

A User Guide for Tera Sailing Clubs

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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.

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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.

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.

Your 'Member' 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-authorized 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 Logins

[\[S\]](#) [\[A\]](#) [\[U\]](#)

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 members 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 Bulk SMS

[\[S\]](#) [\[A\]](#)

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

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

[3.8 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')

[3.9 Club Parameters](#)

[\[S\]](#)

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

[3.10 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.

[3.11 Annual Club Fees](#)

[\[S\]](#) [\[A\]](#)

Screen to show your Club's current annual membership fees

[3.12 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.

[3.13 Logo Change](#)

[\[S\]](#)

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

[3.14 Create a 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

[3.15 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.

[3.16 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)

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

Key to Actions:

- Address Details
- Emergency Contact Details
- Training
- Statement
- ASA Details
- Medical Details
- Produce Documents
- Email Member
- Contact Details
- Bank Details
- Times
- Qualifications

Click on the member number, or any of the action icons, for each member to edit their relevant details. Once updated you will be brought back to this page.

PREV NEXT 1 2 1 - 20 / 35

Surname:

No	Name	DOB	Section	Active?	Email?	Actions
1	Lucy Member	2000/02/06	**Multiple Sections**	Y	Y	[Icons]
2	Samantha Best	2003/02/01	Competitive Swimming	Y	Y	[Icons]
3	Tom Bailey	2005/12/10	Water Polo	Y	Y	[Icons]
4	Steven Holmes	2000/04/15	Competitive Swimming	Y	Y	[Icons]
5	Wesley Johnson	1998/03/12	Competitive Swimming	Y	Y	[Icons]
6	Tommy Smith	1999/02/16	Competitive Swimming	Y	Y	[Icons]
7	Mary Bradley	2004/05/02	Learn to Swim	Y	Y	[Icons]
8	Sonny Templar	2001/05/17	Water Polo	Y	Y	[Icons]
9	Charlotte Young	2003/09/16	Synchro	Y	Y	[Icons]
10	Joseph Rowe	2002/05/20	Competitive Swimming	Y	Y	[Icons]
11	Pam Escot	1956/12/01	Disability Swimming	Y	Y	[Icons]
12	Steven Escot	1976/09/17	Competitive Swimming	Y	Y	[Icons]
15	Paul Brazier	1965/05/16	Competitive Swimming	Y	Y	[Icons]
16	Caryn Rogers	1971/04/29	Competitive Swimming	Y	Y	[Icons]
20	Steve Rogers	1974/02/15	Competitive Swimming	Y	Y	[Icons]
21	Robert Rowntree	1997/04/19	Water Polo	Y	Y	[Icons]
22	Helen Smith	1996/03/28	Synchro	Y	Y	[Icons]
23	Stephanie McManus	2004/12/12	Synchro	Y	Y	[Icons]
25	Robin Smith	1996/12/12	Competitive Swimming	Y	Y	[Icons]
26	Brian Rogers	2003/02/01	Competitive Swimming	Y	Y	[Icons]

40 Members (35 Active, 0 Inactive, 5 Deleted)

An example of a mock 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 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.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	
MEMBER NO.	SURNAME	FORENAME	INITIAL	SEX	DATE OF BIRTH	PUBLICITY	ASA NO	DBS CHECKED	DBS NO.	DBS Expiry Date	ASA CATEGORY	ADDRESS 1	ADDRESS 2	ADDRESS
<p>If you plan on using this club sheet as your master, please delete all instructions in red before you upload the members you have. Leave the heading line and begin the list of members from Row 2. Also, when adding members ensure you replicate the Excel formatting used in rows 1 to 10 as this will ensure the fields are in the correct format for Club organiser's Upload process</p> <p>IMPORTANT: Every member MUST be recorded on a line of their own, and must have their own, unique Membership Number, prefixed with your club's short code assigned upon sign-up. (4 letters, membership no) e.g. DLSC_235</p> <p>The columns highlighted in yellow are the bare minimum number of columns that must be completed for every member</p>														
001	Rogers	Brian		M	01/02/03	Y	123456	Y	00012345678	31/12/15	2	1 The Avenue	Somewhere	
<p>KEY FOR INFO TO BE ENTERED:</p> <p>M - Male F - Female</p> <p>DD/MM/YYYY N - No Y - Yes</p> <p>N - No Y - Yes</p> <p>DD/MM/YYYY 1 - Non Competitive 2 - Competitive 3 - Non Swimming</p>														

Partial Member Upload Sheet Template

5.5 Member Export

[S] [A]

This function allows you to export/download a club member spreadsheet showing all member details. As from 15th May 2018, in accordance with new General Data Protection Regulations, it is an offence to hold **unsecured** personal details of members. As such, we advise clubs who use this function to create a password-protected file once it's downloaded to a computer device, and delete fully as soon as it's no longer needed.

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	B	C	D	E	F	G	H	I	J	K	L
Section:		Competitive Swimming - All Lanes									
Week Commencing:		Sunday 13th March 2016									
Surname	Forename	Mon 14/3	Mon 21/3	Mon 28/3	Mon 4/4	Date of Birth	Age	School Yr	Emergency Tel.		
Best	Samantha					01/02/2003	13	8	07718115976		
Brazier	Paul					16/05/1965	50	N/A	07958 565721		
Escot	Steven					17/09/1976	39	N/A	07958565721		
Holmes	Steven					15/04/2000	15	11	07958565721		
Johnson	Wesley					12/03/1998	18	13	07958565721		
Member	Lucy					26/02/2000	16	11	07958565721		
Rogers	Brian					01/02/2003	13	8	07777 999999		
Rogers	Caryn					29/04/1971	44	N/A	07777 999999		
Rogers	Steve					15/02/1974	42	N/A	07777 999999		
Rowe	Joseph					20/05/2002	13	9	07958565721		
Smith	Robin					12/12/1996	19	N/A	07718236236		
Smith	Tommy					16/02/1999	17	12	07958565721		
Epilepsy / Seizures											
Diabetes (All Types)											
Asthma											
Chronic Fatigue / Fainting											
Hearing Difficulty											
Allergies											
Needs Special Consideration											
Other											

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)

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)

Home / Member Statement

Below is the chosen member's club statement. Only the current year's entries are shown. To show previous years (where available) click on either the year, or the arrow to the right of the line to show/hide the relevant details.

Account Adjust (Credit) Account Adjust (Debit) Recalculate Balance Edit Statement

Bank Statement for Robbin Smith (25)

Date	Description	Payment Method	Cheque No.	Money In	Money Out
2016/02/01	Monthly Competitive Swimming Fee				-25.00
2016/02/15	Section Fees - Monthly - Credit	BACS		25.00	
2016/03/01	Monthly Competitive Swimming Fee				-25.00
2016/03/15	Section Fees - Monthly - Credit	BACS		25.00	

Current Balance is £0.00

A mock example of a member's statement

7.7 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!)

7.8 Account Balance Report

[S]

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

7.21 Race Refund

[S] [A]

Arrange a refund for a member's race who's payments were made within the last 60 days through PayPal and/or Stripe

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 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

8.4 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'.

8.5 Add Race

[\[S\]](#) [\[A\]](#)

Use this page to add a new sailing Race and members will be able to pay to enter those fixtures through Club Organiser, using PayPal or Stripe

8.6 Race List

[\[S\]](#) [\[A\]](#)

This page shows a list of the races that have been added by your club. You can add/update races

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 Race Report

[\[S\]](#) [\[A\]](#)

Display a report of all payments received for a specified race or member

9.8 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.

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 Race Payment

[M]

This is where a member can choose to pay for any Races that they are eligible to partake in. Providing their Club has set up payment services through either PayPal or Stripe. As soon as payment is made, they receive an email confirming their race booking, as does the competition secretary of the club.

12.5 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.

13.3 Race List

[M]

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