A User Guide for Diving Clubs

Why not download this User Guide to your desktop once you've signed up? That way, you'll be able to open and refer back to it at the same time as moving between the pages of Club Organiser as you use the software – it will save you from having to keep closing and opening web pages.

1. Getting Started

Welcome and thank you for looking at Club Organiser.

When you sign up for your month's free trial you will be given a Super User username and password. By going to the Login page (http://www.cluborganiser.co.uk/login.php) you can use those details to sign in to Club Organiser.

This User Guide is set up to show firstly, the options available to Authorised Club Personnel when logged in and secondly, what Club Members will see when they Login.

Please note that as new features are added to Club Organiser, some of the menu options shown may change.

1.1 Symbols used in the guide

Throughout this guide you will see various symbols. These signify two things – the user level able to see the various options, and whether your club type allows these options.

For user level you will see the following symbols if it is applicable:

[M] Member – all club members/parents of members who can access their own member details to check/change any personal and/or medical details, enter eligible fixtures, buy merchandise as applicable and where appropriate

[U] User – coaches/volunteers/committee members who have been given permission to access and use club administrative procedures e.g. bulk email or print off training registers and can also see individual member details, but cannot make any changes to them – purely to use for contact/team purposes.

[A] Admin – usually senior members of the committee or company (e.g.Chairperson/Secretary) who have access to 90% of the system = 'User status' + the ability to register 'Users', add 'Members' and make manual credits/debits adjustments to members accounts as well as amend a members' level of access/validity of membership

[S] Super User – Company or Club Treasurer and/or Secretary – has access to the entire system = 'Admin Status' + access and ability to make use of the banking services such as uploading electronic bank statements, reconciling members accounts and monetary refunds. Can also add/change the club Logo

2. 'HOME'

When you sign into Club Organiser you will be presented with your Club's dashboard (if you are a Super User, Admin or User) or, as a member, the Member's dashboard.

As a Club Administrator, your 'Club' Dashboard includes…

Club Calendar – click on the coloured date(s) to see the details for a Fixture or Club Event. (In addition, the entry/purchase expiry date will be displayed on member's pages.)

Club Membership Details – figures of total membership, and broken down into Active, Inactive (holding for the remainder of their membership year as paid for), and Deleted Members.

User Details – this shows the last time you were logged in to use the system.

Club Invoice Details – An at-a-glance summary of the next Monthly Payment/Invoice details for your club, payable to Club Organiser.

Monthly Costs – a breakdown of any extra charges incurred by your club during the month which will be included in the next invoice. Also shows a cumulative email quota bar which changes colour as you get nearer to your free monthly total allowance.

As a Club Member, your personal Dashboard includes ….

Club Calendar - click on the coloured date(s) to see the details for a Fixture or Club Event. The entry/purchase expiry date is also displayed.

User Details – this shows the last time you were logged in to use the system.

Membership Details – Details of your current fees, statement balance and view of the last payment made to your account. If you have a balance owing, you will also see a 'pay now' button. (Provided your club have set up an online payment option)

3. The 'Super User ' / 'Admin' / 'Users' Menu includes…

3.1 List Super Users/Admins/Users   [S] [A] [U]

Displays a list of all your Club-authorised users of the system, at or below the admin level of the person signed in to Club Organiser. Also offers additional buttons to [Add Authorised User], [Email Users] and [Reset User Passwords]

By clicking on the User Name, you have the ability to change the user's name, email address and admin level. You can also delete the user from the system. N.B. Please bear in mind you should have at least one Super User set up for your club, otherwise you will not be able to access some of the functionality of the system, or create other Super Users.

3.2 List Family Login   [S] [A] [U]

View a list of the Family Logins that have been set up for families within your club. There is also an [Add Family Login] button, which allows you to create a family login on behalf of a family by selecting the main parent name, then the swimmers you wish to group with that main parent. (surname's do not have to be the same in order to group them). Once created, the main parent will have one login and be able to select the accounts for all family group members he/she wants to access via a single drop down list on his/her dashboard therefore, not having to log in/out of the system numerous times.

3.3 Create Member Login   [S] [A]

If you chose to add members without sending them their login details, then this page allows you to create them retrospectively.

3.4 Resend Password Email   [S] [A]

If a member has forgotten their password, you can send it to them using this page, or they can click on the 'forgot password' button themselves at login.

3.5 Reactivate Member   [S] [A]

If you've deleted a member by mistake, or they return later in the same membership year, you can reactivate their member listing here.

3.6 Sent Email List   [S] [A] [U]

A record of all the emails sent by you in the last 3 months with option to view each one

3.7 Process Yearly Swim England & Club Fees   [S] [A]

Enables you to deduct the Annual Swim England and Club Fees from all members' statements in one go. (Quick and effective at the beginning of the year once your annual renewal is done)

3.8 Bulk SMS [S] [A]

SMS Template and option to choose recipient section(s) (SMS to individuals are created from 'Member List') *

3.9 Bulk Email [S] [A] [U]

Email Template (with Club logo) and option to select recipient section(s) (Emails to individuals are created from 'Member List')

3.10 Club Parameters [S]

A record of all your Club's Official Details for PayPal/Stripe/Bank as set up by you

3.11 Club Email Addresses [S] [A]

Page showing 5 prefixed email contacts for your club. These will all be prefilled with the one contact email entered at sign up and should be changed by your club committee accordingly, making sure each one is filled in order for the system to function correctly re notifications etc.

3.12 Annual Club Fees [S] [A]

Screen to show your Club's current annual membership fees

3.13 Annual Swim England Fees [S] [A]

Updated each January to show annual fees and categories as set by Swim England

3.14 Venues [S] [A]

A screen to add the details for venues that your club train or compete at for use during fixture booking and fixture upload

3.15 External Form List [S]

Design your own external form (e.g. membership application form for new enquiries) using the fields provided, create a URL link for your website and add those enquirers to your club database upon acceptance of the submitted info if you wish. Can also be used for event forms etc.

3.16 Logo Change [S]

Use this page to change your club logo for use within Club Organiser (emails etc.)

3.17 Create Club Message [S]

Set up an 'important/official' Club Message to appear 'over' the login page for members to see when they next log in. They can only proceed to access their member account once they've acknowledged receipt of the message

* Additional Charges apply for SMS messaging – please see 'Pricing' page

3.18 Email Templates   [S]

This is where you will find any email templates currently available for your use. Choose one, personalize it how you want to, name it and click Amend Email Template for it to be saved for your future use.

3.19 Screen Wording   [S]

This is where you will find any screen wording templates available for your use. It enables you to add a screen message e.g. to your home page, so that all members will see the message whenever they look at the screen and can be amended/updated any time you like.

4. The 'Sections' Menu includes...

4.1 Section List   [S] [A] [U]

Shows a list of all the sections (departments) within your club that you have set up

4.2 Add Section   [S] [A] [U]

This page is where you add new sections (e.g. competitive swimming, volunteers, masters, committee members)

4.3 Attendance Sheets (Live)   [S] [A] [U]

This page is where you can LIVE 'tick' attendance at a given session, on poolside using your hand held device. In order to make full use of this facility you must already have set up Training Sessions within your sections.

4.4 Attendance Report   [[S] [A] [U]

This page is where you can produce a post week by week report (for up to two months) of section attendance, showing the number of sessions each swimmer has attended during the given time frame.

4.5 Attendance Report by Month   [S] [A] [U]

This page is where you can produce a post-month report of section attendance, showing the number of sessions each swimmer has attended during the given time frame.

4.6 Attendance Report by Diver   [S] [A] [U]

Produce an attendance report for a specific Diver, choosing a 'from' date up to 'today'.

4.7 Diary Entries by Section   [S] [A] [U]

This page is where a coach can make the same, single entry/comment to multiple members' diary pages (all of whom are in the same section) simultaneously e.g. "Good effort from everyone at today's event"

5. The 'Members' Menu includes...

5.1 Member List   [S] [A] [U]

This list shows all your club members with icons for actions. Member list details can only be changed by Super Users/Admin level club officials

An example of a <u>mock</u> club member list

5.2 Member List by Section   [S] [A] [U]

Gives you the choice to view all members of a chosen section on screen.

5.3 Add Member   [S] [A]

This is where you add all the details from your club's completed membership form manually onto the system for a single member (If you have multiple members, it's easier and quicker to do them via a Member Upload spreadsheet) [⌘] Dance Schools can also add Teachers on this page.

5.4 Add Family Member   [S] [A]

When you wish to add a new member to an existing family, simply select an existing sibling/member who holds the same contact details from the list provided and the new member's contact details will be replicated, saving you time. You can also create a FAMILY login from this page.

5.5 Member Upload   [S] [A]

Upload your existing members electronically based on the same format as our spreadsheet template found on this page. If you have 'extra' specific fields that you need for your club, please speak to us first as we'll need to do the upload for you.

Partial Member Upload Sheet Template

5.6 Member Upload from OMS   [S] [A]

If your club is Swim England affiliated, simply download the Full Member Data Report from the SE OMS and then upload it using this page. Very easy, efficient and guaranteed to have the same data that SE hold for your swimmers uploaded into Club Organiser so you can start using the system right away.

5.7 Swim England OMS Update   [S] [A]

Download the Membership Summary CSV file direct from SE OMS and upload it to update any members' missing or incorrect SE Numbers and Swim Categories.

5.8 Swim England Report   [S] [A]

Create an Excel spreadsheet file that contains all the Swim England details for members in all sections. (An easy way to view SE Categories and Numbers for all members on one page)

6. The 'Documents' Menu includes…

6.1 Document List [S] [A] [U]

This page displays your Club Documents that you've uploaded, and the sections they are relevant to. Other Club-Authorised Users can check it before adding a new document of their own to avoid duplication.

6.2 Add Document [S] [A] [U]

Use this page for uploading your own Club Documents for use within the Club Organiser system, choosing which section(s) they relate to. Great for mailmerge – makes mailing fees letters a doddle! You can also choose whether to allow the document to be viewed/printed by members or not.

6.3 Info Sheets [S] [A] [U]

Are Excel spreadsheets produced by selecting a section or sections and the sheet will show all info currently held by your Club for all the members within the section(s) you've selected. You can then delete/move columns as necessary to produce a printable sheet to suit your needs and save it accordingly on your device. (Altering the columns post-download does not affect the program, and the next time you choose Info Sheets from Documents, all the details will be there again).

6.4 Attendance Registers (Manual) [S] [A] [U]

Produce a register sheet for a section – up to 25 weeks (columns) possible per sheet. Contains all important contact info for coaches to use in an emergency, including medical colour coding. Coaches can save to their own device as a docx, mark attendance and keep as a record, or print it off, mark attendance on poolside and keep as a record.

A mock example of section register sheet for 4 weeks

6.5 Member Documents [S] [A]

Choose a Section, member, document and term (if applicable) to email a saved club document direct to a member together with a template cover note. If the document was previously saved as a mailmerge document then the member's details will be used to personalise the document. (e.g. annual membership renewal forms)

6.6 Section Documents

Choose a Section, document and term (if applicable) to email a saved club document direct to all active members of a complete section (who have said yes to receiving emails) together with a template cover note. If the document was previously saved as a mailmerge document then the members' details will be used to personalise the document. (e.g. annual membership renewal forms)

7. The 'Accounts' Menu Includes...

7.1 Bank Statement Upload   [S]

Upload your club's bank statement electronically in either Quickbooks or Excel formats using the layout rules and instructions given on this page. Any entries that fail to reconcile will be saved to Reconciliation (Man) for your (the treasurer's) attention.

7.2 Delete Bank Statement   [S]

Use this screen to delete bank statements that have been uploaded incorrectly.

7.3 Reconciliation (Automatic)   [S]

Shows a list of any outstanding bank statement entries to be processed

7.4 Reconciliation (Manual)   [S]

Gives details of statement entries requiring manual reconciliation and instructions on how to do so.

7.5 Reconciliation Errors   [S]

This page gives a detailed list of the errors created by bank statement entries that require manual reconciliation to help you reconcile them manually.

7.6 Members Statements   [S] [A] [U]

You can check an individual member's statement here. This is also the screen to use if you wish to make a manual adjustment to their statement – both credits and debits facilitated (you can also click through to an individual member's statement by using the Bank Icon on the Member's List)

A <u>mock</u> example of a member's statement

7.7 Banking Report   [S]

Really helpful for your Club Treasurer - As banking transactions are added to Club Organiser they are automatically allocated to the member's section. This page allows you to create a spreadsheet for a given month/year that will show what credit payments have been allocated to each section within your club, giving you a clear idea of which section(s) generate sufficient income

7.8 Overdue Account Report   [S]

Click on 'Produce Unpaid Report' to create an Excel spreadsheet (.XLS) file containing the overdue members' accounts for all sections. (Great for secretaries to know who to chase for payments!)

7.9 Account Balance Report   [S]

Create a spreadsheet for a given month/year that will show what account balance payments have been made.

7.10 Check Mandate Status   [S]

View a list of DD mandates that have recently been created.

7.11 Delete Cancelled/Failed DD Mandate   [S]

This is where a SuperUser can delete a cancelled or failed Direct Debit Mandate

7.12 Cancel Active Mandate   [S]

If a member leaves, cancel their active DD Mandate here.

7.13 Create Ad-hoc DD Payment   [S]

Create an Ad-hoc DD payment to be added to a members' account balance (e.g. merchandise purchase)

7.14 Cancel Direct Debit Payment   [S]

If DD payment has been raised but not yet taken from members' account, you can cancel the payment instruction here.

7.15 Direct Debit Report   [S]

Club SuperUsers can download a report showing the current status of all Direct Debit Mandates and their payments

7.16 Outstanding Direct Debit Report   [S]

Club SuperUsers can see a report of those members who have not yet set up a Direct Debit Mandate

8. The 'Extras' Menu Includes…

8.1 Add Club Event   [S] [A]

Use this page to add a new Club Event (e.g. quiz night/social presentation) and members will be able to purchase tickets through Club Organiser, using PayPal or Stripe

8.2 Club Event List   [S] [A]

This page shows a list of all events created for your club. You can also view an attendee list, add event costs and add an attendee list.

8.3 Add Club Invitation   [S] [A]

When you want to offer members the chance to accept or decline an invite to attend a specific function/event, then use this page to create the invitation. The invitation stats icon will show a graph depicting all responses so you can check who's responded and how.

8.4 Club Invitation List   [S] [A]

This page shows a list of all invitations created. Icons enable you to view an attendee list, email unconfirmed members, view invitation stats in graph format and delete the invitation.

8.5 Add Merchandise   [S] [A]

Use this screen to add new merchandise items that members will be able to purchase from their logins, paying through Club Organiser, using PayPal or Stripe

8.6 Merchandise List   [S] [A]

This screen allows you to view and update merchandise that your club currently has for sale. As well as a direct link to 'Add Merchandise'.

8.7 Add Team   [S] [A] [U]

Use this screen to select team members and create a team using specific criteria

8.8 Team List   [S] [A] [U]

This is where all team eligibility lists which have already been set up are stored and can be viewed, emailed, updated and deleted.

8.9 User Guide   [S] [A] [U]

Shows this User Guide!

8.10 FAQs   [S] [A] [U]

An ever-increasing list of Frequently Asked Questions and their answers.

8.11 Direct Debit Guide   [S] [A] [U]

Shows a Direct Debit Guide that can be printed off, or downloaded for use

8.12 Payments Help Guide   [S] [A] [U]

Shows instructions on how to set up your Club Organiser system to accept transactions made via PayPal or Stripe

8.13 GDPR Explained   [S] [A] [U]

A document giving outline information about the General Data Protection Regulation which comes into force 15th May 2018 and applies to ALL organisations who collect and process people's personal data. VERY IMPORTANT for all clubs to read and take necessary action.

8.14 Hints, Tips & Shortcuts   [S] [A] [U]

An ongoing list of advice to help you get the best out of Club Organiser in the quickest amount of time possible. Some shortcuts don't occur naturally to users, so we're being really helpful and pointing them out!

8.15 Video Tutorials   [S] [A] [U]

As it says – video tutorials available to view via YouTube in case you're a audio visual learner rather than a reader! New ones are being added on an ongoing basis, so if you want to suggest one, go ahead.

9. The 'Reports' Menu includes…

9.1 Login Report   [S] [A]

Select this and an excel spreadsheet will be produced/downloaded showing the last date that all members etc. logged in.

9.2 DBS Report   [S] [A]

Click to download an Excel Spreadsheet showing all DBS checked members, their DBS number and their DBS expiry dates

9.3 Qualification Report   [S] [A] [U]

Click to download an excel spreadsheet showing all Qualifications held by 'staff' and the qualification expiry date if applicable

9.4 Club Message Report   [S] [A] [U]

Click to download an excel spreadsheet showing a full list of who has acknowledged a particular Club Message and the date they did.

9.5 Starter / Leaver Report   [S] [A]

Create an Excel spreadsheet (.XLS) file containing a list of all starters or leavers for the chosen month and year.

9.6 Club Event Report   [S] [A]

Choose an event, a squad member, or both, then click 'Display Report' and a list of PayPal/Stripe event payments will be displayed

9.7 Merchandise Report   [S] [A]

Display a report of all PayPal and Credit Card merchandise payments received

The remaining parts, 10 thru 13, relate to the navigation bar a club member would see when logged in to their personal account

10. The 'Member' Menu includes…

10.1 Personal Details   [M]

This screen allows a member to amend and save their own personal details at any time.

10.2 Emergency Contact 1   [M]

This screen allows a member to add/amend and save the emergency contact details for their first contact at any time.

10.3 Emergency Contact 2   [M]

This screen allows a member to add/amend and save the emergency contact details for their second contact at any time.

10.4 Medical   [M]

This screen allows a member to add/amend and save their medical details at any time. (This is of utmost importance for members with serious medical conditions that club officials / coaches need to be aware of during training/competing. Eg. Epilepsy / Diabetes / Hearing Difficulties / Asmtha.   According to the level of medical condition, a colour code will appear 'highlighting' the member's name on the registration sheet for coaches to be subtly aware.) This is now a legal requirement for many sport governing bodies for health and safety awareness.

10.5 Change Password   [M]

This is where a member can change their password.

10.6 Diary   [M]

This is where a member can write down short and long term goals as well as comments regarding their personal achievements. 'Coaches' who are granted authority by the Club may also add comments and give feedback etc. to the member on this page.

11. The 'Document' Menu includes…

11.1 Print Documents   [M]

All club documents that have been uploaded into Club Organiser and marked as 'Member to View' will be shown in a list on this page. Members are able to select, view and print a document if they so wish.

12. The 'Payments' Menu includes...

12.1 Account Balance Payment   [M]

This is where a member can choose to pay any outstanding fees shown on their account statement, providing their Club has set up payment services through PayPal or Stripe.   Any payments made are automatically allocated to the members' relevant section within CO, adding instantly to the balance that the Treasurer will be able to see on the Club or Section Report if he/she chooses to do so.

12.2 Club Event Payment   [M]

This is where a member can choose to pay for any Club Events that are available to book as added by the Club Super User / Admin personnel.   Providing their Club has set up payment services through either PayPal or Stripe. As soon as payment is made, their name and payment are added to the Club Event Report that is visible to the Club Super User/Admin personnel to keep track of who's paid for an event.

12.3 Merchandise Payment   [M]

This is where a member can choose to pay for any merchandise items that are available to them through their club, as added by the Club Super User, providing their Club has set up payment services through either PayPal or Stripe.

12.4 Direct Debit Mandate Setup   [M]

This is where a member can set up their Direct Debit Mandate by following the on screen instructions. (Your club must have pre-arranged for Direct Debit payments to be activated by Club Organiser for you to use this feature)

13. The 'General' Menu includes…

13.1 Account Statement   [M]

This is where a member can view all transactions shown on their account statement.

13.2 Club Event List   [M]

This is where a member can view all Club Events they are eligible to attend.