description to report on.
- ⇒ Select the appropriate date parameters.
- ⇒ Click **Next**.



⇒ After viewing the report you can choose to save it by clicking the **Save As** button.

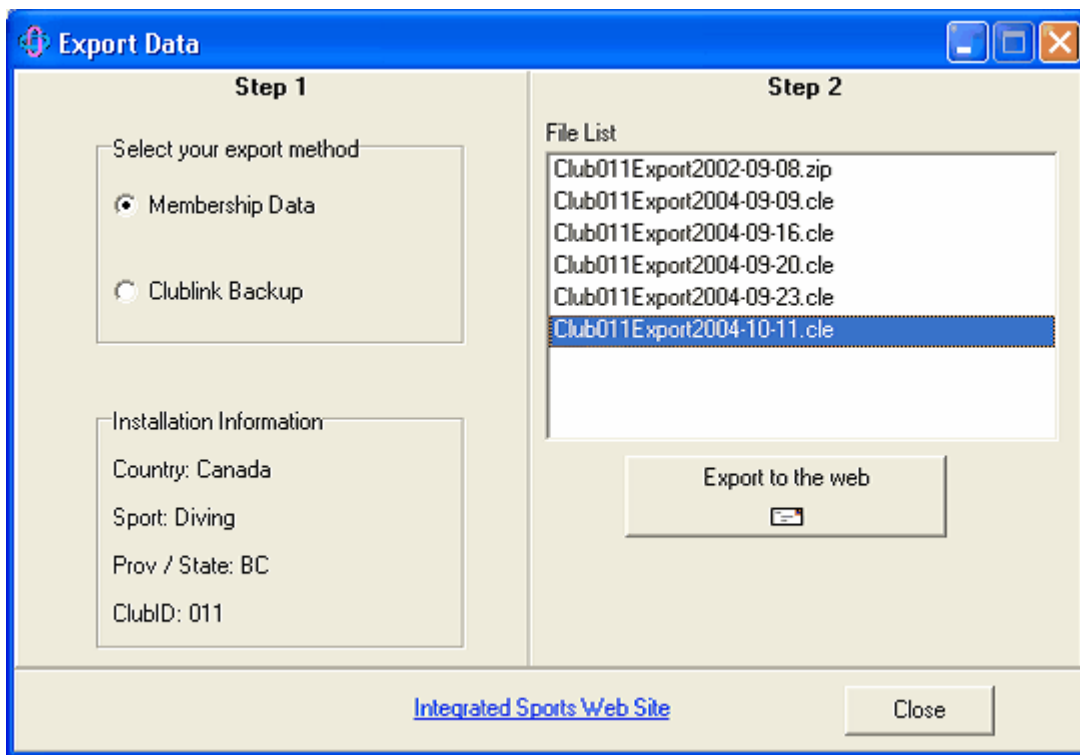
See

[Task Manager](#)

21.3 Export Data to the Web

The Export Data to the Web feature allows you to send your Membership information to the internet to be picked up by your Central Office. This method eliminates the need to send in your data on a floppy or attach it to an email. You can also store your Clublink Backup data directly on the internet. Only you can access the data.

- ⇒ Select **Export Data to the Web** from the Task Manager list.
- ⇒ Click **Launch** at the bottom of the Task Manager window.



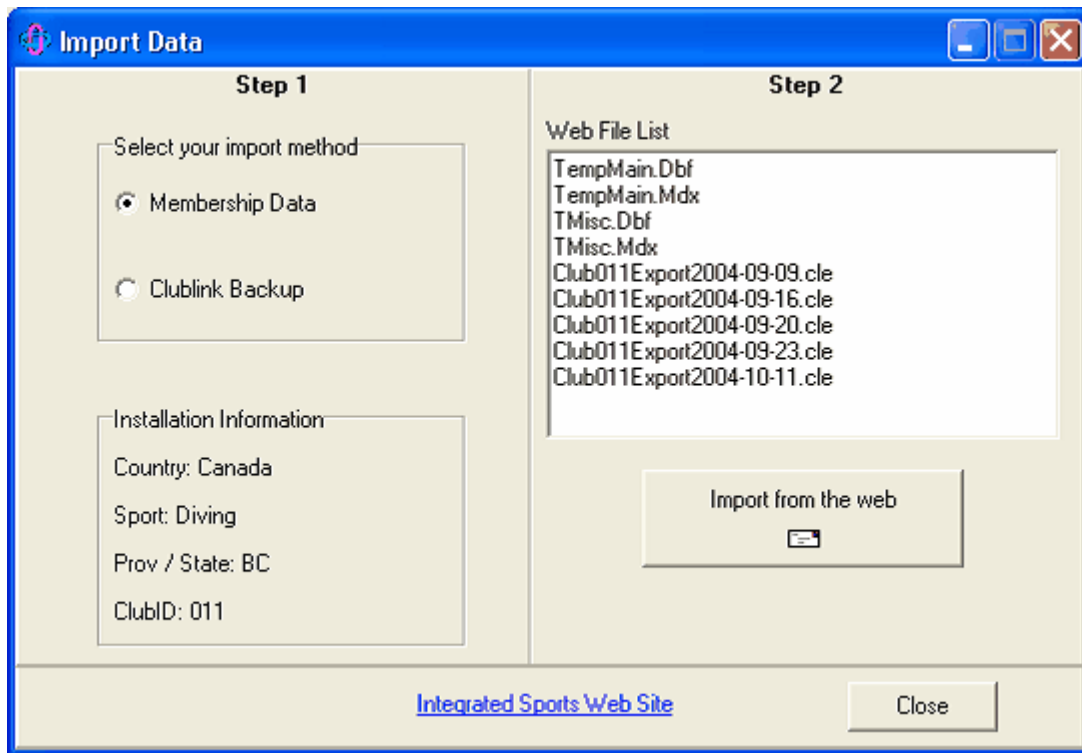
- ⇒ Select either **Membership Data** or **Clublink Backup**.
- ⇒ Select the export file from the **File List**.
- ⇒ Click the **Export to the Web** button.
- ⇒ In the **Task Manager** window click **OK** to confirm via the web.
- ⇒ From the **Upload Clublink Information** window follow the on screen instructions.

See
[Task Manager](#)

21.4 Import Data from the Web

The **Import Data from the Web** feature allows you to download Membership information from the internet that was placed there by your Central Office. This method eliminates the need for your Central Office to mail you a floppy or email you attachments. You can also download your Clublink Backup that you have stored on the web.

- ⇒ Select **Import Data from the Web** from the Task Manager list.
- ⇒ Click **Launch** at the bottom of the Task Manager window.
- ⇒ Select either **Membership Data** or **Clublink Backup**.
- ⇒ Click the **Import from the Web** button.



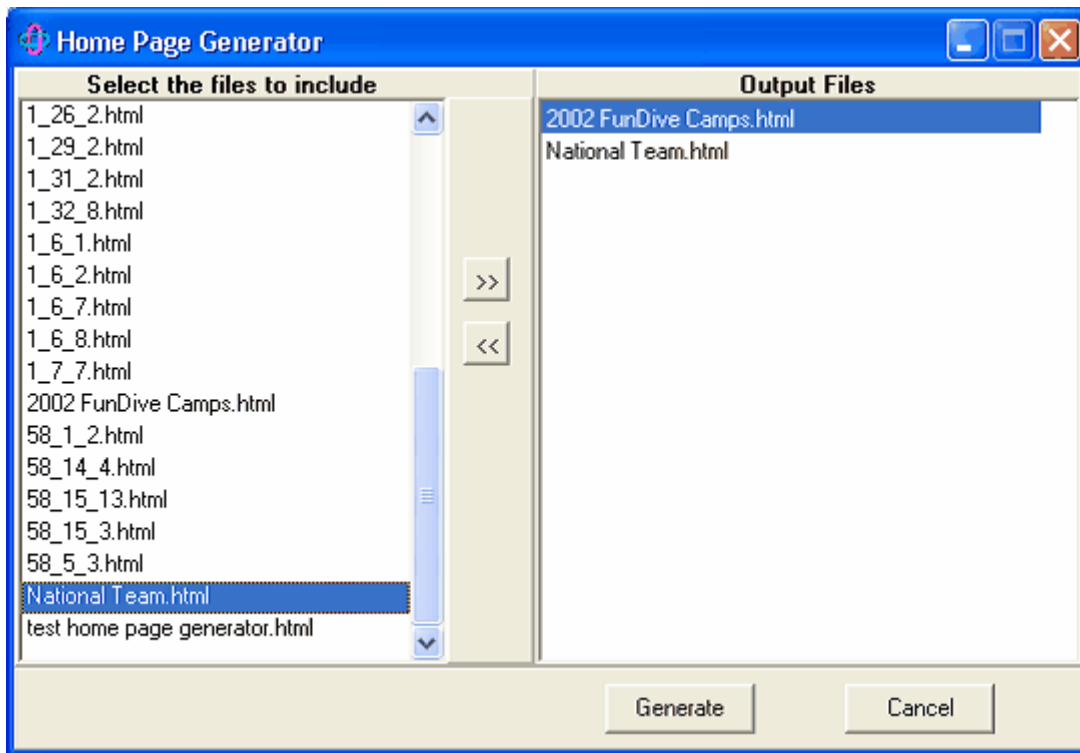
- ⇒ When the import is complete, close the **Import Data** window.
- ⇒ To update your Clublink with these files, see **Importing Club Data** or **Restoring Data Files** (if you imported Clublink backup files).


See
[Task Manager](#)

21.5 Home Page Generator

Home Page Generator makes it easy for you to create a web page of your Schedules and Classes.

- ⇒ In the **Class level** of Clublink select the schedule you want for your web page.
- ⇒ From the Tools menu select **Web site html**, then select either **save this schedule as a web page** or **save this schedule and all classes as a web page**.
- ⇒ Repeat the saving process for each schedule that you want for your web page.
- ⇒ Select **Home Page Generator** in Task Manager and click **Launch**.



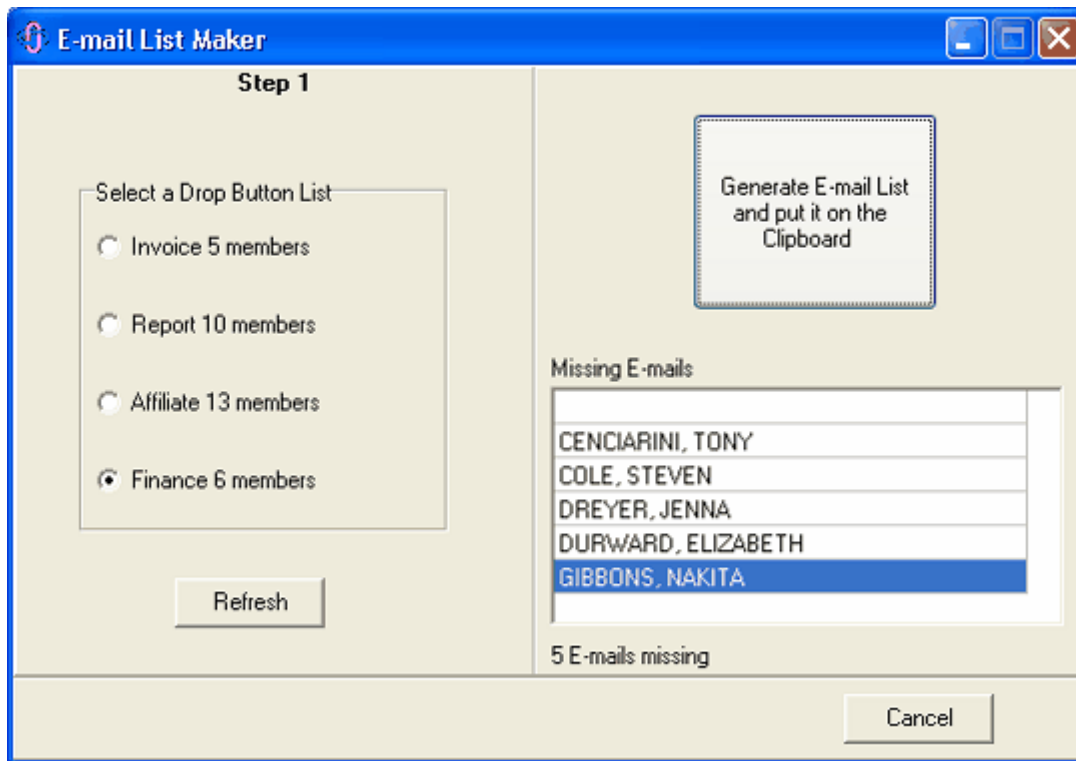
- ⇒ Select each file you want to include then click the **Add button**  to add the file to the list of **Output Files**.
- ⇒ Click **Generate** to create the web pages.
- ⇒ Click **OK** to preview the web pages. This selection will also provide you with the location of the saved web pages to send to your web master.

See
[Task Manager](#)

21.6 Email List Maker

You can generate a list of emails to be copied into your email program. This is a handy tool for sending group emails to your members.

- ⇒ Make sure you have the appropriate members on one of the **Drop Buttons** in Member level. (See adding members to a Drop Button)
- ⇒ Select **Email List Maker** from the Task Manager list.
- ⇒ Click **Launch** at the bottom of the Task Manager window.



- ⇒ Select the appropriate **Drop Button List**.
- ⇒ Click the **Generate Email List and put it on the Clipboard** button.
- ⇒ Click **OK** in the Clublink Task window.

+Note+: A list of members from the drop button you selected that do not have email addresses will be produced.

- ⇒ Open your email program.
- ⇒ Create a new email or open an existing email that you wish to send.
- ⇒ Place your cursor in the Email Recipient box (or TO: box).
- ⇒ Press **Ctrl+V** (hold down the **Ctrl** key and press **V** at the same time) on your keyboard to paste the email addresses into the recipient box.
- ⇒ Proceed with your usual steps for sending an email.

Close the Email List Maker.

See

[Task Manager](#)

22 Chit System


The Clublink Chit System does not come with the standard installation of Clublink but may be downloaded from the web site.

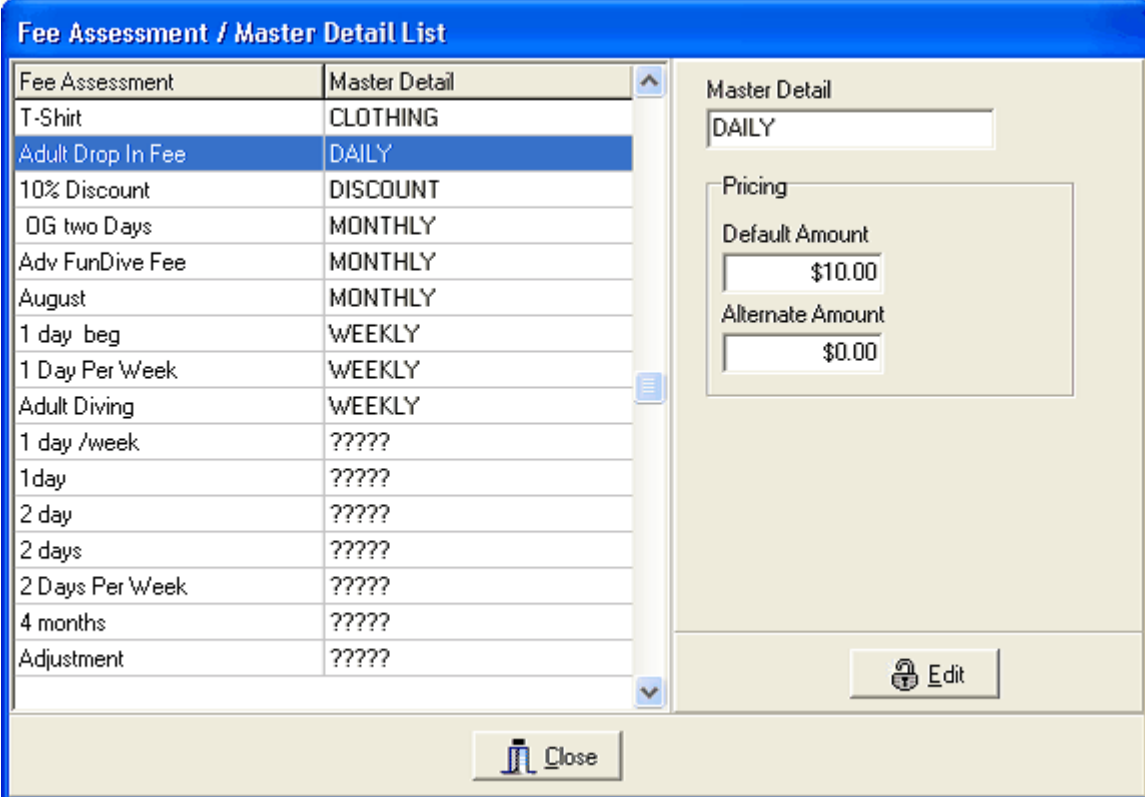
The Clublink Chit System is a fast method of assessing fees to your members. You can use the Chit System while Clublink is closed or open. The Master Details list allows you to categorize your fee assessments for easier reporting and assign default fees to further expedite the fee assessment process.

The first time you open Chit System you will be prompted to setup your Master Details. You can also edit this list at anytime.

See
[Setting Up Master Details](#)
[Entering Fee Assessments](#)

22.1 Setting Up Master Details

- ⇒ From Clublink Application Launcher click **Chit System**.
- ⇒ If Master Details does not open immediately, click the **Fees List** button  on the toolbar or select **Manage Master Detail List** from the **File** menu.




Fee Assessment	Master Detail
T-Shirt	CLOTHING
Adult Drop In Fee	DAILY
10% Discount	DISCOUNT
OG two Days	MONTHLY
Adv FunDive Fee	MONTHLY
August	MONTHLY
1 day beg	WEEKLY
1 Day Per Week	WEEKLY
Adult Diving	WEEKLY
1 day /week	?????
1day	?????
2 day	?????
2 days	?????
2 Days Per Week	?????
4 months	?????
Adjustment	?????


Master Detail

Pricing

Default Amount

Alternate Amount

 Edit

 Close

- ⇒ Select each Fee Assessment and then click **Edit** to add a Master Detail.
- ⇒ In the **Pricing** section enter a **default** amount and an **alternate** amount if desired.
- ⇒ Click **OK** to save your changes.

See
[Chit System](#)

22.2 Entering Fee Assessments

- ⇒ From Clublink Application Launcher click **Chit System**.

- ⇒ Find the member by entering their **Membership #** or by typing their **Last Name**.
- ⇒ Enter the date.
- ⇒ Select a **Fee Assessment** from the list.
- ⇒ Select the **Default Price** or the **Secondary Price**.
- ⇒ Click **Apply** to apply the Fee Assessment.

You can add another Fee Assessment or click the **Apply All Amounts** button  located above the **History** section.

See
[Chit System](#)

23 Utilities

Clublink Utilities is designed for easy management of your Clublink database. To Open **Clublink Utilities** select it from the Clublink **Application Launcher**.

+Note+: To use Clublink Utilities you must close Clublink.

See
[Clean-up and Rebuild](#)
[Rebuild Class Lists](#)
[Delete Data](#)
[Backup Data Files](#)
[Restore Data Files](#)

23.1 Clean-up and Rebuild

Clean-up and rebuild reduces the hard disk space necessary to run Clublink and speeds up the operation of the program.

Clean-up and Rebuild should be completed:

- √ When you open Clublink and it prompts you that **Clean-up is overdue**.

- √ When Clublink is **Unable to open all data files**.
- √ When information does not appear properly in Clublink.
- √ When regular maintenance is being performed on you computer. (ex. Scandisk, Defrag, etc.)

⇒ Select **Clean-up and Rebuild** from the **Clublink Utilities** screen.

⇒ When the process is complete, click **OK**.

See

[Utilities](#)

23.2 Rebuild Class Lists

Rebuild Class Lists should be run if Class Volumes in Class level are showing incorrect numbers. This process will correct the Class Volumes.

⇒ Select **Rebuild Class Lists** from the **Clublink Utilities** screen.

⇒ When the process is complete, click **OK**.

See

[Utilities](#)

23.3 Delete Data

Delete Data is used to delete large amounts of data from Clublink. The Delete Data function should be used with caution as there is no undo button. Always back-up your data before using the Delete Data function (see Back-up Data Files).

⇒ Select **Delete Data** from the **Clublink Utilities** screen.

⇒ Select the data you want deleted.

⇒ Click **OK**.

⇒ Click **Yes** to confirm deletion or click **cancel** to abort the process.

See

[Utilities](#)

23.4 Backup Data Files

Use the Backup Data Files to backup your data on a regular basis. This feature compresses all Clublink data and saves it to a single file.

⇒ Select **Backup Data Files** from the **Clublink Utilities** screen.

⇒ Click **OK** to begin the backup.

⇒ Choose the destination location and file name.

⇒ When the process is complete, click **OK**.

See

[Utilities](#)

23.5 Restore Data Files

Use the Restore Data Files feature to use the data from your backup file to overwrite your existing Clublink data. You can choose to restore from any backup file created with the same version of Clublink.

- ⇒ Select **Restore Data Files** from the **Clublink Utilities** screen.
- ⇒ Choose the backup file to restore (*.clb).
- ⇒ Click **OK** at the warning window **OR** click **cancel** to abort.
- ⇒ Type the word **Replace** in the **Confirm Restore** window.
- ⇒ Click **OK**.
- ⇒ In the **Restore Data Files** window, check the directory and filename that you will be restoring from and click **OK** to confirm or **cancel** to abort the process.
- ⇒ When the process is complete, click **OK**.

See

[Utilities](#)

24 Central Office Only

See

[Creating a Central Office Setup Disk](#)

[Required and Requested Information](#)

[Linked Registration Options](#)

[Custom Drop Boxes](#)

[Certifications](#)

[Medical Template](#)

[Last Revision Date](#)

[Central Office Letter](#)

[Registration Year](#)

[Membership Card](#)

[Distributing Central Office Setup Disk](#)

[Club Information Management](#)

[Importing Data from a Club](#)

[Exporting Data/Confirmation to a Club](#)

[Fees](#)

[Charging Fees to a Club](#)

[Invoicing a Club](#)

[Receiving Payments from a Club](#)

[New Season](#)

[Performing Central Office New Season](#)

[New Season Option Descriptions](#)

24.1 Creating a Central Office Setup Disk

The **Central Office Setup Disk** allows you to define what information will be required and requested from each of your clubs. It also allows you to set the **Linked Registration Options (Registration fees and categories)** for your clubs. You need to create a Central Office Setup disk prior to the start of each registration season or whenever a change is made to the registration criteria (i.e. fee change, you require additional information, etc.) This disk should be distributed to all clubs well in advance of their registration to ensure they are collecting the appropriate fees and information for each member. When distributing the Central Office Setup Disk you should create a document describing your [Linked Registration Options](#), required and requested information and your fee structure. Special notes should be made to detail any changes to the system from one season to the next.

- ⇒ Select **Build Central Office Setup Disk** from the **Central Office menu** on the [Opening screen](#).

Build Central Office Setup Disk

Required Information

Requested Information

Linked Registration Options

Custom Drop Boxes

Certifications

Medical Template

Last Revision Date

Central Office Letter

Registration Year

See

[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

[Required and Requested Information](#)

[Linked Registration Options](#)

[Custom Drop Boxes](#)

[Certifications](#)

[Medical Template](#)

[Last Revision Date](#)

[Central Office Letter](#)

[Registration Year](#)

[Membership Card](#)

[Distributing Central Office Setup Disk](#)

24.1.1 Required and Requested Information

⇒ In the **Build Central Office Setup Disk** window, click **Show** and tab through each page of data fields making the **Required Information** selections (If a club omits required information, they will receive an error message when entering members into Clublink).

+Note+: You must select which information is required for each **Role** separately by selecting the **Role** from the drop box at the top of the [Data Field Options](#) window. (See instructions on setting up the [Certifications](#) template)

Data Field Options

Role:

Information
 Required
 Requested

General | Family | Affiliate | Medical | Certification | Misc

			Description
<input checked="" type="checkbox"/>	Title	Level 1	<input checked="" type="checkbox"/> CATEGORY
<input checked="" type="checkbox"/>	Address	Level 2	<input type="checkbox"/> LEVEL
<input type="checkbox"/>	Apt.	Level 3	<input type="checkbox"/> SUB LEVEL
<input checked="" type="checkbox"/>	City	Custom 1	<input type="checkbox"/> CATEGORY I
<input checked="" type="checkbox"/>	Province	Custom 2	<input type="checkbox"/> CATEGORY B
<input checked="" type="checkbox"/>	Postal Code		

Default Province:

Registration Year:

Close

- ⇒ Click **Close** when you have completed your **Required Information** selections.
- ⇒ In the **Build Central Office Setup Disk** window, click **Show** and tab through each page of data fields making the **Requested Information** selections.
- ⇒ Click **Close** when you have completed your **Requested Information** selections.

See

[Central Office Only
Creating a Central Office Setup Disk](#)

24.1.2 Linked Registration Options

Linked Registration Options gives the Central Office the opportunity to create categories for your members, assign fees to those categories and assign minimum and maximum age requirements for those categories. Each role can have categories (linked list #1), sub categories (linked list #2) and sub sub categories (linked list #3).

+IMPORTANT NOTE+: Each selection in Linked List #2 and #3 will be dependant on the selection in Linked List #1. **The first non-zero fee in the Linked List selection furthest to the right (deepest in the tree) will be used for the Member.**

- ⇒ In the **Build Central Office Setup Disk** window, click **Show** to setup or change your **Linked Registration Options**.

+Note+: You must setup Linked Registration Options for each **Role** separately by selecting the **Role** from the drop box at the top of the window. You may not set any **Linked Registration Options** in categories or sub-categories that have not been selected as **Required Information** in **Central Office level**.

Provincial Sub Divisions

File

Role: Competitive Name: JR NATIONAL Fee: \$75.00 Min. Age: 0 Max. Age: 18

Central Office

CATEGORY	Fee	LEVEL	Fee	SUB LEVEL	Fee
JR PROVINCIAL	0.00				
JR NATIONAL	75.00				
SR PROVINCIAL	50.00				
SR NATIONAL	100.00				
UNATTACHED	125.00				
MASTERS	25.00				

Close Add Modify Delete

- ⇒ Select the appropriate **Role**.
- ⇒ Use the **Add, Modify and Delete** buttons at the bottom of the Linked Registration Options window to edit your Linked Registration Options and Fees.

See

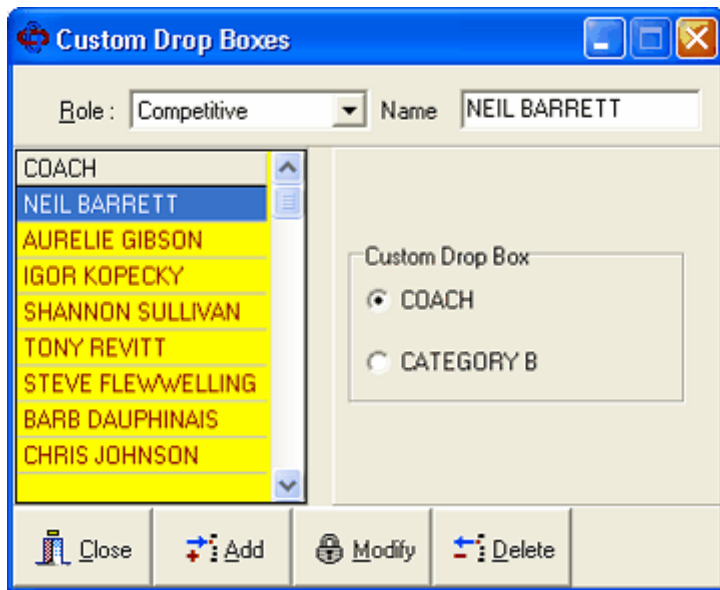
[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

24.1.3 Custom Drop Boxes

There are two [Custom Drop Boxes](#) available on the **General** tab page in **Member Level**. We recommend that, where possible, you do not use these as **Required Information** for the Central Office. These two drop boxes are a valuable tool for clubs to customize. If you do use the **Custom Drop Boxes** as **Required Information**, the box will be highlighted in yellow for all clubs. You will only be able to add to or edit the **Custom Drop Boxes** in the **Build Central Office Setup Disk** window if they are selected as **Required Information**, otherwise you may edit this list from [Member level](#) if it is not Required Information and therefore used by the Central Office only.

- ⇒ In the **Build Central Office Setup Disk** window, click **Show** to setup the **Custom Drop Boxes**.



- ⇒ Select a **Role**.
- ⇒ Select a **Custom Drop Box**.
- ⇒ Use the **Add, Modify and Delete** buttons at the bottom of the **Custom Drop Boxes** window to change your drop box selections.

See

[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

24.1.4 Certifications

Up to seven Certification templates can be created for each **Role** and can be locked by the Central Office so that clubs can track the certifications of their members. If a certification template is left unlocked on the **Central Office Setup Disk** each club will have the opportunity to setup and track their own certification details.

- ⇒ Click **Show** to view or edit the **Certifications** template.

- ⇒ In the **Certifications** window, select the appropriate **Role**.
- ⇒ Select a chart to customize from the right side of the window (numbers 1-7).
- ⇒ In the upper left corner of the chart enter the **title of the chart**.
- ⇒ Edit the **column and row headings**. (ex. row headings could be Start Date, End Date and Exam Date with column headings of Level 1, Level 2, Level 3, etc.)
- ⇒ Close the window to save your changes.

+Note+: In the **Build Central Office Setup Disk** window, you must check the **Certification** box if you wish to have the templates included on the disk.

See

[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

24.1.5 Medical Template

The Medical Template is a form to be used by your clubs when reporting on accidents. You may want to review your insurance claim forms before creating the Medical Template to ensure the clubs are collecting all of the necessary information. If you do not choose to create a template, clubs will have the opportunity to create their own. You must check the **Medical Template** box on the **Build Central Office Setup Disk** window to include the template on the disk.

- ⇒ Click **Show** to view or edit the **Medical Template**.
- ⇒ Type a heading or title for your accident report in the **Medical Template** window.
- ⇒ Type the first **Required Information Title** in the **Medical Template** window. (ex. Date of Accident)
- ⇒ Add a **Data Entry Area** beside the **Required Information Title**.

+Note+: Data Entry Areas need to be enclosed by Lesser Than and Greater Than symbols. (ex. <enter date here>)

- ⇒ Continue typing all of your Required Information Titles followed by a Data Entry Areas on each line of the template.

+Note+: You can insert a page break by clicking the **Page Break** button at the bottom of the template window.

⇒ Click **OK** to save your changes.

+Note+: The user will be able to automatically proceed through the data entry areas by using the F3 key on their keyboard.

See

[Central Office Only](#)
[Creating a Central Office Setup Disk](#)

24.1.6 Last Revision Date

⇒ Enter the date the setup disk was created. This date appears on the Clublink Opening Screen. It is often used to verify whether or not a club 's computer is configured for the current registration season.

See

[Central Office Only](#)
[Creating a Central Office Setup Disk](#)

24.1.7 Central Office Letter

⇒ Certain sports use the Central Office Letter as a unique identifier in creating membership cards. If this box is visible to you then you should contact your National body to obtain your Central Office Letter (often the first letter of your province or state).

See

[Central Office Only](#)
[Creating a Central Office Setup Disk](#)

24.1.8 Registration Year

⇒ Enter the last two digits of the Registration Year for this setup disk. The Registration year is incorporated into the membership card number of new members.

See

[Central Office Only](#)

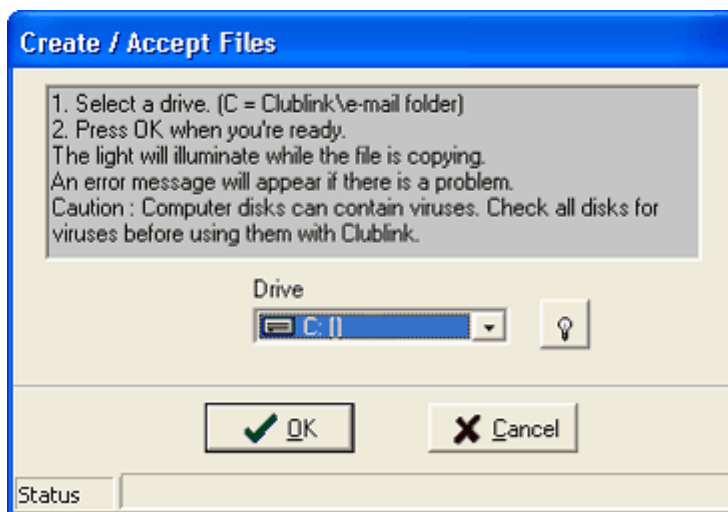
[Creating a Central Office Setup Disk](#)

24.1.9 Membership Card

Membership card numbers are automatically generated for new members. The Membership card number is unique to all members and stays with them year after year. Depending on your sport, the membership card numbers are generated in one of three formats.

1. Numerical: A sequential number is assigned to the member. You may also assign a block of numbers to designated clubs.
2. Central Office Letter: The membership number starts with the Central Office letter.
3. Default: Postal format. The membership number starts with the two character postal province/state.

⇒ Once you have reviewed and/or updated all aspects of the **Central Office Setup Disk**, click **Create Files** at the bottom of the window.



⇒ Select a drive for the files and click **OK**. If you selected your C drive, you should make note of the location of the file.

See

[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

24.2 Distributing Central Office Setup Disk

Each club needs to receive the setup files. Contact us if you would like to include your Central Office Setup Disk on our website for download with easy to follow installation instructions.

By email

- ⇒ Attach the files (located in your Clublink\FromMain folder) to an email.
- ⇒ Send the email with instructions for the clubs to copy the files from the email to their **Clublink\email** folder and then proceed with **Receiving Central Office Setup Disk**.

By CD

- ⇒ Copy the files (located in your Clublink\FromMain folder) to the CD. Repeat this for each club.
- ⇒ Send a Setup Disk to each club.

+Note+: When distributing your **Central Office Setup Disk** we recommend that you include a document describing your Linked Registration Options and Fee structure, Required and Requested Information, and any changes from the previous season.

See

[Central Office Only](#)

[Creating a Central Office Setup Disk](#)

24.3 Club Information Management

The Central Office needs to **Add** any new clubs to the system before importing club data for registration.

See

[Central Office Only](#)

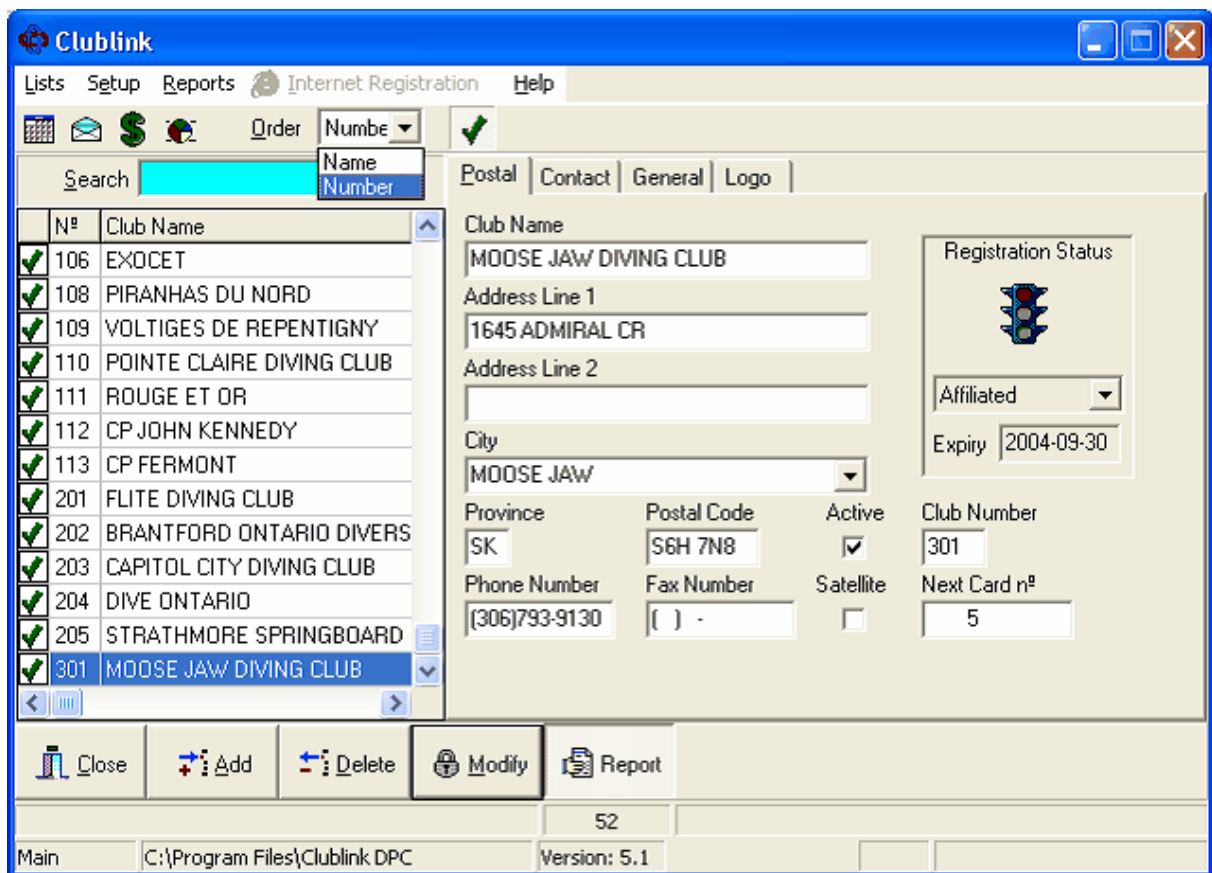
[Adding a Club](#)

[Modifying a Club](#)

[Deleting a Club](#)

24.3.1 Adding a Club

- ⇒ Click the **Clubs** button on the **Opening screen**.
- ⇒ From the **Order** drop box on the toolbar, select **Number**.



- ⇒ Check the bottom of the club list to see what club number should come next. Clublink will automatically get the next highest club number if a numeric club numbering system is used.
- ⇒ Click the **Add** button at the bottom of the window.
- ⇒ Complete the tabbed pages of club information.

+Note+: You will need to assign a club number on the **Postal** tab page. You can also enter the **Registration Status** and **Expiry**. Alternatively, you may want to wait until the club has sent it's registration and fee before changing it's registration status.

See

[Club Information Management](#)

24.3.2 Modifying a Club

- ⇒ Click the **Clubs** button on the [Opening screen](#).
- ⇒ Select the appropriate club.
- ⇒ Click the **Modify** button at the bottom of the window.
- ⇒ Make the necessary changes on each of the tabbed pages.
- ⇒ Click **OK** to save your changes.

See

[Club Information Management](#)

24.3.3 Deleting a Club

Deleting a club will delete all of the club's information from Clublink. We recommend that you deselect the **Active** box on the **Postal** tab page of a club to make them inactive rather than completely deleting them from your system.


To Delete:

- ⇒ Click the [Clubs](#) button on the [Opening screen](#).
- ⇒ Select the appropriate club.
- ⇒ Click the **Delete** button at the bottom of the window.

See

[Club Information Management](#)

24.3.4 Club Mailing Address

The club mailing address  is often the same as the address entered on the **Postal** tabbed page. If you are running Clublink in a multi-club environment, you can specify an alternate mailing address for a club. Some reports use the information on the Postal tabbed page whereas some other reports will use the Mailing Address. If you make a change to the club address, you will be asked if you would like to update the mailing address too.

24.4 Importing Data from a Club

Importing data from a club will update your Clublink with new members and changes to member information. You may receive information regarding accidents, changes to certifications and registration fees for new members. Once you have imported this data and completed the verification form you will need to export data back to the club providing them with a confirmation of registration. Clubs members remain not registered and pending until they are confirmed by the Central Office.

- ⇒ Select **Import Club Data** from the **Central Office menu** on the [Opening screen](#).
- ⇒ Select the appropriate location of your import files and click **OK**
or
- ⇒ Drag n drop the registration file on to the Clublink Opening Screen.

See

[Central Office Only](#)

[Error Report](#)

[Verification Form](#)

[Financial Statement](#)

[Updating Members](#)

24.4.1 Error Report

- ⇒ Review and/or print the **Error Report**. This report shows you the registration fees due from the club and any information that may be missing from their data.

+Note+: The club sees the same Error report before exporting their membership.

Report Preview																	
Error Report																	
Last Name	First Name	Role	Level 1	Level 2	Level 3	Cost	1	2	3	4	5	6	7	8	9	10	
BOARDWORKS																	
412 WEST SAANICH ROAD	Total \$	\$190.00															
VICTORIA, BC	Gst/Tps	\$0.00															
V8Z 3G4	Pst/Tvq	\$0.00															
(250)479-0330	Cost	\$190.00															
S/N	CL677686BW/C																
Version	5.0 - 1																
Last Revision Date	2004-09-22																
Not Registered	13																
Pending	0																
Registered	0																
Total	13	Errors : 26															
Competitive	2																
Recreational	11																
Coach	0																
Judge	0																
Member	0																
Total	13																
Fees																	
1. AJJA	SALVADOR	Recreational															
2. ALEXANDER	MARISSA	Recreational	RECREATIONAL			\$5.00		X					X		X		
3. ALEXANDER	NIGEL	Recreational	RECREATIONAL	Recreational		\$5.00		X					X		X		
4. BAKER	KATHLEEN	Recreational	RECREATIONAL			\$5.00											
5. CARSON	RACHEL	Recreational															
6. DAVID	MICHAEL	Recreational															
7. FAHINMI	SARAH	Recreational	RECREATIONAL			\$5.00		X									
8. GAMBLE	AVERY	Recreational	RECREATIONAL			\$5.00											
9. GAWLEY	KELVIN	Recreational	RECREATIONAL			\$5.00											
10. GELLER	MITCH	Recreational	LEARN TO DIVE			\$5.00											
11. HALLAM	DANIELLA	Competitive	JR NATIONAL			\$75.00					X	X					
12. WALKER	RANDY	Competitive	JR NATIONAL			\$75.00		X	X	X	X	X					
13. YOUNG	KIRSTEN	Recreational	RECREATIONAL			\$5.00		X					X		X		
	Guide																
	1: Age																
	2: Birthdate																

⇒ Close the **Error Report**.

See

[Central Office Only](#)
[Importing Data from a Club](#)

24.4.2 Verification Form

⇒ In the **Import Club Data** window, click **Show** in the **Verification** section to view the updates.

+Note+: When importing, you may be prompted with one of two types of messages from Clublink.

If Clublink finds the same [member duplicated](#) in the same role, then Clublink does not know which member needs to be updated. You will have to make this decision yourself. Generally when this message appears, there are unnecessary duplicates and the duplicate should be removed after the import process is complete.

If Clublink finds the [same member in a different club](#), Clublink does not know if the member should be added to the system a second time and therefore appear in both clubs or if the member has moved clubs. Press Yes to move the member from one club to the other, press No to create a second instance of the member.

⇒ You can choose to view the details for each member in the **Import List** by selecting **On** from the **Details menu**.

Verification
View Details Central Office

Import Data				Clublink			
✓	AJJA	SALVADOR	Recreatic	✗	YANEZ	VAL#RIE	Competiti
✓	ALEXANDER	MARISSA	Recreatic	✓	YANG	YAN	Coach
✓	ALEXANDER	NIGEL	Recreatic	✓	YANKE	DONIELLE	Recreatic
✓	BAKER	KATHLEEN	Recreatic	✓	YANKO	ALEXANDER	Recreatic
✓	CARSON	RACHEL	Recreatic	✓	YANO	CODDY	Competiti
✓	DAVID	MICHAEL	Recreatic	✗	YELLE-ROUSSEA	JULIEN	Competiti
✓	FAHINMI	SARAH	Recreatic	✗	YOUAKIM	BRIGITTE	Competiti
✓	GAMBLE	AVERY	Recreatic	✗	YOUAKIM	GABRIELLA	Competiti
✓	GAWLEY	KELVIN	Recreatic	✓	YOUPELL	SARAH	Recreatic
✓	GELLER	MITCH	Recreatic	✗	YOUNG	KATHRYN	Coach
✓	HALLAM	DANIELLA	Competiti	✗	YOUNG	VAL#RIE	Competiti
✓	WALKER	RANDY	Competiti	✓	YOUSSEF	ANDREA	Recreatic
✓	YOUNG	KIRSTEN	Recreatic	✗	YUZDEPSKI	ROBYN	Competiti
				✓	ZACHARIAS	CHASE	Recreatic
				✗	ZACHARIUK	SCOTT	Competiti
				✗	ZACK	LORI	Competiti
				✓	ZACK	LORI	Member
				✗	ZACK	MEGHAN	Competiti
				✓	ZACK	TARYN	Competiti
				✓	ZAKHARENKO	LIUDMILA	Coach

New
Action --->>>
 Update
 New
 No action
 Change?

Member Updates: 0 No Action: 0
 New Members: 13 Total: 13

Close

⇒ The **Action** to be taken is shown between the **Import List** and the **Clublink List**. If necessary, you can change the action by clicking the **Change button**. Clublink examines the membership and determines whether the member is a new member or if the existing member needs to be updated. When you have finished reviewing the **Import List**, click **Close**.

See

[Central Office Only](#)

[Importing Data from a Club](#)

[Multiple Members Found](#)

[Duplicate Member Found](#)

24.4.2.1 Confirm Member Form

If Clublink finds the same member duplicated in the same role, then Clublink does not know which member needs to be updated. You will have to make this decision yourself. Generally when this message appears, there are unnecessary duplicates and the duplicate should be removed after the import process is complete.

Multiple Members Found

Last Name: MORRIS
 First Name: MICHAEL
 Role: Recreational

Active / (514)398-0766/ 1950-12-25/ 00000094/ ARTISTIC/ 259 MARSH AVE

Select the member to update

Active / () - / - - / / / / / /
 Active / (514)398-0766/ 1950-12-25/ 00000094/ ARTISTIC / / / 259 MARSH AVE
 Active / (514)398-0766/ 1950-12-25/ 00000094/ TRAMPOLINE / / / 259 MARSH AVE

See

[Verification Form](#)

[Duplicate Member Found](#)

24.4.2.2 Duplicate Member Found

If Clublink finds the same member duplicated in the same role, then Clublink does not know which member needs to be updated. You will have to make this decision yourself. Generally when this message appears, there are unnecessary duplicates and the duplicate should be removed after the import process is complete.

Confirm this is the correct member to update

Last Name: MORRIS
 First Name: MICHAEL

Import Data		Clublink	
Address	259 MARSH AVE	Address	259 MARSH AVE
Birthdate	1950-12-25	Birthdate	1950-12-25
Club Number	525	Club Number	576
Card n°		Card n°	00000094

See

[Verification Form](#)

[Multiple Members Found](#)

24.4.3 Financial Statement

⇒ Click **Show** in the **Statement** section to view or print the **Financial Statement**.

Level 1	Amount	Level 2	Amount	Level 3	Amount
BOARDWORKS					
412 WEST SAANICH ROAD	Total \$	\$390.00			
VICTORIA,BC	Gst/Tps	\$0.00			
V8Z 3G4	Pst/Tvq	\$0.00			
(250)479-0330	Cost	\$390.00			
Summary					
CLUB FEES	\$200.00				
Competitive(2)					
JR NATIONAL(2)	\$150.00	(1)	\$0.00	(1)	\$0.00
Recreational(11)					
(3)	\$0.00	(1)	\$0.00	(1)	\$0.00
RECREATIONAL(7)	\$35.00	(1)	\$0.00	(1)	\$0.00
LEARN TO DIVE(1)	\$5.00	(1)	\$0.00	(1)	\$0.00

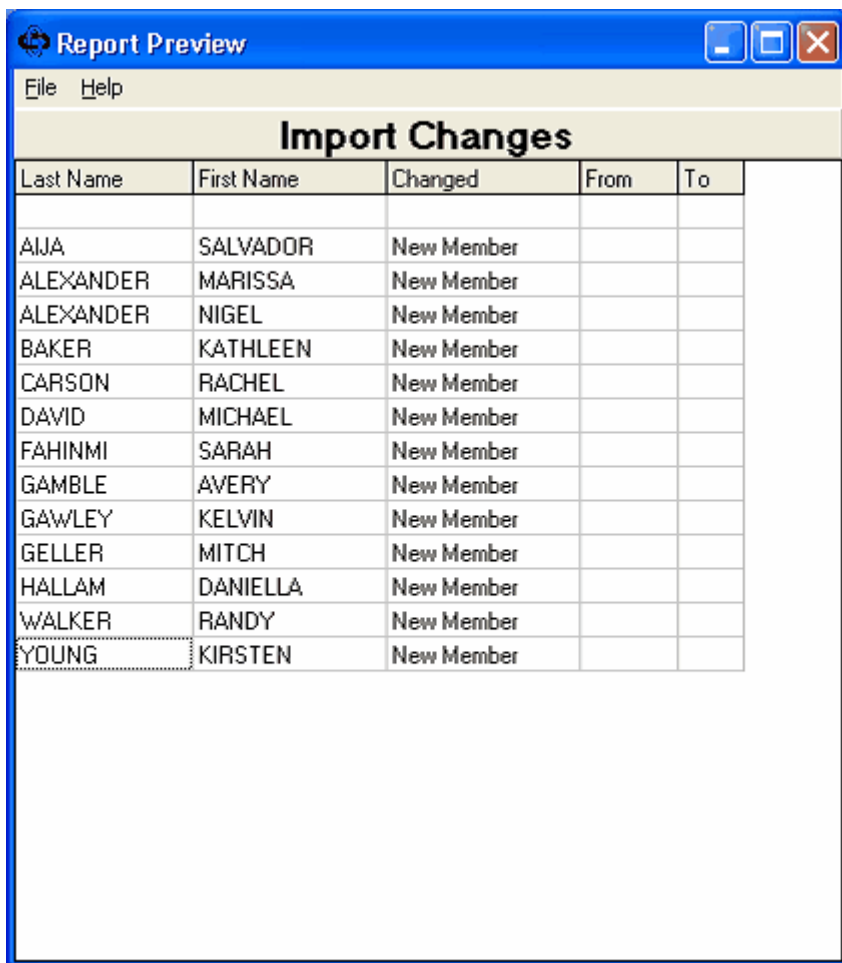
See

[Central Office Only](#)

[Importing Data from a Club](#)

24.4.4 Updating Members

- ⇒ Click **Update Files** to complete the import.
- ⇒ Click **OK** to add all the imported members to the [Registration Button](#).
- ⇒ Enlarge the **Import Changes** list to view or print the changes.



The screenshot shows a window titled "Report Preview" with a menu bar containing "File" and "Help". The main content area is titled "Import Changes" and displays a table with the following data:

Last Name	First Name	Changed	From	To
AIJA	SALVADOR	New Member		
ALEXANDER	MARISSA	New Member		
ALEXANDER	NIGEL	New Member		
BAKER	KATHLEEN	New Member		
CARSON	RACHEL	New Member		
DAVID	MICHAEL	New Member		
FAHINMI	SARAH	New Member		
GAMBLE	AVERY	New Member		
GAWLEY	KELVIN	New Member		
GELLER	MITCH	New Member		
HALLAM	DANIELLA	New Member		
WALKER	RANDY	New Member		
YOUNG	KIRSTEN	New Member		

Close the **Import Club Data** window.

See

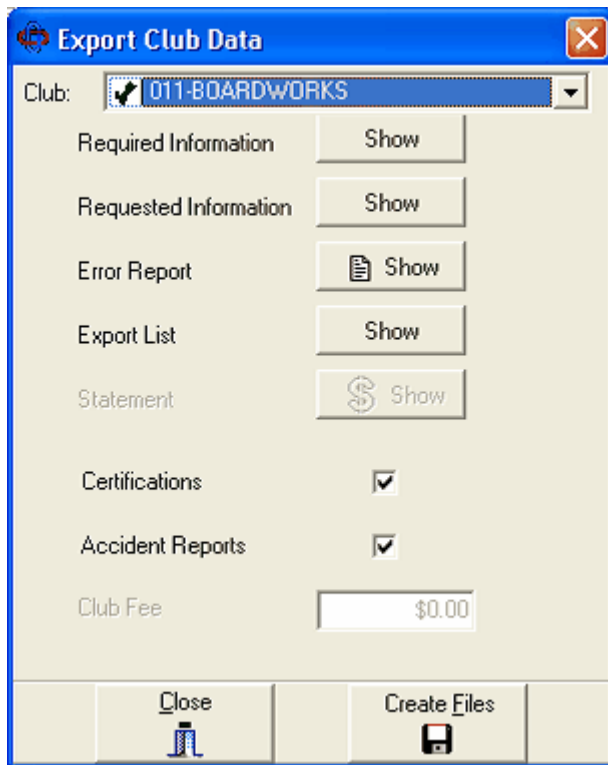
[Central Office Only](#)

[Importing Data from a Club](#)

24.5 Exporting Data/Confirmation to a Club

When you export data to a club you are sending the updated data that the Central Office may have entered as well as confirmation for the data that you imported from the club. The confirmation will update the club's members from **Pending** to **Registered**.

⇒ Select **Export Club Data** from the **Central Office menu** on the [Opening screen](#).



- ⇒ Select the club you want to export. If you are exporting multiple clubs to your National Body, select club "000".
- ⇒ You have one last chance to verify what required and requested information is about to be sent.
- ⇒ Click **Show** to view the **Error Report**. You are required to view the **Error Report** before you can create the export files. You may also print this report by selecting **Print** from the **File menu**.
- ⇒ You may also view the Export List by clicking **Show**.
- ⇒ Check the **Certifications** box if you would like to include certification updates and check the **Accident Reports** box if you would like to include accident report updates. By checking Certifications or Accident Reports, the club will automatically be prompted to send these with their registration.
- ⇒ Click **Create Files**.
- ⇒ Select one of the options from the **Export Method** window.

+Note+: Selecting to open the folder containing your export file will show you where the file has been created. You will still need to send this file to the club (i.e. email, floppy disk, CD).

- ⇒ Close the **Export Club Data** window.

See

[Central Office Only](#)

24.6 Fees

See

[Central Office Only](#)



[Charging Fees to a Club](#)

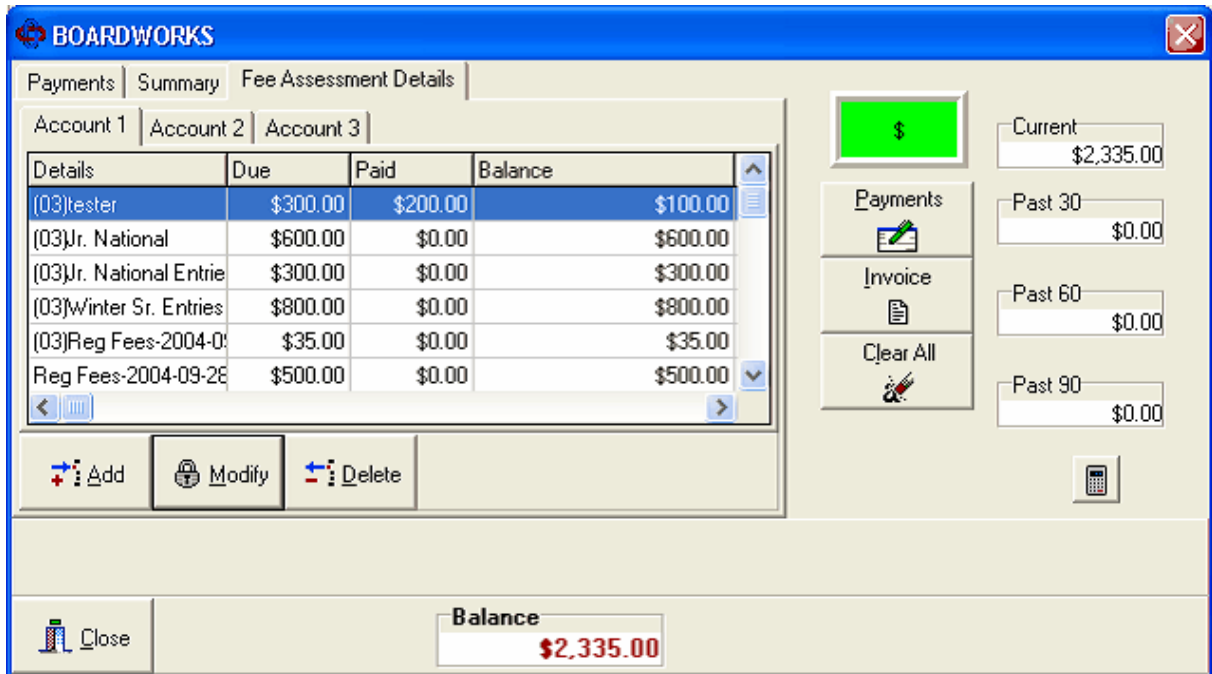
[Invoicing a Club](#)

[Receiving Payments from a Club](#)

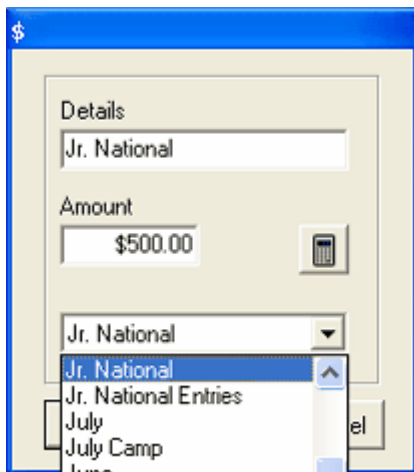
24.6.1 Charging Fees to a Club

At the Central Office you will need to use the data you are importing from each club to assess fees for that club. This will allow you to track your registration income, apply payments from a club and create invoices.

- ⇒ From the **Opening screen** click the **Clubs** button  and select a club.
- ⇒ Click the **Fees** button  on the toolbar to open the club's Fees page.



- ⇒ Click the **Fee Assessments** tab page and select the appropriate **Account** tab.
- ⇒ Click the **Add** button.



- ⇒ Enter an amount and use the bottom drop box to select a name for the **Fee Assessment**.

+Note+: If the **Fee Assessment** does not already exist in your system, you can add a new one by typing it in the **Details** box at the top of this window. The new Fee Assessment title will automatically be added to the drop list for future use.

Click **OK** to complete the **Fee Assessment**.


See

[Central Office Only](#)

[Fees](#)

24.6.2 Invoicing a Club

⇒ From the [Opening screen](#) click the [Clubs](#) button  and select a club.

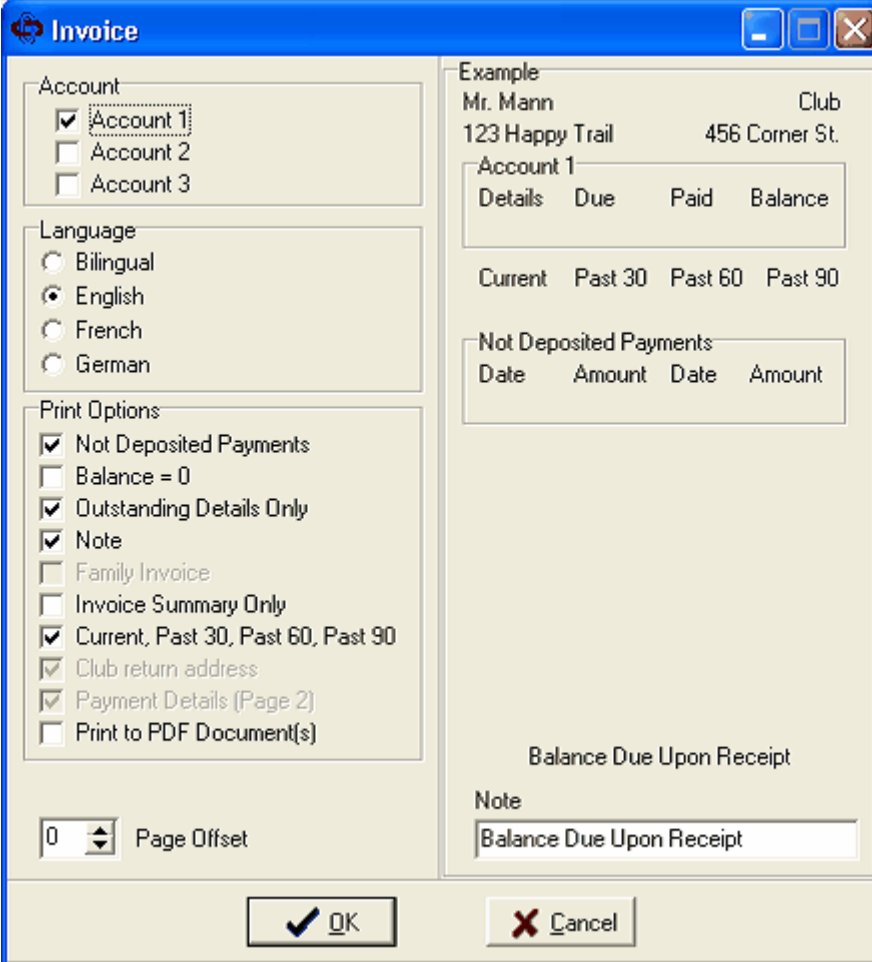
⇒ Click the **Fees** button  on the toolbar to open the club's Fees page.

⇒ After you have assessed all necessary fees (see [Charging Fees to a Club](#) page ???) click the **Invoice** button

 Invoice



on any of the three tabbed pages in the **Fees** window.



Invoice

Account

Account 1

Account 2

Account 3

Language

Bilingual

English

French

German

Print Options

Not Deposited Payments

Balance = 0

Outstanding Details Only

Note

Family Invoice

Invoice Summary Only

Current, Past 30, Past 60, Past 90

Club return address

Payment Details (Page 2)

Print to PDF Document(s)

0 Page Offset

Example

Mr. Mann Club
123 Happy Trail 456 Corner St.

Account 1

Details	Due	Paid	Balance
Current	Past 30	Past 60	Past 90

Not Deposited Payments

Date	Amount	Date	Amount
------	--------	------	--------

Balance Due Upon Receipt

Note

Balance Due Upon Receipt

OK Cancel




- ⇒ In the **Invoice** window, make the appropriate selections. (See **Invoice Window** for descriptions of Invoice selections)
- ⇒ Click **OK** when you have completed your selections.
- ⇒ Select a printer or select PDF to print your invoice to PDF.

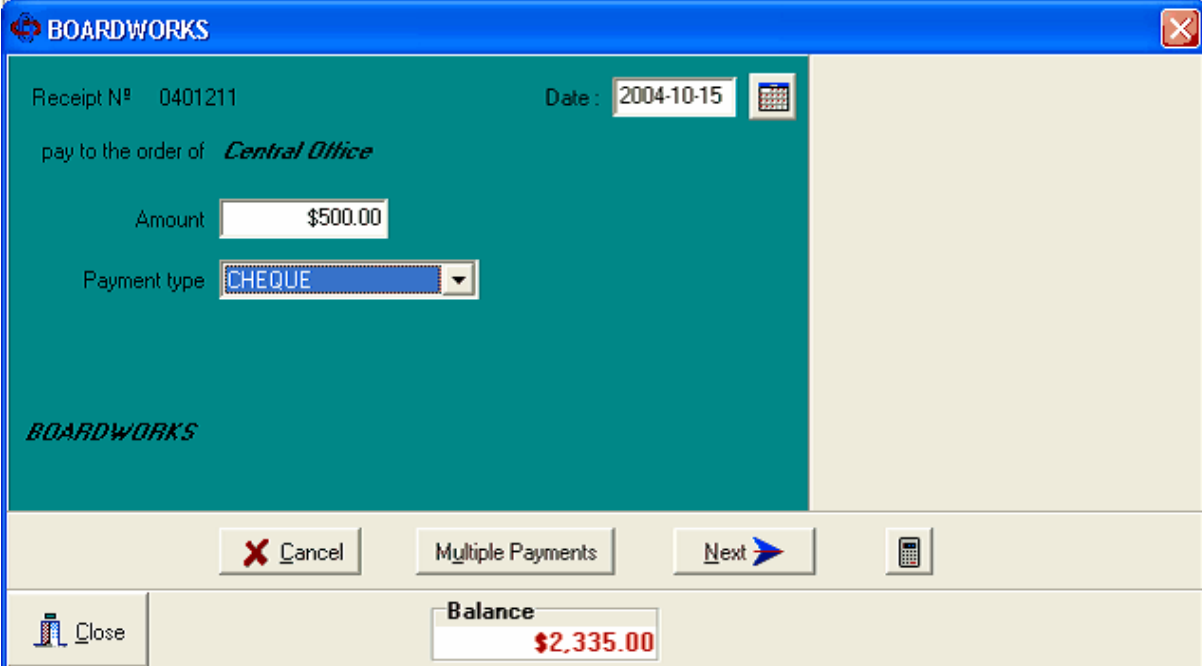
See

[Central Office Only Fees](#)

24.6.3 Receiving Payments from a Club

When you receive money from a club, it must be applied to a **Fee Assessment**. So, you have to have assessed the club fees (see **Charging Fees to a Club** for instructions) in order to enter any payments.

- ⇒ From the **Opening screen** click the **Clubs** button  and select a club.
- ⇒ Click the **Fees** button  on the toolbar to open the club's Fees page.
- ⇒ Click the **Payments** button  on any of the three tabbed pages.



BOARDWORKS

Receipt N° 0401211 Date: 2004-10-15

pay to the order of *Central Office*

Amount: \$500.00

Payment type: CHEQUE

BOARDWORKS

Cancel Multiple Payments Next > [Calculator Icon]

Close Balance: \$2,335.00

- ⇒ Enter the **Date** of the payment.
- ⇒ Enter the **Amount** of the payment.
- ⇒ Select the **Payment Type**.
- ⇒ Click **Next**.

nothing	Detail	Due	Paid	Balance
81	(03)tester	300.00	200.00	100.00
81	(03)Jr. National	600.00	0.00	600.00
81	(03)Jr. National En	300.00	0.00	300.00
81	(03)Winter Sr. Entr	800.00	0.00	800.00
81	(03)Reg Fees-200	35.00	0.00	35.00
81	Reg Fees-2004-09	500.00	0.00	500.00

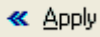
Payment 1 of 1

Amount: 500.00 Date: 2004-10-15

Balance: 500.00

Buttons: << Apply, Custom, <, >, >>

Bottom Bar: OK, Cancel, Close, Balance: \$2,335.00

⇒ Select a **Fee Assessment** to apply the payment to, then click the **Apply** button .

+Note+: You can apply a payment to more than one fee assessment by selecting another assessment and clicking the **Apply** button again.

- ⇒ The OK button will illuminate when you have applied the full amount of the payment.
- ⇒ The Fees window will automatically show the **Payments** tabbed page for you to view the details of the payment that you just received.
- ⇒ Click **Close** to close the fees window.

+Note+: For all other **Fees** information, see **Fees**)

See

[Central Office Only](#)

[Fees](#)

24.7 New Season

New Season should be performed at the **Club level** by following the Performing New Season instructions. In addition, there is a **Central Office New Season** that should be performed. The Central Office New Season works the same as the club New Season except each action is performed on the list of clubs rather than the list of members. This process should be completed before importing any club data for the upcoming season.

See

[Central Office Only](#)

[Performing Central Office New Season](#)

[New Season Option Descriptions](#)

24.7.1 Performing Central Office New Season

- ⇒ Select **New Season** from the **Central Office** menu on the [Opening screen](#).
- ⇒ In the **New Season** window, select the operations you want performed for the New Season. (See New Season Option Descriptions below)

New Season

Set all clubs to not Active

Set all clubs to Not Registered

Delete all paid transactions

Delete deposited receipts before... 2003-10-16 [Calendar Icon]

Rename transaction details (03) before... 2004-10-15 [Calendar Icon]

Example : Fee1 --> (03)Fee1

OK Cancel

When you have completed all your selections, click **OK**.

See
[Central Office Only](#)
[New Season](#)

24.7.2 New Season Option Descriptions

Set all clubs to Not Active – will remove all clubs from the Active list and change them to the Not Active list.

Set all clubs to Not Registered – will change all affiliation status lights from Green or Yellow to Red and clear the expiry date.

Delete all paid transactions – will erase all transactions where the amount due is exactly equal to the amount paid. This process will remove unwanted financial information for the **New Season** and can be run throughout the season.

Delete deposited receipts before... – a given date will remove all transactions that have been acknowledged as deposited (have a deposit date) before a specified date. Deleting deposited receipts will enhance the performance of Clublink and remove unwanted receipts. Set a deletion date to a reasonable date where you would not have to justify a payment and it's details. Keeping receipts in Clublink for one year is reasonable provided you perform annual backups of your software.

Rename transaction details... – will rename fee descriptions by adding in the year of the fee to differentiate old fee descriptions from current fees.

See

[Central Office Only
New Season](#)

25 Checklists

Here are some checklists to help you get the most out of Clublink.

See

[Club Checklist](#)
[Central Office Checklist](#)
[Clublink Data Fields](#)

25.1 Club Checklist

Clublink is a very flexible piece of software and can be customized to match the operations of your club. Complete the checklist to ensure you get the most out of Clublink's flexibility.

- Select the language for Clublink (English / French). [Opening Screen, Options | Language from the menu].
 - Enter a unique club id number (defined by your Central Office). [Opening Screen, Module | Club Level from the menu].
 - Define access passwords (Administrator and Read Only) (optional). [Opening Screen, Options | Administrator Password].
 - Receive your **Central Office Setup Disk**. [Opening Screen, Options | Receive Central Office Setup Disk].
 - Import Central Office Data** (if your Central Office sent you data, it will reduce your data entry drastically by importing their data into your system). [Opening Screen, Options | Import Central Office Data].
 - Customize Clublink's data fields (remove unwanted data fields from the registration forms and customize the titles of custom edit and list boxes). [Base Level, Setup | Data Fields Options].
 - Review the **Required** and **Requested** data fields setup by your **Central Office**. [Base Level, Setup | Central Office Data Field Options].
 - Build your own **Custom Drop Boxes** (bottom two drop-down boxes on the General tabbed page and the Registration Form). [Base Level, Lists | Custom Drop Boxes]. (see the Getting Started Guide).
 - Set up your **Tax System** [Base Level, Options | Tax System].
 - Assign your club fees in conjunction with the **Central Office** registration fee structure. [Base Level, Lists | Linked Registration Options].
 - Build your own **Certifications** (ex: NCCP). [Base Level, Setup | Certifications].
- Remember to backup your data on a regular basis.
 - Please read [New Season](#) to familiarize yourself with seasonal reset features of Clublink.

See

[Checklists](#)

25.2 Central Office Checklist

Clublink is a very flexible piece of software and can be customized to match the operations of all of the clubs in your jurisdiction. Complete the checklist to ensure you get the most out of Clublink's flexibility.

- Select the language for Clublink (English / French). [Opening Screen, Options | Language from the menu].
- Define access passwords (Administrator and Read Only) (optional). [Opening Screen, Options | Administrator Password].

- Customize Clublink's data fields (remove unwanted data fields from the registration forms). [Base Level, Setup | Data Fields Options].
 - Define the **Required** and **Requested** data fields (information you will need to exchange with your clubs and information you would like to exchange with your clubs). [Opening Screen, Central Office | Central Office Data Field Options].
 - Set up your **Tax System** [Base Level, Options | Tax System].
 - Build your **Linked Registration Options** (the registration fee structure for all new members). [Opening Screen, Central Office | Linked Registration Options].
- Only **Linked Registration Options** checked as **Required** can be edited from the Central Office menu. To edit in-house **Linked Registration Options**, select [Base Level, Lists | Linked Registration Options].
- Build your **Custom Drop Boxes** (bottom two drop-down boxes on the General tabbed page and the Registration Form). To build a list that you would like to send to the clubs [Base Level, Lists | Custom Drop Boxes].
- Only **Custom Drop Boxes** checked as **Required** can be edited from the Central Office menu. To edit in-house **Custom Drop Box**, select [Base Level, Lists | Custom Drop Boxes].
 - As a rule of thumb, the **Central Office** does not **Require** any **Custom Drop Boxes**, to provide maximum flexibility of Clublink at the club level.
- Build your own **Certifications** (ex: NCCP). [Opening Screen, Central Office | Certifications]. Place a lock in any **Certification** structure you would like to include on your **Central Office Setup Disk**.
- Only locked **Certifications** will be sent to the clubs via the **Central Office Setup Disk**. To edit in-house **Certification** structures, select [Base Level, Setup | Certifications].
- Build your **Medical Template** [Opening Screen, Central Office | Medical Template].
 - Enter all of the clubs for your jurisdiction and assign unique club id numbers. [Opening Screen, Module | Club Level from the menu].
 - Build your **Central Office Setup Disk**. [Opening Screen, Central Office | Build Central Office Setup Disk].
 - Export Club Data** (if you have club data, export the data to each club to facilitate their data entry and ensure data accuracy). [Opening Screen, Central Office | Export Club Data].
- Remember to backup your data on a regular basis.
 - Please read **New Season** to familiarize yourself with seasonal reset features of Clublink.

See
[Checklists](#)

25.3 Clublink Data Fields

General

- Title
- Address
- Apartment
- City
- Province
- Postal Code
- Level 1 and Level 1 Name
- Level 2 and Level 2 Name
- Level 3 and Level 3 Name
- Level 4 and Level 4 Name
- Level 5 and Level 5 Name

- Default Province
- Default Area Code

Family

Contact 1

- Last Name
- First Name
- Is the responsible adult (check box)
- Occupation
- Phone Number
- Relationship

Contact 2

- Last Name
- First Name
- Is the responsible adult (check box)
- Occupation
- Phone Number
- Relationship

Affiliate

- Age
- Sex
- Birth date
- Today's age (calculated)
- Age as of (calculated)
- Age as of (Date)
- Membership card
- Active (check box)
- Renewal (check box)
- Club Start Date
- Club Current Date
- Club End Date
- PSO Start Date
- PSO Current Date
- PSO End Date

Photo

- Date

Medical

- Medicare Number
- SIN Number
- Height
- Weight
- Doctor's Last Name
- Doctor's First Name
- Doctor's Phone Number
- Emergency Last Name
- Emergency First Name

- Emergency Phone Number
- Medical Note

Miscellaneous

- Work Number
- Fax Number
- Extra Check Box 1
- Extra Check Box 1 Name
- Extra Check Box 2
- Extra Check Box 2 Name
- Extra Date Box 1
- Extra Date Box 1 Name
- Extra Date Box 2
- Extra Date Box 2 Name
- Extra Text Box 1
- Extra Text Box 1 Name
- Extra Text Box 2
- Extra Text Box 2 Name
- Additional Clubs
- E-mail address
- Employee (check box)

See

[Checklists](#)

26 Support

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