Clubware Manual

Welcome to Clubware

Contents

Clubware Manual

About Clubware

Clubware is a complete health club and sports facility management software package.

It gives you full control of all aspects of club management, for small, independent clubs or large, multi-site franchised operations.

Functionality includes, but is not limited to:

- Full member and membership account management.
- Management of members' details, fitness profiles, fitness programs, assessments, classes, bookings and activities.
- Complete and comprehensive class management, from small single-site events to multi-site, multi-venue programs.
- Arrivals control and management with the ability to manage multiple entry zones within a site.
- Point of sale, retail management and full stock control.
- A comprehensive calendar feature for members, resources, classes, bookings and staff time allocations.
- Effective and easy-to-use reporting, correspondence and email tools.
- True multi-site functionality for all of the following environments –
  - Wide Area Networking (WAN)
  - Local Area Networking (LAN)
  - Terminal Services
  - RemoteAPP
- Support and synchronisation with leading billing companies.

Supported Hardware

Clubware supports the following hardware specifications:

- Processor: PC with Pentium 4 processor or higher
- Server Operating system:
    - Microsoft Window Server 2008
    - Microsoft Window Server 2012
    - Microsoft Window Server 2016
    - Windows 7 Professional
    - Windows 8 Professional
- Client Operating system:
    - Windows 7 Professional or higher
- Memory (Minimum):
    - Database Machine: 8GB
    - Client PC: 4GB
- Hard Disk Space:
    - Database Machine: Sufficient free space for Clubware Databases and Clubware software (10GB),
    - Client Machine: Sufficient free space for Clubware software (500MB)
- SQL Server 2012 to SQL Server 2017
- CD/R or CD/RW, Tape Drive, USB Drive (for back-ups)
- VGA or higher-resolution monitor: Super VGA recommended
- Serial scanner
- USB scanner (HID compliant)
- Epson compatible receipt printers
- Laser printers
- Cash drawer (can use serial or USB com kick connection, or plugged directly in to receipt printer)
- Serial ports (require one port for each serial device – physical or virtual)
- Sound Card and speakers (not essential, however useful for sound features in Clubware)
- Serial Turnstiles
- Paxton Access Control Hardware using Net2 Version 5.02.2525, 5.03.4427, 5.04.6217 and 6.1.8113 software
- Inner Range Access Control Hardware using Integriti Version 4 up to Integriti Version 19

Recommended Hardware

Client

- Windows 7 Professional or higher
- CPU: Intel Core i3 or better
- 4GB memory

Single Branch Server

- Windows 7 Professional or higher
- CPU: Intel Core i5 or better
- 8GB memory
    -

Multi-Branch Server

- Microsoft Window Server 2012/2016
- CPU: Intel Xeon, Intel Core i7
- Dedicated Database Server,
- 8GB memory free for SQL Server (suitable for up to ten branches)
- 512MB memory per thin client connection
- Microsoft best practices
- If the central database is going to support more than ten branches, we recommend enlisting an IT provider to recommend your hardware requirements.

Support and Updates

Support

For support in operating Clubware, please use the following contacts:

	New Zealand	Australia	United Kingdom
Email	support@clubware.co.nz	support@clubware.com.au	support@clubware.co.uk
Phone	09 481 0490	1800 114 777	03 332020197
Web	www.clubware.co.nz	www.clubware.com.au	www.clubware.co.uk

Remote Access

Remote access is mandatory to provide ongoing support. Our preferred remote access method is TeamViewer. TeamViewer can be accessed through Clubware by selecting “Help” and “Clubware Remote Support”.

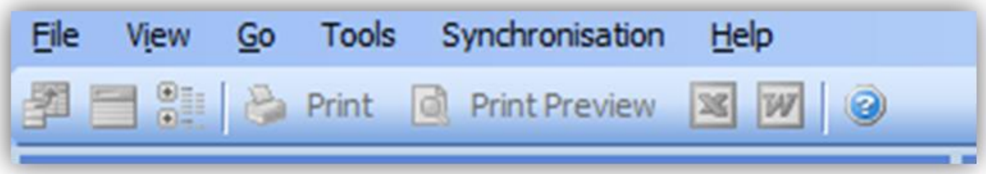
.

Navigation

Clubware uses an interface similar to Microsoft Outlook™. This familiar design makes it easy for users to learn how to navigate within Clubware.

Clubware uses three main levels of navigation – the **main menu** at the top of the main screen, the **navigation panel** on the left side of the main screen and **shortcut keys**. These items are outlined below.

Main Menu



File

The File menu gives access to the following functionality:

Print: Prints the active home screen.

Print Preview: Previews the print of the active home screen.

Print setup: Sets up the printer for Clubware.

Exit: Exits the application.

View

The View menu gives access to the following functionality:

Navigation Panel: Hides or displays the navigation panel.

Toolbars: Toggles toolbar display on or off.

Status Bar: Toggles the status bar display on or off.

Go

The Go menu will navigate the user to the following sections within Clubware:

1.	My	Ctrl + 0
2.	Front Desk	Ctrl + 1
3.	Members	Ctrl + 2
4.	Calendar	Ctrl + 3
5.	Retail Management	Ctrl + 4
6.	Classes	Ctrl + 5
7.	Term Classes	
8.	Reports	Ctrl + 6
9.	Correspondence	Ctrl + 7
10.	Administration	Ctrl + 8

Quick navigation to each of these sections can be made by using the associated short key combination.

Tools

The Tools menu gives access to the following functionality:

New Login: This feature allows users to switch who is logged into the program without having to close and restart the application.

Backup Database: A backup of the database can be performed from this menu item.

Error Log: System errors can be viewed from this menu item.

Synchronisation

The Synchronisation menu gives access to the following functionality:

Sync with *(Billing Company Name):* Perform a manual sync with Billing Company.

Sync with Access Control: Perform a manual sync with Access Control software

Sync with Member Website: Perform a manual sync with Online Bookings Portal

Help

The Help menu gives access to the following functionality:

Help: This gives the user access to the Clubware Help Manual.

Clubware Remote Support: This will run our remote support tool for connecting to your machine for remote assistance while talking to a support person over the phone.

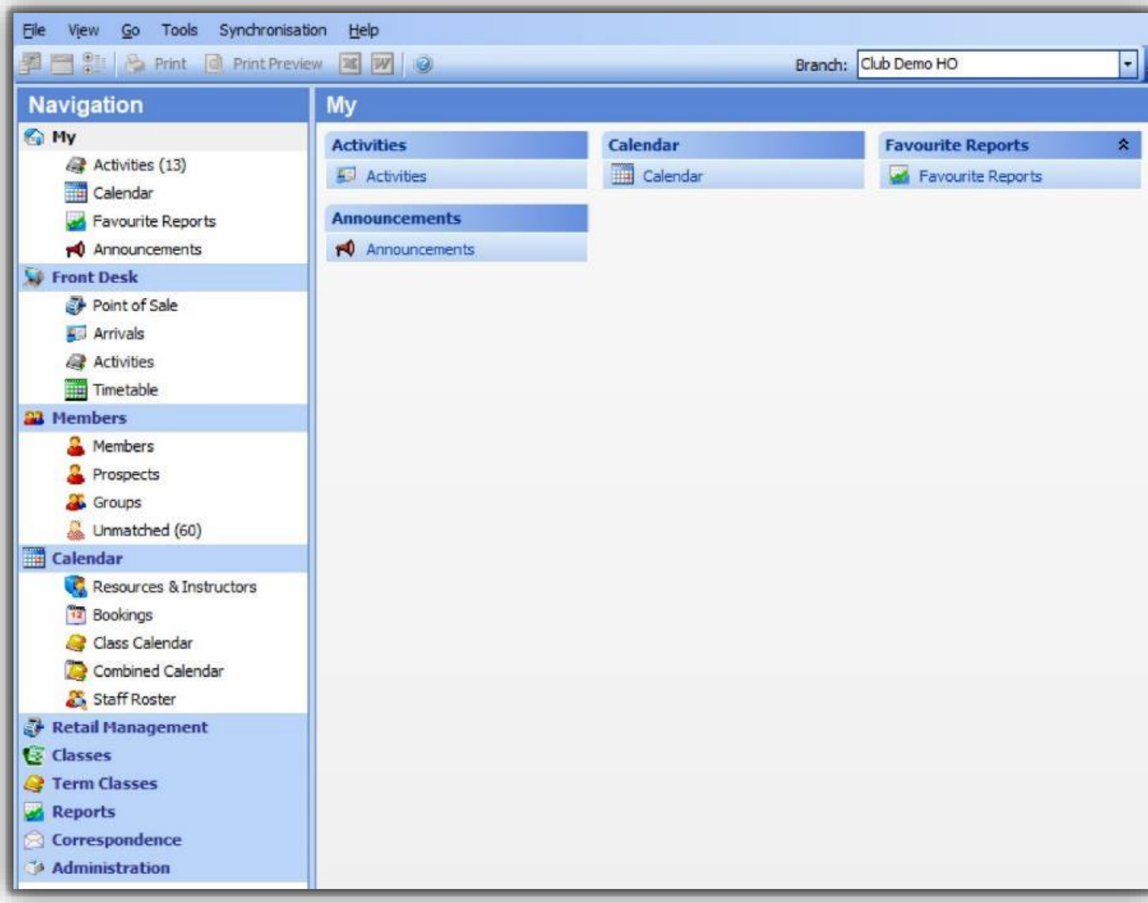
About Clubware: This gives users information on the version of Clubware they have installed and other system information.

Navigation Panel

The **navigation panel** groups together items with similar functionality for easy access. Each bar on the panel represents a section of similar functions. By clicking on a bar, you can see the list of functions within that section.

The functions within the Members bar are shown below.

On the right of the navigation panel is a **dashboard** that allows quick access to items within a section. Often a dashboard will also have shortcuts to functionality associated with the section you are in.



The functionalities of these sections are outlined in subsequent pages of this manual. Each section has two sections, an Overview and How To section.

Shortcut Keys

Clubware has built in shortcut keys to speed navigation within the system.

When familiar with these shortcut keys, a user can quickly navigate to one of four main areas of the system with two keystrokes.

The Members home screen, for example, can be accessed using the shortcut key Ctrl + F8, as shown below. Shortcut keys can be used from anywhere in the system.

All shortcut keys are explained below.

Ctrl + F5 – New Login

Shortcut to open another Clubware session for a new user.

Ctrl + F8 - Members

Shortcut to the Members' home screen. This allows direct access to adding, editing and deleting members from the Members home screen under the Members section on the navigation panel.

Ctrl + F9 - Calendar

Shortcut to the Resources & Instructors View. This allows direct access to the combined calendar view under the **Calendar** section on the navigation panel.

Ctrl + F10 - Timetable

Shortcut to the Timetable screen. This allows direct access to the Timetable screen under the **Front Desk** section on the navigation panel.

Ctrl + F11 - Arrivals

Shortcut to the Arrivals screen. This allows direct access to the Arrivals screen under the **Front Desk** section on the navigation panel.

F11 – Add an Arrival

Shortcut to Add an Arrival. When this is used the '**Choose a Member'** screen displays.

Ctrl + F12 - POS

Shortcut to the POS (Point of Sale) screen. This allows direct access to the POS screen under the Front Desk section on the navigation panel.

F1 - Help

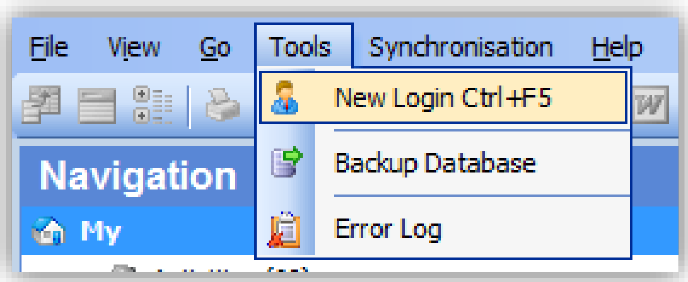
Click F1 to display the Clubware Help menu. This is effective anywhere within Clubware.

How to use the Main Menu

Changing the logged in user

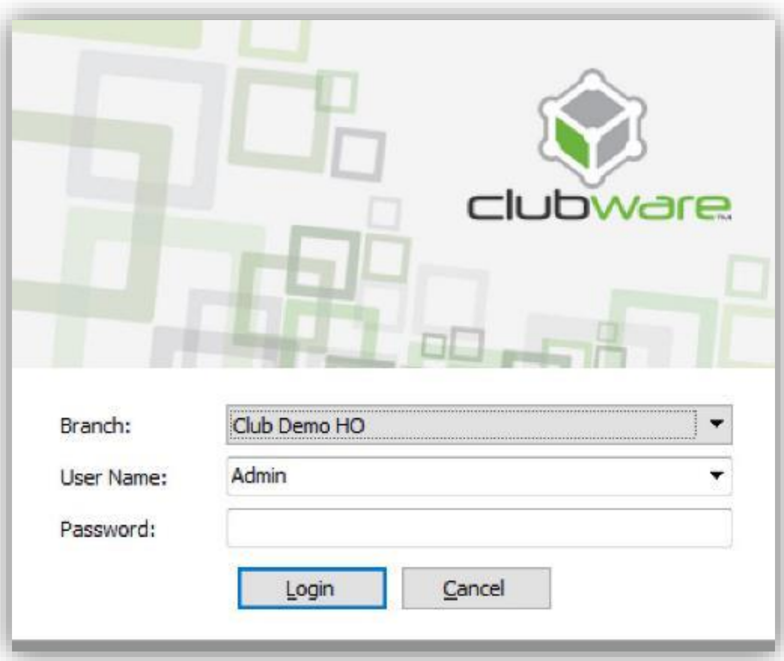
This feature allows users to switch who is logged into the program without having to close and restart the application.

Permissions for the user change accordingly.



Step 1. Select **Tools | New Login** from the main menu or use the keyboard shortcut **Ctrl + F5**.

The **Clubware login** screen displays**.**



Step 2. Click on the drop-down list to select the branch (if applicable), select user and enter the password, then press Enter or click Login.

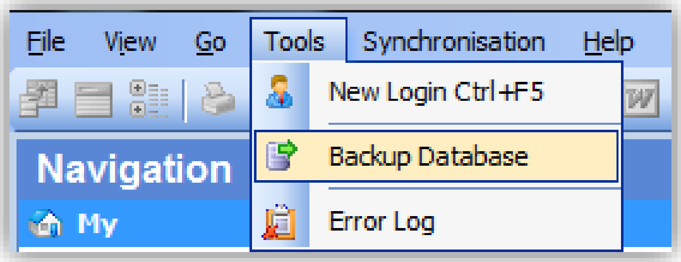
You have completed the steps required to change the logged in user within Clubware.

Backing up the Database

Clubware is now programmed to back up on a scheduled basis. Should you need to manually run a backup, follow the below tutorial.

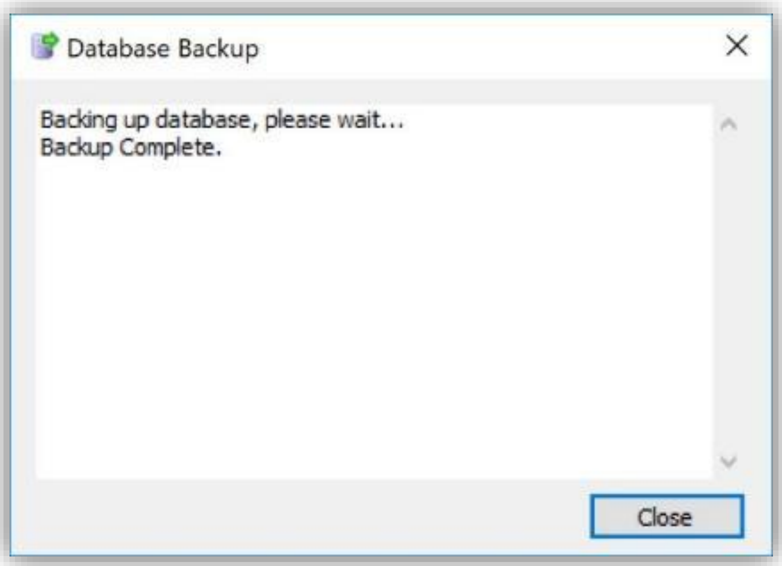
This tutorial describes the steps required to back up the database within Clubware.

Step 1. Select **Tools | Backup Database** from the main menu as shown below.



Note: The cursor changes to an hourglass while the database is backed up.

A confirmation message displays when the process is complete.



Step 2. Note the location of your database backup from the **Progress Indicator** screen above.

If the facility is responsible for taking backups offsite, navigate to this location via **My Computer,** and copy the **clubwarebackup.dat** file onto an external storage device and take offsite daily.

Step 3. Click Close.

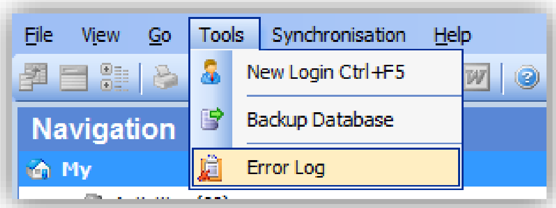
You have completed the steps required to back up the database within Clubware.

Viewing the Error Log

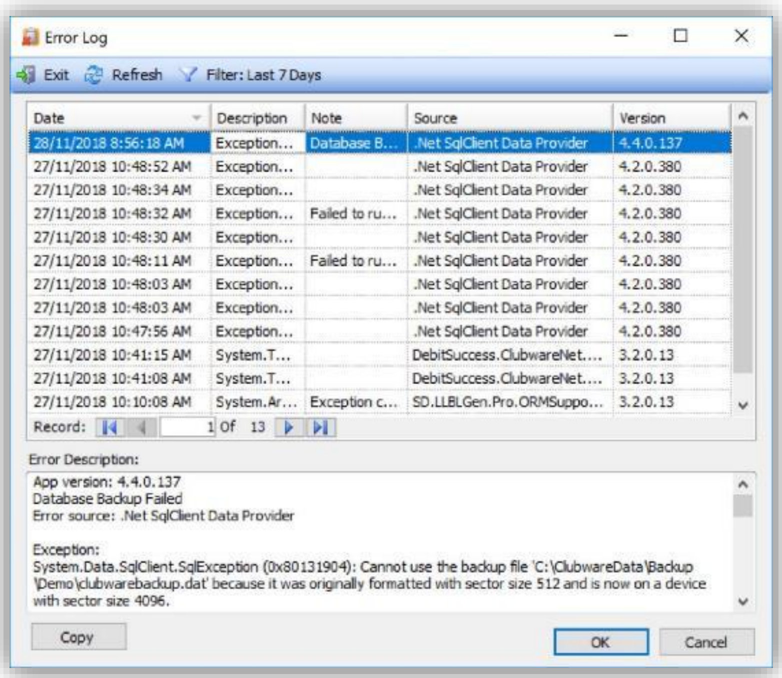
Occasionally Clubware will encounter errors. If you require more information, it can be found in the Error Log.

This tutorial describes the steps to view the Error Log within Clubware.

Step 1. Select **Database | Error Log** from the main menu as shown below.



Step 2. The screen below displays.



Main Points:

Main screen: This is a list of all errors encountered by Clubware in date order.

Error Description: This is the most relevant information regarding the error. This provides information on when and where the error has occurred.

Copy: This allows you to copy the Error Description to the Clipboard for your computer. This information can then be pasted into an email or word document if required.

Step 3. Click **OK** to close the Error Log.

You have completed the steps required to view the error log within Clubware

Synchronisation

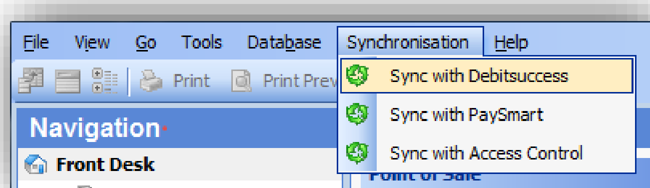
Synchronising with a Billing Company

If your site uses a billing company, Clubware has the ability to share information between the billing company and your site. This removes the requirement to re-key information provided by the billing company.

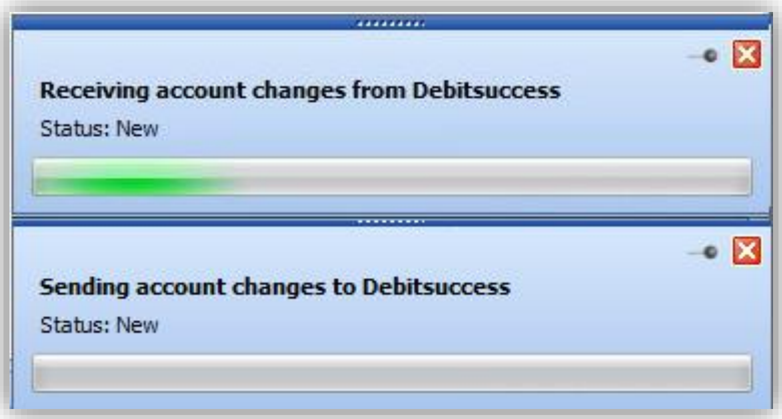
This tutorial describes the steps required to synchronise with a billing company within Clubware.

Using the Sync with Billing Company option

Step 1. Select **Synchronisation | Sync with Billing Company** from the main menu within Clubware, as shown below.



Step 2. The **Synchronisation** screen displays as shown below in the bottom right hand corner of the screen. You can check the progress of this sync from **Administration | Service Jobs.** These boxes will close once the sync has finished.



During the synchronisation process, Clubware attempts to match billing company members and Clubware members. Sometimes, however, members can't be matched and need to be matched manually.

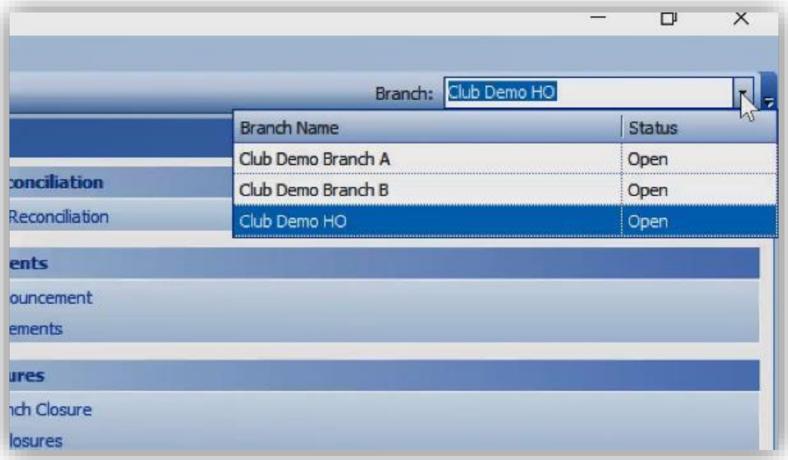
See the tutorial, Processing Unmatched Records for information on how to correct this.

You have completed the steps required to synchronise with a billing company in Clubware.

Branch

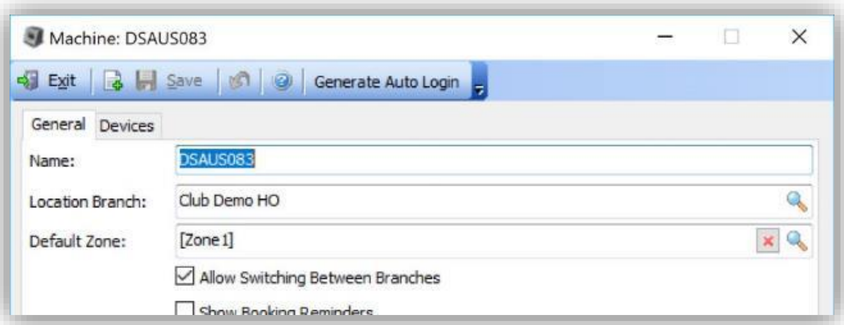
Changing branches

This feature allows a Clubware User to quickly switch between branches without having to close and reopen the application. A branch selector drop-down box is accessible during the Clubware login screen or via the top right-hand corner of the screen

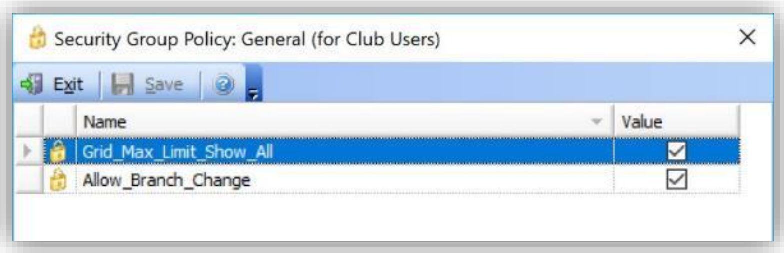


A user can switch between branches in Clubware if both their machine and their security group allow them to. To configure this feature:

Step 1. Ensure the machine (**Administration | Machines)** is configured to allow switching. Refer to the tutorial Adding a Machine for instructions on how to do this.



Step 2. Ensure the Security Group Policy (Administration | Security Groups | General) for the user is configured to allow switching



Note: It is not recommended to switch between branches if the machine running Clubware is monitoring an entry zone device or configured for Point of Sale.

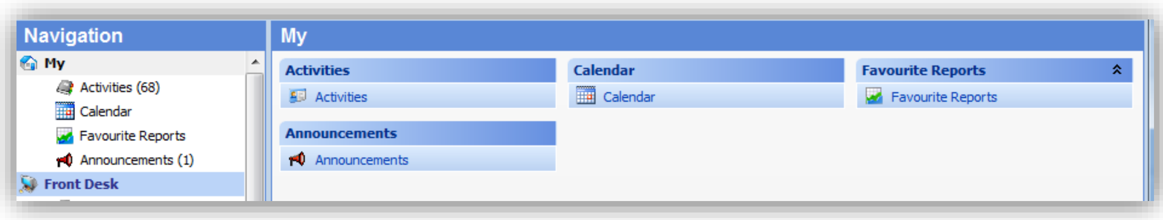
Step 3. Restart Clubware to load the branch selector.

My

Overview

Clubware has introduced a user specific area called **My**.

In this area the individual user who is logged in can have access to their important information/resources quickly.



Activities

Individual user activities can be scheduled and viewed from the My section of Clubware. The activities home screen displays a schedule of tasks, such as member correspondence, and highlights overdue tasks.

You can also use the **Include Completed Activities** (yes or no, tick and cross) option to be displayed.

Calendar

Calendar is a feature for instructors to view their personal commitments for the day, and to enable them to organise their work days effectively.

Favourite Reports

These reports allow the user to access frequently used reports without having to search through the reports module.

It can be personalised to show only reports important to the user's role.

Announcements

Announcements are a versatile form of communication for a Clubware user. They can be marked as read or closed on a per user basis. The purpose of this is to ensure all staff can view important information and notes without having to leave Clubware. (See Creating an Announcement)

How to

Activities

This tutorial describes the steps to add an activity in Clubware.

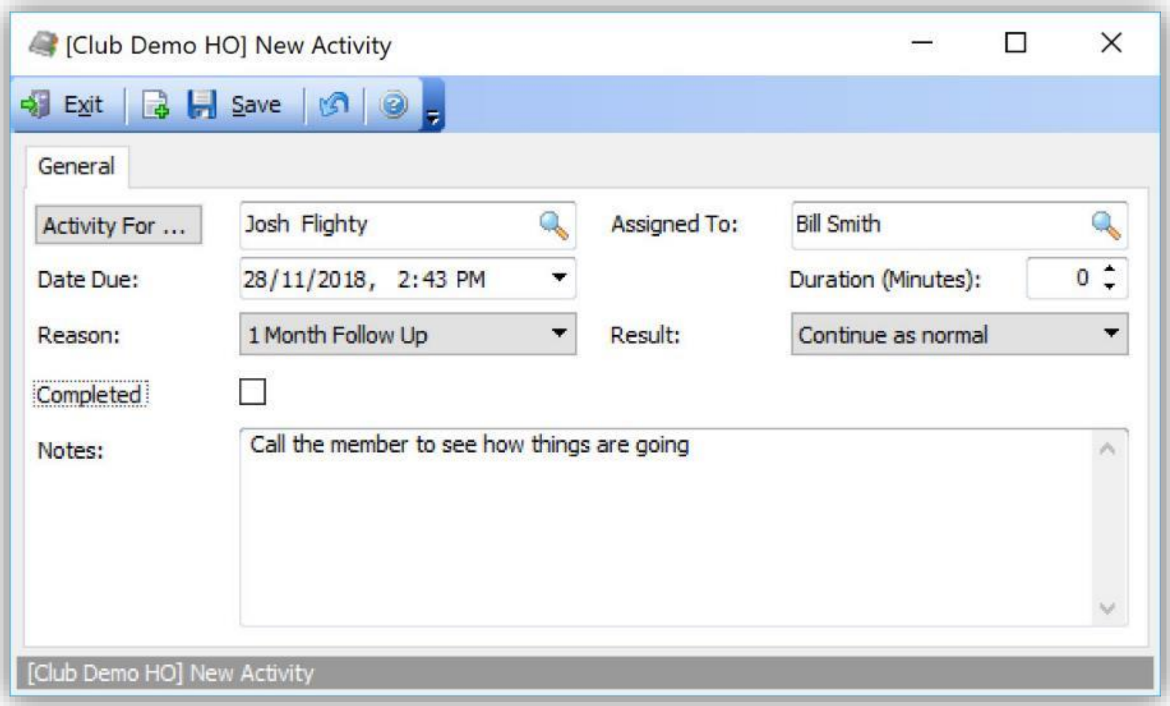
Adding an Activity

Step 1. Select **Front Desk | Activities** from the navigation panel

The **Activities** screen displays in the main panel.

Step 2. Click **Add**. A **New Activity** screen displays

Enter details as shown in the example below.



Main Points:

Activity For: Click on the magnifying glass to search for the required member.

Assigned To: Click on the magnifying glass to search and associate an activity with a staff member.

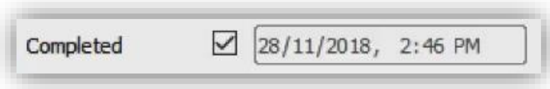
Due Date and **Time:** Enter the date and time this activity should be completed.

Reason: Select the reason that describes the activity required for the member.

You can add new reasons and results in **Administration | Lookups**.

Result: Select a result for the activity when it is completed.

Completed: Check this box when the activity has been completed. When you complete an activity, the completed date and time will display.



Step 3. Save and **Exit** the New Activity screen.

You have completed the steps required to add an activity for a member in Clubware.

Linking Activity Types to Activity results

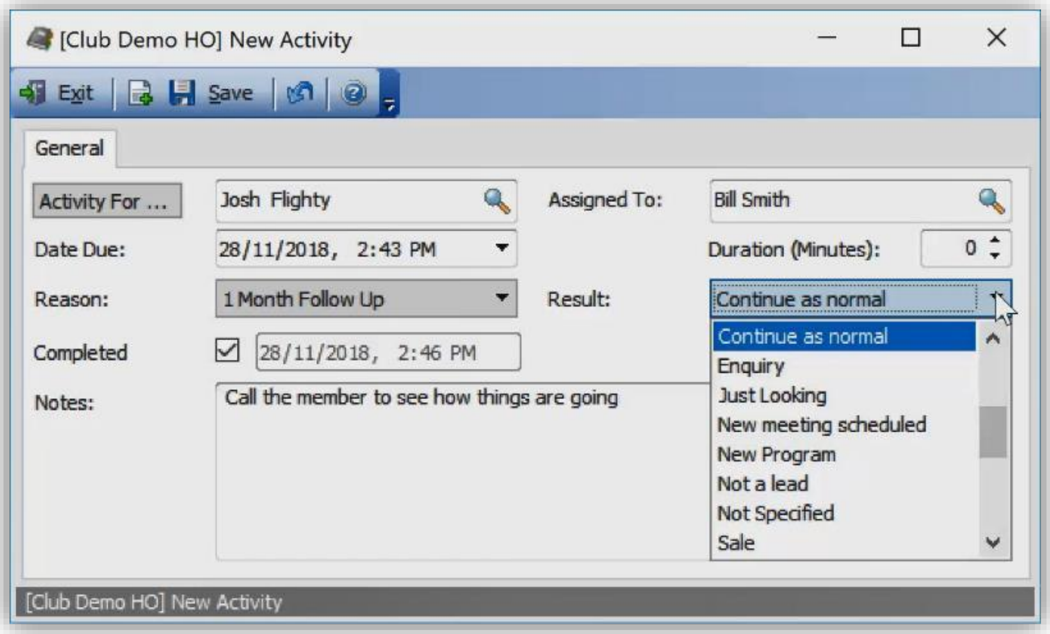
When you assign an Activity Type you can customise the Activity Results which will appear for this Activity Type.

You can add new reasons and results in **Administration | Lookups**.

Refer to the tutorial, Adding a Lookup Item for instructions on how to do this.

You can link a set of results to a reason so that only those results appear in the drop-down box.

This enables to you to view only those selected results instead of scrolling through the complete list, as shown in the example below.



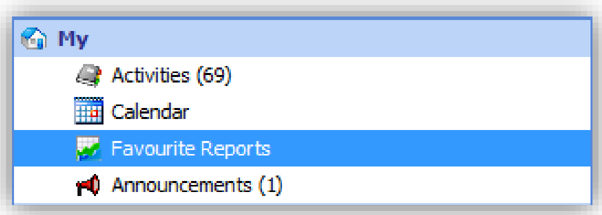
You have now completed the steps required to link activity types to activity results in Clubware.

Favourite Reports

Running a Report

This tutorial describes the steps required to run a report from Favourite Reports in Clubware.

Step 1. Select **Favourite Reports** from the navigation panel, as shown below.



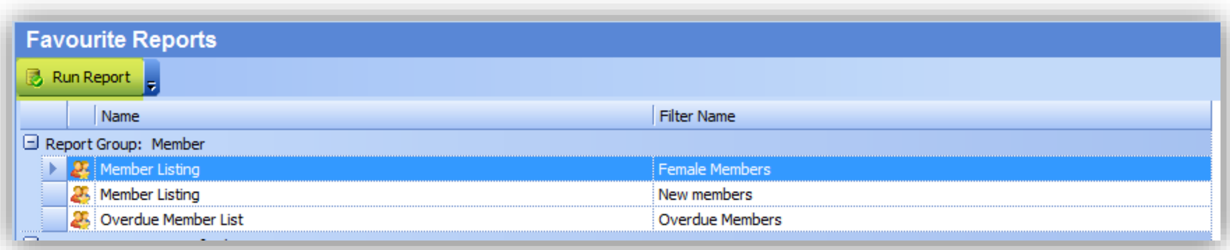
Step 2. The Favourite Reports List screen displays in the main panel.

Select the report you want to run.

Note: If the Report has a filter name populated, then the report will run based on those filters.

If the filter name filed is blank, the report filter box will appear allowing you to select from the pre-set criteria or create a custom report.

Double Click the Report, or click **Run Report** from the toolbar, as shown below.



Step 3. The screen below displays.

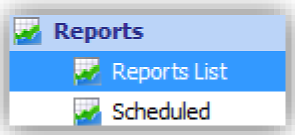
The report has successfully run based on preselected criteria.

You have completed the steps required to run a favourite report in Clubware.

Configuring an Individual Favourite Report

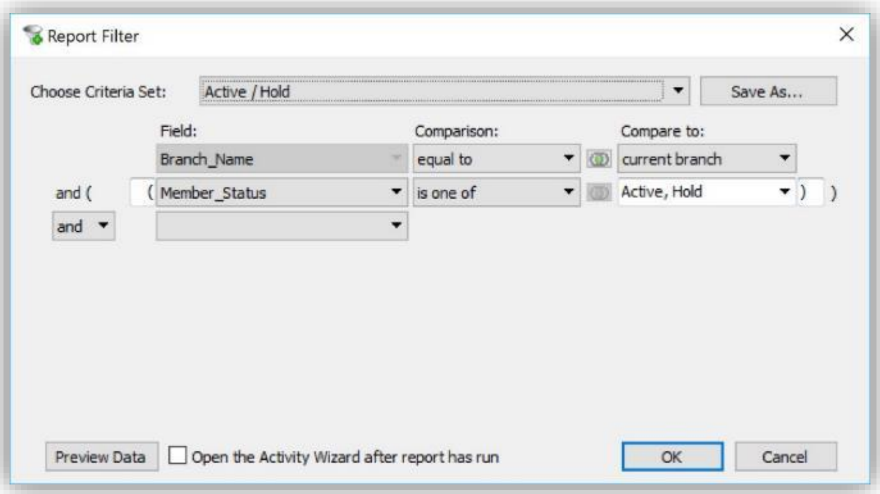
This tutorial describes the steps required to configure an individual favourite reports within Clubware.

Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.



Step 2. The Reports List screen displays in the main panel. Select the report you want to run. Double Click the Report, or click **Run Report** from the toolbar, as shown below.

Step 3. Choose a criteria set, or create and save a custom criteria set. Click OK to run the report.



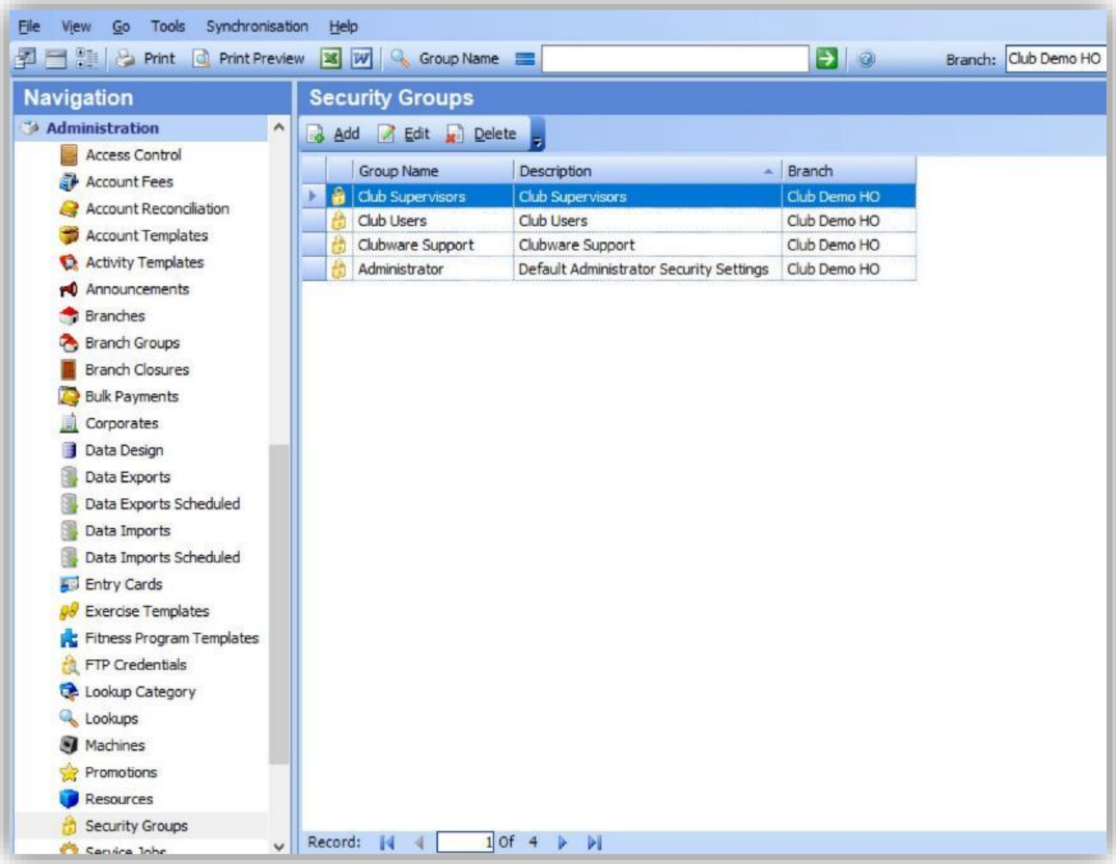
Step 4. Choose to Favourite the report from the report toolbar

You have completed the steps required to configure an individual favourite report in Clubware.

Configuring the Favourite Reports list for a Security Group

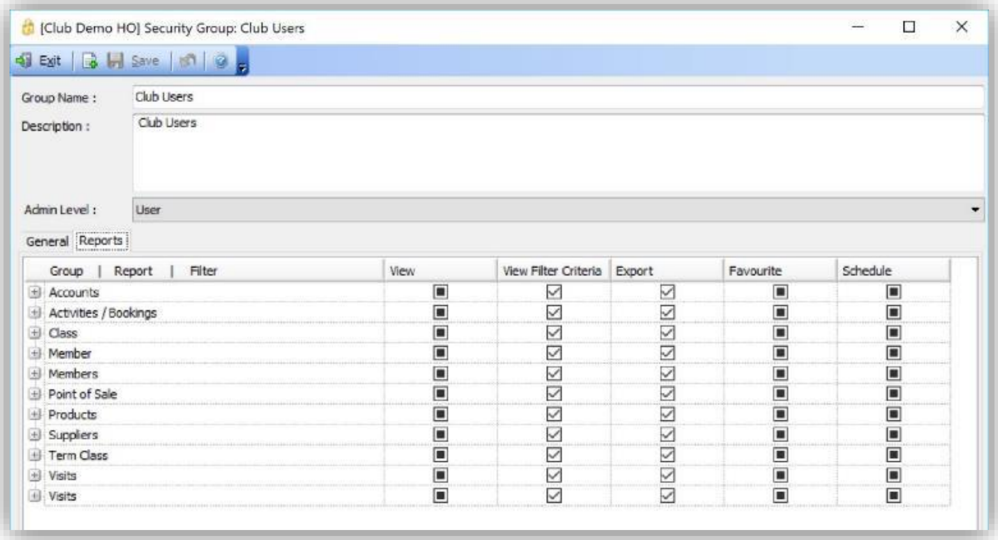
This tutorial describes the steps required to configure the favourite reports list within Clubware.

Step 1. Select **Administration | Security Groups** on the navigation panel as shown below. The Security Group screen displays in the main panel.

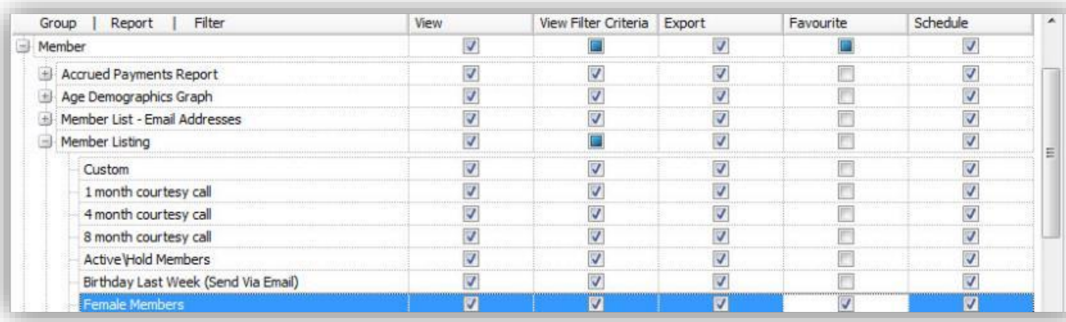


Step 2. Locate the desired security group as shown above.

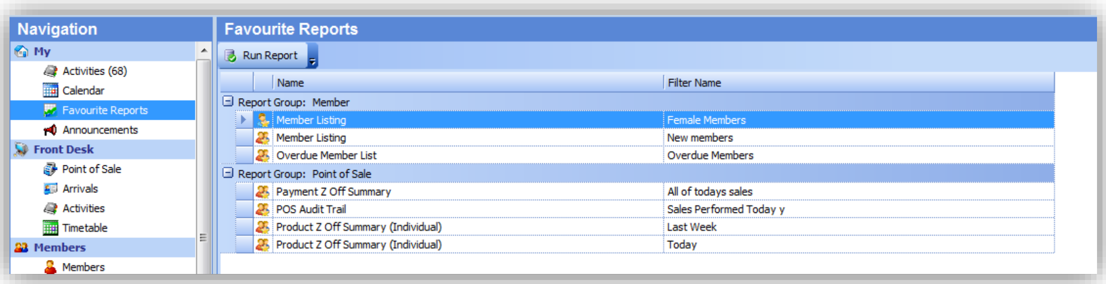
Step 3. Double click on your required security group. Then select the Reports tab as shown. The screen below displays.



Step 4. Select the favourite box next to the required report filter as shown below.



Step 5. Click **Save** and **Exit. Restart Clubware and the selected report filters will now be visible in Favourite Reports.**



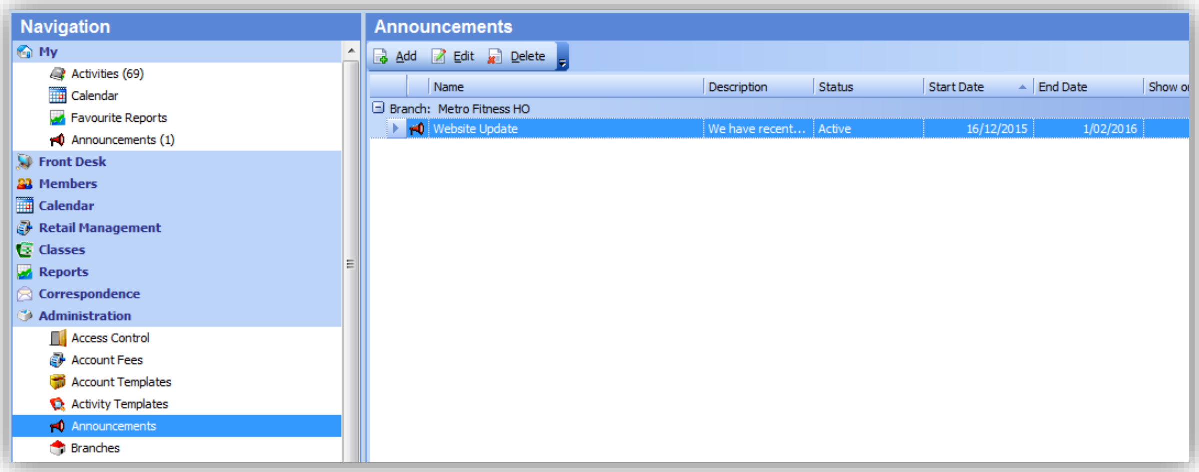
You have completed the steps required to configure favourite reports in Clubware.

Announcements

How to create an announcement

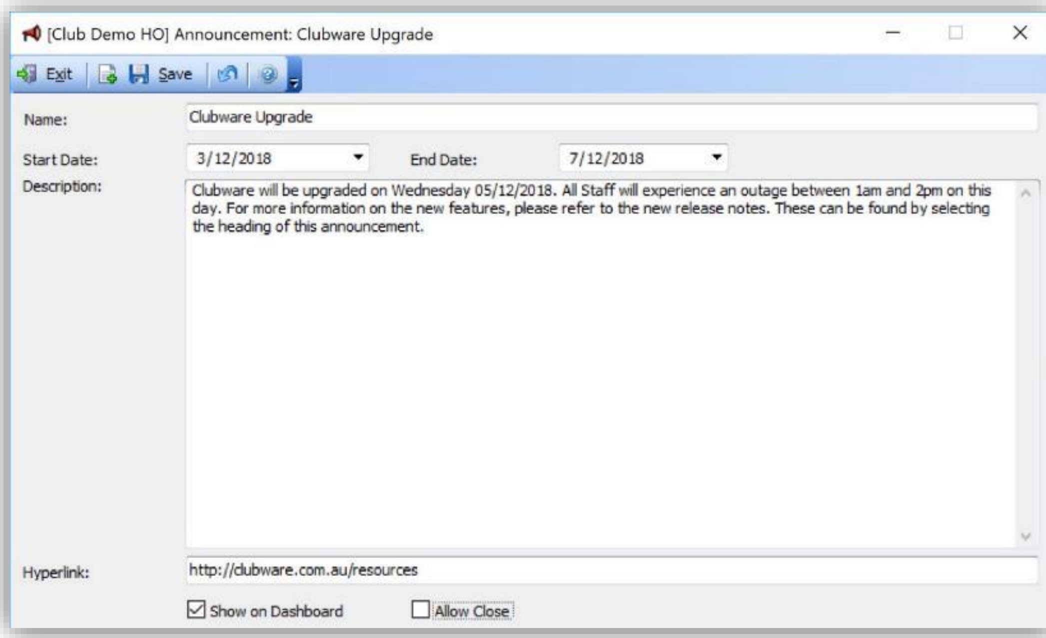
This tutorial describes the steps required to create an announcement within Clubware.

Step 1. Select **Administration | Announcements** on the navigation panel as shown below.



Step 2. Select **Add** from the toolbar on the Announcements screen.

A **New Announcement** screen displays.
Enter information as shown below.



Main Points:

Name: This will be the name of the announcement. The Hyperlink will operate from here

Start Date: The first date the announcement will appear in the Announcements area.

End Date: The last date the announcement will appear in the Announcements area.

Description: Any details relating to the announcement which need to be communicated with staff.

Hyperlink: Websites and file locations are able to be added to the announcement.

Show on Dashboard: Tick this to display on the dashboard or untick to remove.

Allow Close: Allows staff to close the announcement, ensuring it is no longer visible in the announcements area

Step 3. Click **Save** and **Exit. The announcement will now be visible by selecting My | Announcements from the navigation panel.**

You have completed the steps required add announcements in Clubware.

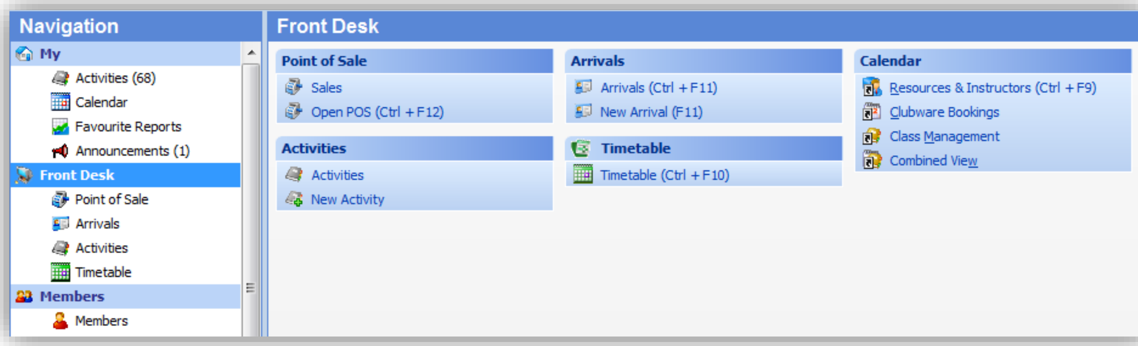
Front Desk

Overview

Clubware offers a comprehensive front desk management system.

Point of Sale, Arrivals and Activities are managed from the Front Desk.
These activities are usually carried out at the entry of your club.

There are also shortcuts to the Calendar from the Front Desk dashboard, allowing users to navigate to other parts of Clubware while working at the Front Desk.



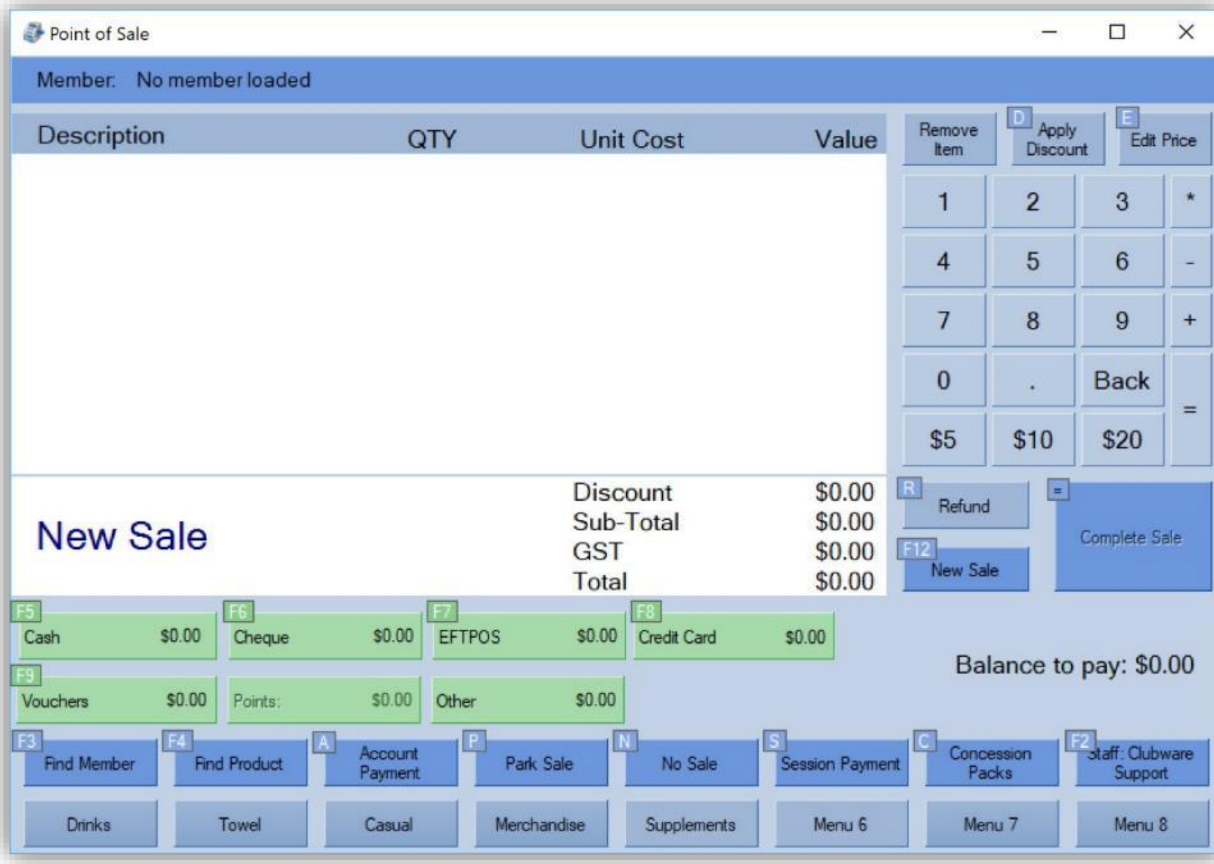
Point of Sale (Ctrl + F12)

Clubware provides a fully featured Point of Sale for selling items or services at your site. These can include selling stock, membership payments, lodging sales against members and recording loyalty points.

Clubware has full stock control functionality (See Completing a Stocktake) to compliment the Point of Sale. Sales can be parked (put on hold) and retrieved as required, as well as recalled later if a receipt or review is needed.

Clubware handles all payment types and configurable sales tax rates. Clubware also has configurable Hot Keys. These allow frequently used products to be configured to appear on user defined menus.

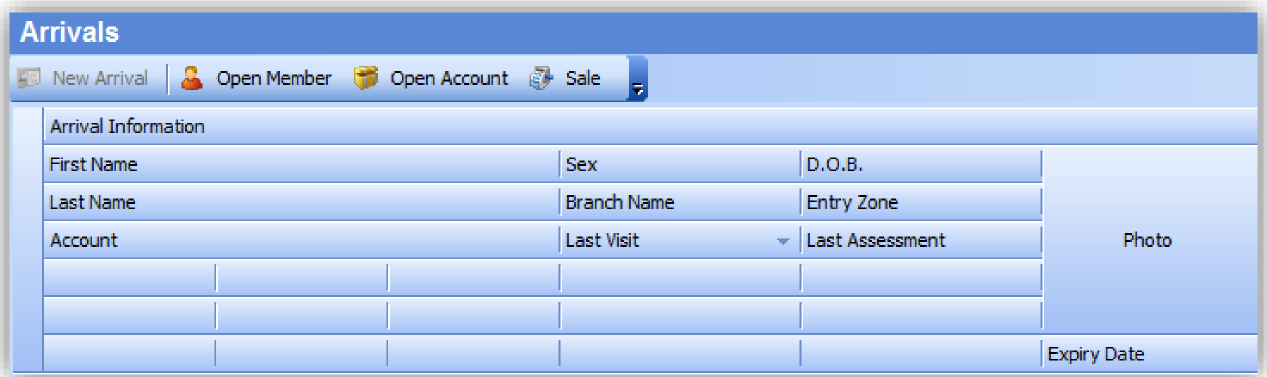
A blank POS screen is shown below.



Arrivals

Arrivals log member visits. Arrivals are linked to the Members functionality of Clubware and as such can provide a tool for displaying relevant member information. Members' photos, account information including overdue or expired accounts, members' bookings and birthdays can be displayed.

- The Arrivals screen also handles concession cards and class arrivals.
- A non-intrusive arrival alert displays member visits as members arrive.
- Historical arrival data can be viewed by using the Arrivals home screen.



Activities

Staff activities can be scheduled and viewed from the Front Desk section of Clubware. The activities home screen displays a schedule of tasks, such as member correspondence, and highlights overdue tasks.

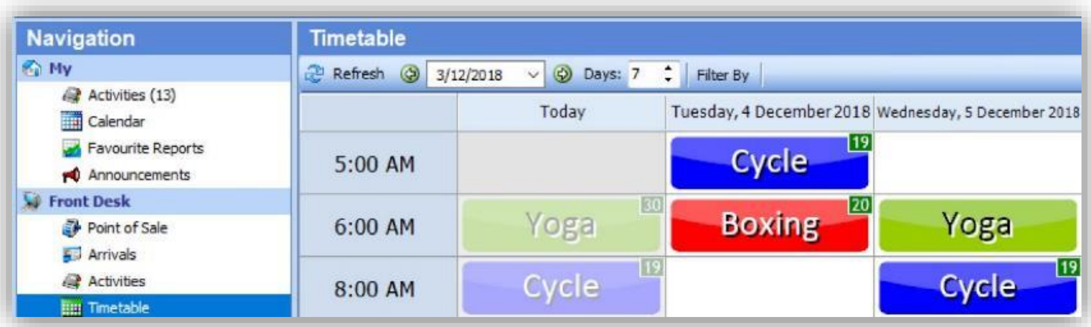
You can also use the **Include Completed Activities** (yes or no, tick and cross) option to be displayed.

Examples of uses for the **Activities** screen are:

- Use as a diary note for complaints, injuries, reminders for assessments, appointments or classes.
- Sales staff can use Activities to track prospects.
- Personal Trainers can use Activities for monitoring re-assessments.

Using **Activities** is a reliable way of staff sharing knowledge.

Timetable



Timetable allows staff to see Classes in an easy to read format.

Examples of uses for the Timetable screen are:

- Book Members into sessions either on an individual basis or in bulk
- View remaining position available for specific classes, including waitlist
- Add casual members to Clubware
- Make Notes for Staff on an ad hoc basis

The timetable will display:

- Past sessions
- The number of positions available
- If the class has waitlist positions available or completely full

Using **Timetable** allows you to view your group exercise activities in an easy to read format. These classes can be created in the Classes module.

How To

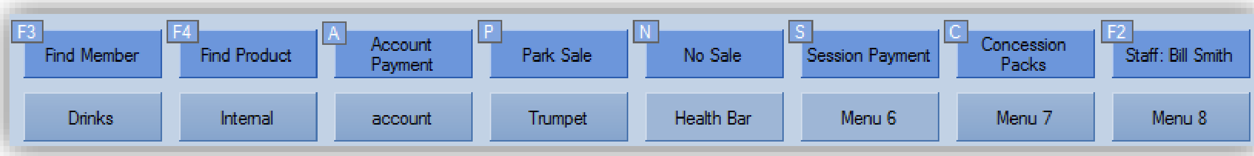
Point of Sale

Configuring Hot Keys

The configurable Hot Keys are placed along the bottom of the screen. When configured, these keys provide convenient shortcuts for your sales area.

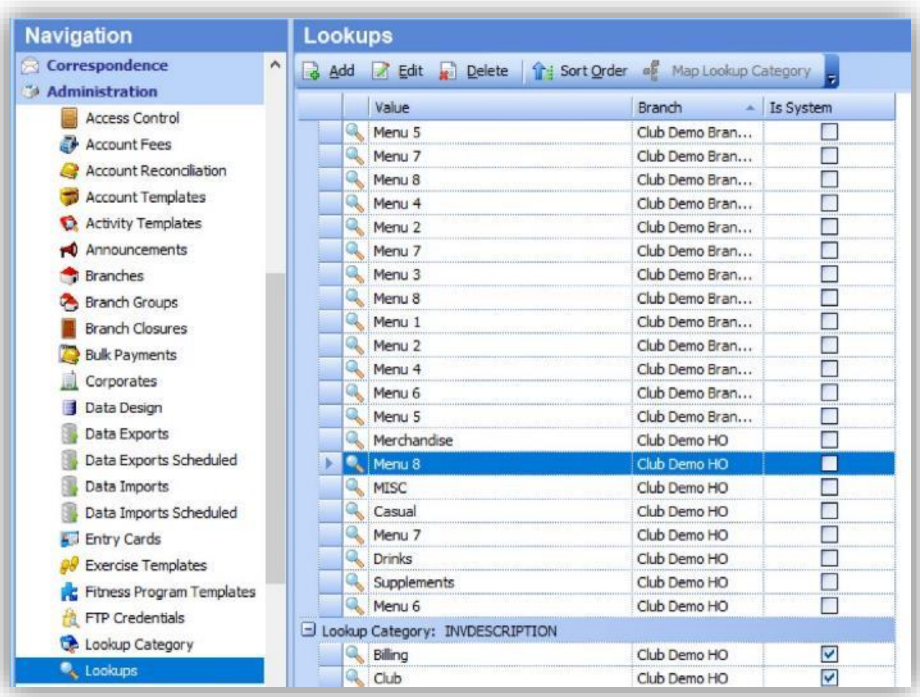
This tutorial describes the steps required to configure and use the Hot Keys.

There are eight available keys by default for you to program to suit your site as shown below and labelled Menu 1 to Menu 8.



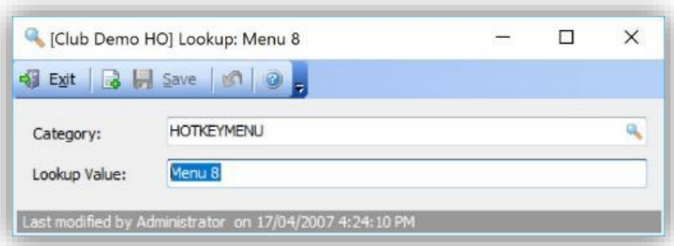
This tutorial describes the steps required to configure, add and use the Hot Keys.

Step 1. Select **Administration | Lookups** on the navigation panel as shown below. The Lookups screen displays in the main panel.



Step 2. Locate the HOTKEYMENU Category as shown above.

Step 3. Double click on your required Menu Key. The screen below displays.



Note: You can select Add from the Lookup Tool Bar to create additional hotkeys if more are required. Clubware has the ability to add more Hot Keys as required.

Step 4. Enter a new menu name in the Lookup Value field. Make sure the category selected is HOTKEYMENU

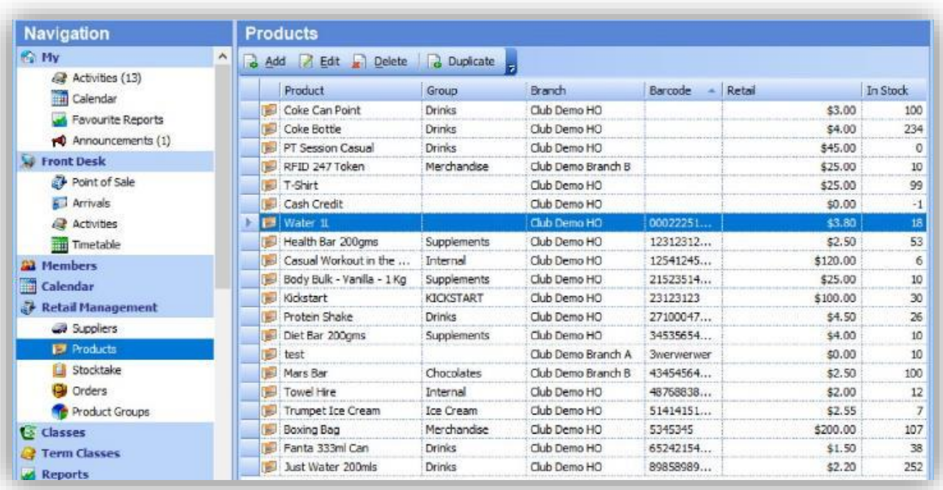
Note: Examples of names could be Drinks, Shakes, Supplements, Protein Bars, Merchandise, Casuals etc.

Each Hot Key contains twenty five available keys. This enables you to group similar items together under one Hot Key.

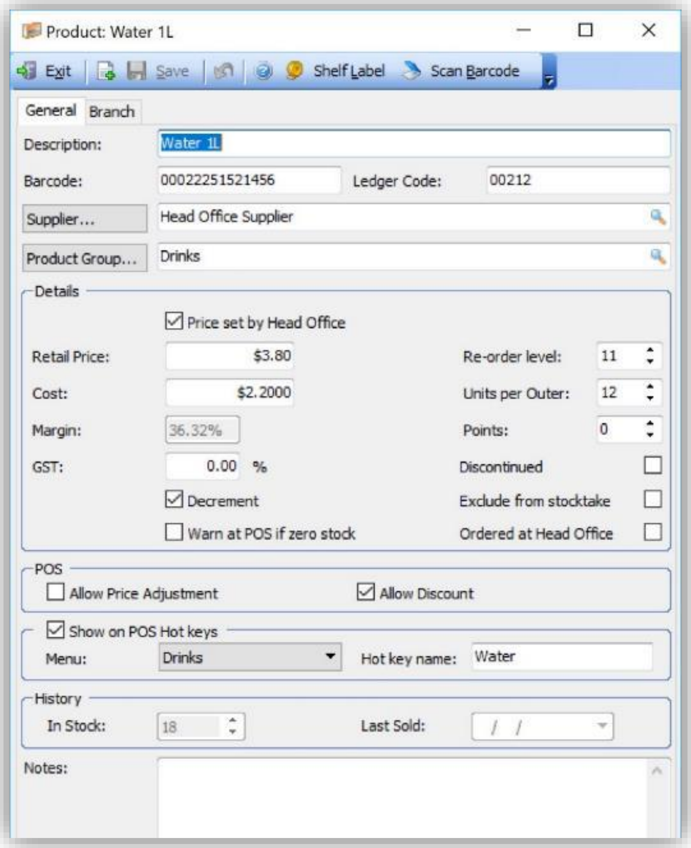
Step 5. Click **Save** and **Exit.**
(When you enter the new **Lookup Value** name, the **Save** button becomes available).

When you have completed your Hot Key Labels, you need to amend each product screen to reflect your choices.

Step 6. Select **Retail Management | Products** on the navigation panel as shown below. The Products screen displays in the main panel.



Step 7. Select a product and Click **Edit**, (or double click the product).
The product screen displays.

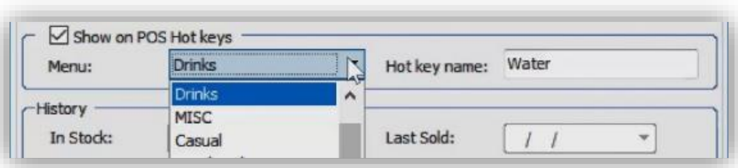


Step 8. Ensure the **Show on POS Hot Keys** box in the lower section of the screen is checked.

Step 9. Click the drop-down arrow on the end of the **Menu** field to select the required menu as shown below.

Step 10. Insert the Hot Key name to appear on the menu in the **Hot Key name** field.

Note: If you intended on the menu being for a single item only, the Hot Key Name will become the Menu name in POS.



Step 11. Save and **Exit** the Product screen.

Step 12. Repeat these steps for all your required products**.** Now when you open the POS Screen it will display the Hot Key new names, as shown below.

You have completed the steps required configure Hot Keys in Clubware.

Using Hotkeys

Step 1. Click the required Key.

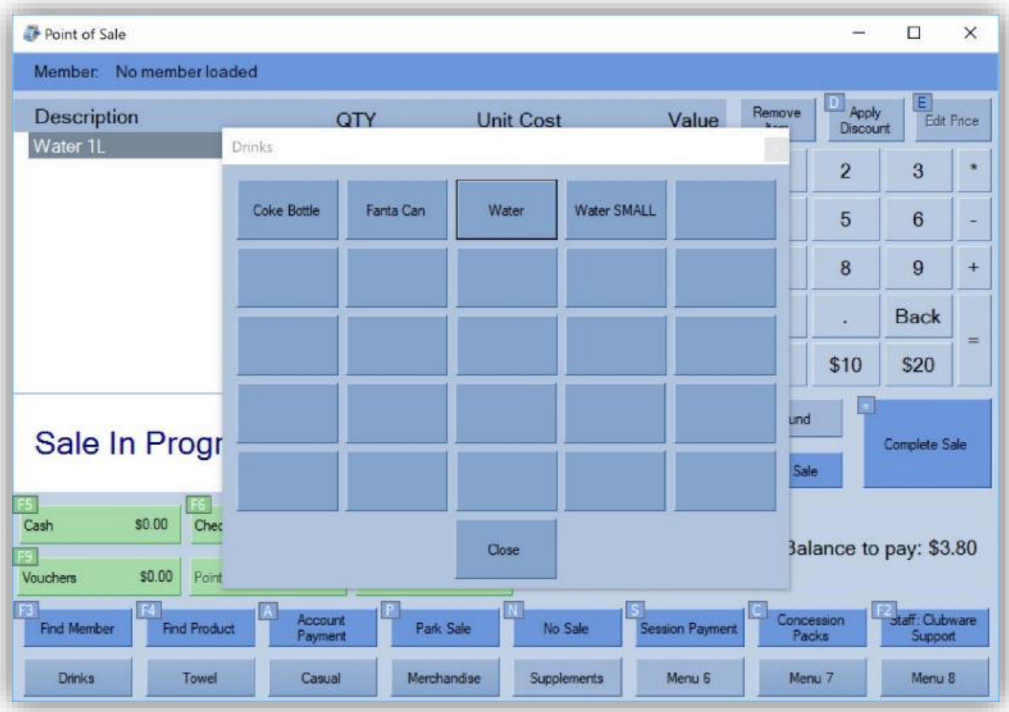
The screen below displays with the choices programmed within that key.

In the example below ''**Drinks'** was selected, and that screen displays with the choices available.

Step 2. Click your product choice.

The example below is **Water 1L**.

The product displays in the description field on the POS screen.



Step 3. Close the **Hot Key** screen.

Note: If you had added a single product to the Hot Key, it will not display choices, but please the item directly into the POS screen.

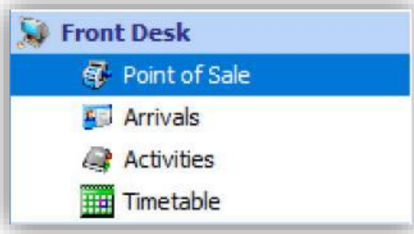
You have completed the steps required to configure hot keys in Clubware.

Processing a Sale

This tutorial describes the steps required to process a sale within Clubware.

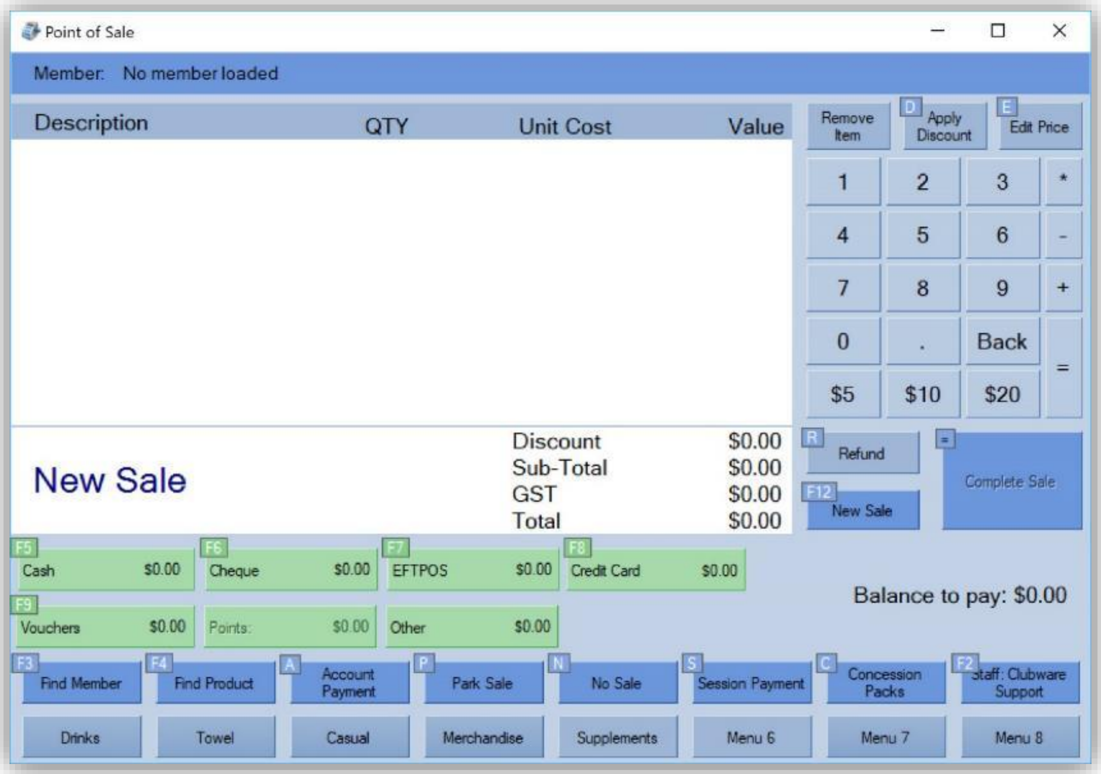
Step 1. Select **Front Desk | Point of Sale** from the navigation panel, as shown below.

Or Press **Ctrl + F12** to go to the POS screen**.**



Step 2. Select **Open POS** from the toolbar, as shown below.

The POS screen displays, as shown below.



Step 3. If you have a barcode scanner attached to your computer, scan a product you want to sell.

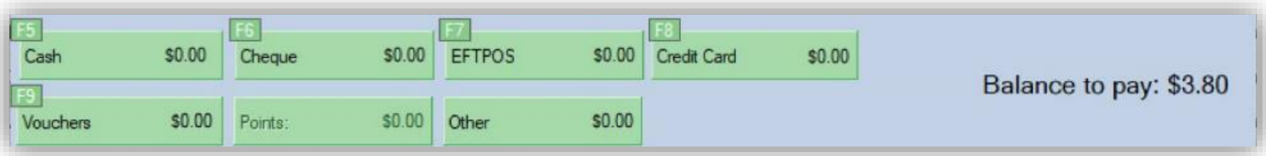
If not, press **F4** to find the product you want to sell.
(For steps to load products, see the tutorial Adding a Product.

If the product you scanned is already loaded, it will appear as shown below.

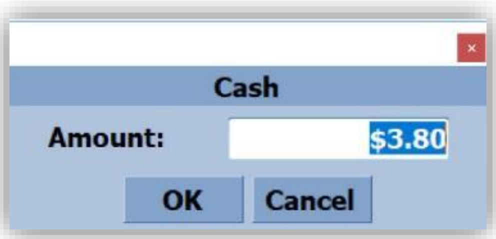
You can add to the quantity by re-scanning the product or using the plus and minus keys on the keyboard. Add extra products as required.

If you want to apply a discount to a product, see the tutorial Applying a Discount.

Step 4. To complete the sale -
Select the payment option from the area below the products list, as shown below. (You can use more than one payment option to complete a sale).

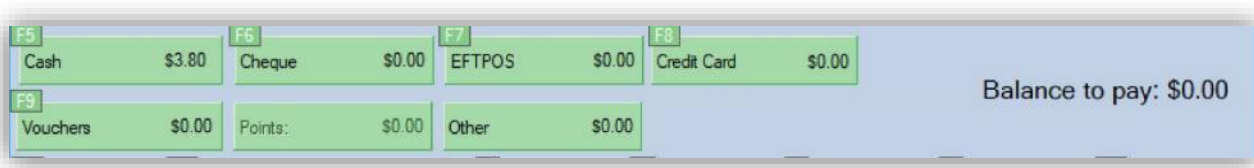


Click **Cash,** and the screen below displays.



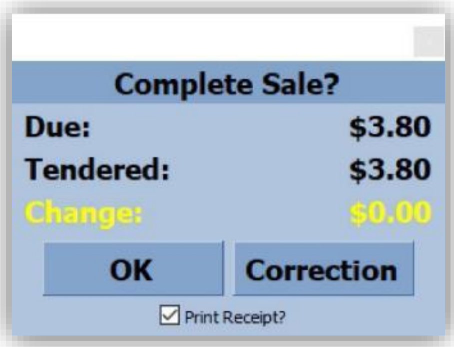
Click **OK** if the default amount is correct.

The POS screen updates as shown below.



Step 5. Click **Complete Sale** to complete the sale.

A confirmation screen will display, as shown below.



Click **OK** to complete the sale.
If you want to print a receipt, ensure the **Print Receipt** checkbox in this confirmation screen is ticked.

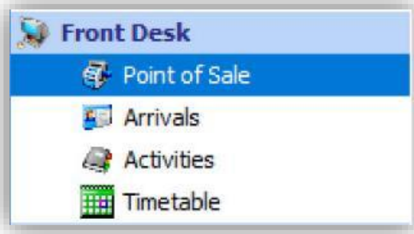
The POS will reset, prepared for the next sale.

You have completed the steps required to process a sale in Clubware.

Processing a Refund

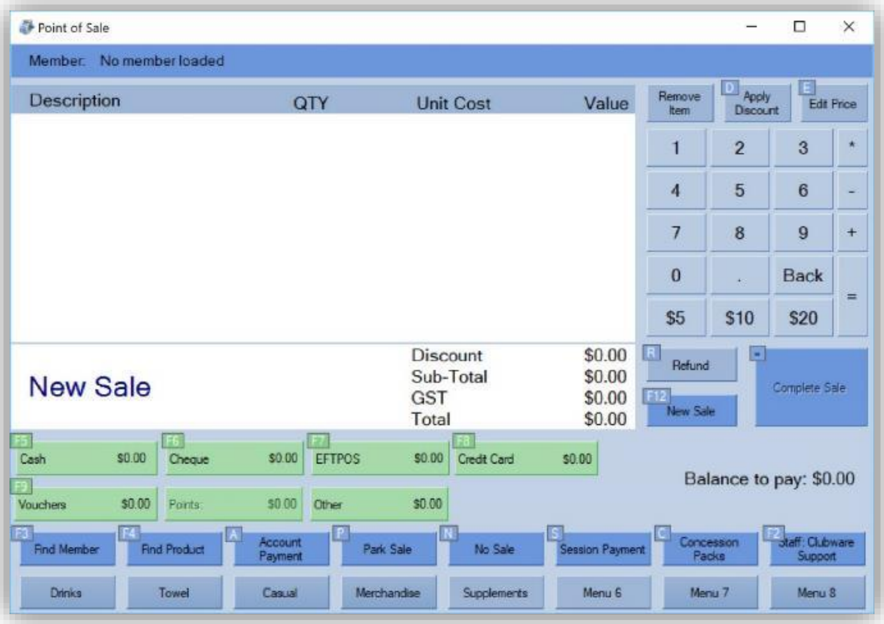
This tutorial describes the steps to process a refund.

Step 1. Select **Front Desk | Point of Sale** from the navigation panel as shown below.

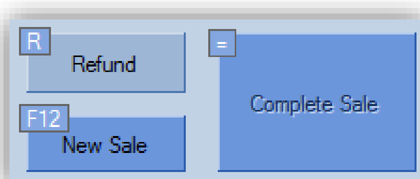


Step 2. Select **Open POS** from the toolbar.

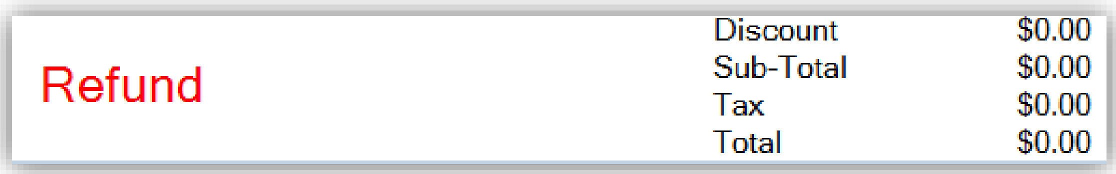
The screen below displays.



Step 3. Select **Refund** from the POS screen as shown below.



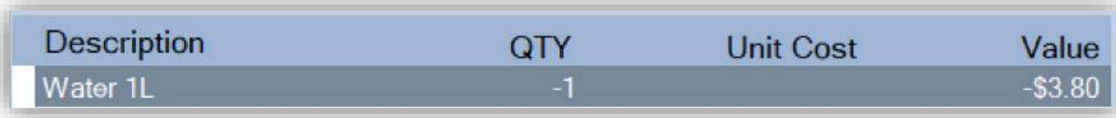
The POS displays as shown below, indicating a **Refund** is in progress.



Step 4. If you have a barcode scanner attached to your computer, scan a product you want to refund.

If not, press **F4** to find the right product.
(For steps to load products, see the tutorial Adding a Report.)

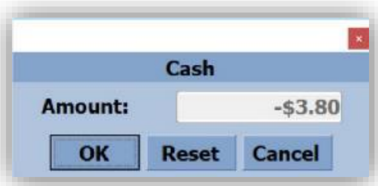
The product will display as shown below.



You can add to the quantity by re-scanning the product or using the plus and minus keys on the keyboard. Add extra products as required.

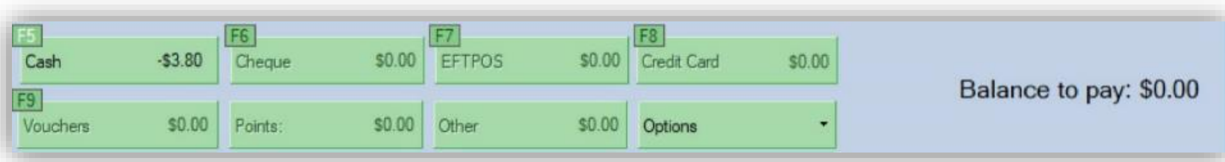
Step 5. To complete the refund, select the payment option from the area below the products list, as shown below.

Click **Cash.** The screen below displays.

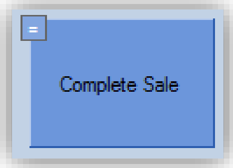


If the amount is correct, click **OK.**

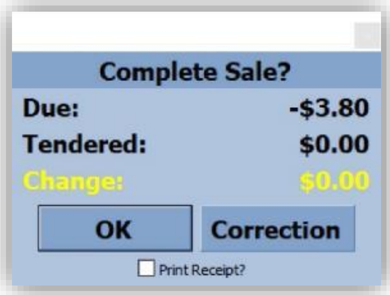
The POS screen will update as shown below.



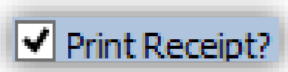
Step 6. Click **Complete Sale** to complete the refund, as shown below.



A confirmation screen will display as shown below.



Click **OK** to complete the refund.
Note: If you want to print a receipt, ensure the **Print Receipt** checkbox is ticked.



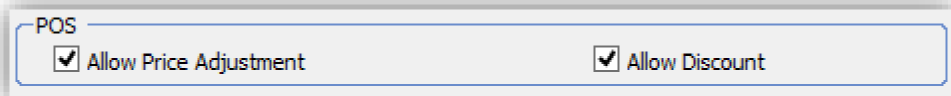
The POS will reset, ready for the next transaction.

You have completed the steps required to process a refund in Clubware.

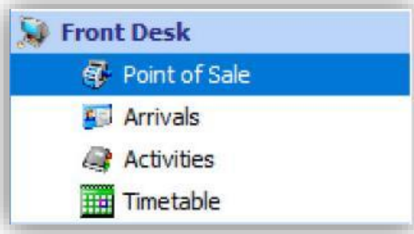
Applying a Discount

This tutorial describes the steps required to apply a discount within Clubware.

Note: In order to edit a price at POS the product must have the ‘**Allow Discount**’ checkbox ticked on the product screen as shown below.

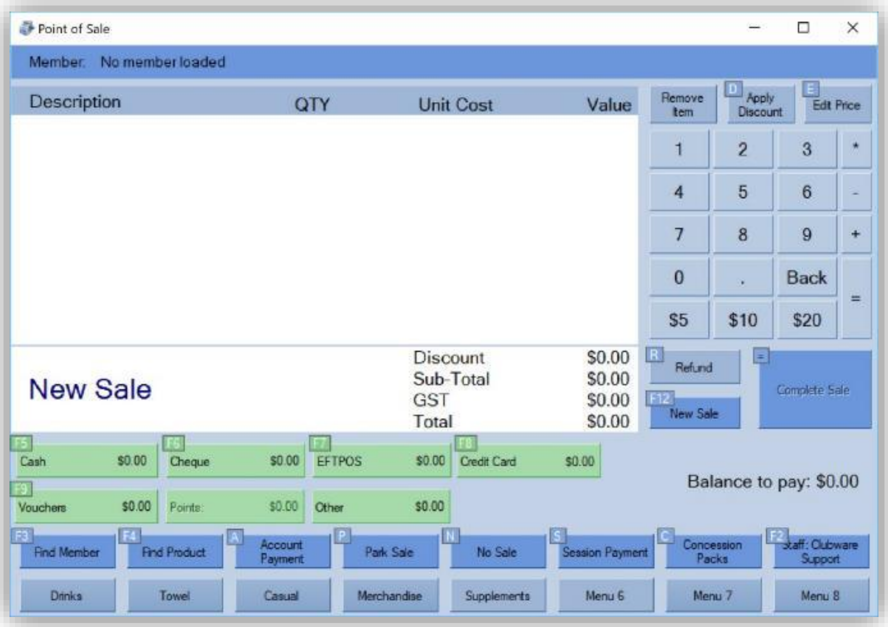


Step 1. Select **Front Desk | Point of Sale** from the navigation panel, as shown below.



Step 2. Select **Open POS** from the toolbar, as shown below.

The POS screen displays, as shown below.



Step 3. If you have a barcode scanner attached to your computer, scan a product you want to sell.

If not, press F4 to find your required product to sell.
(For steps to load products, see the tutorial Adding a Report).
If the product you scan is already loaded, it will display as shown below.

Step 4. Highlight the required product.

Click the **Apply Discount** button or “**d**” on the keyboard. The screen below displays.

Step 5. Enter the required amount of discount in the percentage field.
Or type in a new price in the Extended Price field and Clubware will calculate the discount for you.

Step 6. Click **OK** to accept the discount.

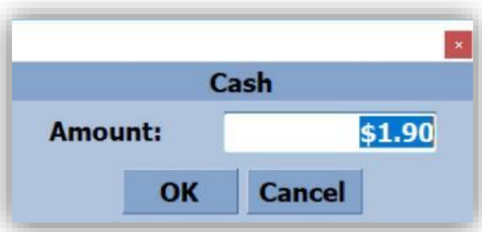
The POS screen displays the discount applied as shown below.

Step 7. To complete the sale:

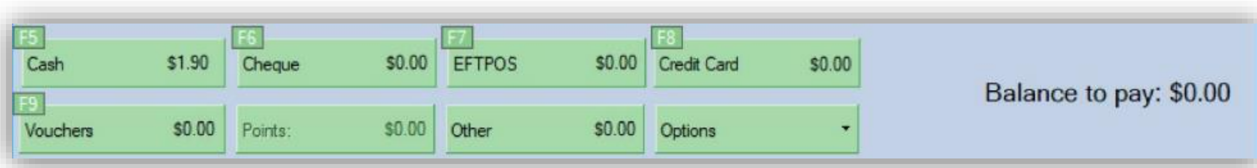
Select the required payment option as shown below.

Note: You can use more than one payment option to complete a sale.

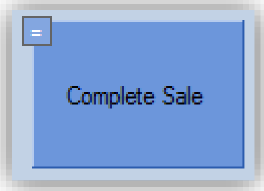
For example, click **Cash.** The screen below displays.



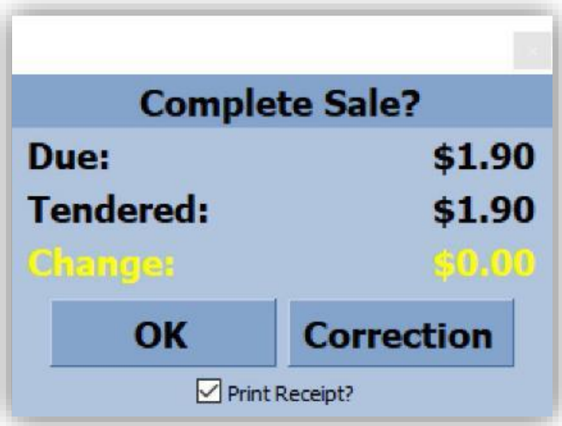
Click **OK** if the default amount is correct.
The POS screen will update as shown below.



Step 8. Click Complete Sale.



A confirmation screen displays, as shown below.



(If you want to print a receipt, ensure the **Print Receipt** checkbox is ticked).

Click **OK** to complete the sale.

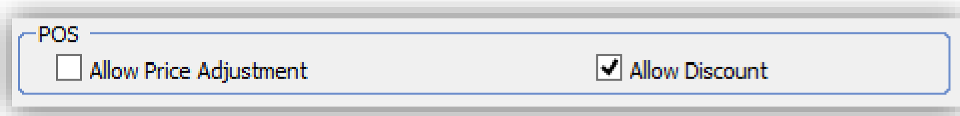
The POS will reset, ready for the next sale.

You have completed the steps required to apply a discount in Clubware.

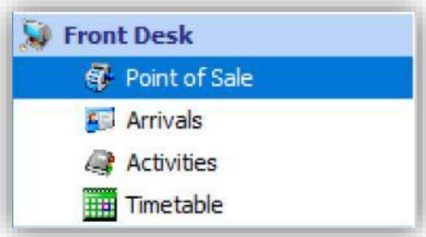
Editing a Price at POS

This tutorial describes the steps to process to **Edit a Price** within Clubware.

Note: In order to edit a price at POS the product must have the
'A**llow Price Adjustment**' checkbox ticked on the product screen as shown below.

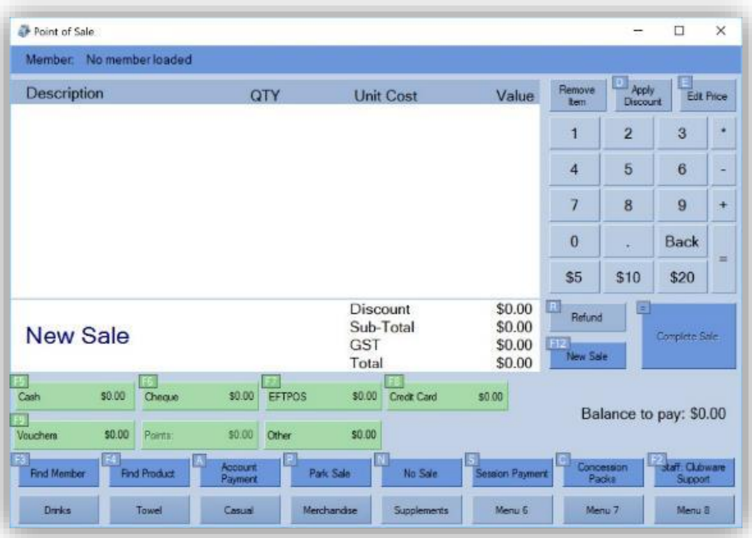


Step 1. Select **Front Desk | Point of Sale** from the navigation panel, as shown below.



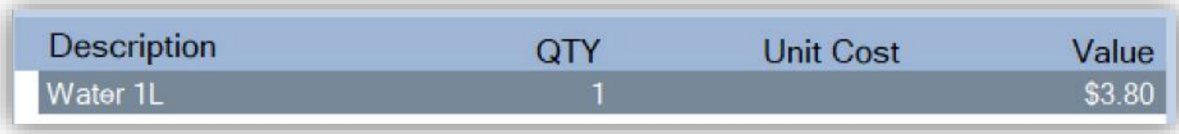
Step 2. Select **Open POS** from the toolbar, as shown below.

The POS screen displays.

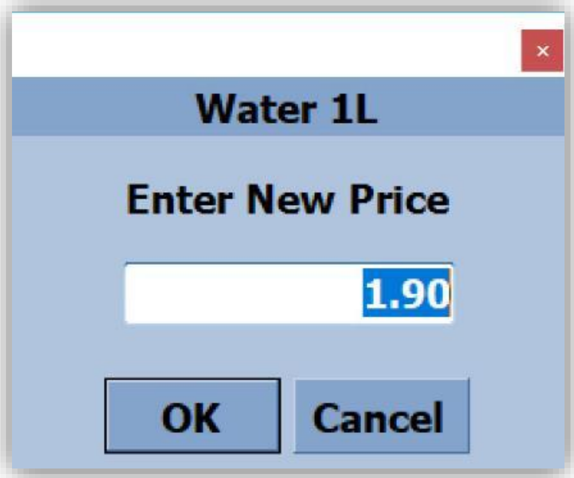


Step 3. If you have a barcode scanner attached to your computer, scan a product you want to sell. If not, press **F4** to find the product you want to sell.

(For steps to load products, see the tutorial Adding a Product)
If the product you scan is already loaded, it will display as shown below.

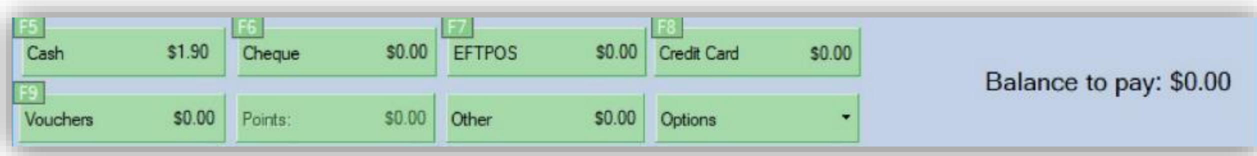


Step 4. Click the **'Edit Price**' button or press "**e**" on the keyboard to edit the price. The screen below displays.

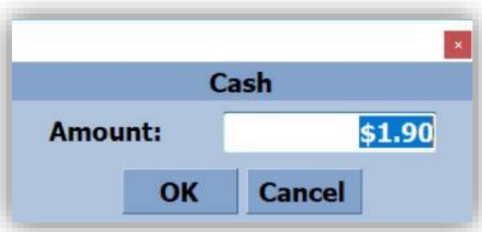


Enter the new price and click **OK** to return to the POS Screen.
Your product now displays the new price.

Step 5. Select the payment option from the area below the products list to complete the sale, as shown below.
Note: You can use more than one payment option to complete a sale.



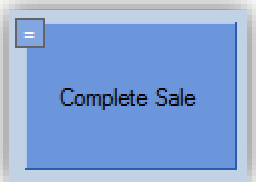
For example:
Click **Cash,** the screen below displays.



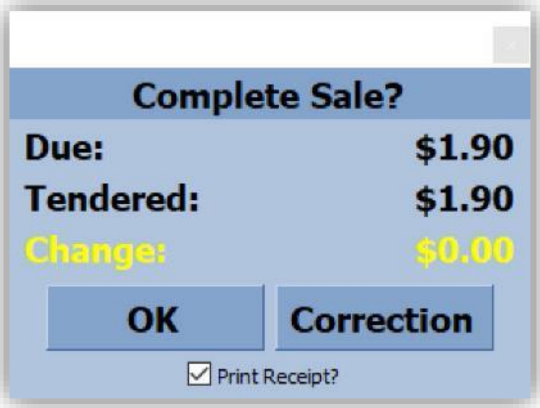
Click **OK** if the default amount is correct.

The POS screen updates as shown below.

Step 6. Click **Complete Sale** on the right side of the POS.



A confirmation screen will display, as shown below.



Note: if you want to print a receipt, ensure the **Print Receipt** checkbox in this confirmation screen is ticked.

Click **OK** to complete the sale.

The POS will reset, ready for the next sale.

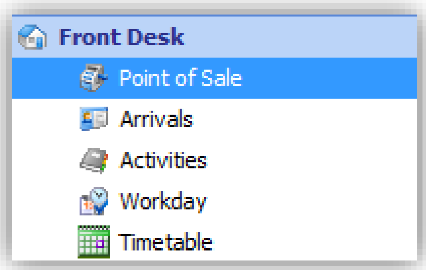
You have completed the steps required to edit a price in Clubware.

EFTPOS Cash Out

This tutorial describes the steps to process EFTPOS Cash Out with purchase within Clubware.

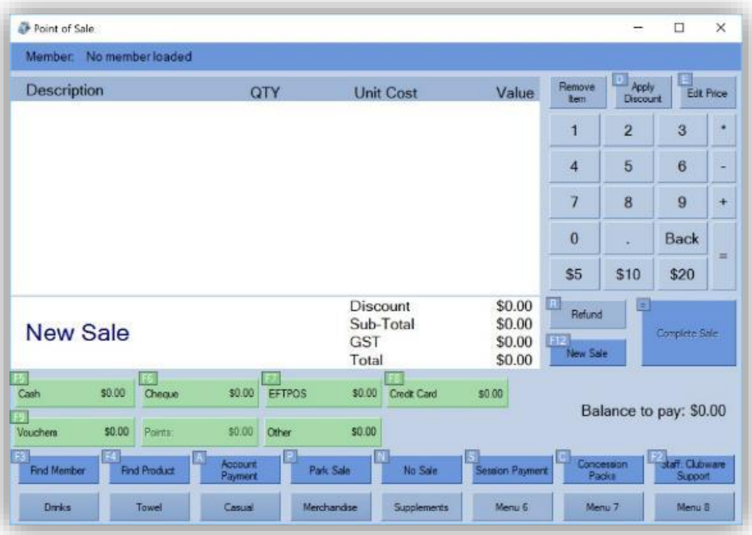
Note: In order to allow cash out with an EFTPOS transaction the POS must have the security permissions enabled. See the tutorial Adding a Security Group.

Step 1. Select **Front Desk | Point of Sale** from the navigation panel, as shown below.



Step 2. Select **Open POS** from the toolbar, as shown below.

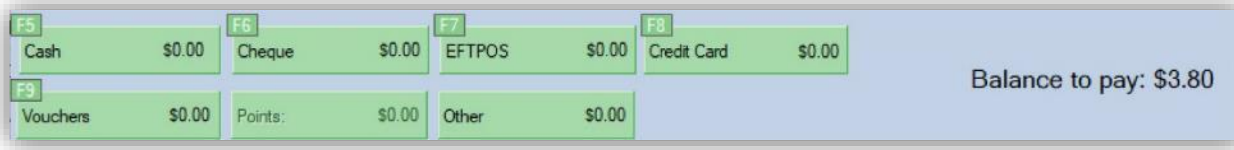
The POS screen displays.



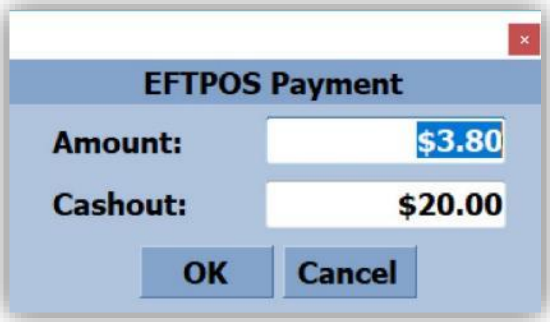
Step 3. If you have a barcode scanner attached to your computer, scan a product you want to sell. If not, press **F4** to find the product you want to sell.

(For steps to load products, see the tutorial Adding a Product)
If the product you scan is already loaded, it will display as shown below.

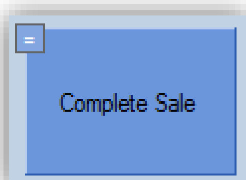
Step 4. Select the EFTPOS option from the area below the products list to complete the sale, as shown below.



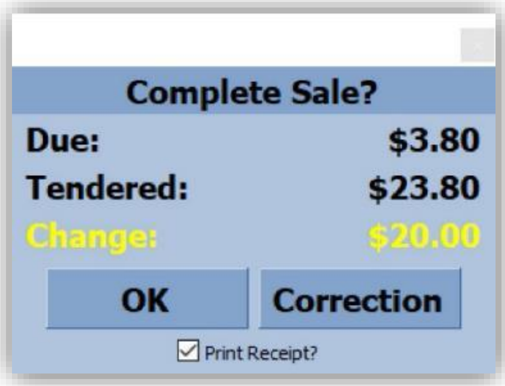
The payment screen will appear and allow for a cash out amount if required.



Step 5. Click **Complete Sale** on the right side of the POS.



A confirmation screen will display, as shown below.



Note: if you want to print a receipt, ensure the **Print Receipt** checkbox in this confirmation screen is ticked.

Click **OK** to complete the sale.

The POS will reset, ready for the next sale.

Note: Should the member want cash out and the security settings permit it, you do not need to add a product. Select EFTPOS and add a cash out amount. Then complete the sale as normal.

You have completed the steps required to process EFTPOS with cash out in Clubware.

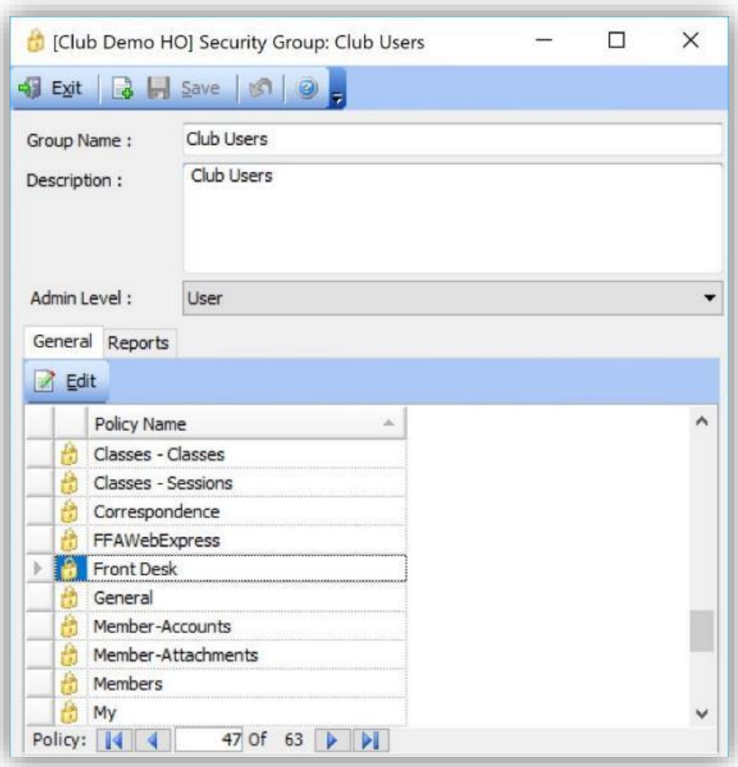
Configuring EFTPOS Cash Out

This tutorial describes the steps to turn on EFTPOS cash out within Clubware.

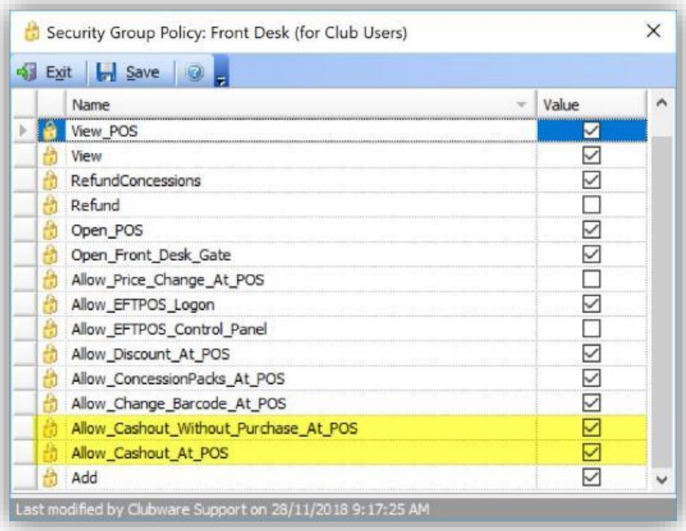
Note: You must have the relevant security permissions to access the Administration area. If not, please refer to your manager.

Step 1. Select **Administration | Security Groups** on the navigation panel as shown below. The Security group screen displays in the main panel.

Step 2. Double Click on the applicable security group and select Front Desk, double clicking to edit.



Step 3. Check the security requirements required for EFTPOS cash out. There are two available as highlighted below.



Step 4. Save and exit.

Step 5. Edit any other security groups as needed by following Steps 1 – 4. Restart Clubware.

You have completed the steps required to configure EFTPOS with cash out in Clubware.

Arrivals

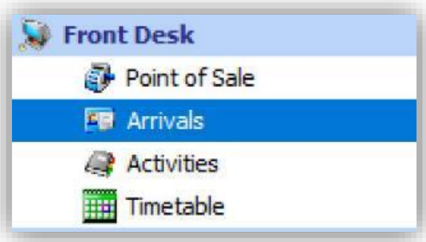
Manually Processing an Arrival

This tutorial describes the steps to process an **arrival** within Clubware.

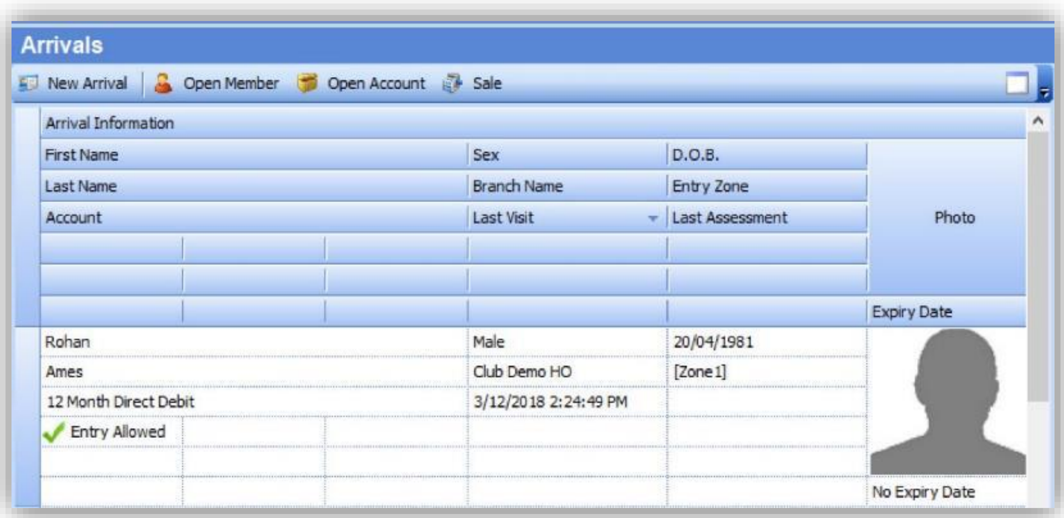
There are three ways to do this.

Method 1.

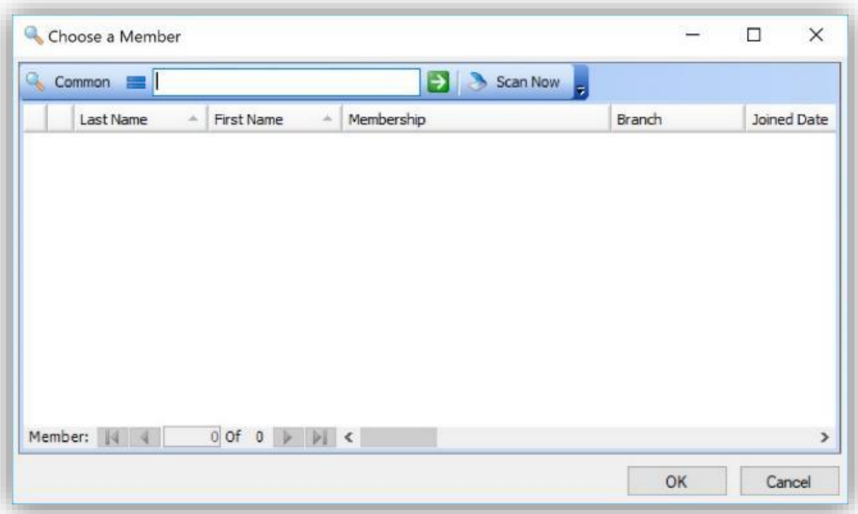
Step 1. Select **Front Desk | Arrivals** from the navigation panel, as shown below. (Or press **Ctrl + F11.**)



The **Arrivals** screen displays.



Step 2. Click **New Arrival.** Two screens will load.
The first is the **Choose a Member** search screen displayed below:

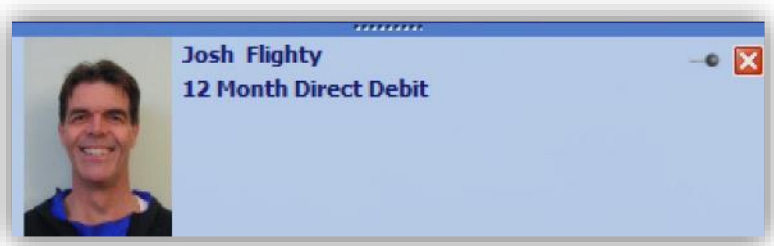


Use the search criteria and green arrow to locate a member. You can scan the member barcode using the Scan Now option.

Highlight your selection.

Click **OK.**

The **New Visit** Screen displays as shown below.



Method 2.

Press **F11** to display the **'Choose a Member'** screen.

Use the search criteria and green arrow to locate a member.

Highlight your selection.

Click **OK.**

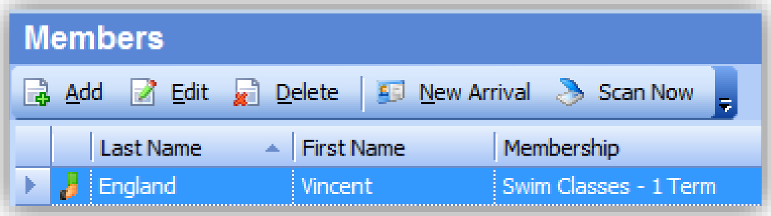
The **New Visit** Screen displays as shown above.

Method 3.

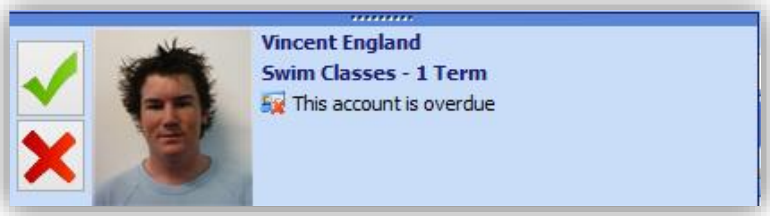
Step 1. Press **Ctrl + F8** to display the Members home screen.

Use the filter to locate and highlight the required member.

Click **'New Arrival**' at the top of the Members home screen, as shown below.



If the member has only one current account, or under **Administration | Branches | Select Current Branch | Settings | Entry** you have **Auto-save manual arrivals with current account**, as a default, then the screen will display as below and the sounds will play. (As long as Sounds are enabled on the **Options** screen).



Step 2. Click the **Accept Arrival** icon (Green Tick).

Note: If a member account is not overdue, the member will be arrived. (The Accept Arrival tick is not required).

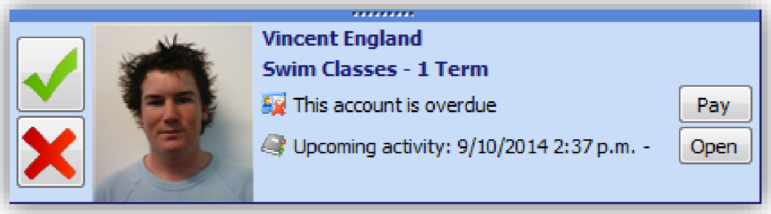
If the member has multiple accounts, the account field will automatically default to the current account, however setting this can be changed.

Click the magnifying glass on the end of the account.

Select the required account.

Step 3. Click Save.

Note: This will be the account that the visit will be logged against, as shown in the example below.



Note: The Arrival box contains important information relating to the member or account. In the illustration above the member is overdue.

Click on the members name and you will be taken to their profile or, click on the account to go to the account that is being used for the arrival.

Use the Pay button to launch the POS and take an account Payment.

Use the Open button to view upcoming activities for the member.

You have completed the steps required to add an arrival manually in Clubware.

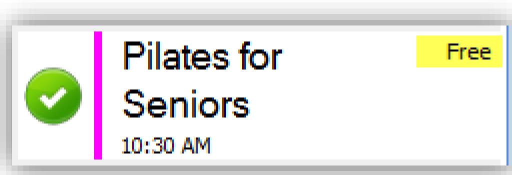
Arriving a member in a class

This tutorial relates to adding members to a class from the arrivals screen.

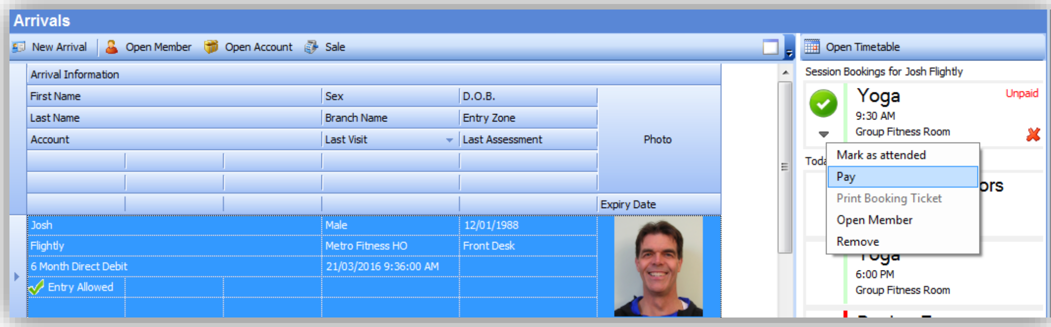
Step 1. Ensure the member has recorded an arrival at the facility on the Arrivals Screen.

Step 2. Highlight the member and hover over the applicable class from the list on the right-hand side of the arrivals screen. The class with show a "+" symbol until selected, then will show a tick, as shown below.

Note: If the class is inclusive of the membership, the class box will tell you the class is free.



If the class is not inclusive of the membership, the class box will indicate it is unpaid. Use the drop-down arrow to select pay and open the POS to complete the sale.



You have completed the steps required to add a member to class from the arrivals screen in Clubware.

Configure Clubware to Record Exits

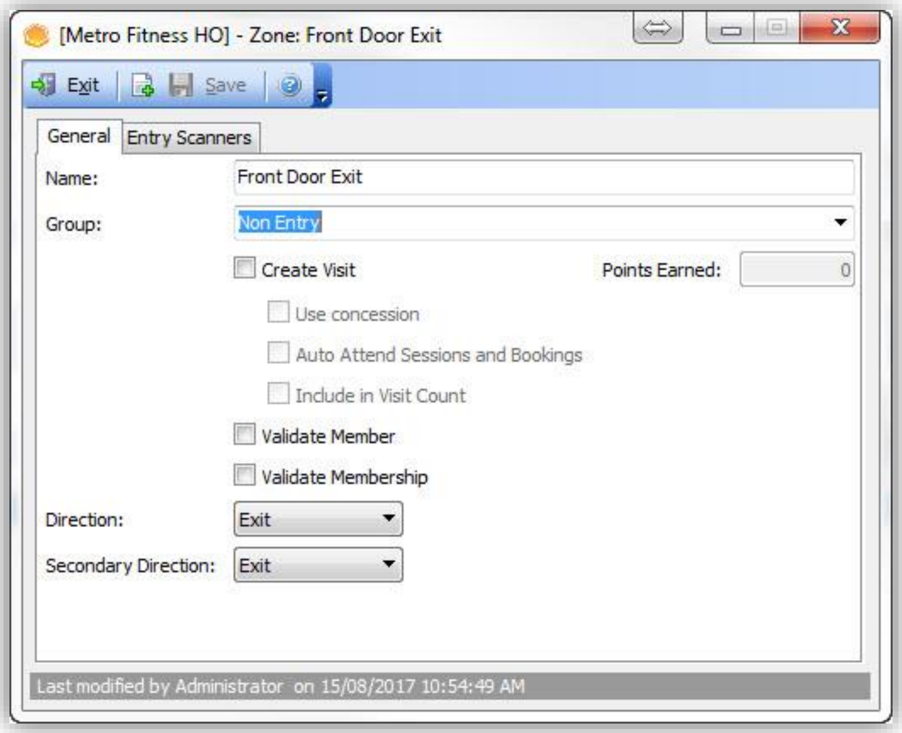
This tutorial relates to users of 24 hours systems or facilities which have an exit scanner as part of their hardware. It describes the steps required to configure Clubware to record Exits from the Club.

Step 1. Select **Administration | Zones** from the navigation panel

The **Zones** screen displays in the main panel.

Step 2. Click **Add**. A **New Zone** screen displays

Enter details as shown in the example below.



Main Points:

Name: This should be an easily identifiable name describing the location of the exit point

Group: Create specific groups for your entry and exit points.

Create Visit: Create a visit for the member in Clubware

- **Use a concession:** Tick checkbox to allow concession to be deducted when the arrival is created
- **Auto Attend Sessions and Bookings:** Arrive the member to classes and bookings at this point
- **Include in Visit Count:** Add a visit to the member's visit count

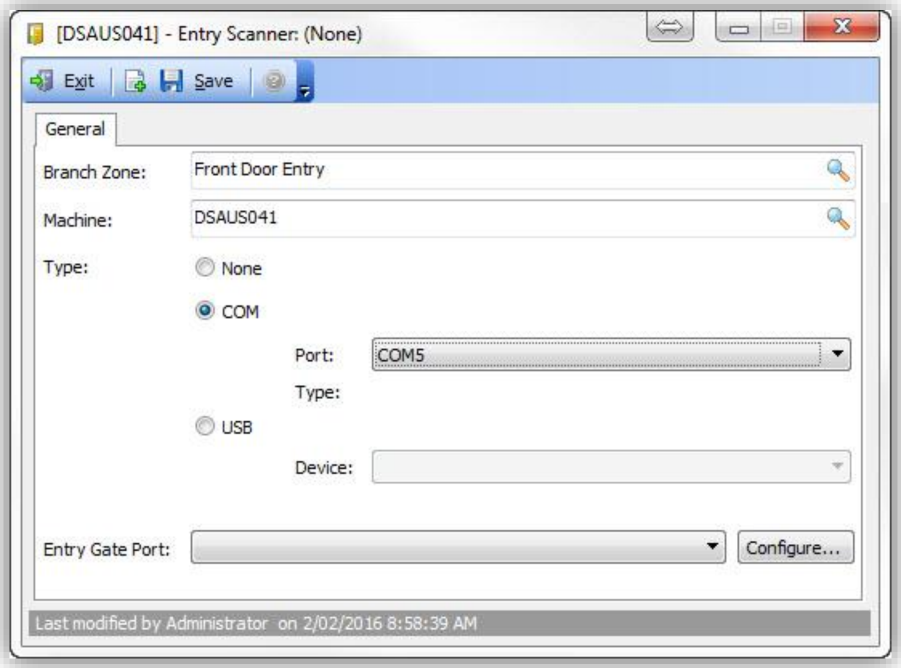
Validate Member: Validate the member's status

Validate Membership: Ensure the membership is not expired or overdue

Points Earned: Points can be collected upon arrival

Direction: Defines if a zone is an entry or exit point

Step 3. Select **Entry Scanners** and then **Add.** A new **Entry Scanner box** will appear. Enter the details as required.



Main Points:

Branch Zone: This should populate with the newly created zone name.

Machine: The machine name where the entry scanner will the hosted. May not be the machine currently in use.

Type: Allows the zone to be configured for a USB, serial or gate device.

Step 4. Save and **Exit** the New Entry Scanner screen. Save and **Exit** the new Zone.

You have completed the steps required to configure a zone for Exits in Clubware.

Activities

Adding an Activity

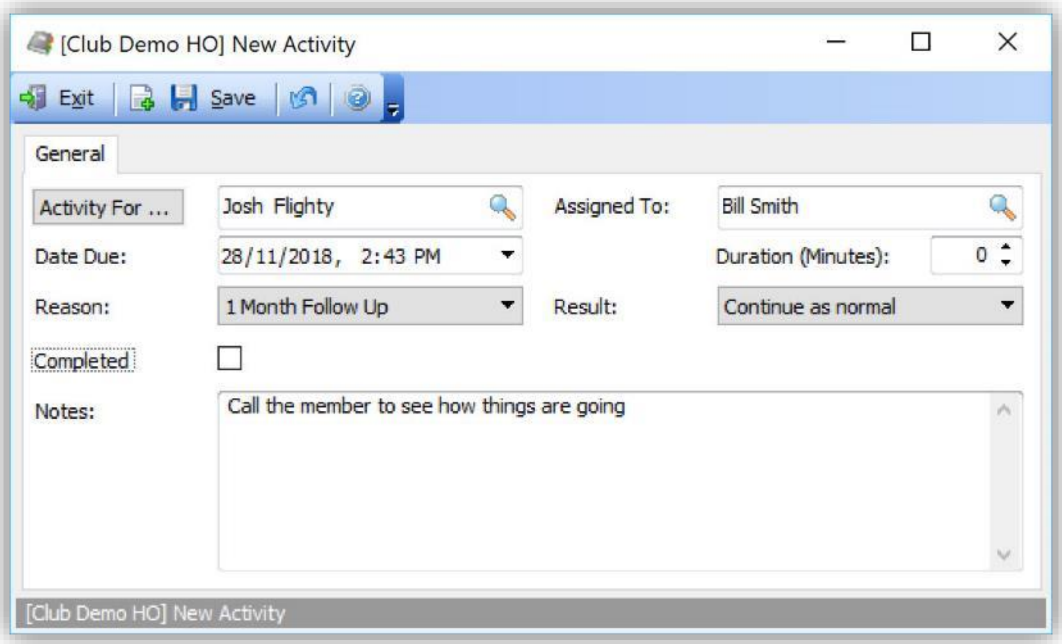
This tutorial describes the steps to add an activity in Clubware.

Step 1. Select **Front Desk | Activities** from the navigation panel

The **Activities** screen displays in the main panel.

Step 2. Click **Add**. A **New Activity** screen displays

Enter details as shown in the example below.



Main Points:

Activity For: Click on the magnifying glass to search for the required member.

Assigned To: Click on the magnifying glass to search and associate an activity with a staff member.

Due Date and **Time:** Enter the date and time this activity should be completed.

Reason: Select the reason that describes the activity required for the member.

You can add new reasons and results in **Administration | Lookups**.

Result: Select a result for the activity when it is completed.

Completed: Check this box when the activity has been completed. When you complete an activity the completed date will display.

Step 3. Save and **Exit** the New Activity screen.

You have completed the steps required to add an activity for a member in Clubware.

Linking Activity Types to Activity results

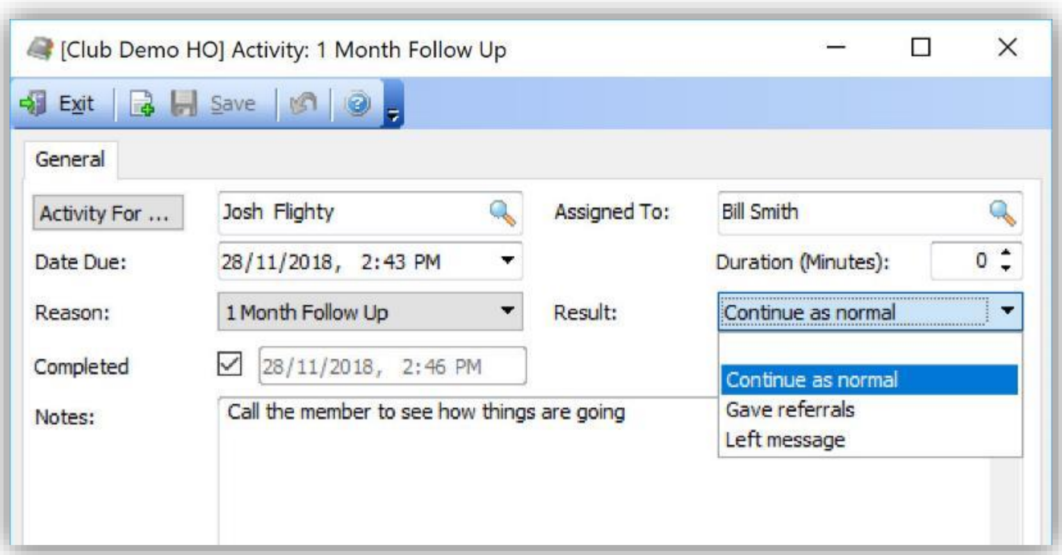
When you assign an Activity Type you can customise the Activity Results which will appear for this Activity Type.

You can add new reasons and results in Administration **|** Lookups.

Refer to the tutorial Adding a Lookup Item for instructions on how to do this.

You can link a set of results to a reason so that only those results appear in the Drop Down box.

This enables to you to view only those selected results instead of scrolling through the complete list, as shown in the example below.



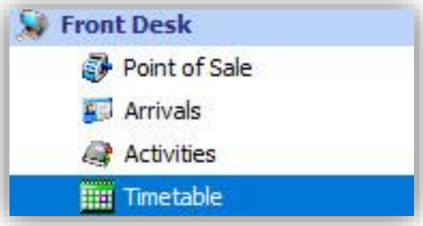
Timetable

Add Bulk Attendees to a class

This tutorial describes the steps to add bulk attendees to a class in Clubware.

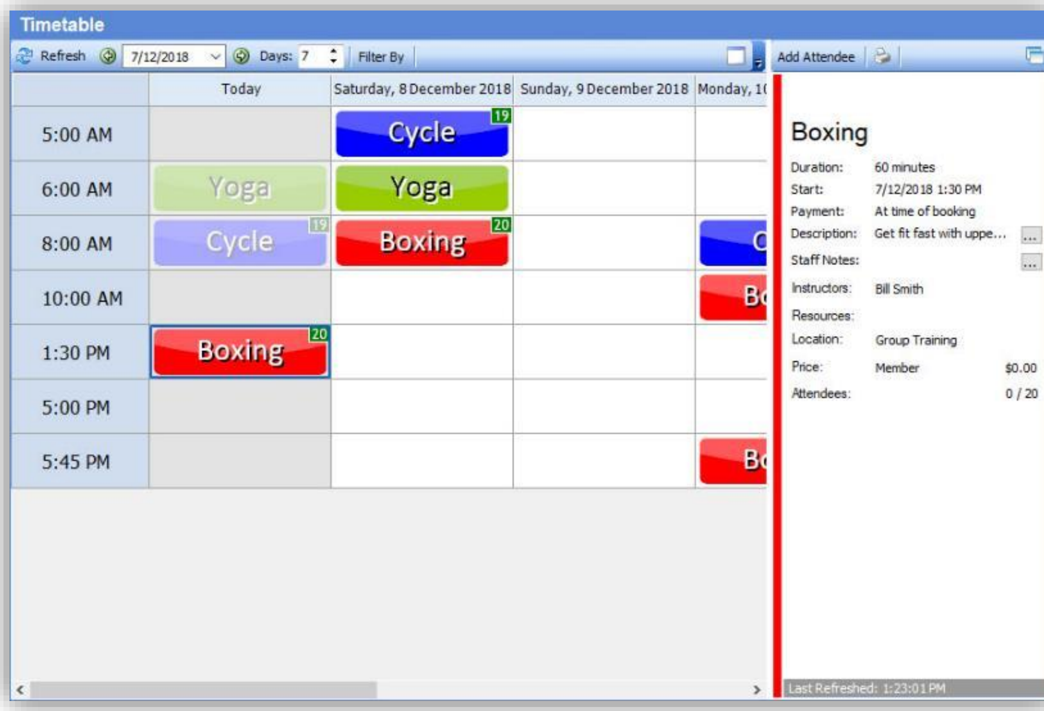
Note: The session must have ended, and the members arrived within an hour of the class start time.

Step 1. Select **Front Desk | Timetable** from the navigation panel

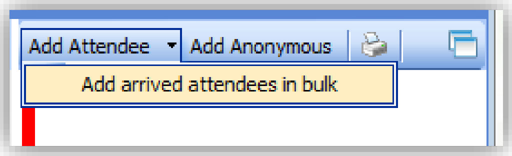


The **Timetable** screen displays in the main panel.

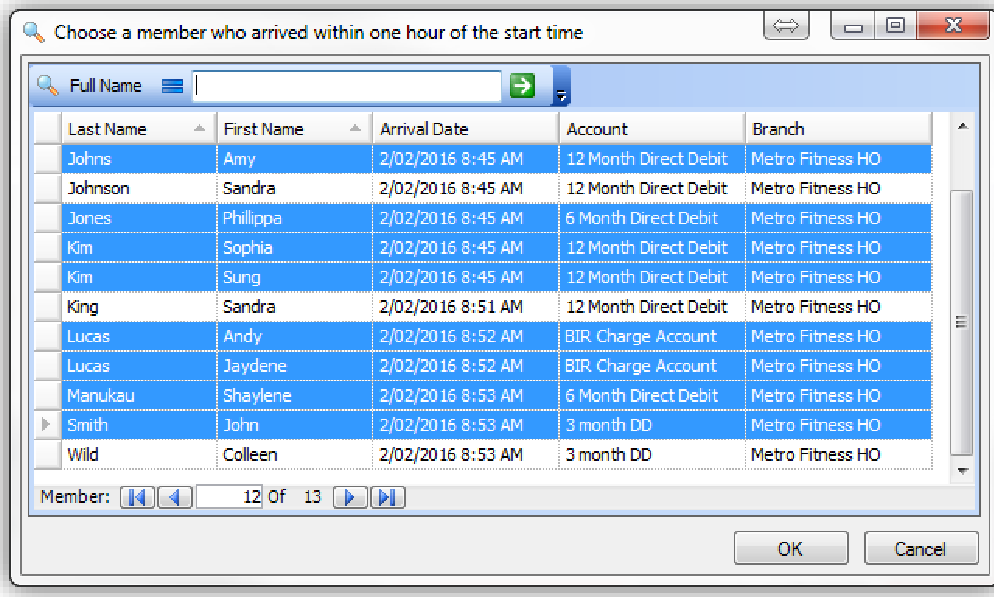
Step 2. Select the session. The details will appear in the session summary on the right-hand side as shown below.



Step 3. From the session summary, use the drop-down arrow beside Add Attendee and select Add arrived attendees in bulk, as shown below.



Step 4. Select multiple members by holding down the Ctrl key on the keyboard and highlighting members with the mouse. Then select ok.

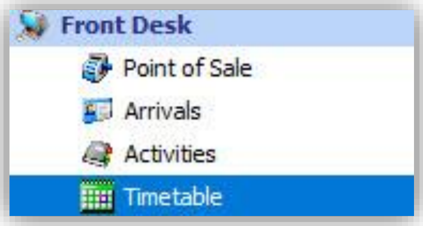


You have now successfully completed the steps to add bulk attendees to a class in Clubware.

Add Casual Attendees to a class

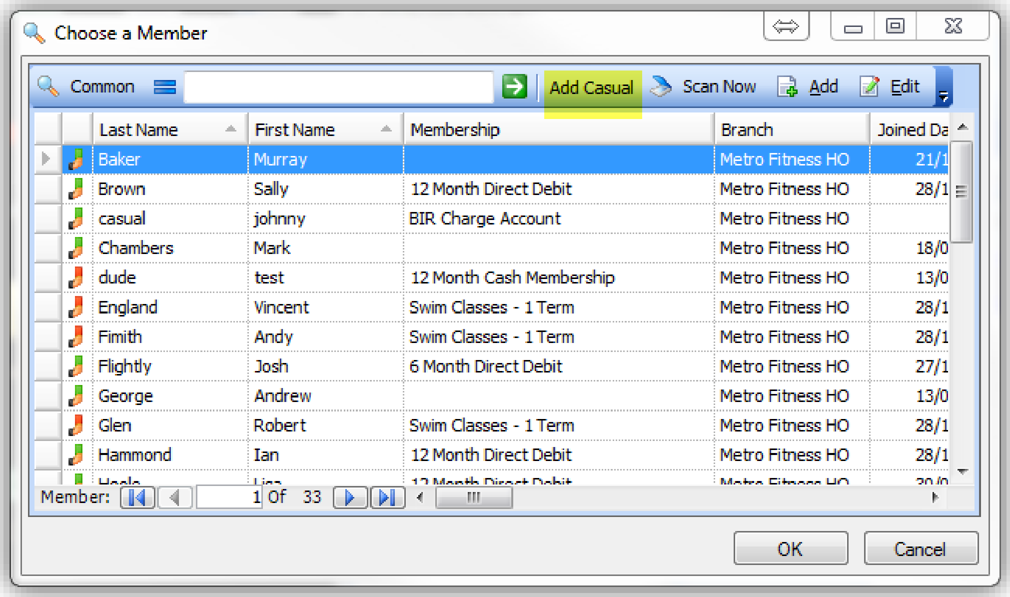
This tutorial describes the steps to add a casual attendee to a class in Clubware.

Step 1. Select **Front Desk | Timetable** from the navigation panel



The **Timetable** screen displays in the main panel.

Step 2. Select the session. The details will appear in the session summary on the right hand side as shown below.

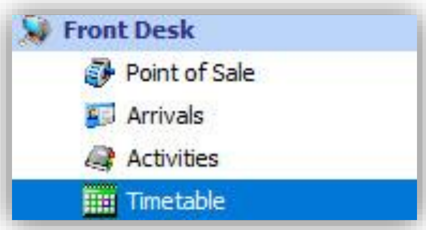


Step 3. From the session summary, select Add Attendee. An arrivals box will appear. Select Add Casual and add the casual members' details. (For more information on this, please refer to the tutorial, Adding a Member.)

Add Anonymous attendees to a class

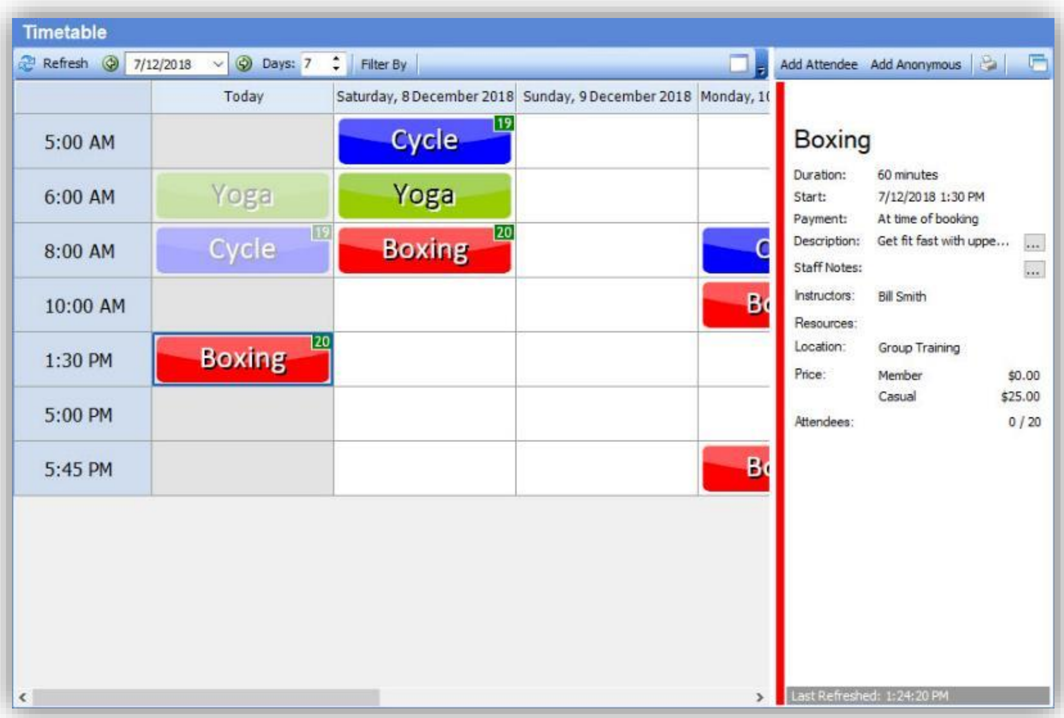
This tutorial describes the steps to add an anonymous attendee to a class in Clubware.

Step 1. Select **Front Desk | Timetable** from the navigation panel

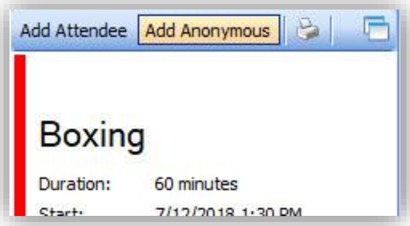


The **Timetable** screen displays in the main panel.

Step 2. Select the session. The details will appear in the session summary on the right hand side as shown below.

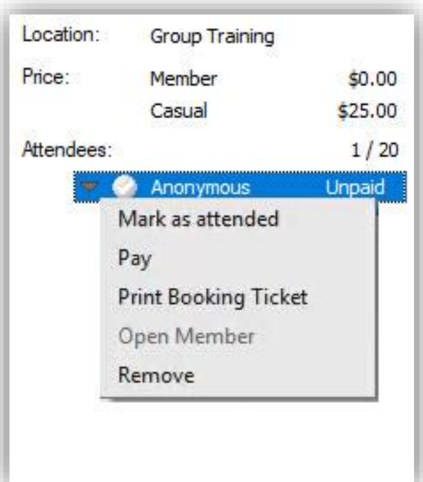


Step 3. From the session summary, select Add Anonymous.



An anonymous attendee will appear in the Attendees list. If the Class has a cost associated for casual visits loaded, the POS may also appear to allow payment to be taken. See tutorials Adding Classes and Taking Payment for more information.

Step 4. From here you can perform other functions by highlighting the attendee and using the drop-down arrow that will appear.



Main Points:

Mark as attended: This will mark the attendee as attended the session

Pay: Selecting this will open the POS and allow you to process a casual payment from the class

Print Booking Ticket: Print a booking ticket if needed

Open Member: Only applicable if the attendee is a member

Remove: Remove the attendee from a session

You have completed the steps required to add an anonymous attendee to classes in Clubware.

Members

Overview

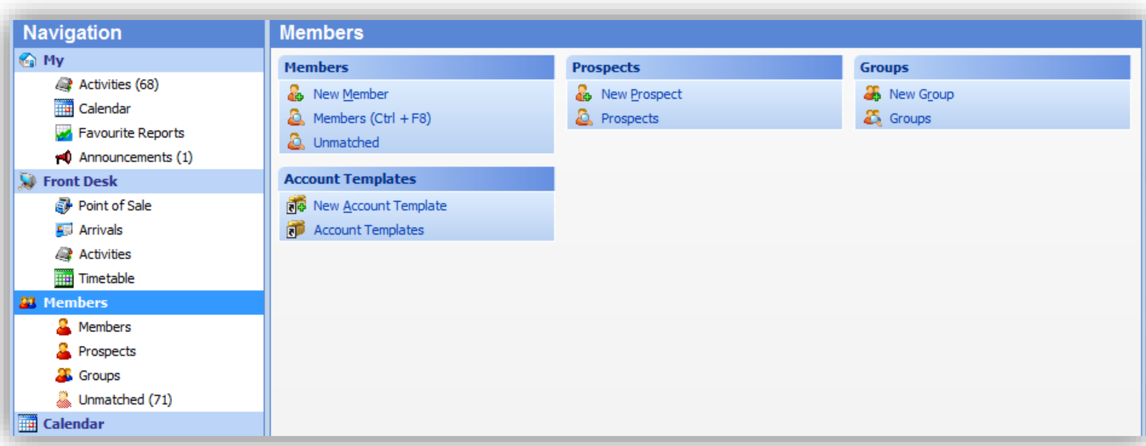
Member management is central to the success of any facility in the competitive market of health and fitness.

Clubware enables successful member management by freeing your staff from time-consuming and repetitive administration and allowing them to focus on the most important aspect of your business – your clients.

The Members section of Clubware stores information about the clients who visit your centre. Important member information is stored for each individual, and each member can belong to one or more groups.

The Members dashboard also includes a shortcut to Account Templates, which saves repetitive data entry when adding a new membership account.

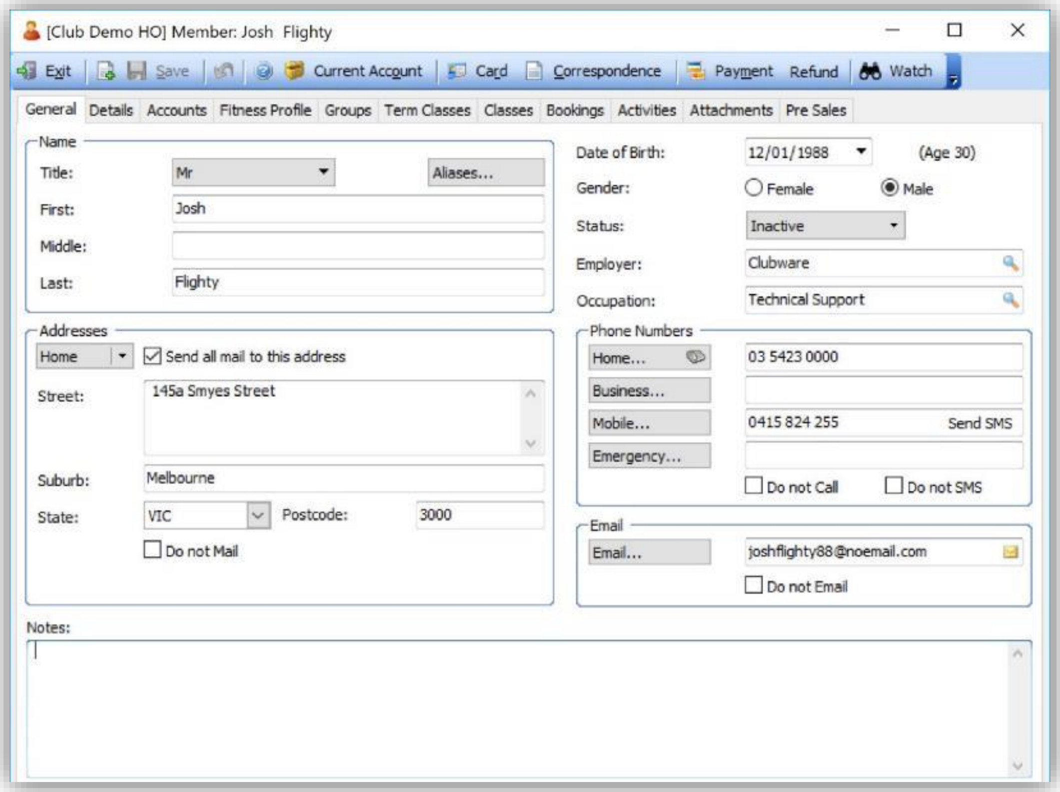
All member information in Clubware is easily accessible.
It is quick and easy to assign the correct account and personal information to members according to your requirements.



Members

A member is a person with an active or past account with your facility.
Members can be current, expired, casual or on hold.
Relevant information about each member is stored in the tabs in this section.

An outline of these tabs is set out below.

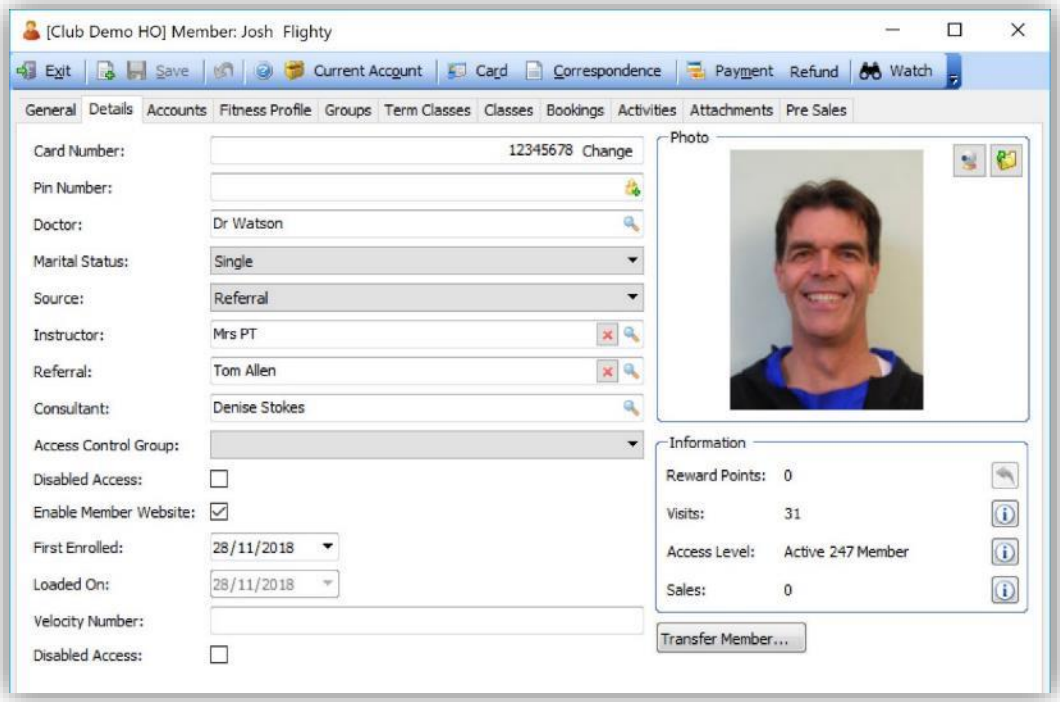


General

('**General'** is the default view). Basic information such as addresses, phone numbers, email addresses, occupation, employer, gender and membership status, is stored under the General tab.

Details

This tab contains more detailed information about your member, including the member's photo, visit information, pre-sales information, POS purchases and other user-defined fields, as well as consultant and instructor information. Your members access control information can also be found on the tab.



Accounts

A member can have one account or multiple accounts of different types for different purposes. The different types of accounts available in Clubware are:

- Membership
- Concession
- Charge
- Class

The different types allow you to have separation between the various revenue streams within your business. For example, revenue derived from gym memberships can be viewed separately from that derived from added-value extras such as personal training or sunbeds.

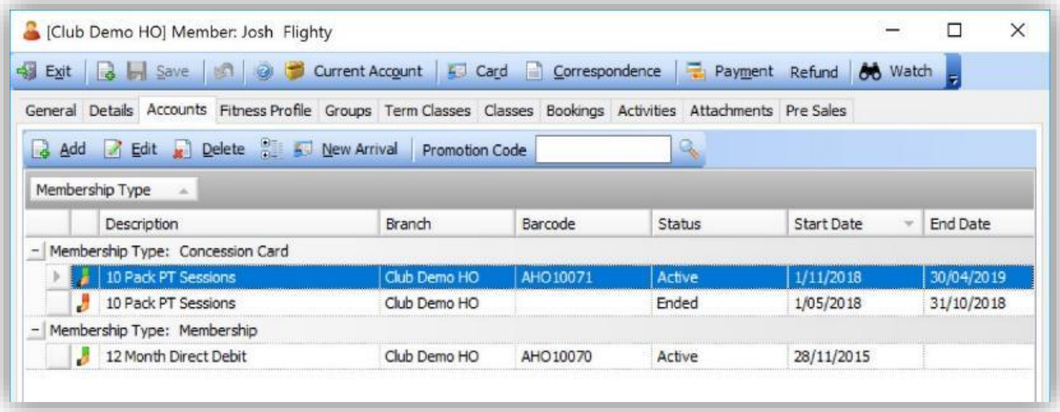
There are also some helpful business rules built directly into each account type.

- **Membership** accounts are accounts where the member joins for a set period of time or an open-ended 0membership. They usually correspond with lump sum payments for a set period, or contracts signed with billing agencies.
- **Concession** accounts allow a specific number of visits before they expire. This type of account could be used for Spin classes, personal training appointments, sunbed concessions etc.
  Concession accounts can also have specified expiry dates, for example, “either 10 visits or 3 months, whichever comes first”.
- **Charge** accounts are usually associated with bookings for activities or services that are not directly related to the customer’s membership, such as one-off use of a sunbed or a special fitness class or event.
  When you book such a service or event, Clubware will automatically create a charge

account, even if the booking is for a non-member making use of your facility. This allows you to keep track of all invoices associated with a customer.

- **Class** accounts function in the same way as Membership accounts, expiring after a set time, such as a term.
  This feature is suitable for facilities which operate classes that have the same attendees and times each week over a term and offer progression to higher levels. It is suitable for classes such as swimming, martial arts/kick boxing.
  This feature is also useful for classes that function as a separate business unit.

The **Accounts** tab of the Member screen lists all accounts related to that member, along with a card icon to indicate the status of the account, as outlined below.

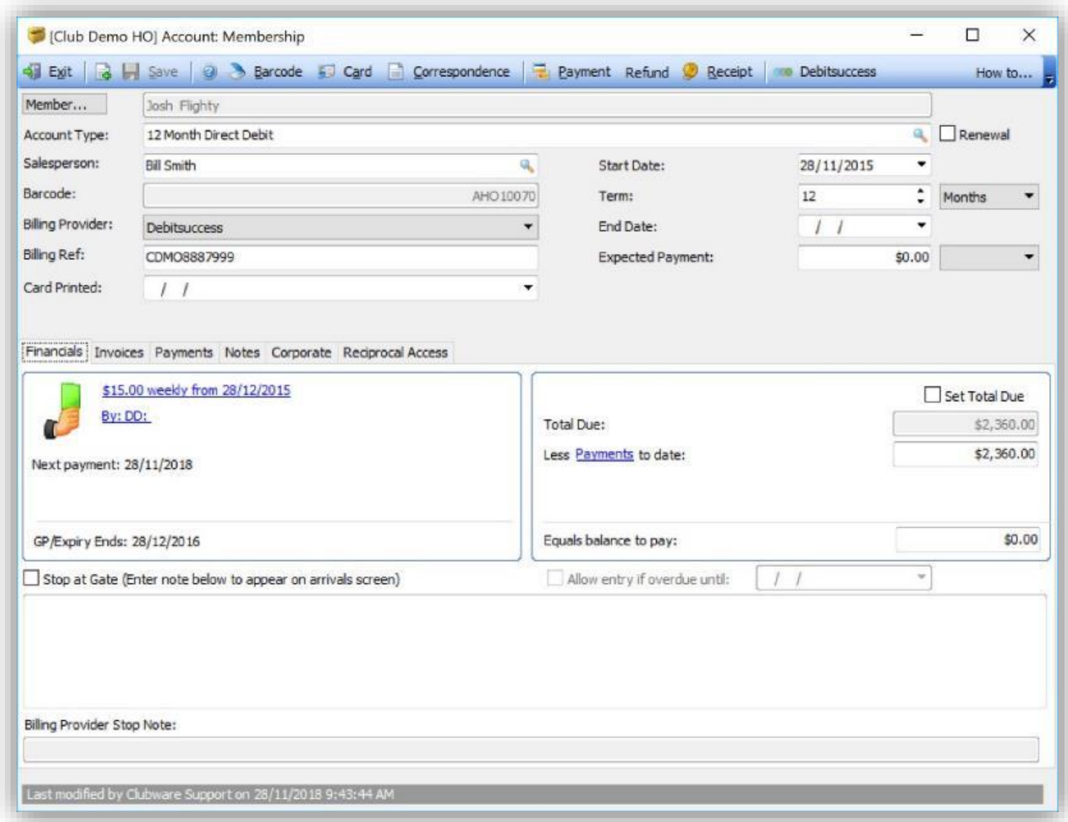


Red: The account has expired, is closed, or is overdue.

Yellow: The account is on hold.

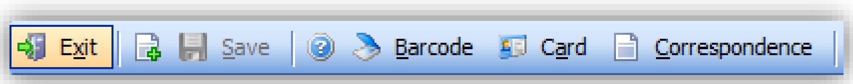
Green: The account is active, and all payments are up to date.

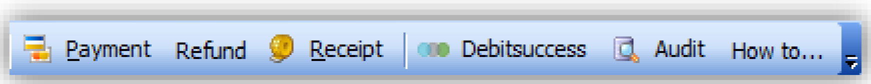
Use the Accounts tab to add, edit or delete accounts for the member.
(See the tutorial Adding an Account)



Select any account to view a separate Account screen. This new screen provides more information about the selected account.

Account screen toolbar:





Exit – This option saves any changes made to the Account and closes the Account screen.

Add a New Record – The 'page and plus' icon  allows you to add a new account to the member's record in Clubware. (See the tutorial [Adding an Account](#)).

Save – The Save option saves changes made to the account record without closing the Account screen.

Help – Opens the Clubware Help on the Account Screen Overview

Barcode – This icon opens a new screen that allows you to add a barcode to the account, either by swiping a card, typing in a code, or generating a new code. You can also select the barcode from another account.

Card – This option opens the Entry Card screen, which is used to print an entry card for the account, with a barcode generated by Clubware.
(See the tutorial Designing a New Entry Card for more information).

Correspondence – The Correspondence option opens a new screen used for generating correspondence regarding the account.
(For information about setting up new document templates, see the tutorial Adding New Correspondence).

Payment – The payment button opens a new screen that allows you to take payments related to this account, a membership payment or a one-time fee, such as for a lost card.

The option to report the payment to the billing company will be presented for all accounts handled by a billing company.
(See the tutorial Taking an Account Payment.)

Refund – The refund button opens a new screen that allows you to make a refund related to this account.

The option to report the refund to the billing company will be presented for all accounts handled by a billing company.

Receipt – This button allows you to print a receipt for any past or recent payment or payments made on the account.

Recharge – Use this option to add a new set of sessions and create a new invoice for a concession card account.

Note: The Recharge option will only appear on the Account screen toolbar if the account you are viewing is a concession card account.

Debitsuccess/Paysmart – Opens the account information stored by the billing provider.

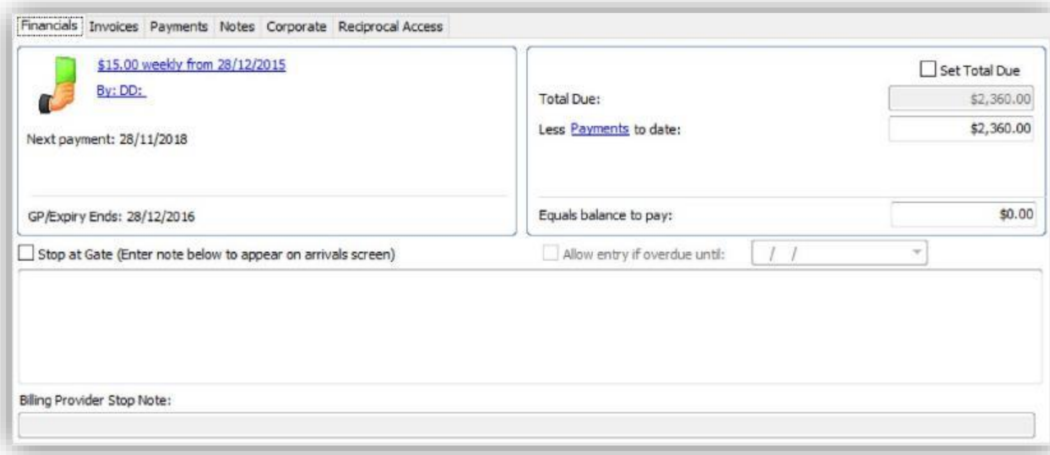
Audit – Allows you to review any changes made on the account while this feature has been activated. Please contact Clubware Support should you wish to have this feature enabled.

Below the toolbar, the Account screen contains several fields of information about the account, including account type, salesperson, barcode, billing reference and start and end dates.

Below this general information area are four tabs that contain further information about the account, as outlined below.

Account screen tabs

Financials – This tab contains three boxes of information. In the top left box is a card icon that indicates the current status of the account:



- **Red** for expired, closed, or overdue; or 'Stop at Gate'
- **Yellow** for on hold; or
- **Green** for active and all payments up to date.

This box also contains the amount and date of the latest invoice, and the payment method. These can be edited by clicking on the given information to open a new screen with more details.

The box on the top right, shows the total cost of this account, payments to date, and the amount currently owing on the account.

At the top of this section is a tick box that when ticked enables you to set the total (**Set Total)** cost of the account manually, either for a fixed-term contract that will not be renewed, or to override the automatic cost of a certain type of account.

If this box is not ticked, the total cost of the account cannot be edited.

It is recommended that the cost of a Membership be adjusted via the invoices as opposed to adjusting the '**Set Total Due'** amount.

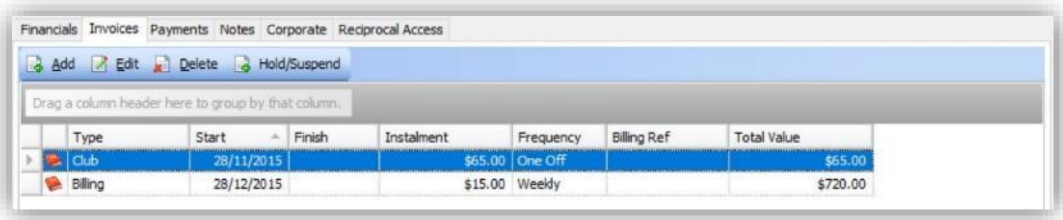
Note: An on-going account (an account with no end date) should not have the **Set Total Due** Box ticked.

Payments Hyperlink: Use this link to take a payment for this account.
(See the tutorial Taking an Account Payment**).**

Stop at Gate: The lower box in the account window contains a tick box for stopping the member at the gate, and space for a note regarding why the member is being stopped or what needs to be done to resolve the account.

Billing Provider Stop Note: If there is a stop in the billing provider system the stop will appear in this field and the member will be stopped at gate. The stop enforcement can be turned off via **Administration | Branches | Select Current Branch | Settings | Entry** if required.

Invoices – This tab contains records of all the member's invoices for this account, current and historical.

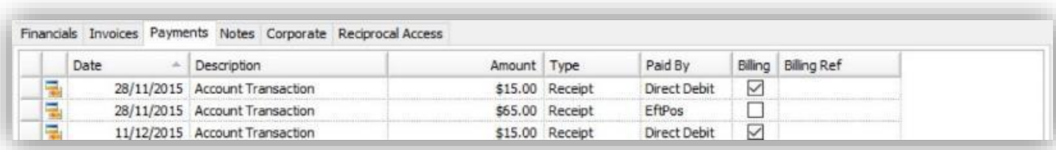


Highlight an invoice and click **Edit** to make changes or **Delete** to remove and cancel an invoice. Most invoices are created as part of account templates. (See the tutorial Adding an Account Template*)*.

Use the **Add** button to create a new invoice manually if it is not part of an account template.

Use the **Hold/Suspend** button to put the account on hold. (See the tutorial Adding a Suspension for a Member's Account)

Payments – This tab contains all payments made against the account.



Date: The date the payment was made either directly into Clubware or with the billing provider

Description: The Account Fee applied to the payment (See the tutorial Taking an Account Payment)

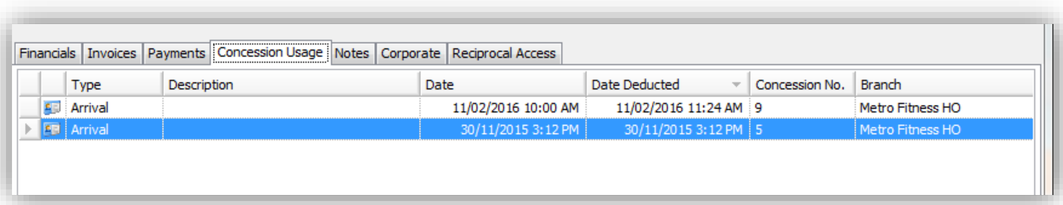
Amount: The amount of money taken in that transaction

Type: Receipt for payment, Invoice for a refund

Paid by: Payment type (cash, EFTPOS, credit card, Direct Debit etc.)

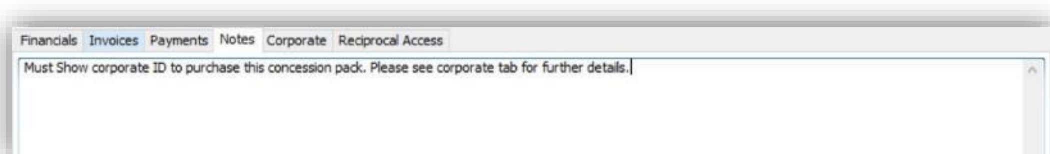
Billing: The tick box indicates if the payment is associated with a billing provider

Billing Ref: The billing provider created ID number for a payment.

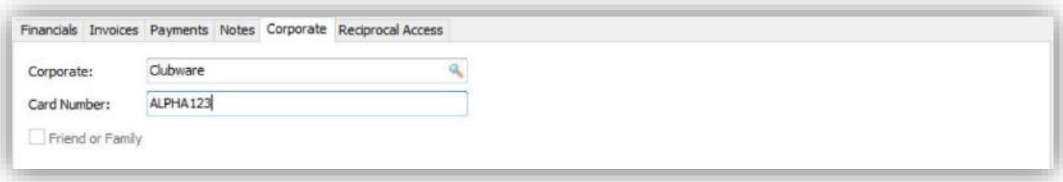


Concession Usage - This will display the details for visits and remaining concessions. This is only applicable for Concession Cards.

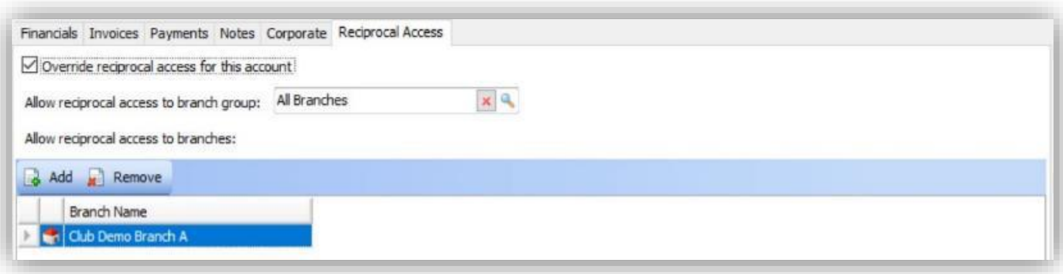
Notes - If there are important notes added to an account template, they will display here (See the tutorial Adding an Account Template).



Corporate - Identification details for the member if the Account Template has been marked as for corporate clients. (See the tutorial Adding an Account Template)



Reciprocal Access - Allows member's access to all or certain branches with in a group if reciprocal rights are granted.



Fitness Profile

A member's fitness profile stores notes on a member's fitness condition, fitness programs and assessment information.

Fitness Programs

Clubware has the ability to define and manage fitness programs for members. A member can have many fitness programs over time. A fitness program contains goals, exercises and target heart rates. You can add both weight and cardio exercises to a member's fitness program from exercise templates. A fitness program can be printed for the member to use while training at your site. A pre-activity health questionnaire can also be completed and stored with a fitness program.

Assessments

You can store one or many assessments for members. Assessments can be completed for general health, body measurements, body fat measurements, fitness and strength. You can report on assessments over time to create a profile for your member.

Groups

A member can belong to one or many groups. This information can be edited from the Groups section or from the Members section. A group can be any entity, from a family group to a sports group or business organisation.

Term Classes

This section displays all the term classes the member is or has been enrolled in at your centre. You can also enrol a member into a new class from this section.

Classes

This section displays all the classes the member is or has been enrolled in at your centre.

Bookings

A member can make bookings at your centre. A booking is different from an activity as a booking can have charges and resources associated with it, whereas an activity can't. A booking can also be made for multiple members.

Activities

Activities, as outlined in the Front Desk section, can also be accessed and added from a member's screen. Activities can be used to register upcoming events for a member or to log events that have occurred historically (i.e. a list of correspondence sent). For upcoming activities and activities overdue by up to 60 days, an alert will display on the Arrivals screen when the member scans their card on arrival at your centre. You can also use the **Include Completed Activities** (yes or no, tick and cross) option to be displayed.

Attachments

Files can be attached to the member's record for reference.

Pre Sales

Contains all of the pre sales information for prospects. This is kept once the member is converted to a member.

How To

The following tutorials describe the most common actions associated with the Members section of Clubware.

Members

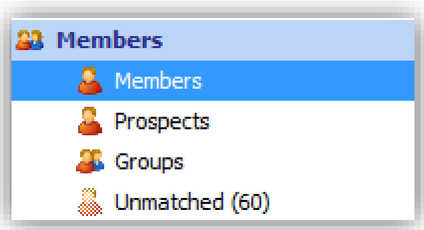
Finding a Member

This tutorial describes the steps required to find a member within Clubware.

Step 1. Select **Members | Members** on the navigation panel, as shown below.

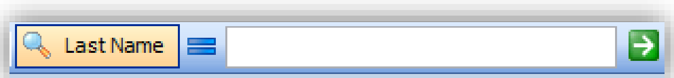
Or, use the keyboard shortcut **Ctrl + F8.**

Or, use the **Scan Now** button to scan the member's barcode.



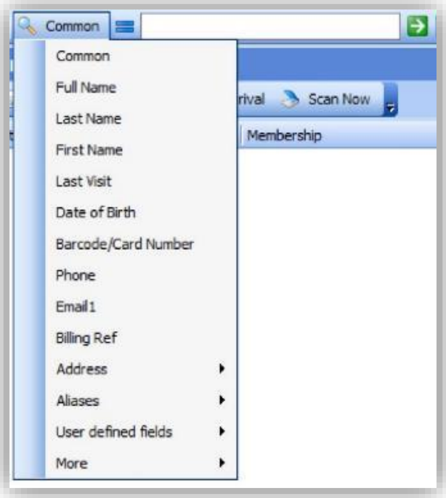
The Members home screen will appear. This may be empty.

To search for a member, use the **Filter** at the top of the screen, as shown below.

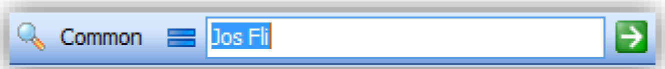


The filter has many options. You can search for a member using various criteria.
In the example above, the search criteria is set to **Last Name.**

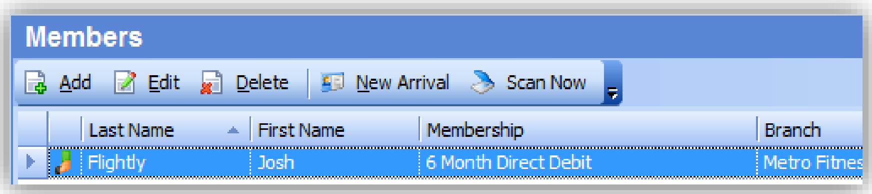
Step 2. Click the **dropdown button** (small triangle) next to **Last Name**, the list below displays.



Step 3. The default filter is **Common** (Allows you to search by First Name, Last Name, Date of Birth, Billing Reference, Barcode, Card Number, Phone Number, Email Address or Alias). Select one of the above options and enter in the member's information. Press **Enter**, or use the green arrow, as shown below.



If any records match your search criteria, the screen below the main toolbar will display matching members, as shown below.



Step 4. Edit the member you are searching for, either:

Double click the entry on the screen, or
Select the member and click the **Edit** button.

You have completed the steps required to find a member in Clubware.

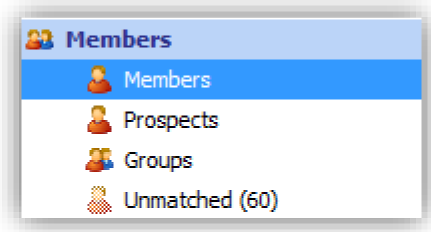
Adding a Member

This tutorial describes the steps required to add a member within Clubware.

Step 1. Select **Members | Members** on the navigation panel as shown below.

Or, use the keyboard shortcut**, Ctrl + F8.**

The Members home screen displays in the main panel.

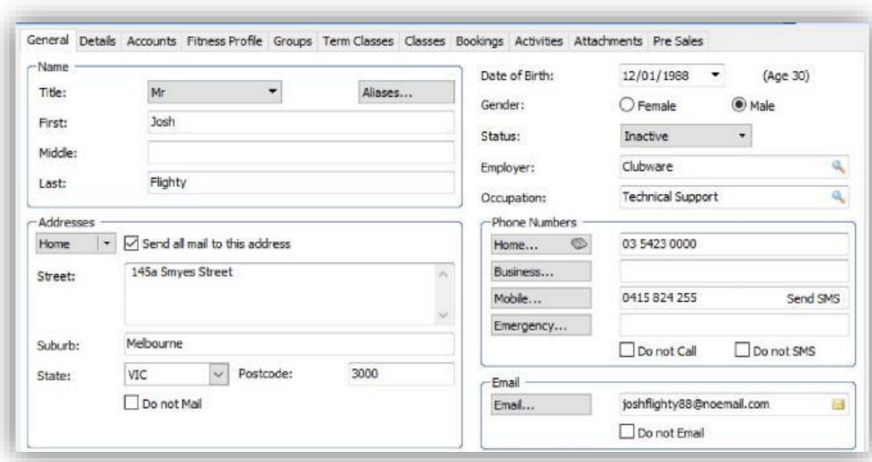


Step 2. Select **Add** from the Members toolbar.

A blank **New Member** screen displays.

Note: If your club has more than one branch, a separate pop-up screen may display to select a branch for the member before the New Member screen opens.

Step 3. Enter details as shown below on the **General** tab.

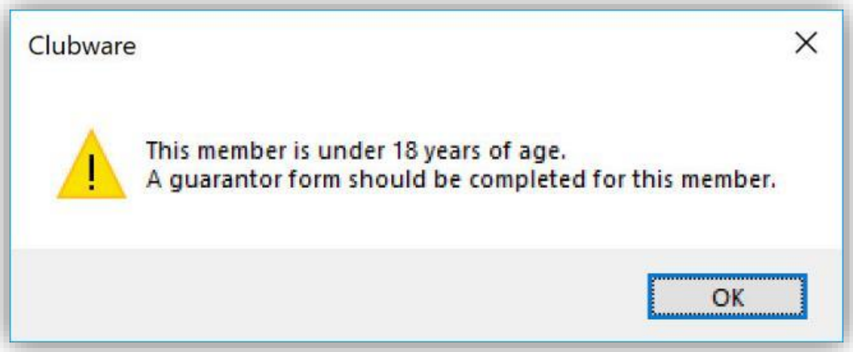


First Name: Enter the member's first name.

Middle: Enter the member's middle name, if known.

Last: Enter the member's last name.

Date of Birth: If you enter a birth date for a person less than 18 years old, you will be prompted to remind you a Guarantor form should be completed.

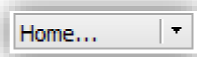


Employer: Click the magnifying glass to search for an existing employer. If the required employer is not listed, enter the employer's name manually. This will keep your database tidy.

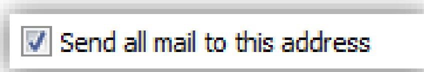
Occupation: Click the magnifying glass to search for an existing occupation. If the required occupation is not listed enter the occupation manually.

Addresses: Multiple addresses can be entered.

Click the **drop down** button in the Addresses group, as shown below. Select an alternative address type.

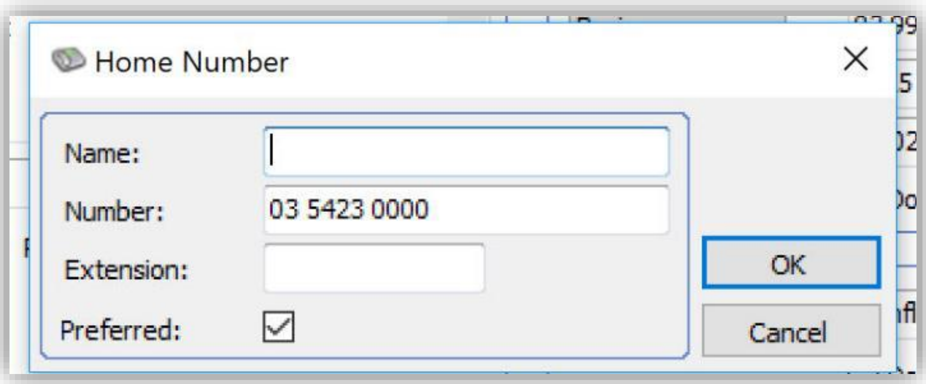


Select the **Send all mail to this address** checkbox for the preferred postal address, as shown below.



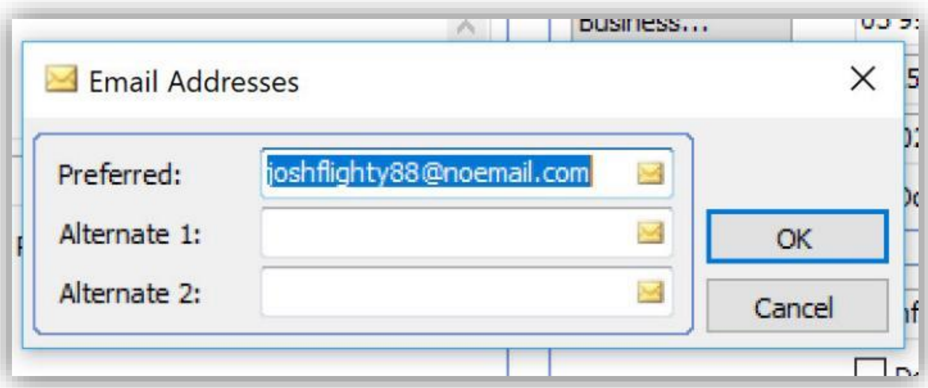
Phone Numbers: If you are entering several phone numbers, the first number entered automatically becomes the preferred number.

To change the preferred number, click the box for your choice. (The example below shows 'Home Number'.



Check the **Preferred** checkbox for the member's primary phone number.

Email: Click the Email button and the Email Addresses box displays as shown below



Enter the required Email addresses and click **OK**.

Your selected **Preferred** email address will now display in the email field.

When you click on the Email icon on the right-hand side of this field an addressed email message will display.

Should the member wish to not receive contact from the facility, there are 4 check boxes on the General Tab to assist with this.

Note: The **Do Not Mail**, **Do Not Email**, **Do Not Call** and **Do Not SMS** boxes will allow you to omit a member from a report or correspondence based on filters which are outlined in **Reports**.

Step 4. Select the **Details** tab and enter information as shown in the screen below.

Note: All fields are optional.

You can set options within Clubware to make selected fields compulsory.
An exclamation mark displays next to a compulsory field if you attempt to save without entering any data.

A description of the Fields on the **Details Screen** is set out below.

Card Number: The members card number which always links to the member's current account

Pin Number: The Members Access Pin used in conjunction with Access Control.

Doctor: Enter the name of the member's doctor.
It is recommended that a contact phone number is added in this field as well.

Marital Status: Use the drop-down menu to select status.

Source: Use the drop-down menu to select the closest reason why the member joined.

Sources can be added/deleted from the **Administration | Lookups** section.

Instructor: Use the magnify glass icon to select the members instructor.

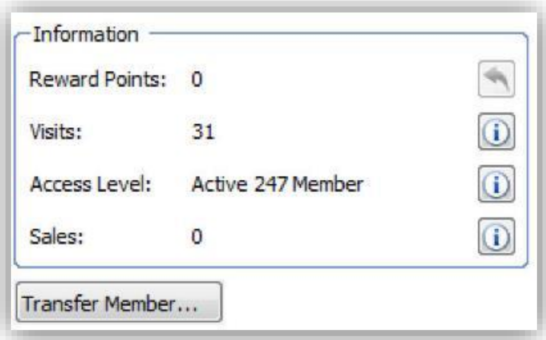
Referral: Use the magnifying glass to select the existing member who referred this new member.

Consultant: This is the name of the staff member monitoring the member's care and progress, **not** the person who sold the membership.

Access Control Group: If this has been setup in Clubware, an optional additional level of access control can be selected.

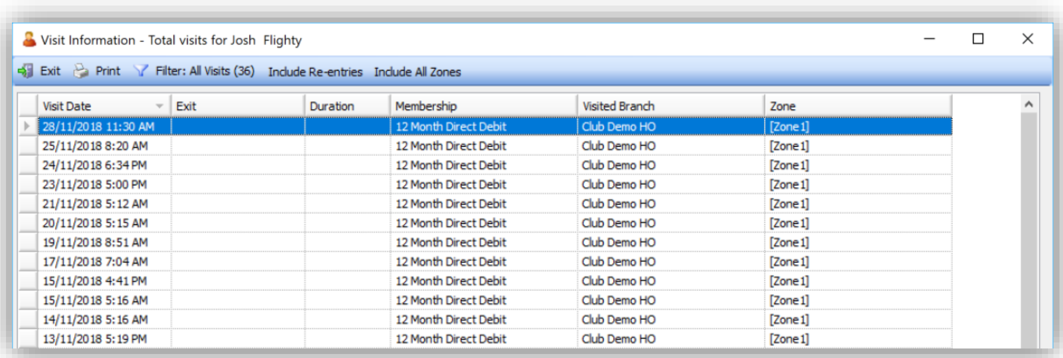
Enable Member Website: This is turned on by default. If checked the member can book through online bookings, if unchecked the member cannot book through the online booking portal.

Information:



When you click any of the above buttons, a screen displays with all the data available for that selection.

For example, below is the **Visit info** screen which displays when Visit info  button is clicked.



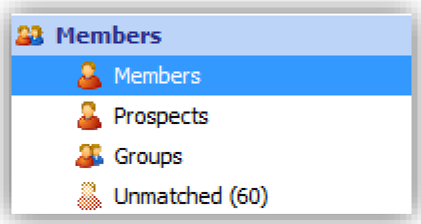
(To add a photo, see the tutorial [Working with Member Photos](#)).

You have completed the steps required to add a new member in Clubware.

Working with Member Photos

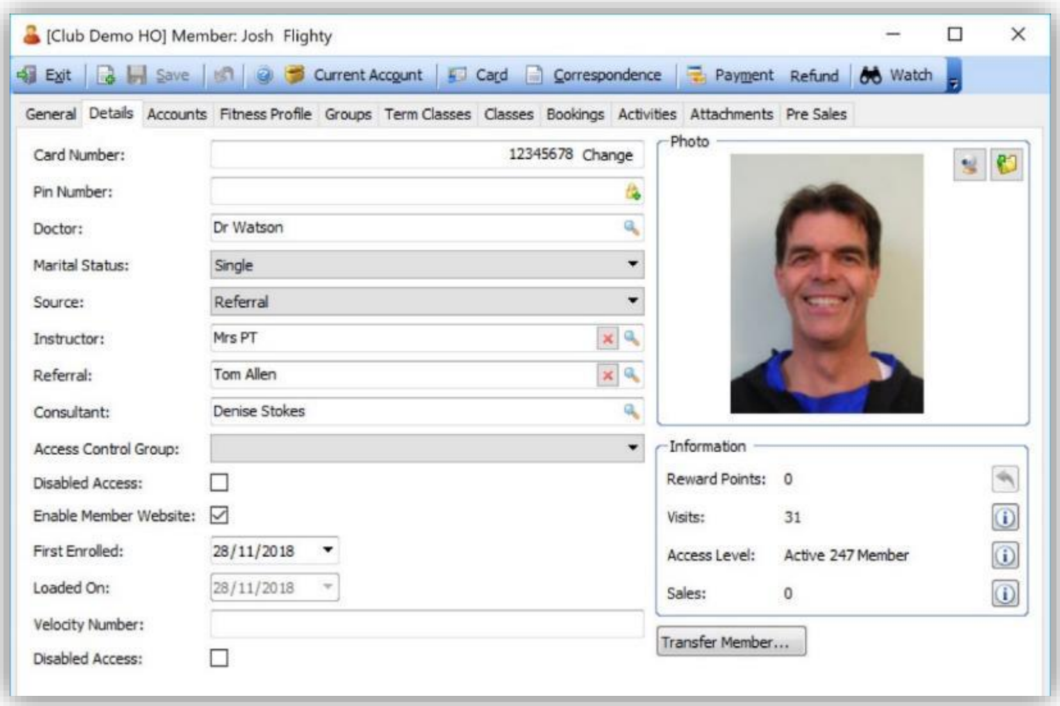
This tutorial describes the steps required to add a photo to a member in Clubware.

Step 1. Select **Members | Members** in the navigation panel, as shown below.
Or, use the keyboard shortcut **Ctrl + F8**.



Step 2. The Members home screen displays in the main panel.
Locate and select the required member.
Double click to open your selection. (See the tutorial Finding a Member).

Step 3. Select the **Details** tab on the Member screen, as shown below.



The Photo box is on the right side of the screen. There are two small icons on the top right of this box. These are:

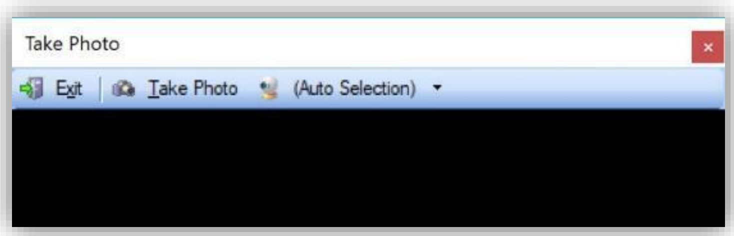
 **Take Photo -** If you have a camera connected to your PC, you can use this option.

 **Load image from File -** You can load an image from a file located on disk.

Both these options are explained below.

Take Photo

Clubware can store images directly from your webcam.
Click the **eyeball camera** icon in the top right corner of the Photo box.
The screen below displays.



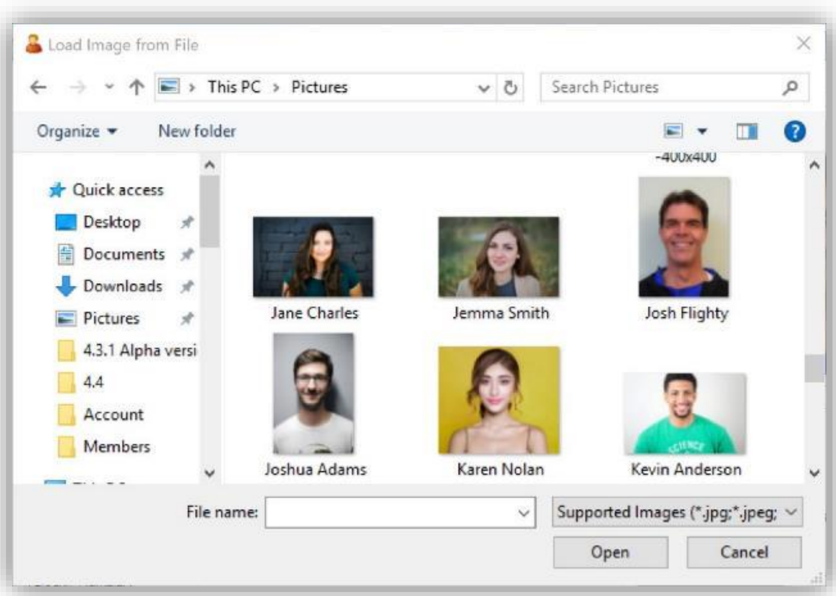
An image of the person being photographed displays.
Click the **Take Photo** button when you are satisfied with the image.
The camera will take the photo and Clubware stores the image.

If a compatible camera is not set up, you will receive an error "Error setting up Camera. (You will need to install the correct driver software for your camera).

Load image from file

If you have images of members saved on your computer, you can use these and link them to a member.

Click the small **open folder with a green arrow** icon, in the top right corner of the Photo box. The screen below displays.



This is a standard Windows dialog box.

You can navigate to your saved pictures if they are in another folder.
Select your image and click the **Open** button.
Clubware will associate this image with the member you have selected.

Step 4. Save and exit the Member screen.

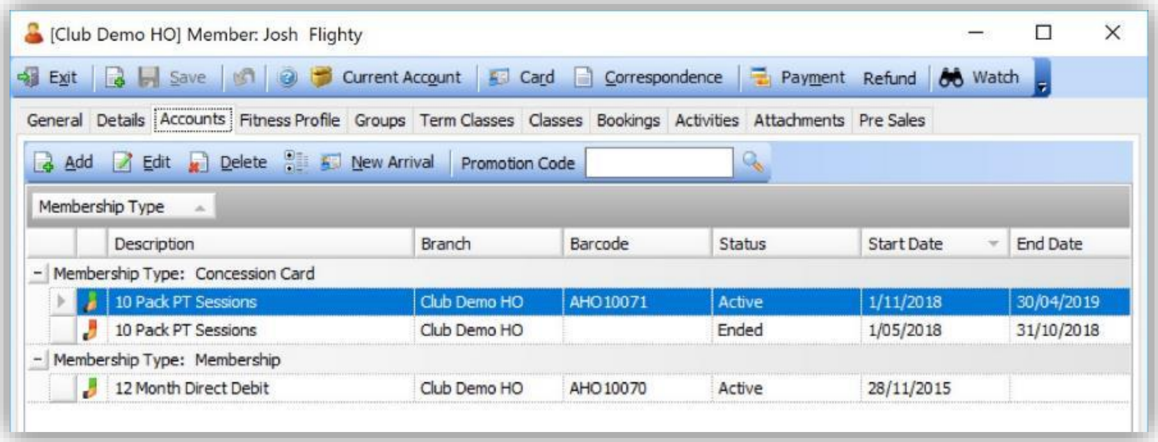
You have completed the steps required to add a new photo for a member in Clubware.

Adding an Account

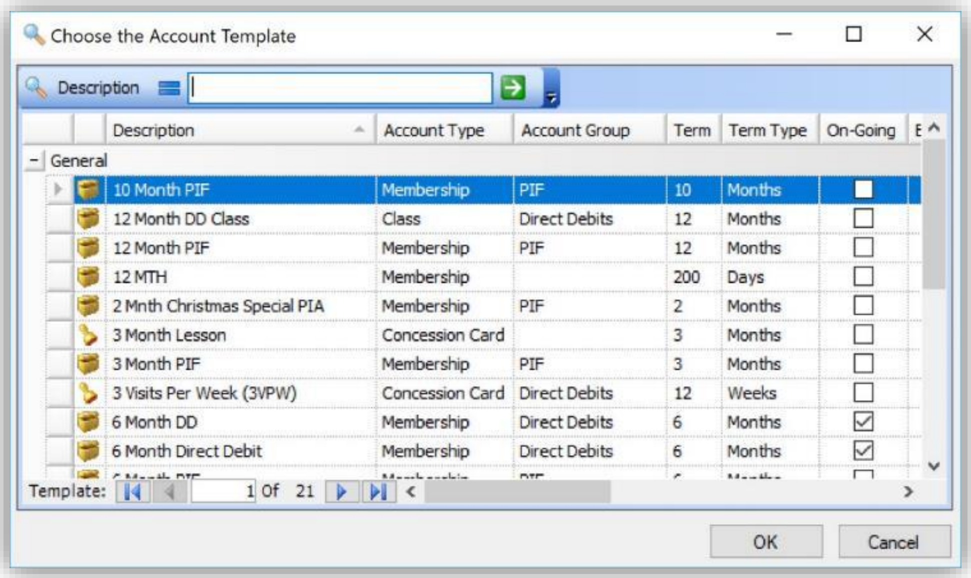
This tutorial describes the steps required to add an account to a member within Clubware.

Step 1. Select **Members | Members** on the navigation panel.
The Members home screen displays in the right panel.
Select and open your selection. (See the tutorial Finding a Member).

Step 2. Select the **Accounts** tab, as shown below.



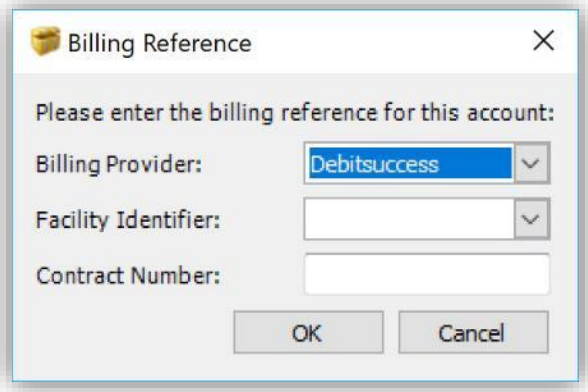
Step 3. Click **Add** on the Accounts tab.
The **Choose the Account Template** screen displays as shown below.
(If your club has more than one branch, you may need to select a branch for this account first).



Step 4. Setting up the Account
Select an account template, then click **OK**.
(For information on setting up an account template, see the tutorial Adding an Account Template).

You can add a membership account, concession card or class account from this screen.

If you use a billing company, the screen below displays.



Select the appropriate facility from the drop down menu if you have more than one facility identifier.

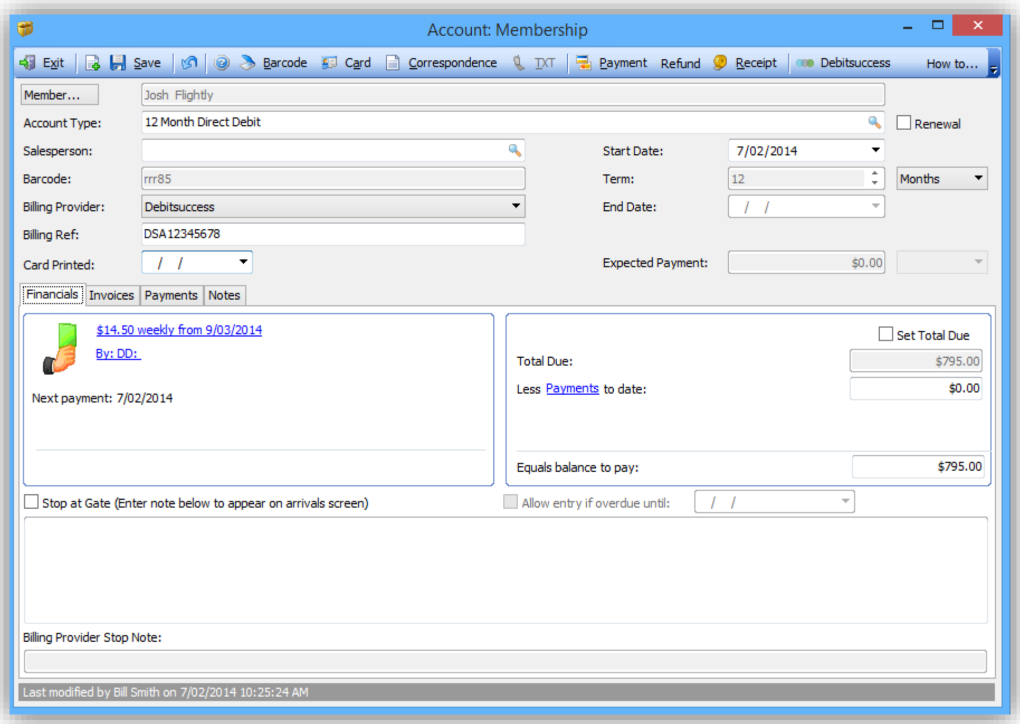
Enter the contract number from the physical membership contract the member has completed. Click **OK**.

Note: If you do not have a complete Billing Reference, you can simply cancel this and continue

The **Account** screen pre-loaded with information from the account template you chose displays.

Click **Save** to apply financial information for the account as shown below.

Note: You need to press **Save** to populate the Total due, financial summary and invoices fields.



(If your site does not use a billing company, the **New Account** screen will appear without a request for a billing reference).

Check the following for the account type selected.

Salesperson: This field is optional.

Start Date: This is the date the member can start using the facility.

Term: The duration of the membership, or the minimum term of the membership.

End Date: If the account is set to a specific term the **end date** will be populated based on the term. If the account runs past the minimum term (flexi contract) the date will be left blank.

Invoices: Open the **Invoices** tab, and check that the correct invoices exist for the membership.

If you need to change or remove invoices, **you must save the new account first.**

Payments: Payments the member has made for the account are shown under the Payments tab. These should align with invoices.

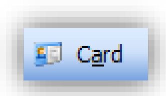
To add or view payments, you must save the new account first.

To add payments, use the **Payments** button on the top menu of the Accounts screen.

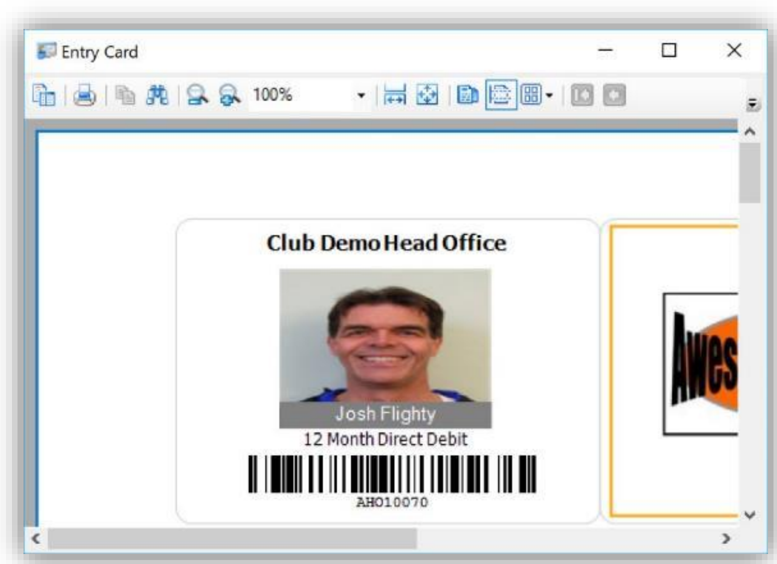
To view payments, click the **Payments** tab.

Step 5. Membership Card
Note: Membership cards require a barcode scanner to be read in Clubware. If you are issuing fobs for an Access Control System, then this step is not required. There are two options regarding membership cards:

1. Print your own card. If you print your own cards, select the Card button on the Account screen toolbar, as shown below.

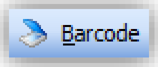


The screen below displays.

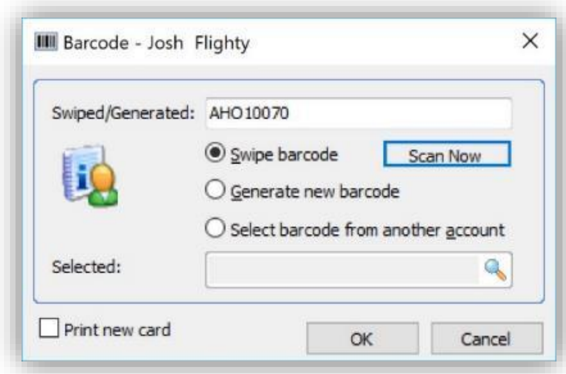


Click **Print** at the left of the toolbar.
Membership cards can be designed within Clubware to your own specifications.
(See the tutorial Designing a New Entry Card for more information.)

2. **Pre Printed.** If you use pre-printed cards, click **Barcode** from the toolbar, as shown below.



The screen below displays.



There are three options.

- Swipe barcode
- Generate new barcode
- Select barcode from another account

For this tutorial, we explain the first option, **Swipe barcode**.

- Select Swipe barcode
- Press the **scan now** button
- Swipe the card with the barcode scanner.

The barcode you swiped will be assigned to the membership, as shown below.
If you don't have a barcode scanner, you can enter the barcode into the **Swiped/Generated** field.

Step 6. Save and close the Account screen.

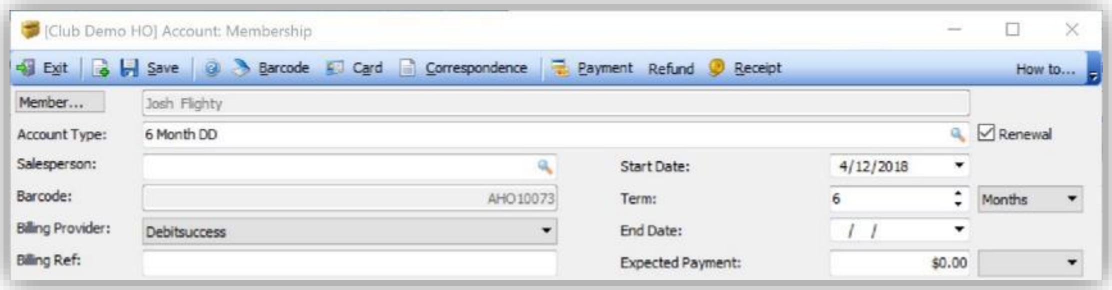
You have completed the steps required to add a new account for a member in Clubware.

Renewing an Account

This tutorial describes the steps required to renew an account for a member within Clubware

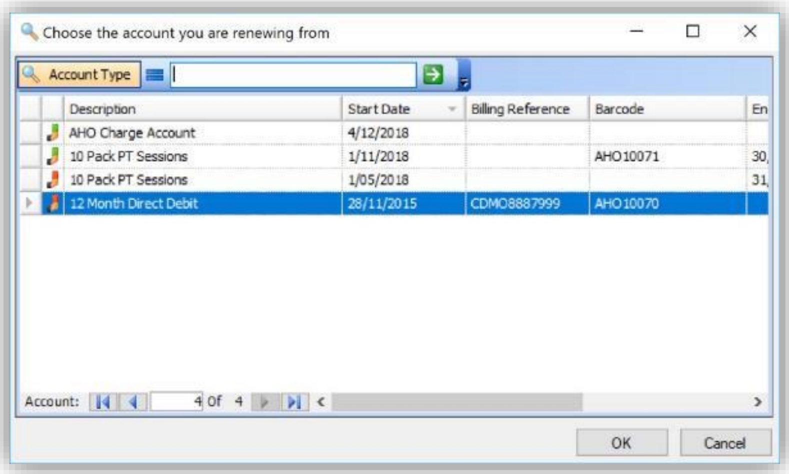
Step 1. Follow the tutorial Adding an Account.

Step 2. Prior to selecting Exit, **tick the renewal box** next to the account name as shown below.



You will then be prompted to select the account immediately prior to the new account. This will allow 2 steps to occur.

1. This will allow reports to be more accurate if you're the filters indicate to exclude renewal members.
2. This will relocate the existing barcode to the new account the first time the member scans in after the new account has started.



Step 3. Select save and exit Clubware

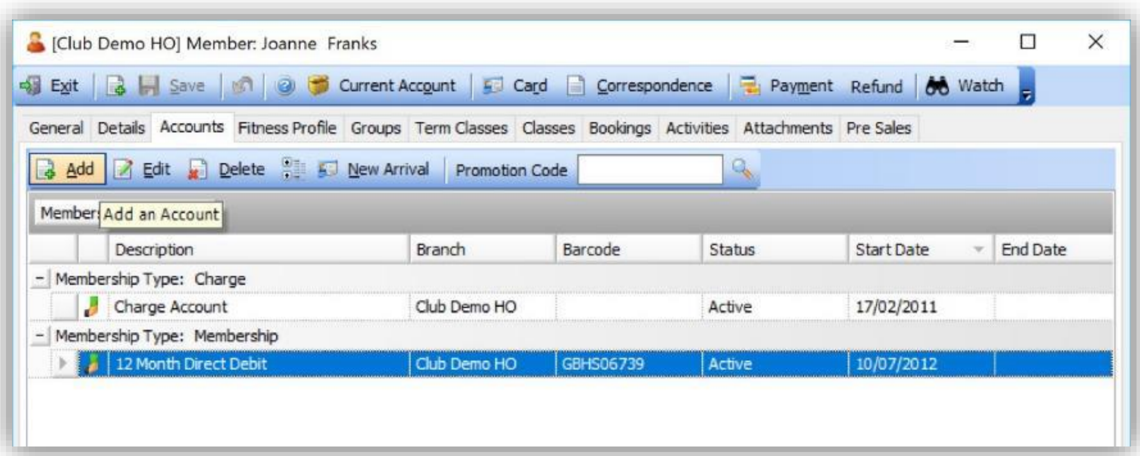
You have completed the steps required to renew an account for a member in Clubware.

Adding a Concession Card Account

This tutorial describes the steps required to add a concession card account to a member within Clubware.

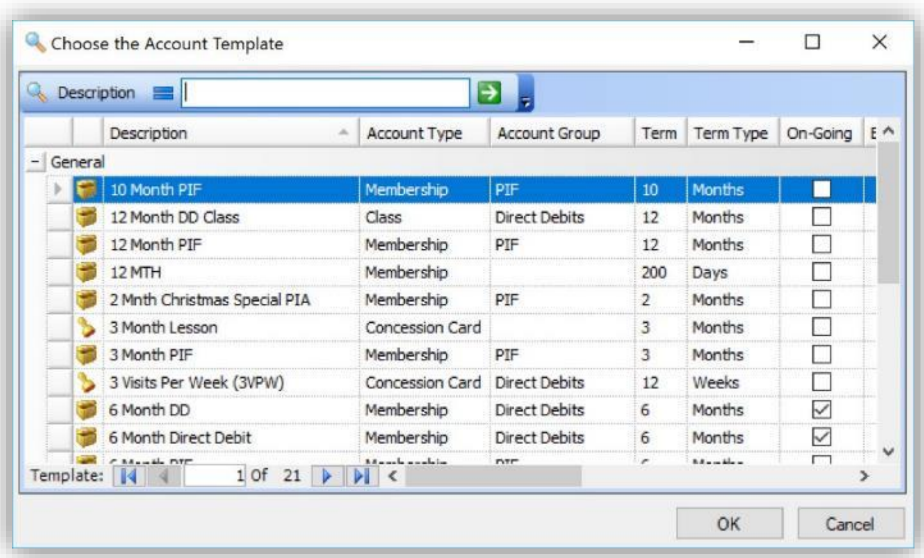
Step 1. Select **Members | Members** in the navigation panel.
The Members home screen displays in the right panel.
Select your required member. (See the tutorial [Finding a Member](#)).

Step 2. Open the member's screen and select the **Accounts** tab, as shown below.



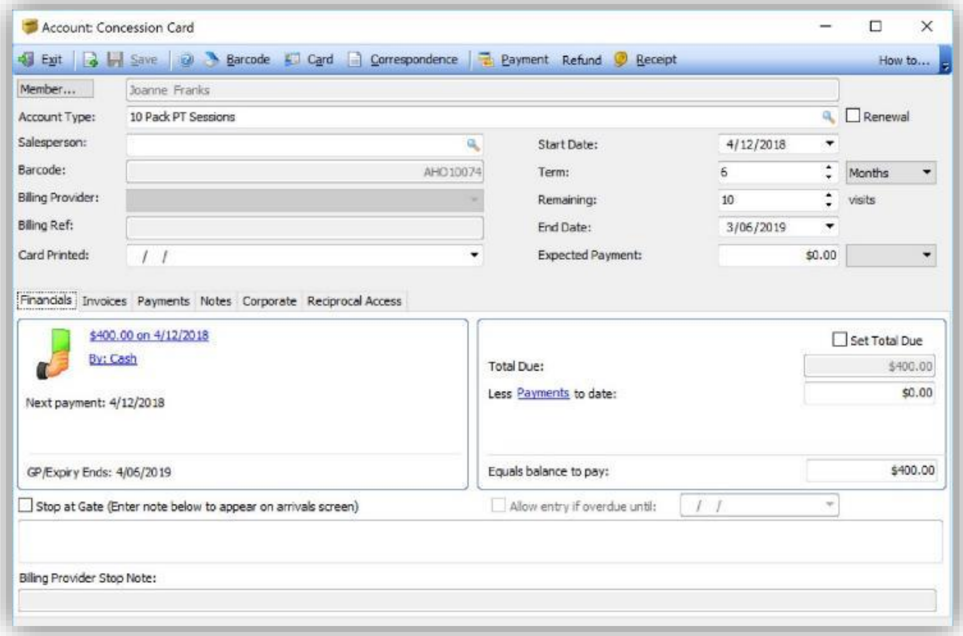
Step 3. Click **Add** on the Accounts tab.
The **Choose the Account Template** screen displays as shown below.

Note: If your club has more than one branch, you need to select a branch for this account, and then proceed to this screen.



Step 4. Setting up the Account
Select an account template for the concession card, then click **OK**.

The **New Account** screen displays.
(For information on setting up an account template, see the tutorial Adding an Account Template).



Check the following for the account type that has been selected.

Start Date: This is the date that the concession card becomes active.

Term: This is the length of time that the member has to use the concession card before it expires.

Remaining: This is the number of visits the concession card can be used for during the term. This number will automatically decrease each time the member uses the card.

End Date: This is the date the Concession card will expire.
This will automatically be populated if the account template is set to term '**Ongoing'** in account template unticked). It will load an end date according to the length of the term

If the '**Ongoing'** box is checked (ticked) then no end date will be populated and the account won't expire until all the concessions are used.

Invoices: Open the **Invoices** tab, and check that the correct invoice exists for the membership. If you need to change or remove invoices, **you must save the new account first**. Full payment for concession cards is usually taken at or before the time the concession card account becomes active.

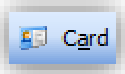
Payments: Payment for the account is shown under the **Payments** tab. To add or view payments, **you must save the new account first**.

To add payments, use the **Payments** button on the top menu of the Accounts screen. For a cash membership such as a concession card, enter the payment taken when the member signs up. This is usually the full amount of the invoice.

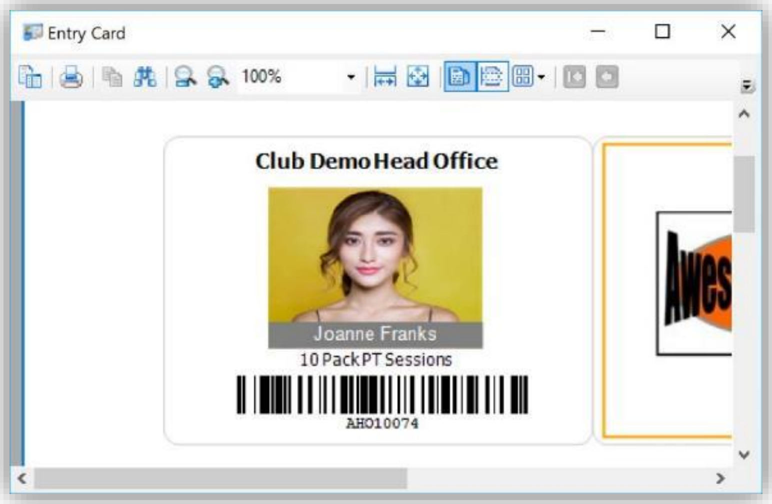
To view payments, click on the **Payments** tab. (For more information on taking a payment, see the tutorial Taking an Account Payment).

Step 5. Concession Card
There is two options regarding **Concession** cards.

- **Print your own card**. If you print your own cards, select the **Card** button on the Account screen toolbar, as illustrated below.



The following screen displays.



Print using the button at the left of the toolbar. **Concession** cards can be designed within Clubware to your own specifications. (See the tutorial Designing a New Entry Card for more information).

- **Pre Printed.** If you use pre-printed cards, select the **Barcode** button from the toolbar, as illustrated below.

The following screen displays.

There are three options. For this tutorial, we are concerned with the first option, **Swipe barcode**.

Select this option, and then swipe the card with the barcode scanner.

The barcode you have swiped will be assigned to the membership, as illustrated below.

If you don't have a barcode scanner, you can enter the barcode into the **Swiped/Generated** field.

Step 6. Save and close the **Account** screen.

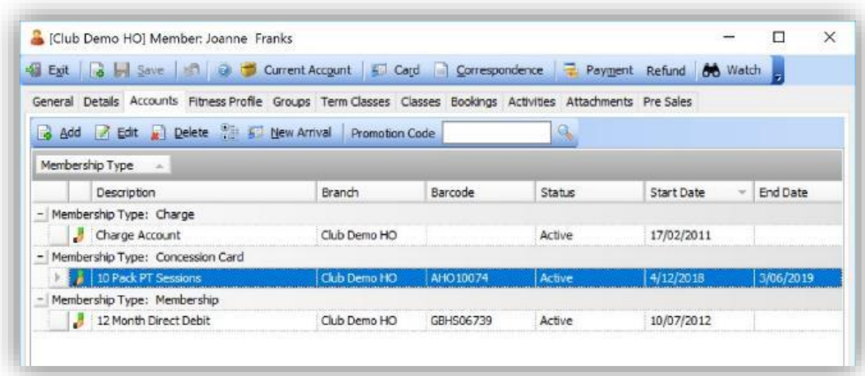
You have completed the steps required to add a Concession Card Account in Clubware.

Recharging a Concession Card

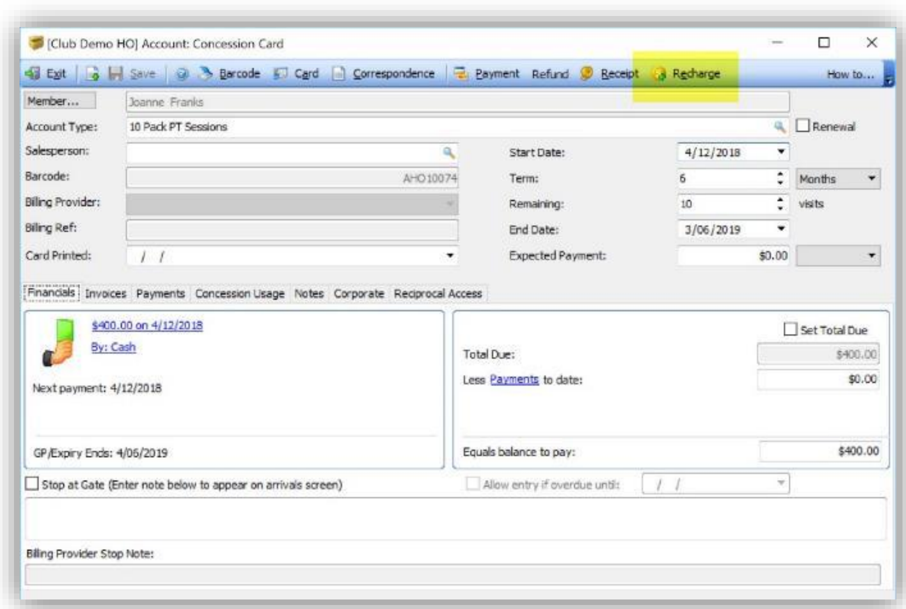
This tutorial describes how to recharge a Concession Card.

Once your member has used all of the concessions previously purchased, you have the ability to recharge this account instead of adding a new account.

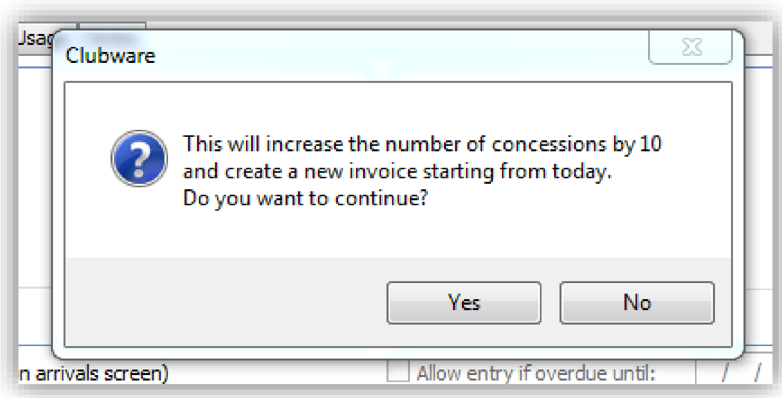
Step 1. Select and open the required member's screen.
(See the tutorial Finding a Member.)
Select the **Accounts** tab, as shown below.



Step 2. Highlight the required account.
Click **Edit** to open this account.
The Account screen displays.



Step 3. Select **Recharge** from the Toolbar. The following prompt will appear.



Select **Yes** and then process the payment as outlined in the tutorial Adding a Concession Card Account**.**

You have now completed the steps required to recharge a concession card in Clubware.

Adding a Suspension for a Member's Account

This tutorial describes the steps required to suspend a member's account.

Note: Hold/Suspend invoices do not **sync up** to the billing company.

If you are adding a **Hold** invoice for a Debitsuccess account, you need to do one of the following:

- Call the Debitsuccess Call Centre to advise them of the **hold** details OR
- **Load** the **Hold** via the Debitsuccess website and create a suspension via the variations option on the member.

  When it is loaded at Debitsuccess the Hold will automatically **sync down** to the Member's account.

If you are adding a **Hold** invoice for a Paysmart account, you need to do one of the following:

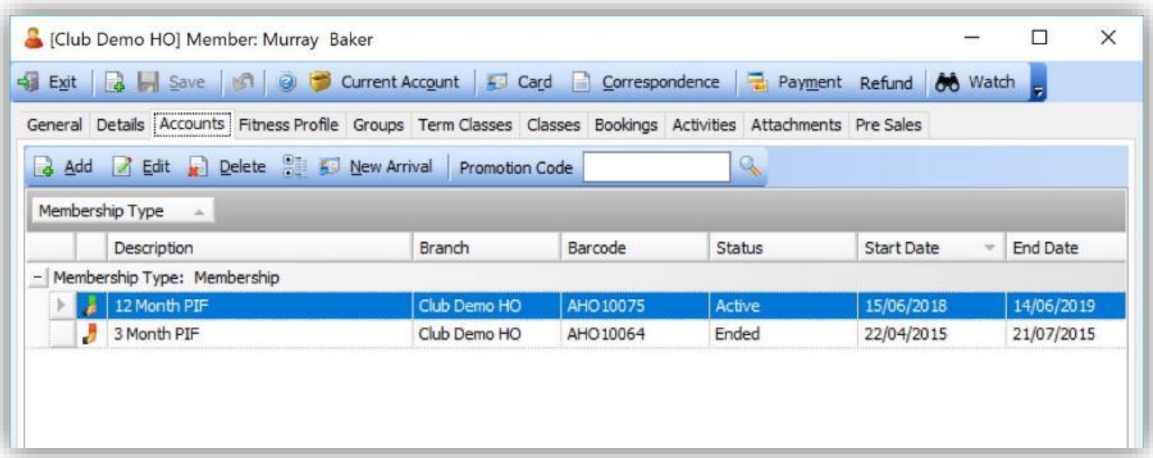
- Call PaySmart to advise them of the **hold** details
- Create an Action Request in WebExpress to advise them of the **hold** details.

  You will have to add the **Hold** to the members account as these details do not sync from Paysmart.

If you are adding a **Hold** invoice to a Lump Sum Account, you need to do the following:

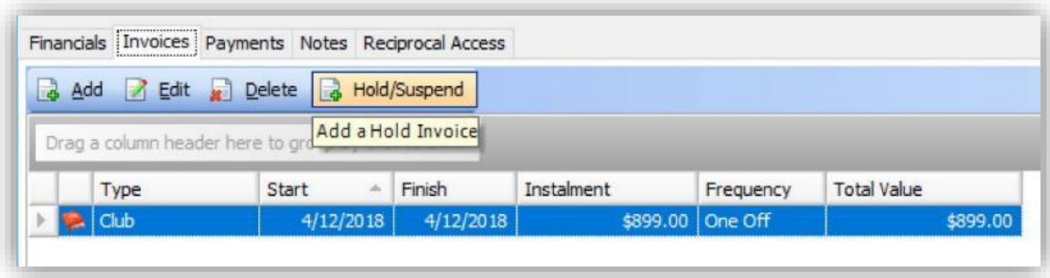
- Enter the **Hold** Invoice into Clubware.

Step 1. Select and open the required member's screen.
(See the tutorial Finding a Member).
Select the **Accounts** tab, as shown below.



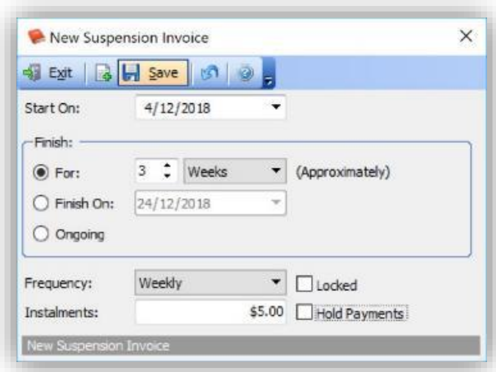
Step 2. Highlight the required account.
Click **Edit** to open this account.
The Account screen displays.

Select the **Invoices** tab, as shown below.



Step 3. Click **Hold/Suspend** on the Invoices tab toolbar.

The **Hold/Suspend** screen displays. Enter relevant information as shown below.



Main Points:

Start on: Enter the date the suspension starts.

No finish date: If the suspension is for an indefinite period, choose this option. (Not recommended).

For: If the suspension is for a specific length of time, uncheck the **No finish date** checkbox.
The **For** and **Finish on** items will become enabled. Enter a period of time for the length of the suspension.

Finish on: Enter the date the suspension will finish.

Frequency: If you want to charge the member while the account is suspended, you can set this up here. The member will be billed on the frequency selected.

Instalments: Choose the amount to charge while the account is on suspension.

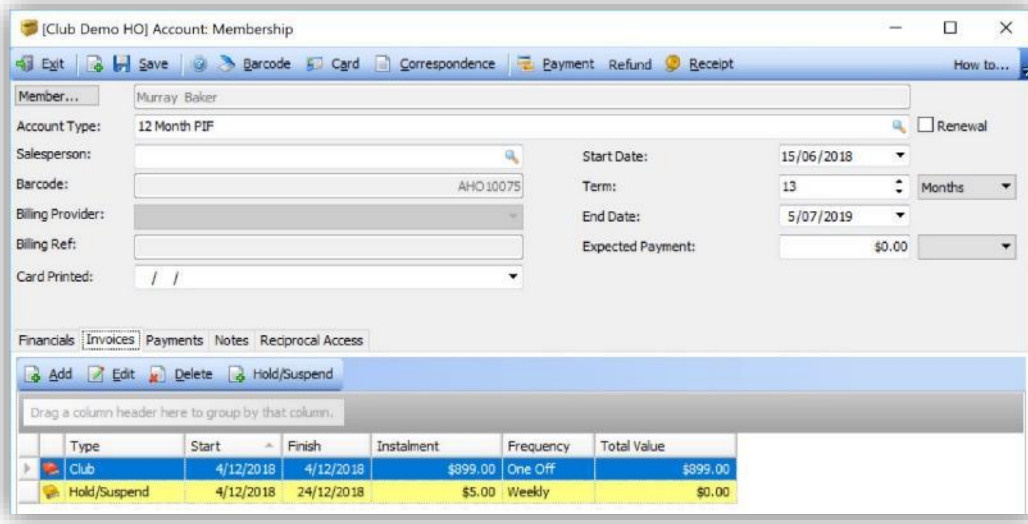
Hold Payments: If you don't want to charge the member their standard instalment amount while on suspension, select this option.

Step 4. Save and **Exit** the Suspension Invoice screen when entries are complete.

Note: When you save a fixed term suspension against a fixed term account, you will be asked if you want to update the contract finish date to include the suspension period. Answer **Yes** or **No** to complete.

You will return to the Account screen.

The Invoices tab will display as shown below.



You have completed the steps required to add a suspension to an account in Clubware.

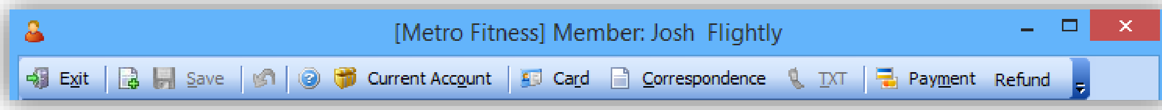
Taking an Account Payment

This tutorial describes the steps required to take an account payment.

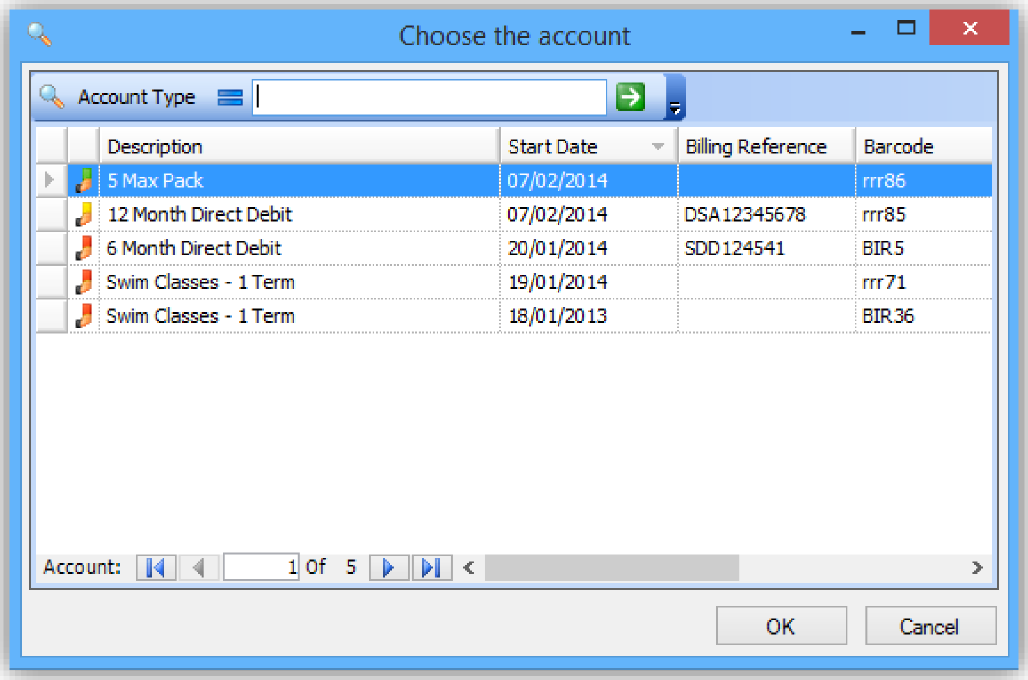
Step 1. Locate and open the required members screen.
(See the tutorial Finding a Member).
Select the required account from the **Accounts** tab.

Or,

Click the **Payment** button from the Member screen.



Step 2. Select the required account.



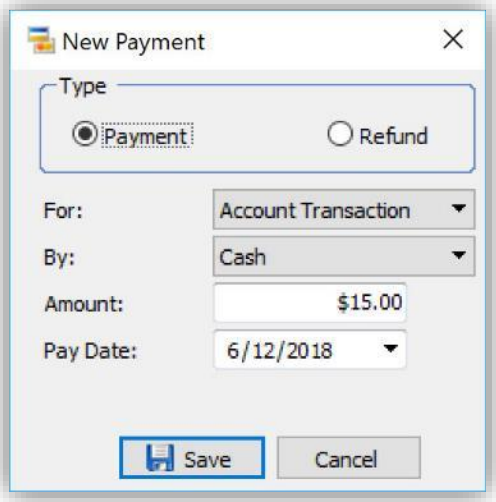
Click **Ok**

The New Payment screen displays.

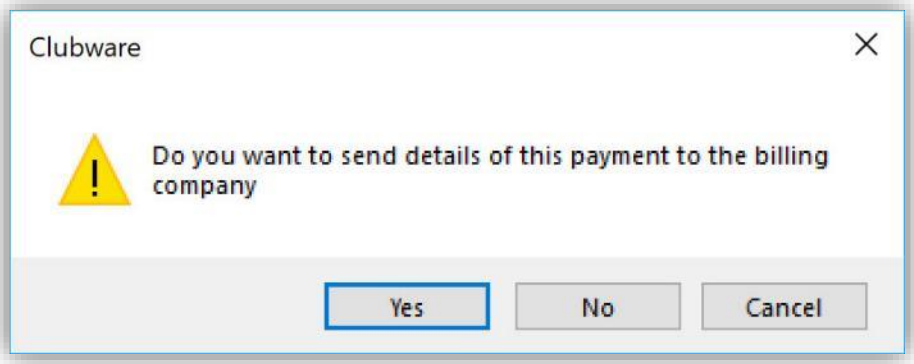
Note: There are two methods for taking payments within Clubware.

Method 1:

When the payment button is selected the following New Payment options will be displayed.



If the membership is linked with a billing company and the payment has a prompt set for send to Billing (See Tutorial Adding a New Account Fee), the screen below displays.



Note: Only click '**Yes'** to send details to the billing company if a member was paying an overdue amount at the facility, or monies related to a contract.

Main Points:

Type: Select either Payment or Refund.

For: This is usually **Account Transaction.** You can take payments for registration fees etc. if required.

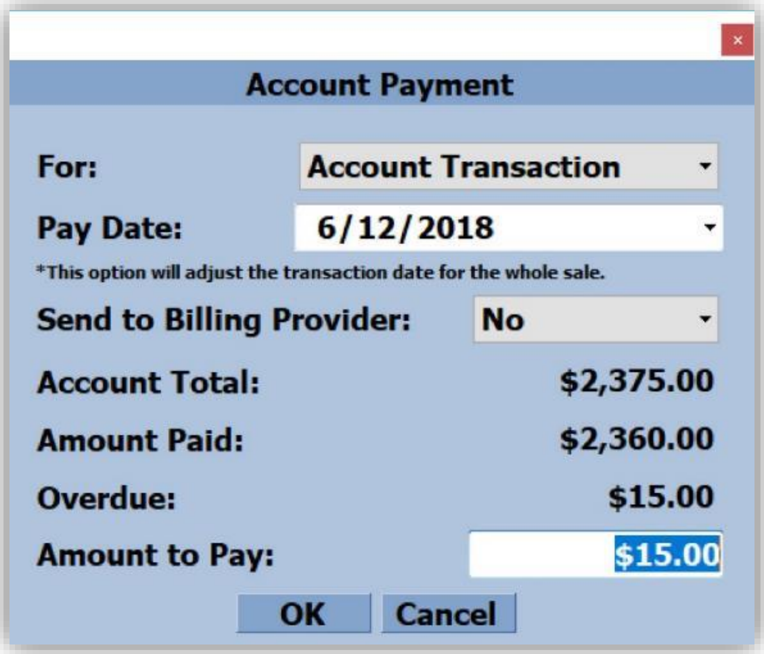
Payments other than 'Account Transactions', 'Suspension Fees' and 'Account Payments' do not require an invoice to be offset against.

By: Select the method of payment. If payment is by cheque, the system will prompt for further information.

Pay Date: You can back date the payment date if you have the required Clubware permissions to do so.

Method 2

The POS screen opens linked to the selected member and account, with the screen below displayed



Main Points:

For: This is usually **Account Transaction.** You can take payments for registration fees etc. if required.

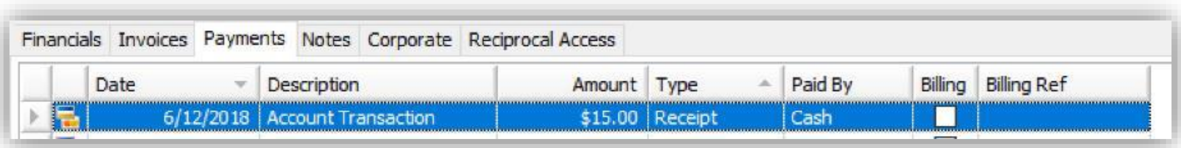
Pay Date: You can back date the payment date if you have the required Clubware permissions to do so.

Send to Billing Provider: If the account fee type you have selected requires a Yes/No response to send the payment to the billing provider then you will need to select the required option, otherwise this field will have a default and will be greyed out.

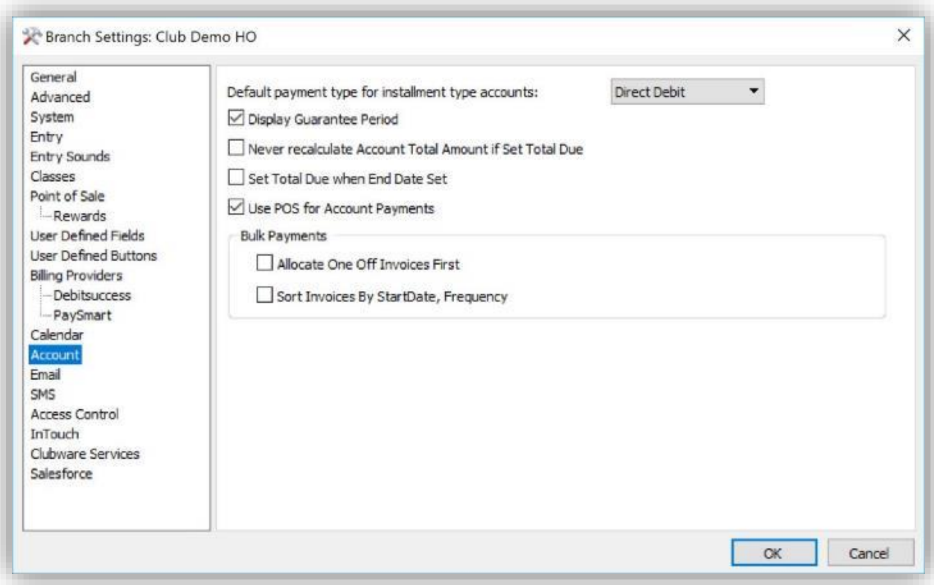
Step 4. Enter the amount for the payment and click **Save**.

Step 5. The POS screen appears. Complete the sale as outlined (See Tutorial Taking an Account Payment).
The POS screen closes.

To check the payment has been made, select the **Payments** tab on Account screen, as shown below.



To activate the POS screen as outlined in Method 2. **Administration | Branches | Select Current Branch | Settings | Entry | Account | Use POS for Account Payments**. Save and restart Clubware.

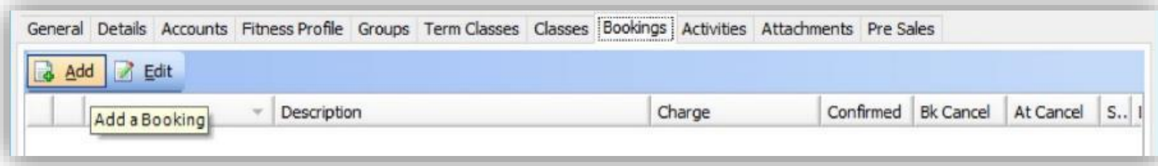


You have completed the steps required to take an account payment in Clubware.

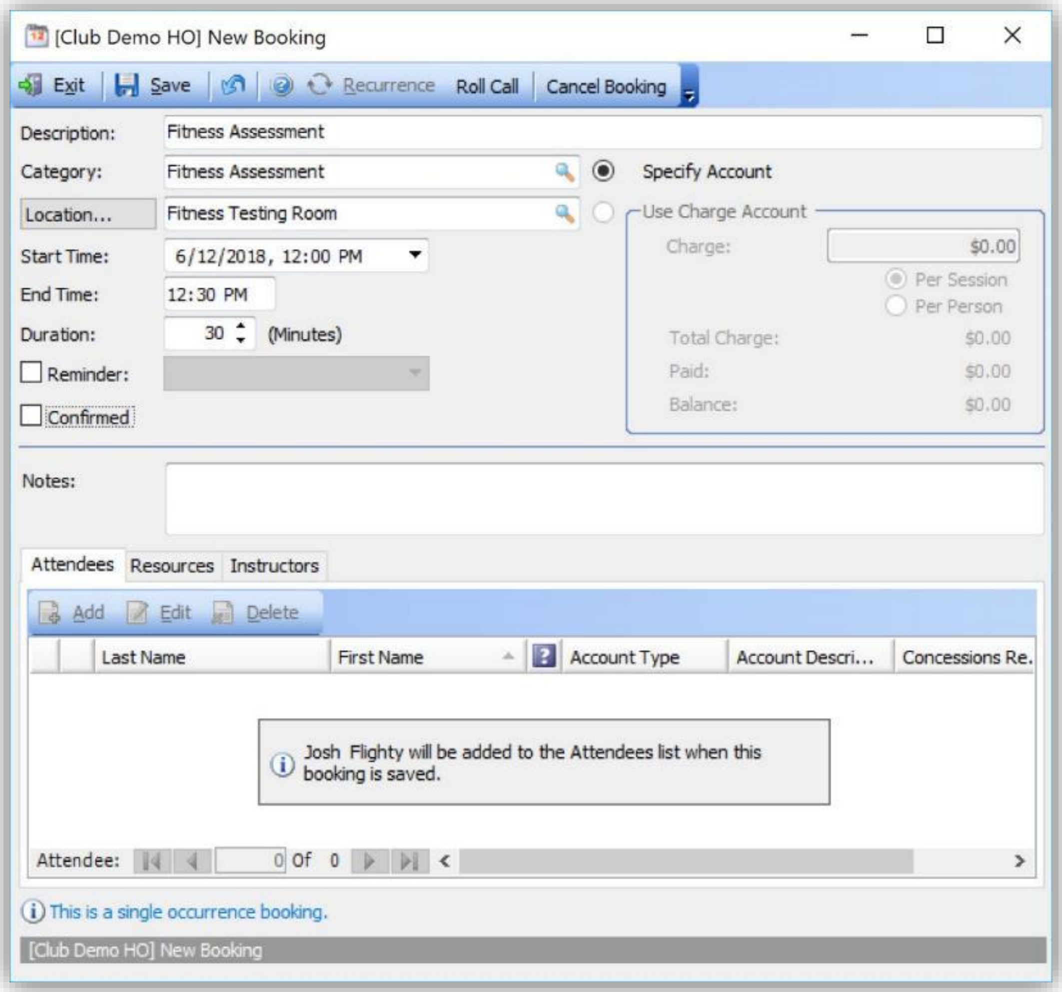
Adding a Booking for a Member

This tutorial describes the steps required to add a booking for a member within Clubware.

Step 1. Locate and open the required member's screen.
(See the tutorial *Finding a Member*).
Select the **Booking** tab, as shown below.



Step 2. Click **Add**.
A **New Booking** screen will display.
Enter information regarding the booking, as shown below.



Main Points:

Description: The description that appears on the Booking screen and Calendar.

Category: Select a Category for the booking. (Category options must be setup in administration)

Location: Select the location for the booked event. (This field is optional).

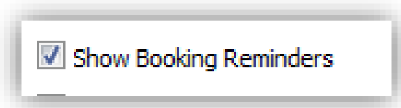
Start Time: Enter the date and time the event will start.

End Time: Enter the time the event will end.

Duration: Check the length of the booking.

Reminder: Check this box and select a time to display a reminder pop-up. This option has to be enabled in the **Options** screen.

Select **Administration | Machines | Select Current Machine**. Check the Show Booking Reminders box, as shown below.



Specify Account/Use Charge Account: You can select the method by which members pay their bookings.

By specifying the account used you can attach an account to the booking, which can be useful for items like PT sessions. If you link a concession account to the booking, each time the member attends the booking their concession card will be debited one concession.

You have the option to charge for bookings if you use the '**Use Charge Account**' option.

Charge: Enter the charge for the booking (if any). If a yellow warning symbol appears after you have entered the charge, use the Charge buttons under the Attendees tab to ensure the amounts charged to attendees equal the total charge for the booking.

Attendees: (This field is optional).
This tab shows a list of attendees for the booking.
To view or edit this list, you need to save the booking.
Click **Save** at the top of the Booking screen.

A booking can have multiple attendees. For more information on adding attendees, see the Adding a Booking tutorial of the Calendar – How to section.

Within this tab, charges can be

- Split between attendees using the **Split Charge** button,
- Charged to one attendee using the **Charge Selected** button, or
- Set individually for each attendee by double-clicking the member's name.

How to take Payments -

- Highlighting the member
- Click '**Payment'**
- Enter details of the payment.

How to make a Refund –

- Highlight the member

- Click ‘Refund’
- Enter details of the refund.

  Resources: (This field is optional). This tab shows a list of resources for the booking.
  A booking can have multiple resources.
  To view or edit this list, first save the booking as described in the Attendees paragraph above.

  Instructors: (This field is optional).
  This tab shows a list of instructors for the booking.
  A booking can have multiple instructors.
  To view or edit this list, first save the booking as described in the Attendees paragraph above.

  Recurrence: A booking can be set up to recur at pre-determined intervals. See the tutorial Adding a Recurrence to a booking for more information.

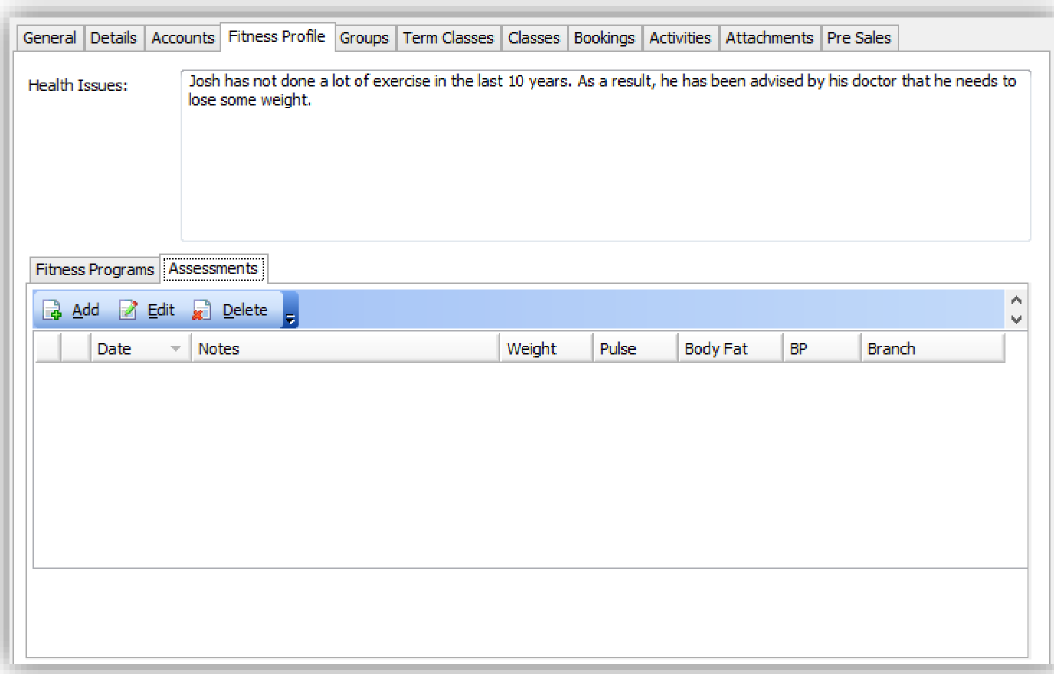
Step 3. Save and **Exit** the screen.

You have completed the steps required to add a booking for a member in Clubware.

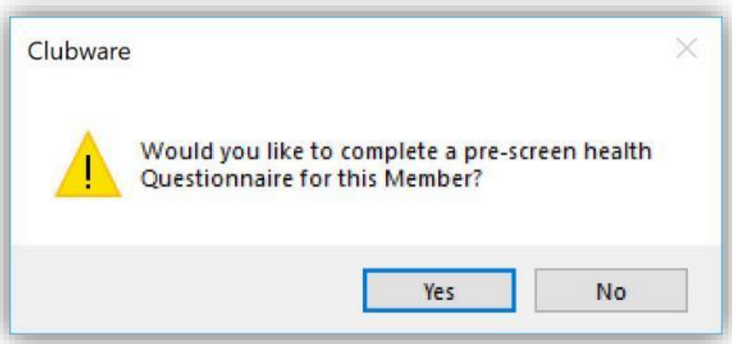
Completing a Pre-Screen Questionnaire

This tutorial describes the steps to complete a pre-screen health questionnaire for a member when adding a fitness program in Clubware.

Step 1. Locate and open the required member's screen.
(See the tutorial Finding a Member).
Select the **Fitness Profile** tab, as shown below.

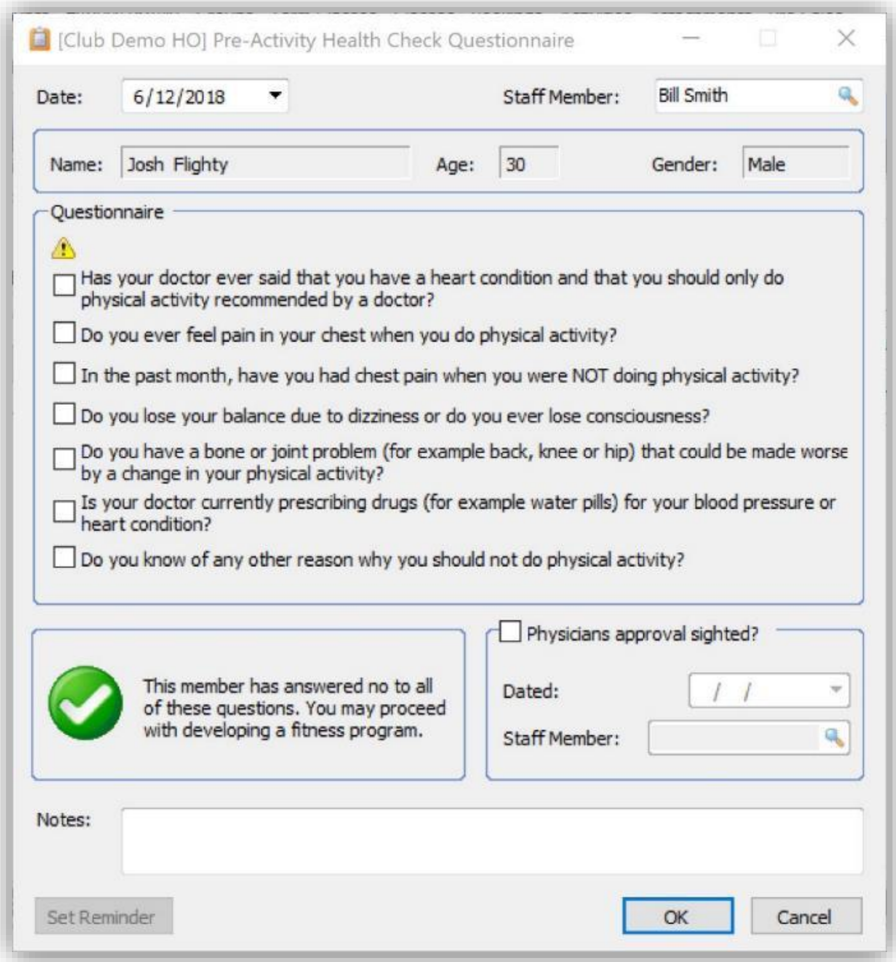


Step 2. Click **Add,** under the **Fitness Programs** tab.
The screen below displays.
(You may be prompted to choose a branch for the program first).



Step 3. Click **Yes**.

The Pre-Activity Health Check Questionnaire screen displays.



Enter the date at the top of the screen.
Click the **dropdown arrow** to select the staff member completing the questionnaire.

If the member answers "Yes" to any of the questions, a physician's approval should be sighted before developing a fitness program for this member.

When this approval is sighted, tick the box in the lower right portion of the screen to indicate that this step has been completed.

Step 4. When the approval is sighted, or if the member answers "No" to all the pre-screen health questions, it is safe to proceed with developing a fitness program.

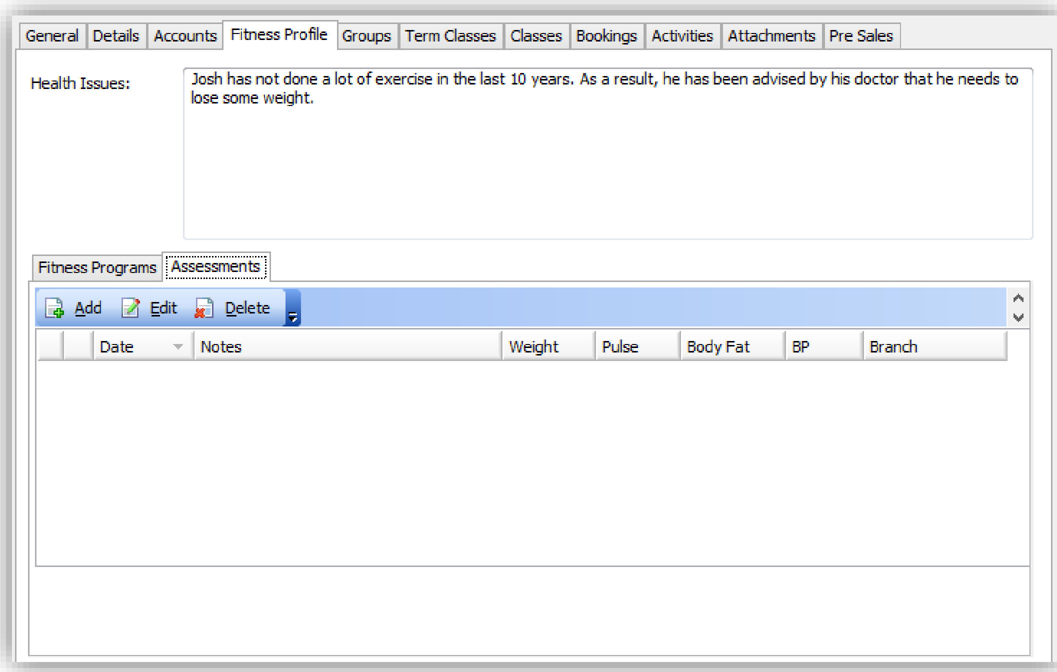
Click **OK** at the bottom of the Questionnaire screen.
You can return to the **New Fitness Programme** screen and continue developing the member's programme.
(See the tutorial Adding a Fitness Program for a Member).
The member's pre-screen questionnaire status will be displayed at the top of the Fitness Program screen.

You have completed the steps required for completing a pre-screen questionnaire for a member in Clubware.

Adding a Fitness Program for a Member

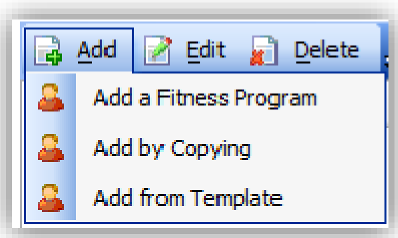
This tutorial describes the steps required to add a fitness program for a member.

Step 1. Locate and open the required member's screen.
(See the tutorial Finding a Member).
Select the **Fitness Profile** tab, as shown below.



Step 2. Insert any health concerns in the **Health Issues** field.

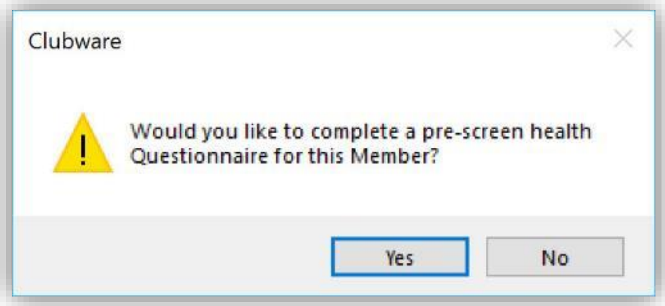
Click the dropdown triangle next to the **Add** button under the **Fitness Programs** tab.
The options shown below display.



You can add fitness programs by copying existing programs or templates.

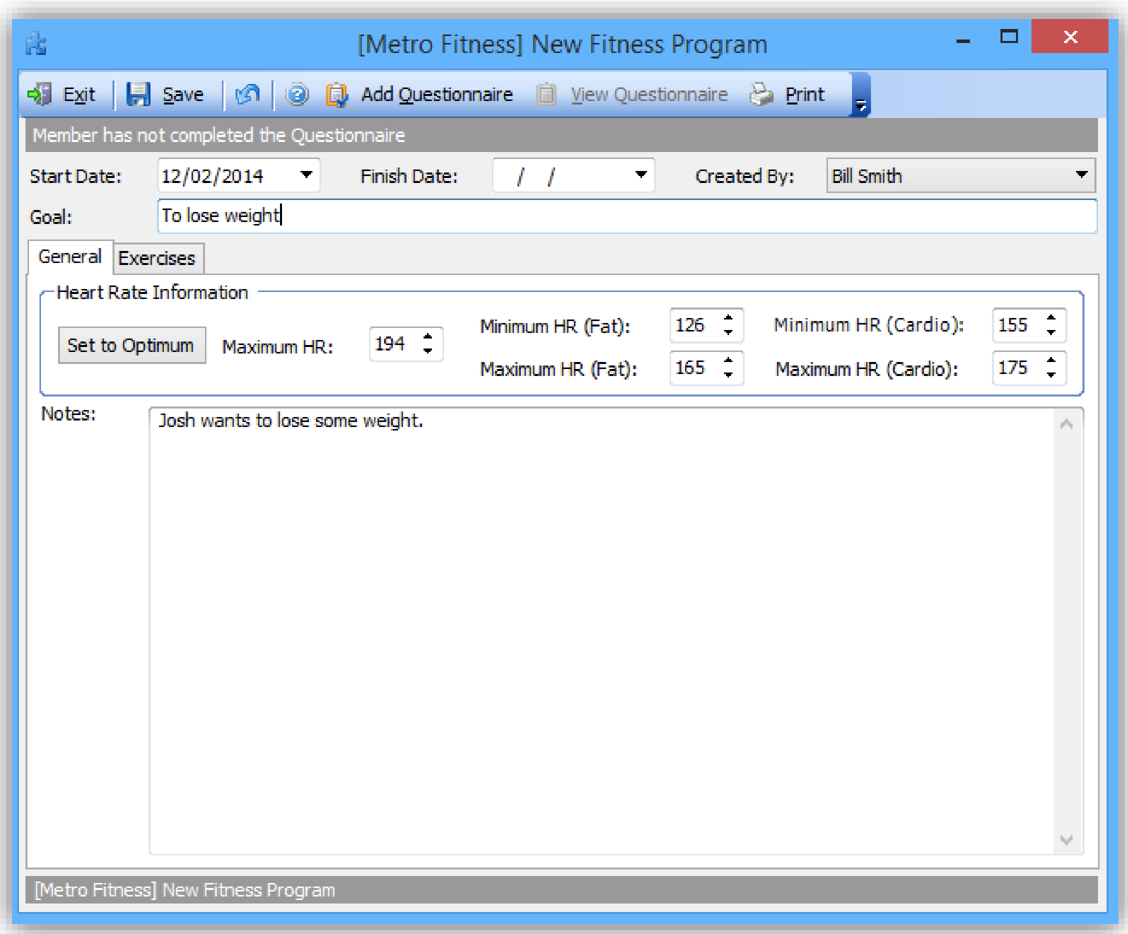
Select **Add a Fitness Program** (for this example)**.**
The screen below displays.

(You may be prompted to choose a branch for the program first).



Click **Yes** to complete a pre-screen health questionnaire.
(See the tutorial Completing a Pre-Screen Questionnaire).
For the purposes of this tutorial, click **No**.

The **New Fitness Program** screen displays.
Enter information as shown below.

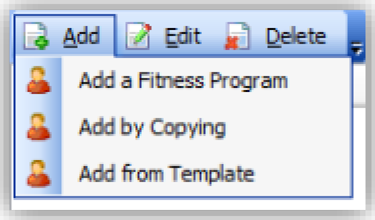


The **Created By**, and **Goal** fields are mandatory.

In the Heart Rate Information box, Clubware uses the member's age to calculate the appropriate heart rates. The member's DOB must be entered for this to happen.

If you wish to alter the given numbers, type new values into the boxes or use the arrows to change the values.
To return to Clubware's calculations at any time, click **Set to Optimum.**

Step 3. Click the **Exercises** tab to add exercises to the fitness program, as shown below.

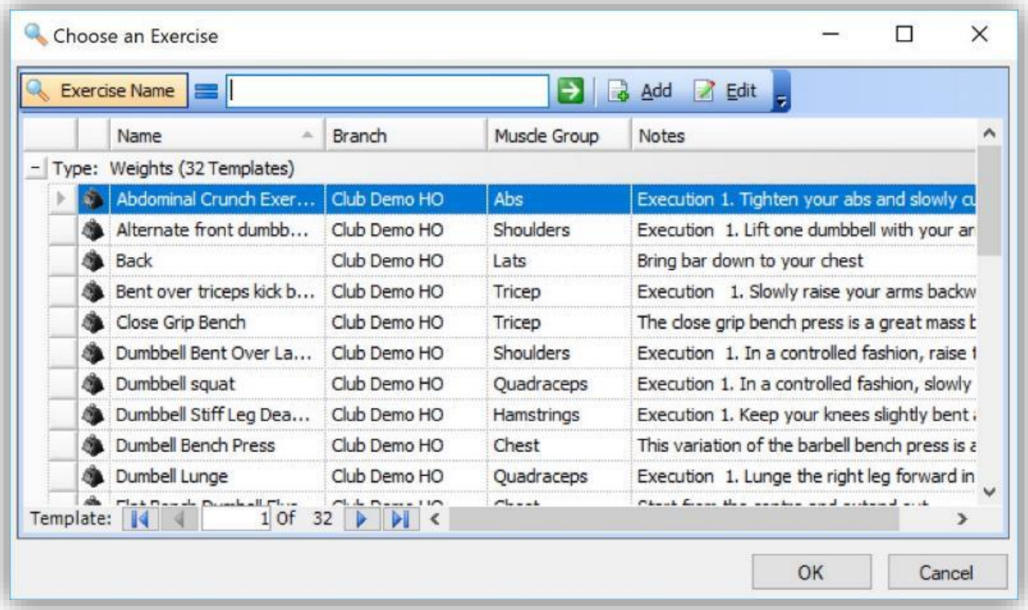


You must save the program before you can add exercises to the program.

Click **Save** in the toolbar of the New Fitness Program screen.

Click the **Add** dropdown button and selecting either **Add Cardio** or **Add Weights** to add exercises.

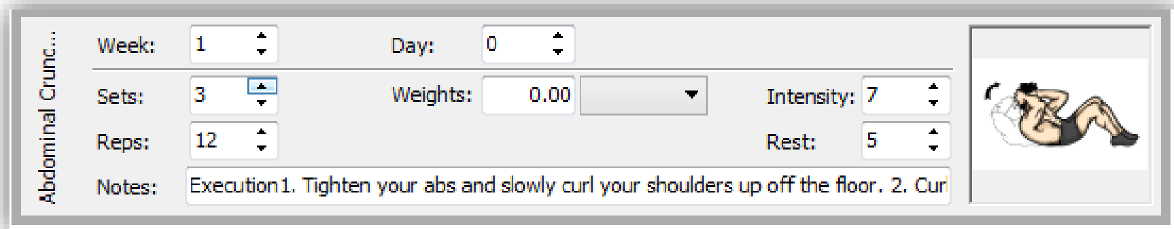
If you choose **Add Weights,** the screen below displays.
Note: You must have exercises added in Administration – Exercise templates.



Step 4. Select the exercise to add to the program and click **OK**.

Note: If the exercise you want doesn't exist, see the tutorial Adding a New Exercise Template.

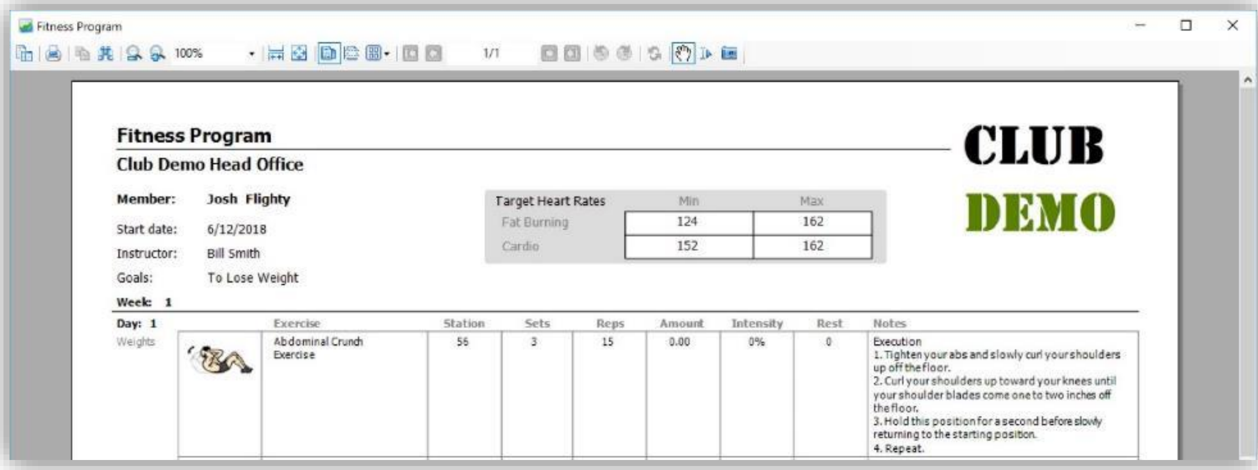
The selected exercise will appear in the new fitness program.
When you click to highlight the exercise, details of the exercise will be displayed on the bottom panel, as shown below.



Edit the values for the exercise.
Repeat the process to add more exercises as required.

Step 5. You can print the fitness program. Click **Print** on the right end of the toolbar.

The screen below displays.



Click **Print** at the top left of this screen.
The Fitness program will print on your designated printer.

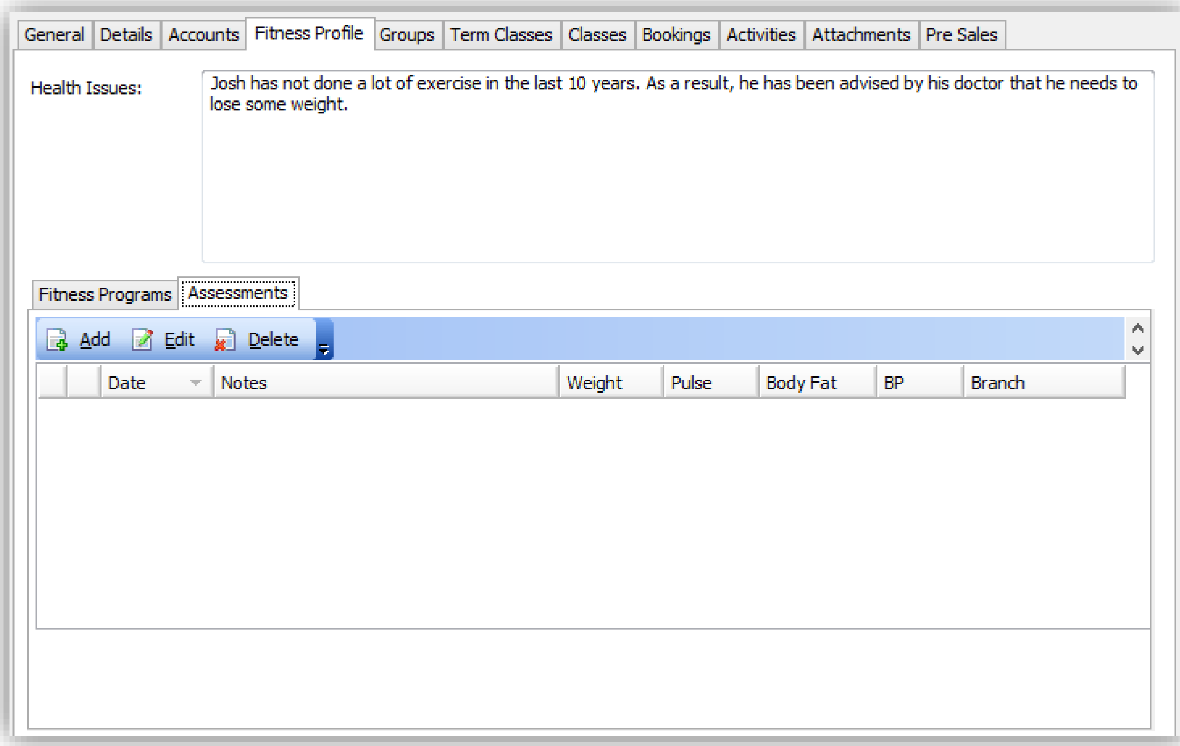
Step 6. Save and E**xit** the fitness program.

You have completed the steps required to add a fitness program for a member in Clubware.

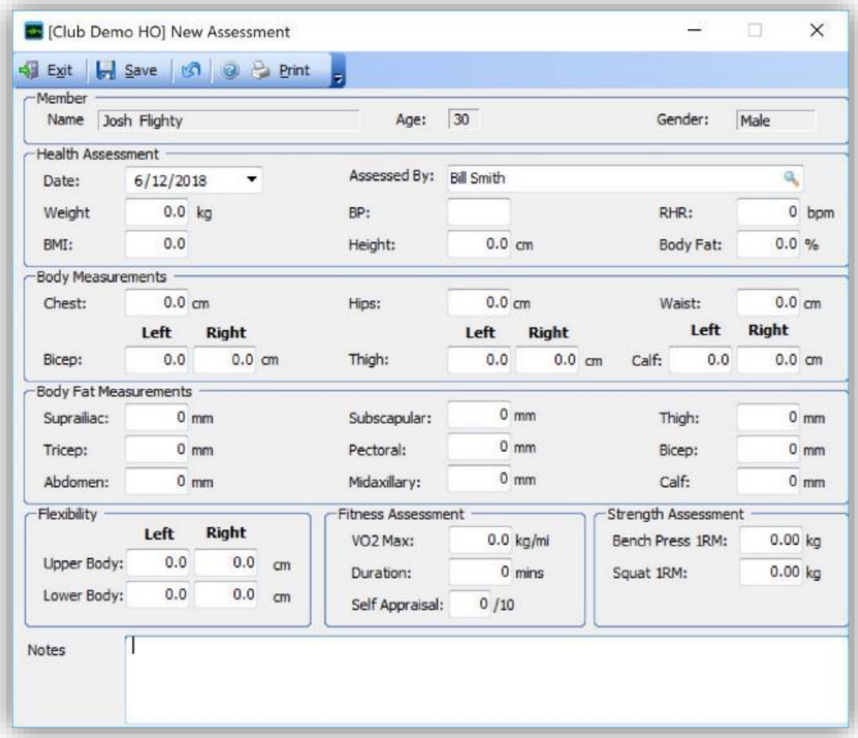
Adding an Assessment

This tutorial describes the steps required to add an assessment to a member within Clubware.

Step 1. Locate and open the member screen you want to add an assessment to. (See the tutorial Finding a Member).
Select the **Fitness Profile** tab, as shown below.



Step 2. Click the **Assessments** tab and click **Add**.
The assessment screen displays, as shown below.



Step 3. Enter the relevant assessment information for the member.

The Assessment screen is divided into the following sections:

Health Assessment
Body Measurements
Body Fat Measurements
Flexibility
Fitness Assessment
Strength Assessment

In the **Strength Assessment** section, you can record one-rep maximums for both bench press and squat.

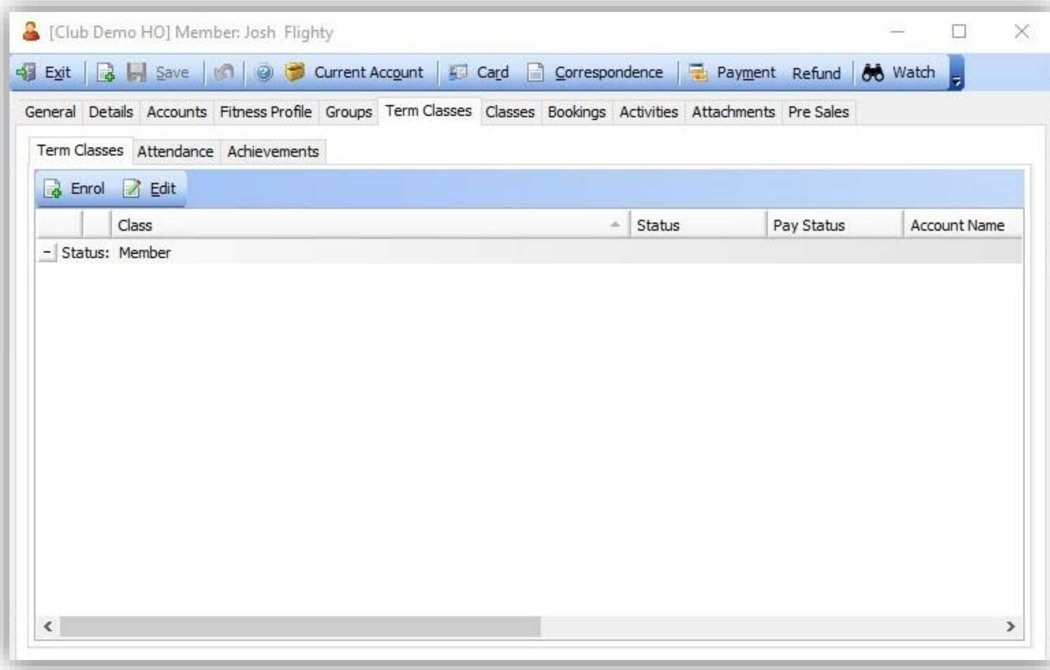
Step 4. Save and **close** the form when the entries are completed.

You have completed the steps required to add an assessment for a member in Clubware.

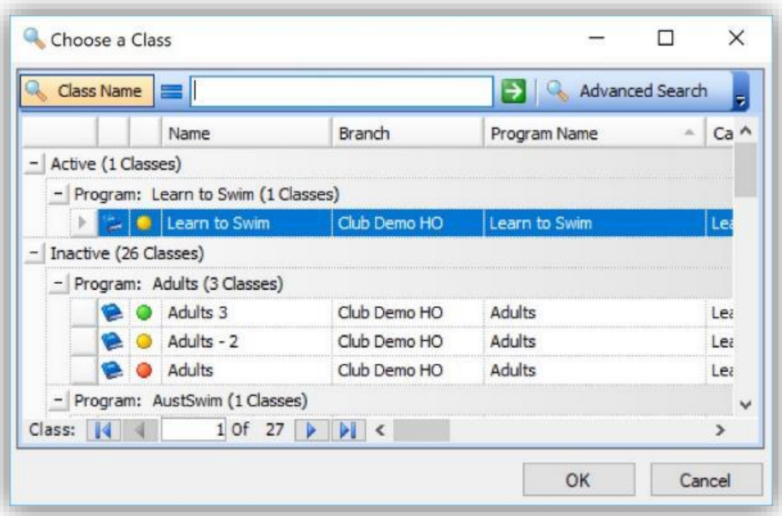
Enrolling in a Term Class

This tutorial describes the steps required to enrol a member in a Term Class.

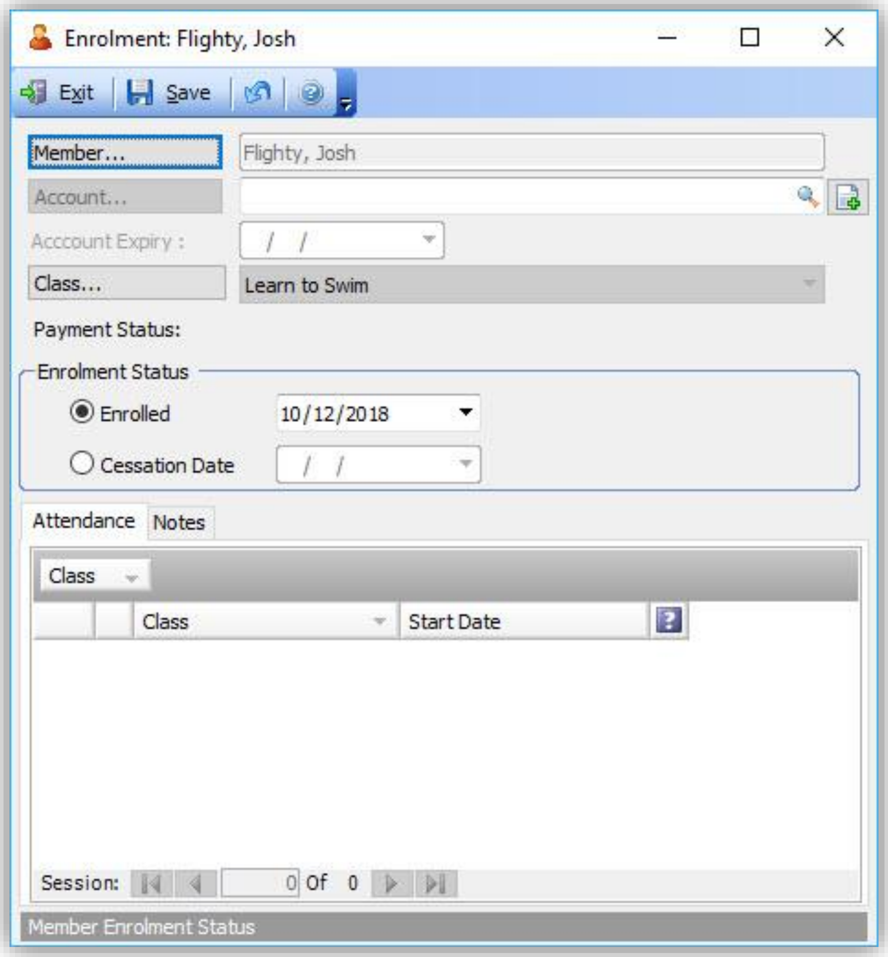
Step 1. Find and open the screen for the member you want to enrol.
(See the tutorial Finding a Member).
Select the **Term Classes** tab, as shown below.



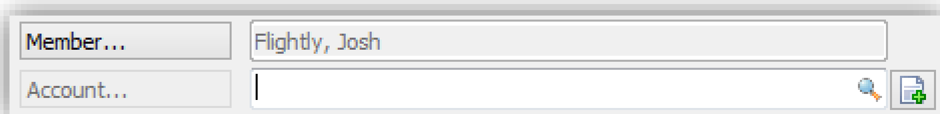
Step 2. Click **Enrol**. The screen below displays with a list of available classes.



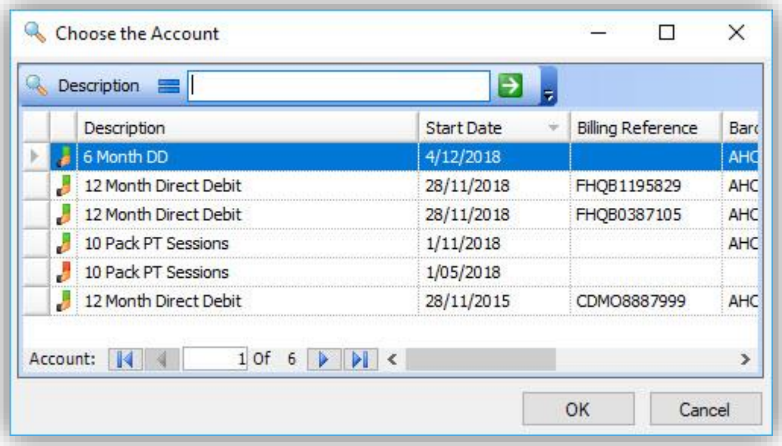
Step 3. Select the required class.
Click **OK**. The screen below displays.



Step 4. Option 1. Click the magnifying glass button to the right of the **Account** field.

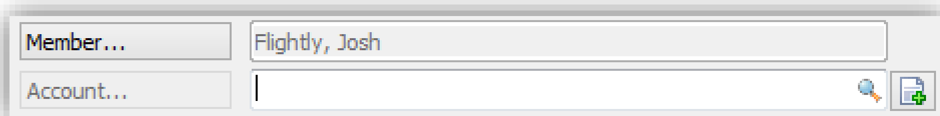


If the member has an existing account the ‘Choose the Account Template’ screen display, as shown below.

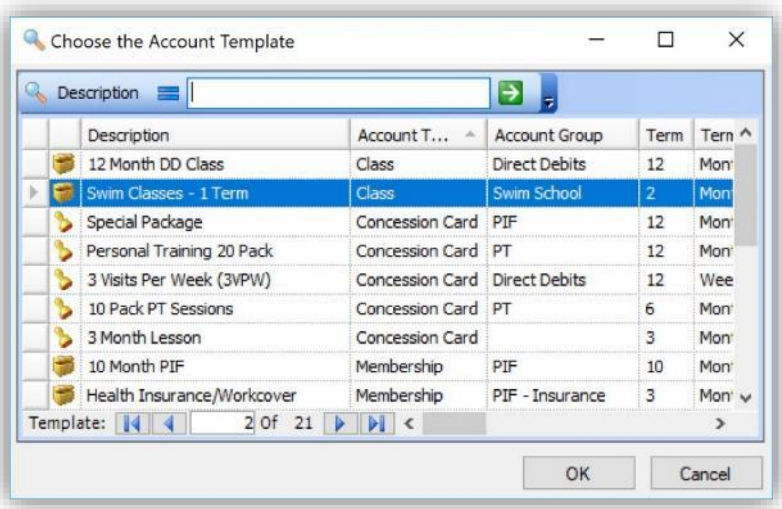


Select an account and click **OK** to create a new account of this type.

Step 4. Option 2. Click the  next to the magnifying glass.

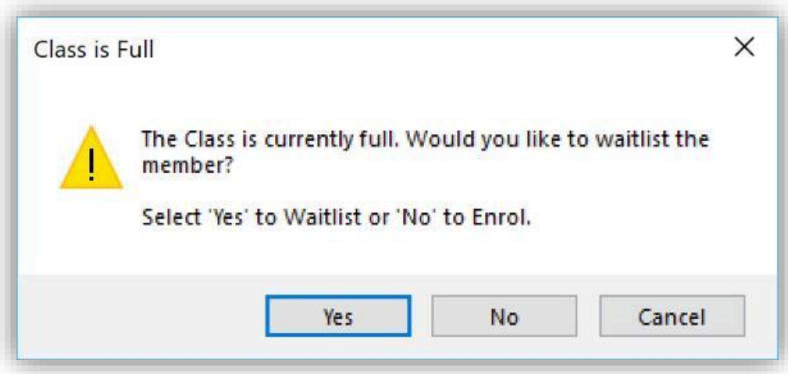


The **‘Choose the Account Template’** screen displays.



Select the required account and Click **OK.**

Step 5. Save and exit the form.
If the class is full, the dialog box shown below displays.



You can waitlist the member or choose to force the enrolment.
If you waitlist a member, you can enrol the member from a waitlist at a later time. (See the tutorial Enrolling a Member from a Waitlist).

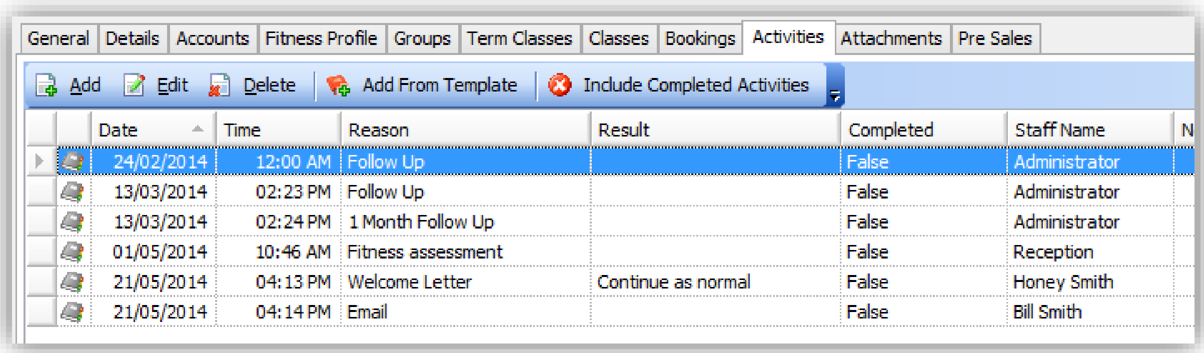
You have completed the steps required to enrol a member in a class in Clubware.

Adding an Activity

This tutorial describes the steps to add an activity and activity templates to a member. Activities can be added from either the Member or from the Activities home screen in the Front Desk section. Activity Templates can only be added from the Member.

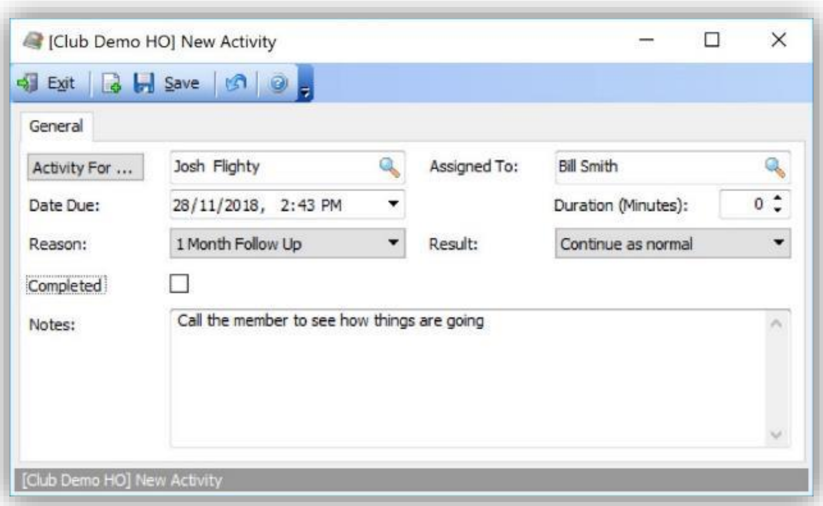
This tutorial focuses on adding an activity or activity template from the members screen.

Step 1. Locate and open the screen for the member you want to add an activity to. (See the tutorial [Finding a Member]).
Select **Activities** on the far right, as shown below.



Step 2. Either click **Add** or click **Add From Template**.

If you click Add a New Activity screen displays. Enter details as shown in the example below.



Main Points:

Assigned To: Click on the magnifying glass to search and associate an activity with a staff member.

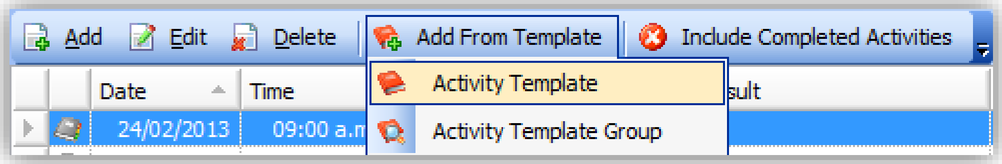
Due Date and **Time:** Enter the date and time when this activity should be completed.

Reason: Select the reason that describes the activity required for the member.
You can add new reasons and results in **Administration | Lookups**.
You can also link a set of results to a reason so that only valid results appear in the Drop down Box. These can be linked in: **Administration | Lookups | Map Lookup** category.

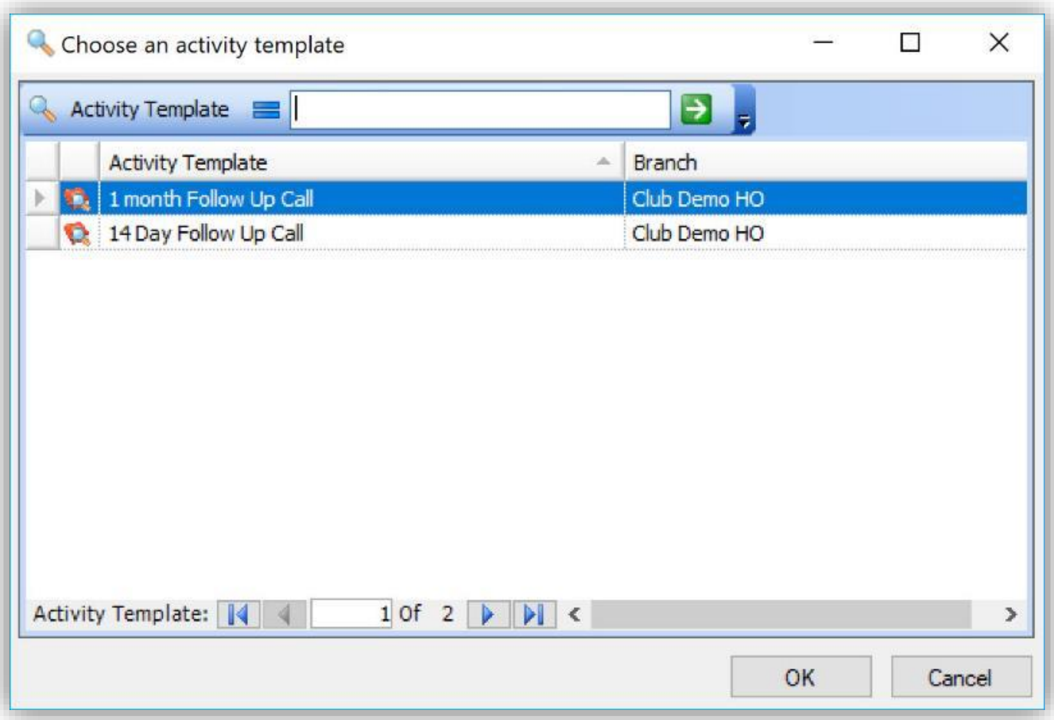
Result: When the activity is completed, staff can enter a result for the activity.

Completed: Check this box when the activity has been completed. When you complete an activity the completed date will display.

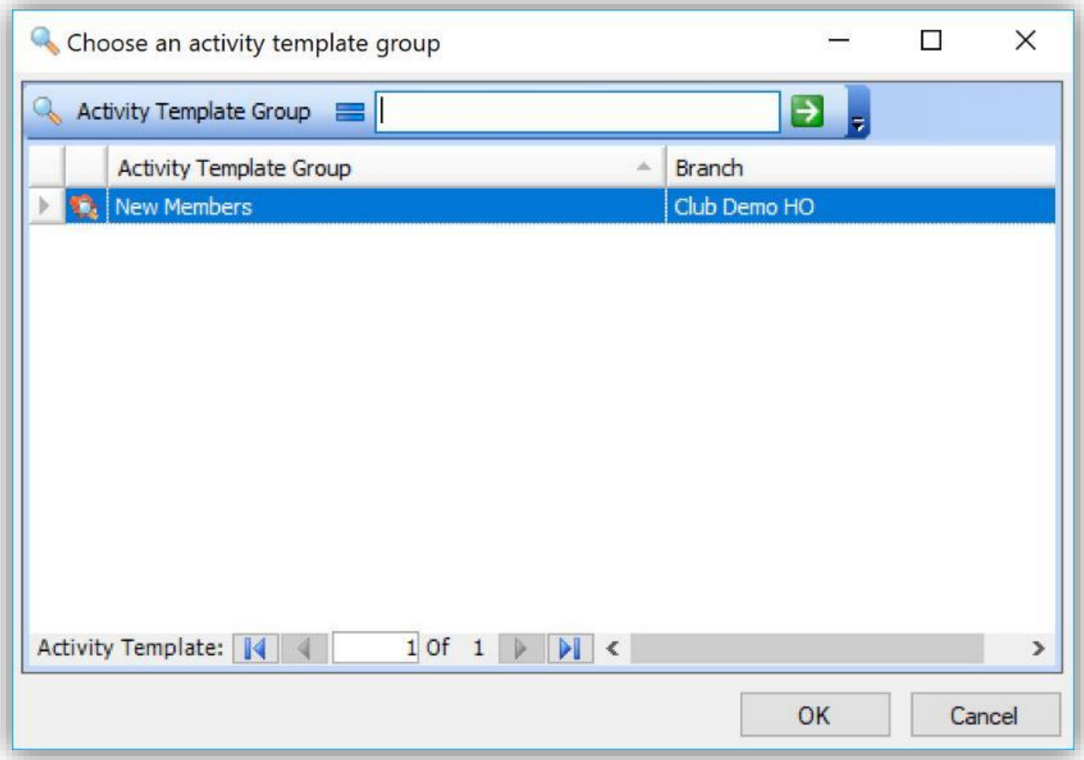
If you click **Add From Template**, you then have the option to add an individual activity template or a group of activity templates.



Select one of the activity templates from the list, click OK. See Adding an Activity Template for how to add new templates.



Or select an activity template group, click OK.



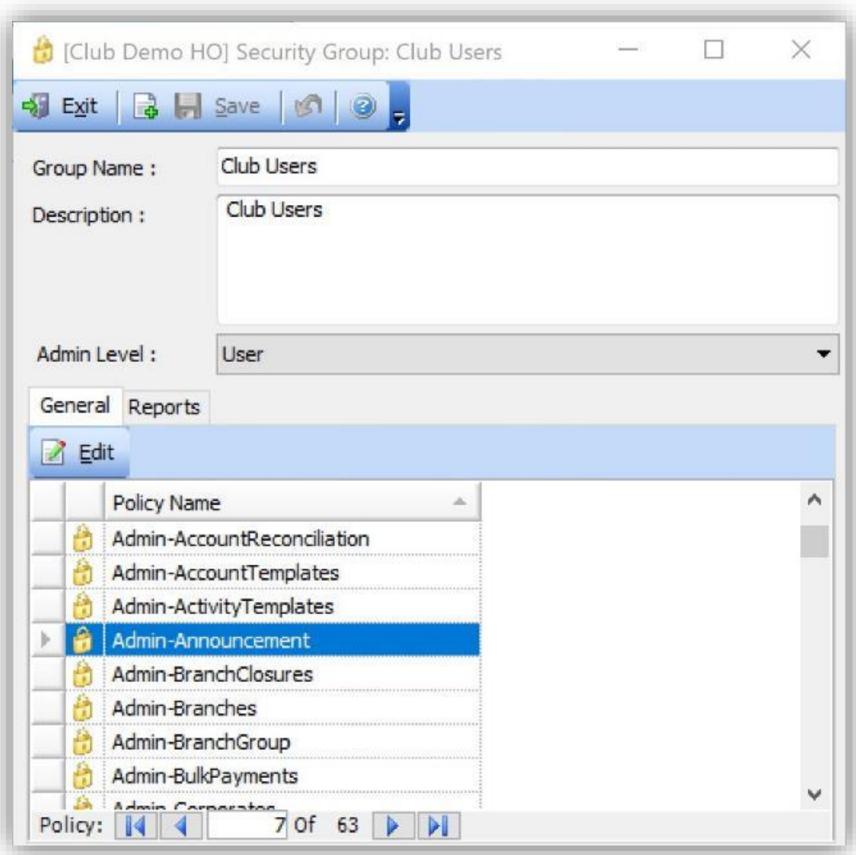
The selected activities will be added against the member.

You have completed the steps required to add an activity for a member in Clubware.

Adding an Attachment

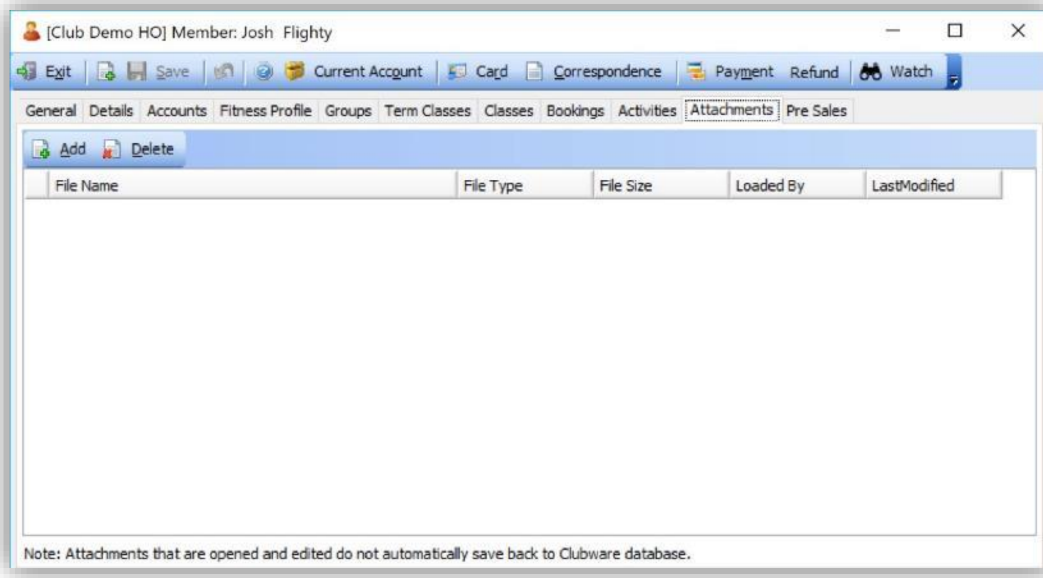
This tutorial describes the steps required to add an attachment to a member.

The Attachment tab is disabled by default for all users. To enable this feature, enable the appropriate access to the Member-Attachments security policy in security groups (**Administration | Security Groups**)

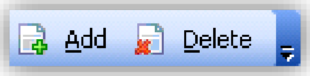


Step 1. Find and open the screen for the member you want to add an attachment to (See the tutorial Finding a Member).

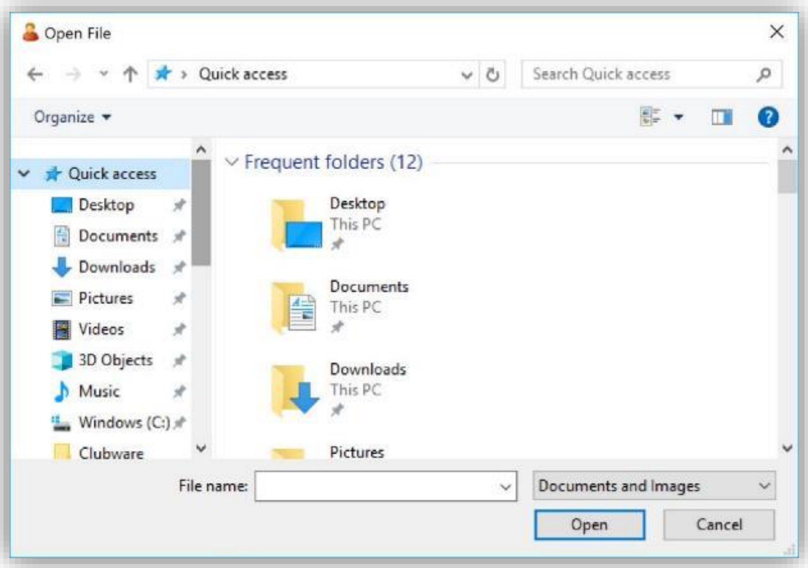
Select the **Attachment** tab, as shown below.



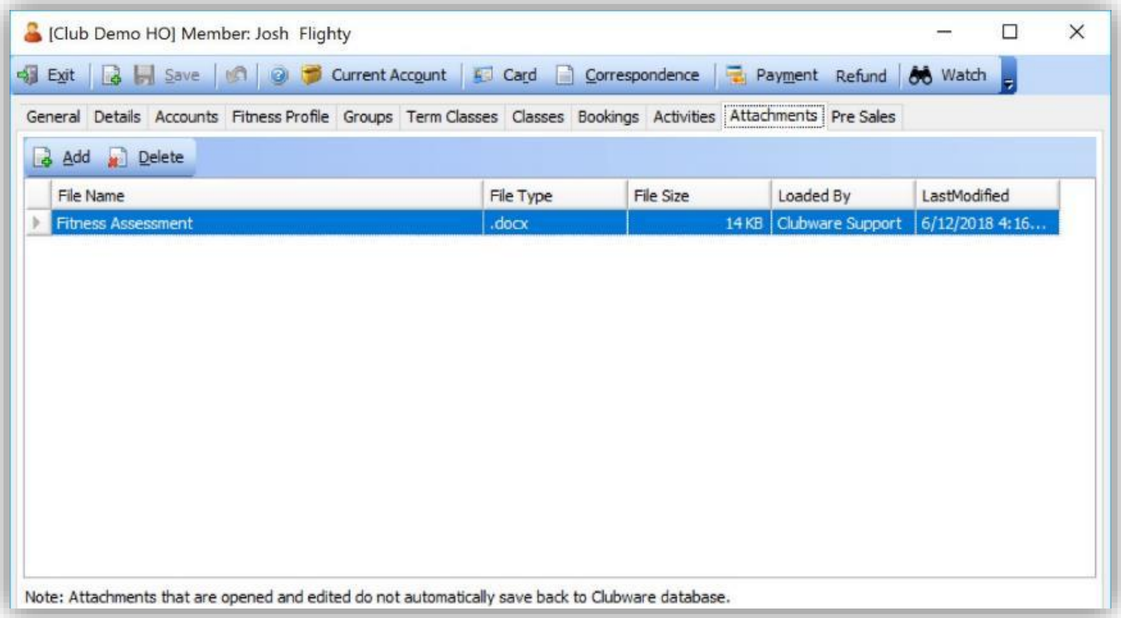
Step 2. Select **Add** from the Attachments toolbar and browse to the location of the file.



A Windows Explorer window will appear so that you can navigate to the file to attach.



Once the file is attached it will appear on the Attachments tab, as shown below.



Files can be opened if the associated application is installed on the computer.

Note: Attachments that are opened and edited do not automatically save back to the Clubware database.

You have completed the steps required to add an attachment for a member in Clubware.

Linking Activity Types to Activity Results

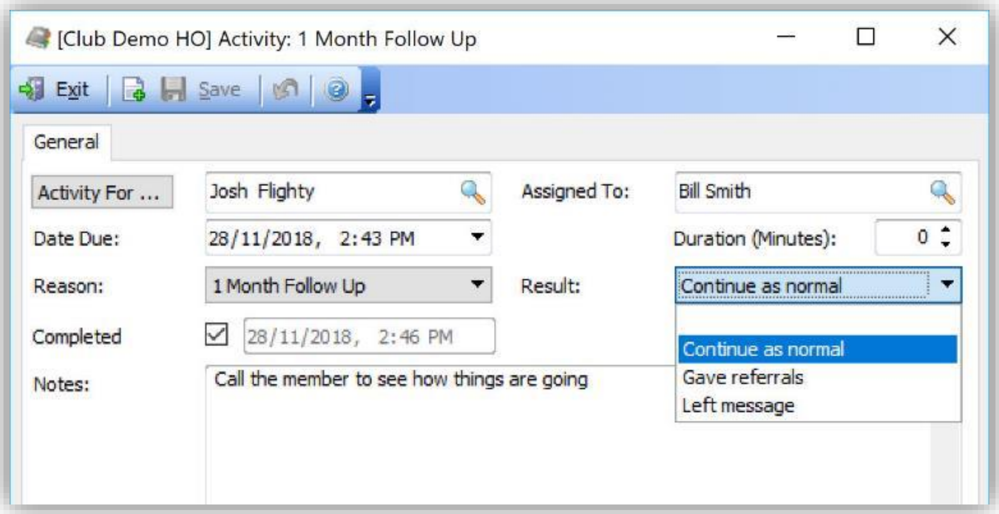
When you assign an Activity Type, you can customise the Activity Results which will appear for this Activity Type.

You can add new reasons and results in **Administration | Lookups**.

You can link a set of results to a reason so that only those results appear in the drop-down box.

Refer to the tutorial Linking Activity Types to Activity results for instructions on how to do this.

This enables you to view only those selected results instead of scrolling through the complete list, as shown in the example below.

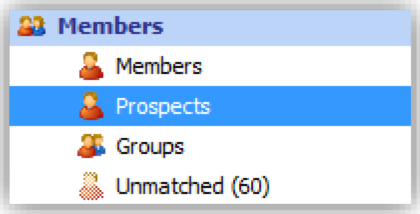


Prospects

Adding a Prospect

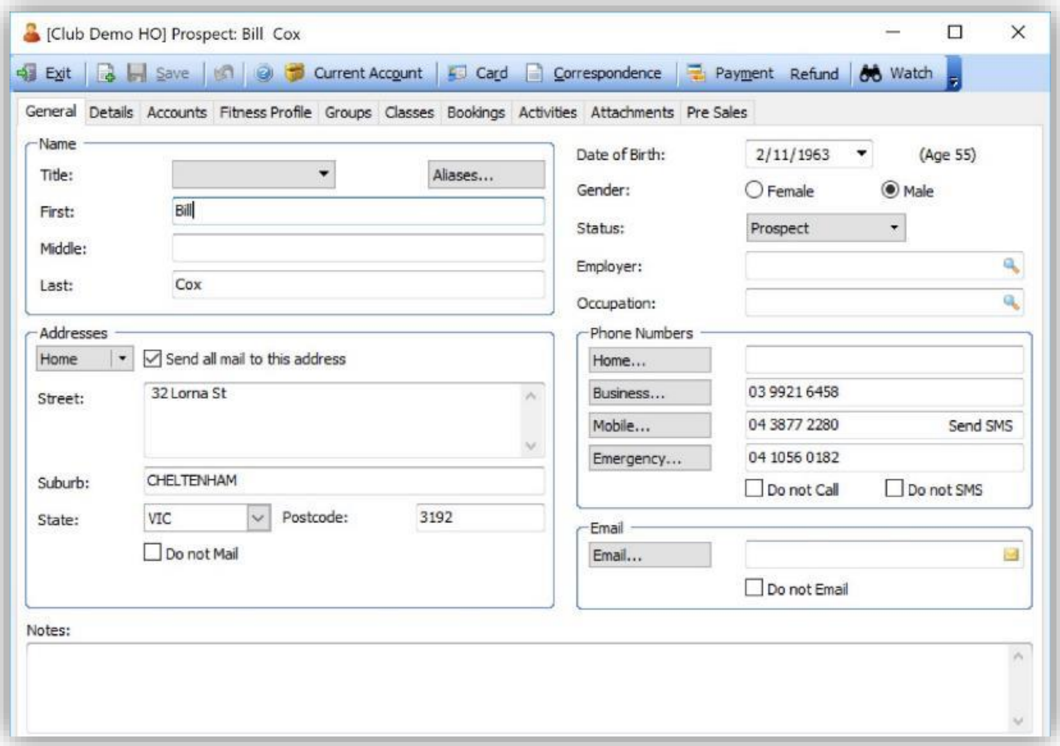
This tutorial describes the steps required to add a prospect within Clubware.

Step 1. Select **Members | Prospects** in the navigation panel, as shown below.



Step 2. The **Prospect home screen** will display on the right panel.
Select **Add** from the toolbar.

Step 3. A **New Prospect** screen displays.
The **General** tab is the default screen.
Add relevant information to your Prospect.

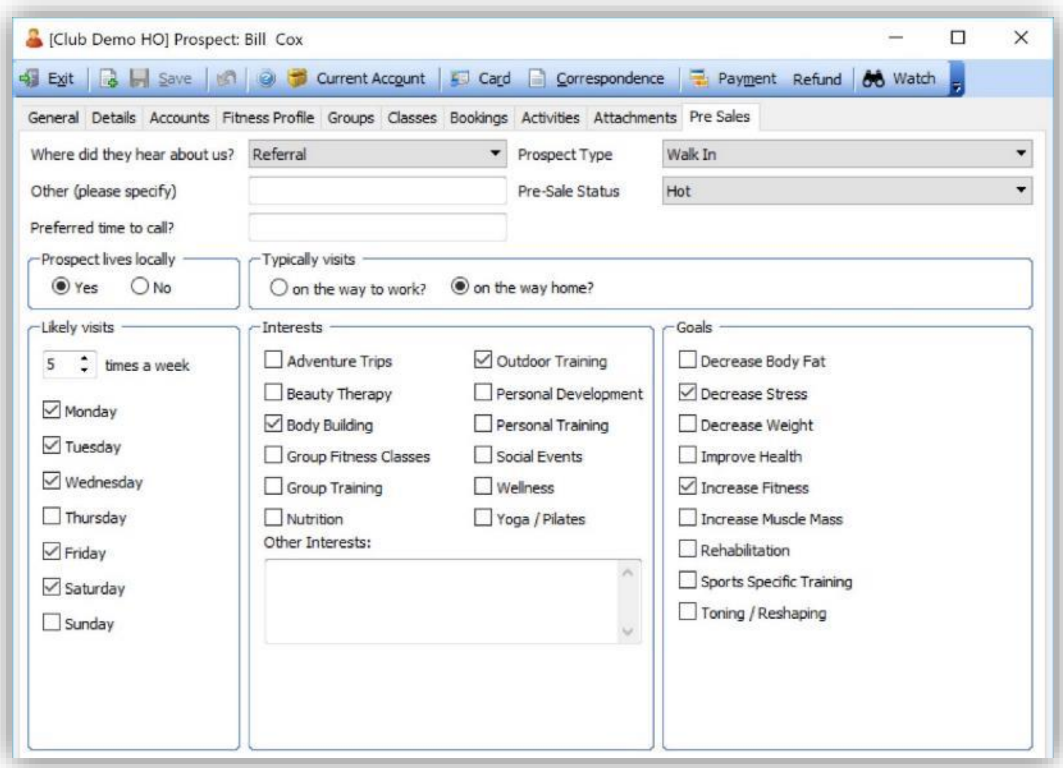


Step 4. Click the **Pre-Sales** tab and enter details as shown below.
Use the drop down menus to make selections.

Note: You can **Add/Edit** the options for;

- Where did you hear about us?
- Prospect Type
- Pre-Sale Status e.g. Hot, Warm, Cold.

Via Administration | Lookups.



Step 5. Click the **Activities** tab; enter any activities for the prospect.
See the tutorial Adding an Activity for more information).

Step 6. Save and exit the New Prospect screen.

You have completed the steps required to add a prospect in Clubware.

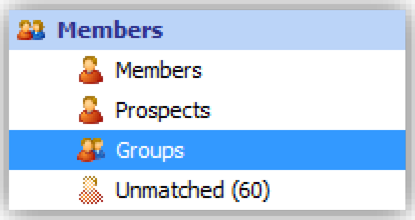
Groups

The following tutorials describe the most common actions associated with Groups.

Adding a Group

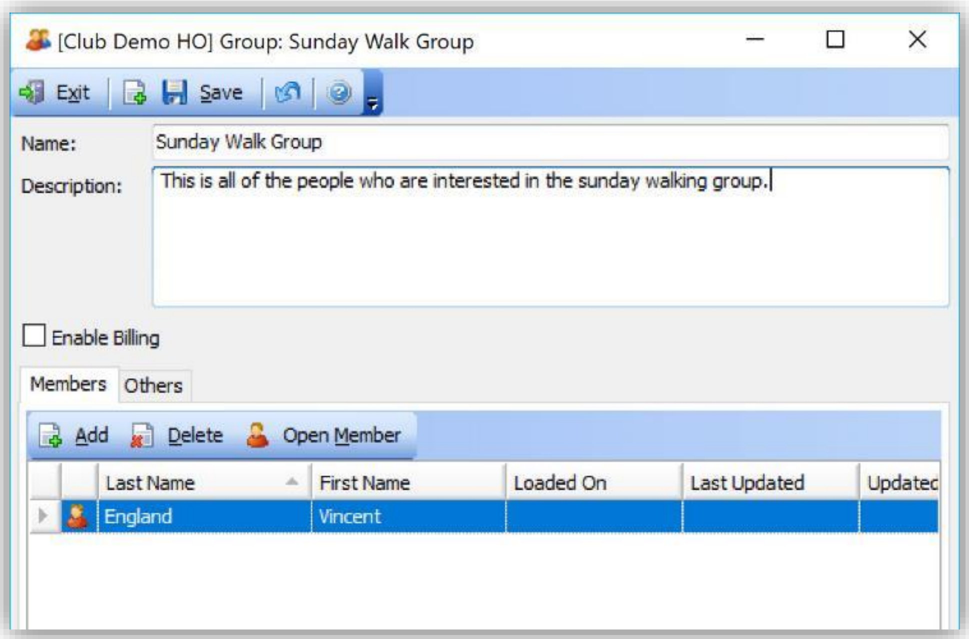
This tutorial describes the steps to add a group within Clubware.

Step 1. Select **Members | Groups** in the navigation panel as shown below.



Step 2. The **Groups home screen** displays in the right panel.
Select **Add** from the toolbar.

Step 3. A **New Group** screen displays.
Add relevant information to your group as shown below.



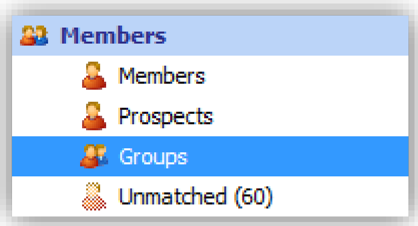
Step 4. Save and exit the New Group screen.
To add a member to a group, see the next tutorials, Adding Members to Groups or Adding Others to Groups.

You have completed the steps required to add a group in Clubware.

Adding Members to Groups

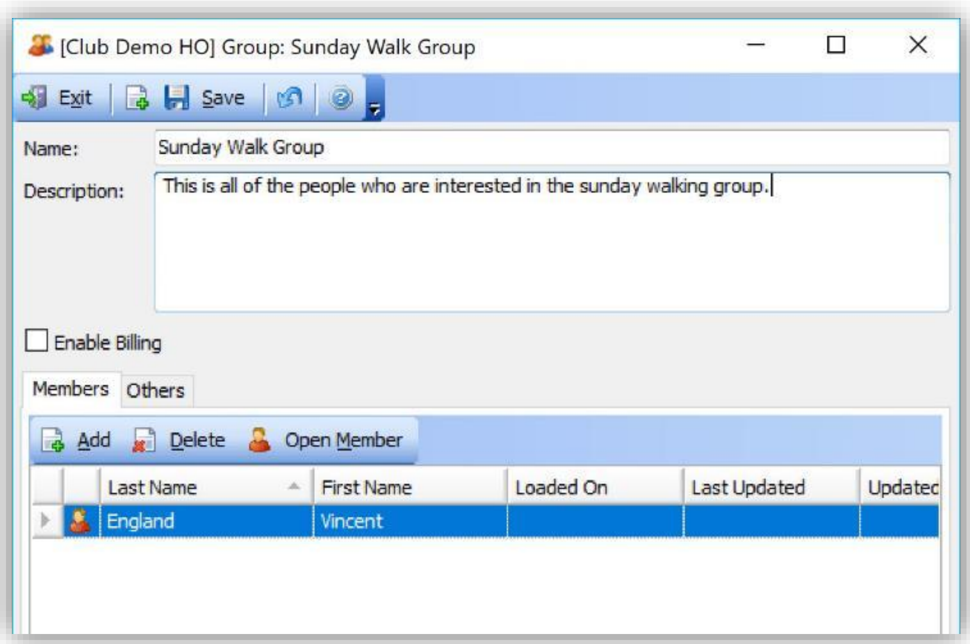
This tutorial describes the steps required to add members to groups.

Step 1. Select **Members | Groups** in the navigation panel as shown below.

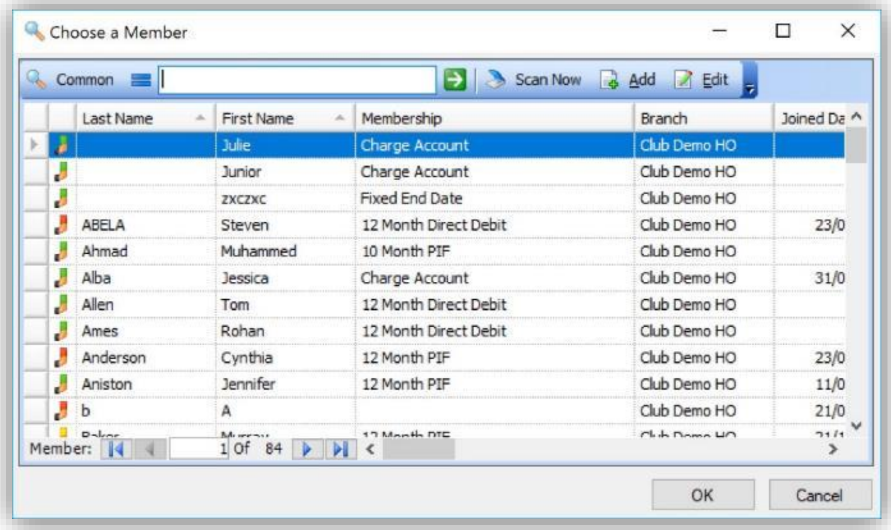


Step 2. The **Groups home screen** will display on the right side panel within Clubware. Select the group you want to add to, and then click **Edit** in the Groups toolbar.

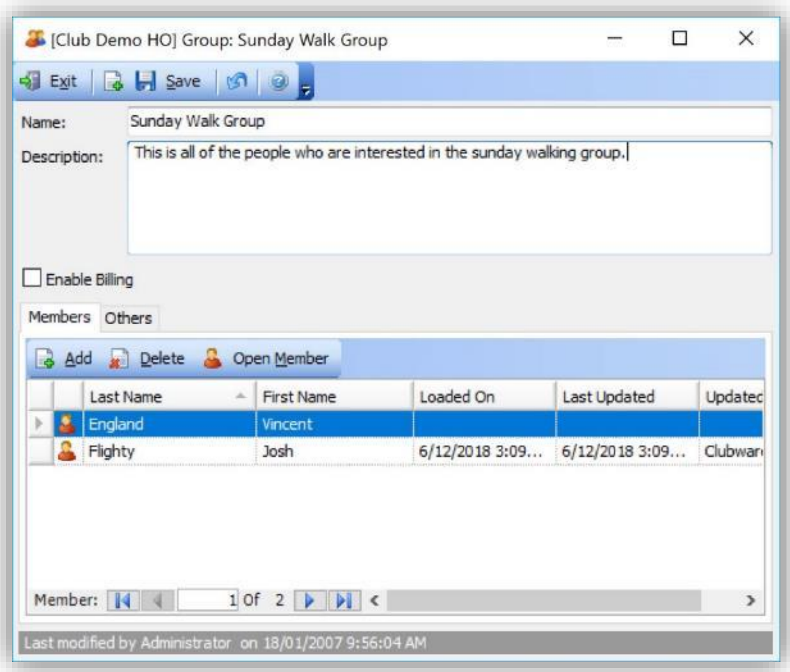
The screen below displays.



Step 3. Click **Add** on the **Members** tab. The screen below displays.



Select a member and click **OK.**
The member selected will appear on the **Group** screen, as shown below.



The first member added to a group is always marked as the billing member. This is indicative only.

Repeat the process for each member to be added.

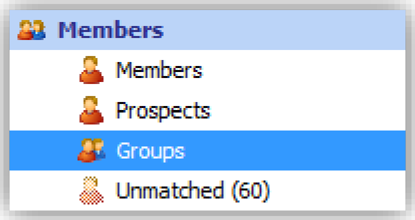
Step 4. Save and exit the **Group** screen.

You have completed the steps required to add members to a group in Clubware.

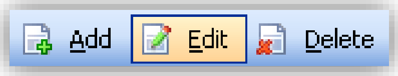
Adding Others to Groups

This tutorial describes the steps required to add members to groups within Clubware.

Step 1. Select **Members | Groups** in the navigation panel, as shown below.

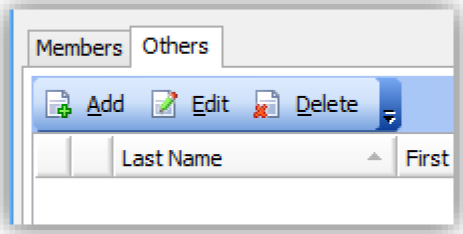


Step 2. The **Groups home screen** will display on the right side panel within Clubware.
Select the group you want to add another person to, or use the search feature on the toolbar, then click **Edit**.

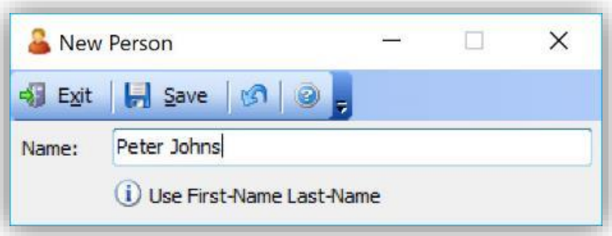


The Group screen displays.

Step 3. Select the **Others** tab as shown below.



Step 4. Click **Add**. The screen below displays.



Enter the details.

Step 5. Click Save and Exit.

Step 6. Repeat the process for each person you want to add.

You have completed the steps required to add others to a group in Clubware.

Enabling Group Billing

Background

Members are made part of a group with one member being responsible for the group payments.

Each individual member has their own account. The bill payers will have an account with invoices. The non-payers will have an account with no invoices. When a member scans in, the system checks if –

- They are a member of a group, and whether responsibility for the payment lies with another
- The bill payer's account is overdue.

On the arrival **pop up** and **Arrivals home screen** it will show an overdue icon saying "**At least one other Member Account is Overdue**" if the billing members account is overdue.

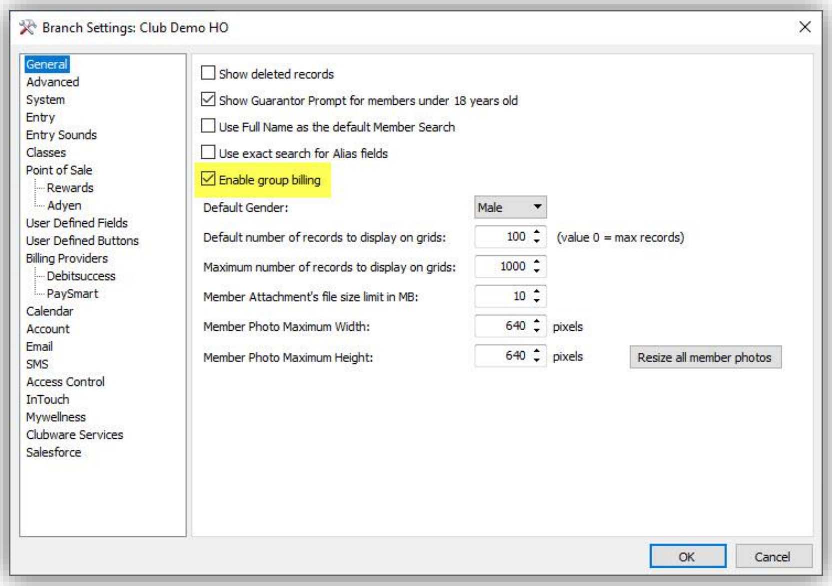
You need to manually go into the "Groups" tab on the member record to find the name of the group they are part of and who the billing member is.

Then open the billing member's record and check the financial details on the account.

Procedure

To utilize this functionality, you need to check the "**Enable group billing**" option from the **Options** screen.

Select **Administration | Branches | Select Current Branch | Settings | General**



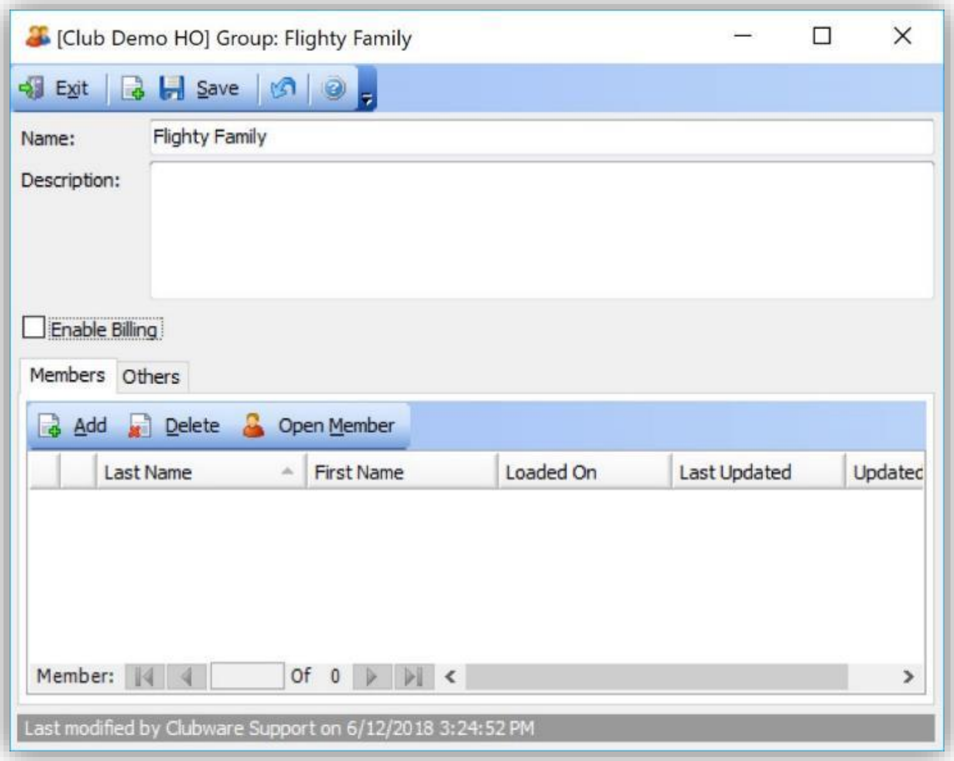
Check the "**Enable group billing".**

Click "**OK**" and restart Clubware.

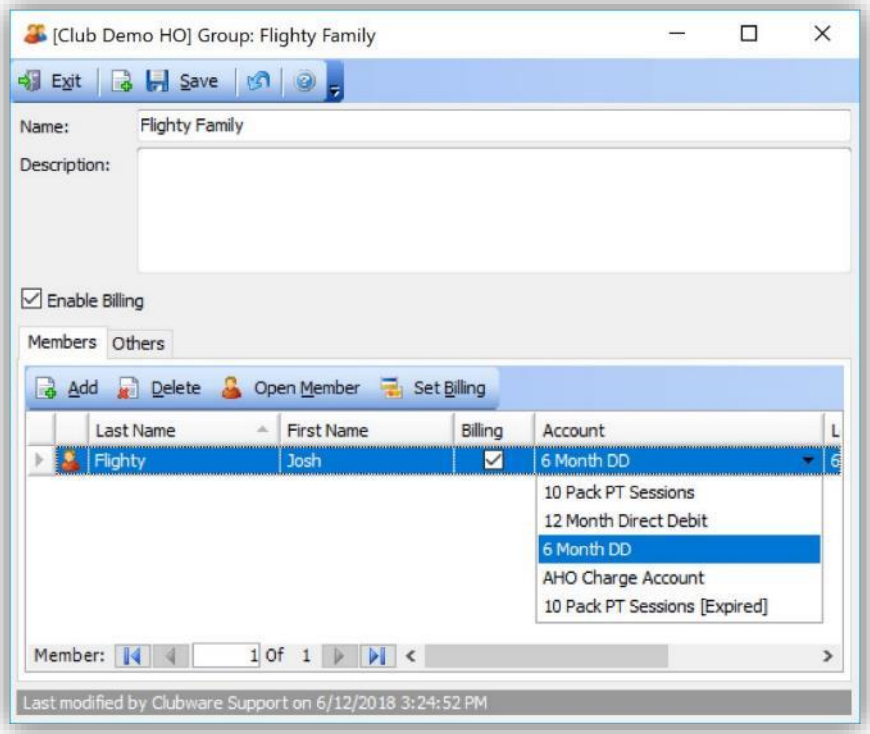
Step 1. Create a member and load the "Billing member" account against the billing member. (We assume each member is to have their own account and their own membership card to swipe in. If this is the case then you will need to add each other member and load an account against them also).

It is recommended creating another new account template for the additional members that is not linked to a billing company (billing box unchecked) and does not have any invoices loaded against it.

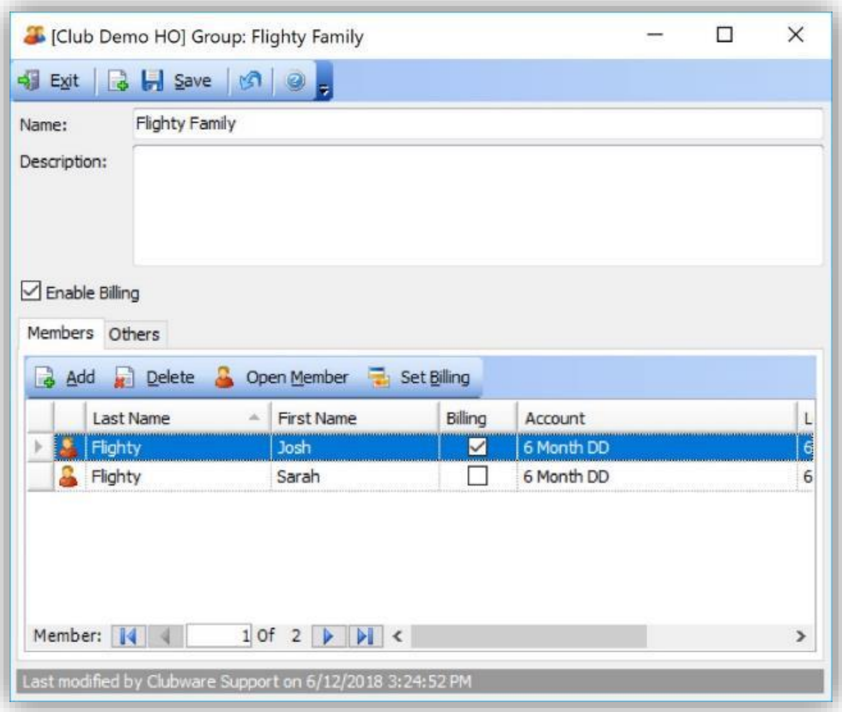
Step 2. Create a New Group. Click **Save**.
The screen below displays.



Step 3. Tick the **Enable Billing** box and add the billing member to the group. Select ‘**Set Billing’** and select the account f there are multiple options.



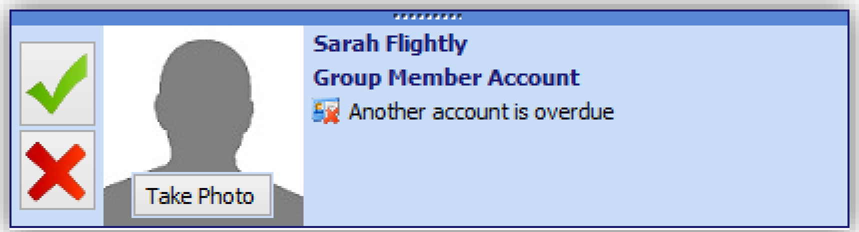
Then add the other members of the family and select their accounts.



Note: You can reassign the billing member function as required.
Highlight the member and tick '**Set Billing'**. The Billing member changes automatically.

Note: The Billing Member must be the member who is the nominated Bill payer.

If a member of the group scans in and the billing member's account is overdue, an arrival pops up similar to the one below will appear.



Note: When the billing member closes the account, the end date will sync to his account and close it down, but it will not automatically close the other group members' accounts, and the same in respect to holds, so these accounts must be adjusted manually.

Run a **Member listing - All accounts** report periodically and check if there are any inactive Billing member accounts.

If there are, check the members in the group and close down their accounts to ensure they don't remain active.

You have completed the steps required to enable group billing in Clubware.

Unmatched Records

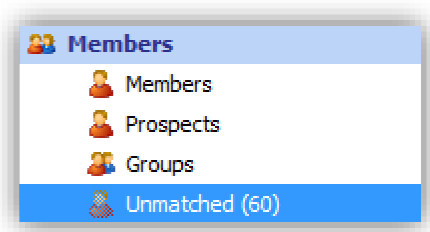
Processing Unmatched Records

This tutorial describes the steps required to process unmatched records within Clubware.

Note: When a sync is performed, the Billing Provider, Billing Reference and account are checked to see whether a match can be made to an existing member record. If there is no match, the information from the sync is placed into Unmatched Records. The Unmatched grid in Clubware is a list of records that are waiting to be matched or created.

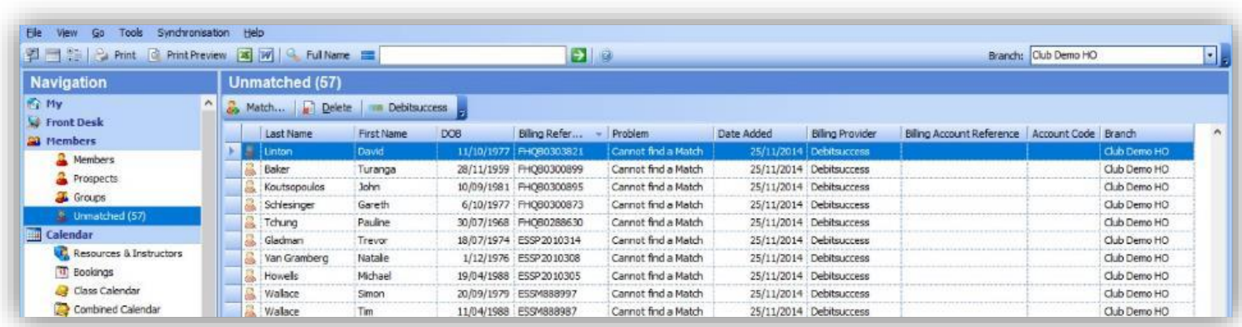
The User should review this screen regularly and take note of the problem when resolving the Unmatched Record.

Step 1. Select Members | Unmatched from the Members menu.



The **Unmatched Records** screen displays as shown below.

Note: You can access the Member's billing provider details from this screen by highlighting the member and selecting the billing provider icon as indicated below.



Step 2. Select the first member from the screen.

The **Problem** column displays the reason the member is in the unmatched records file. This is usually one of three reasons, as follows:

Cannot Find a Match: A member with the same name, date of birth, billing reference and account code doesn't exist within Clubware. This is due to Clubware and the billing provider not having all the exact matching details to link or create a new member. See Tutorial Adding an Account Template for more information on account codes.

Matches more than one billing ref: This indicates that the same billing reference is against two different accounts.

It is recommended you show your deleted records (**Administration | Branches | Select Current Branch | Settings | General**) and then search by **Billing Ref** – this should locate the duplicate entries.

You will need to remove the billing reference from the incorrect account.

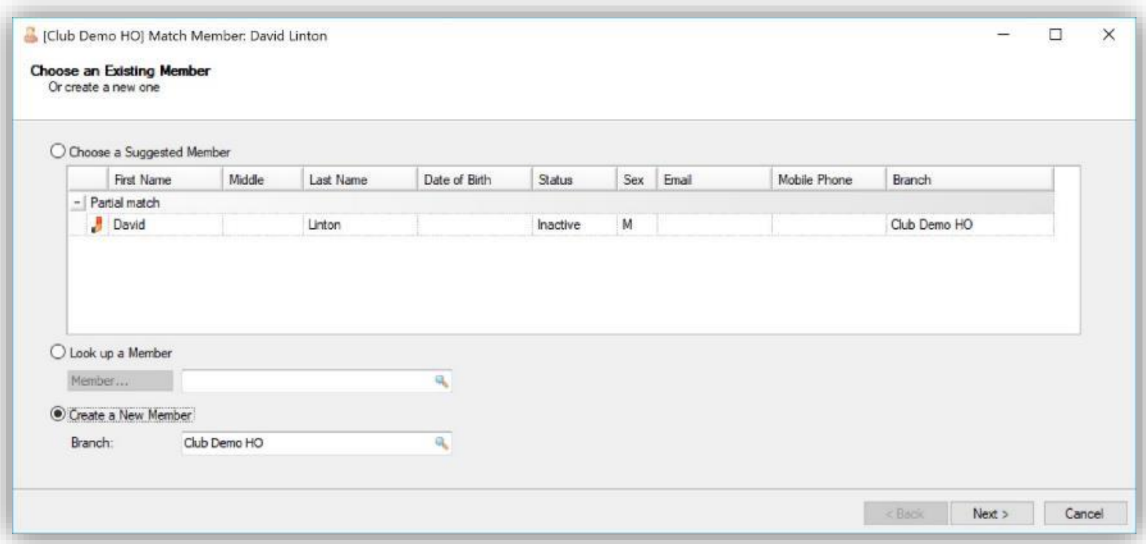
Once completed, click the **Match** button to match the record.

Matches Member with Multiple Accounts: This indicates that a member has multiple active accounts, and none of them have a billing reference.

Step 3. Matching a Record.

Select the member and click the **Match** button.

The **Match Member** wizard displays.

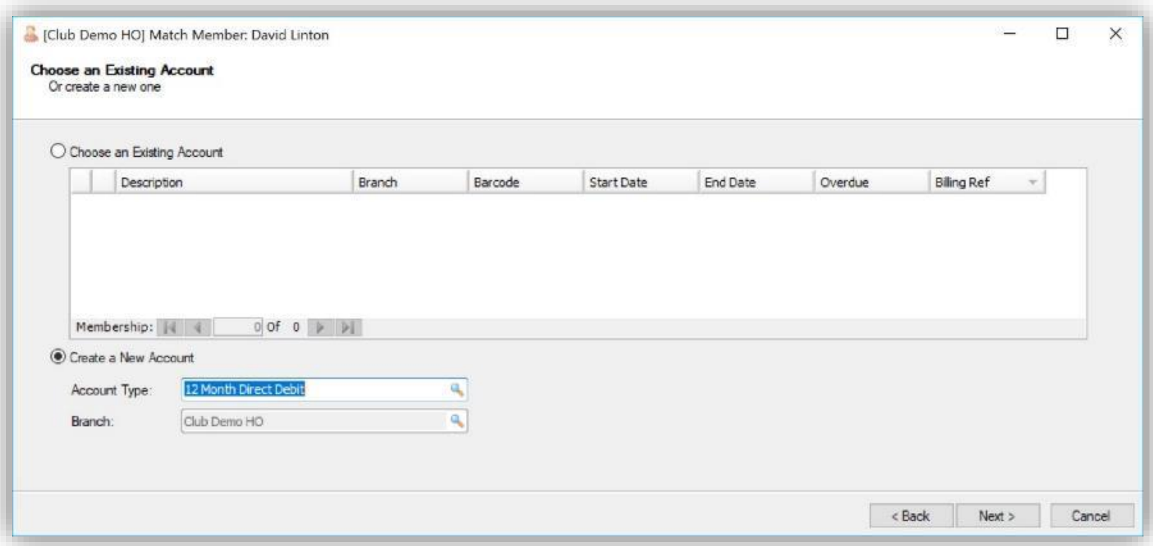


You have 3 options:

- Select from a suggested member
- Look up an existing member
- Create a new member

Choose your option, then select **Next**.

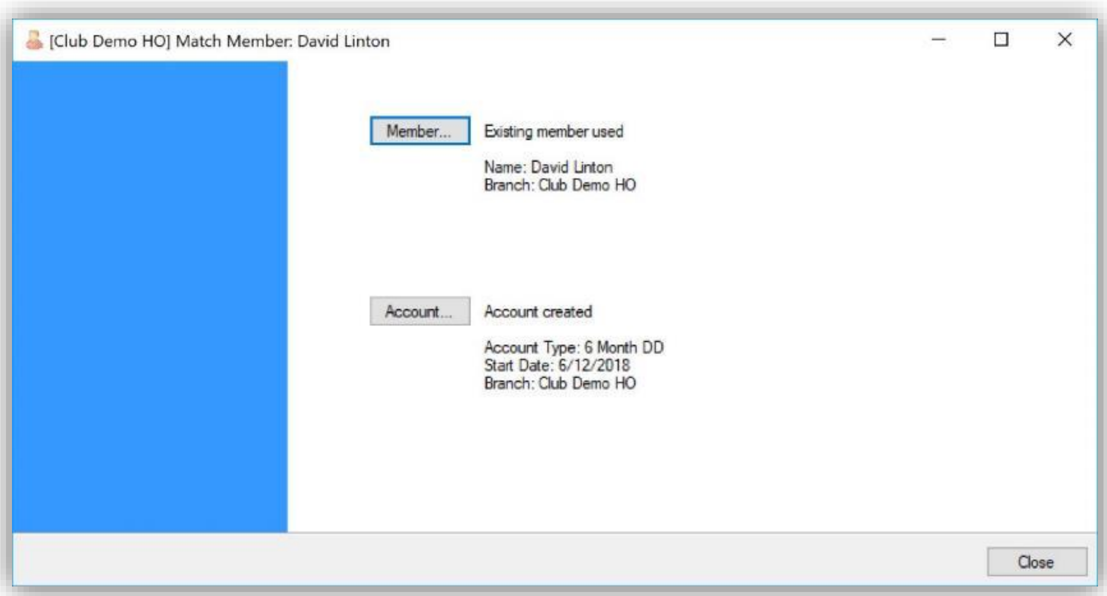
The next step will ask about the account the member has signed up for.



You have 2 options

- Chose an existing account
- Create a new account

Choose your option then select **Next**.



The confirmation displays, as shown below.

Click **Next Member** to move onto the next member in Unmatched.
The processed member will be removed from the unmatched screen and added to Clubware.

Step 4. Repeat the process for all members in the unmatched records screen. Select **Close** to close the wizard

Note: At any stage you can enter a member or an account from the Unmatched screen by double clicking the member or account option.

You have completed the steps required to process unmatched records in Clubware.

Calendar

Overview

The Calendar allows you to view bookings, classes, resources and instructors from one central area within Clubware.

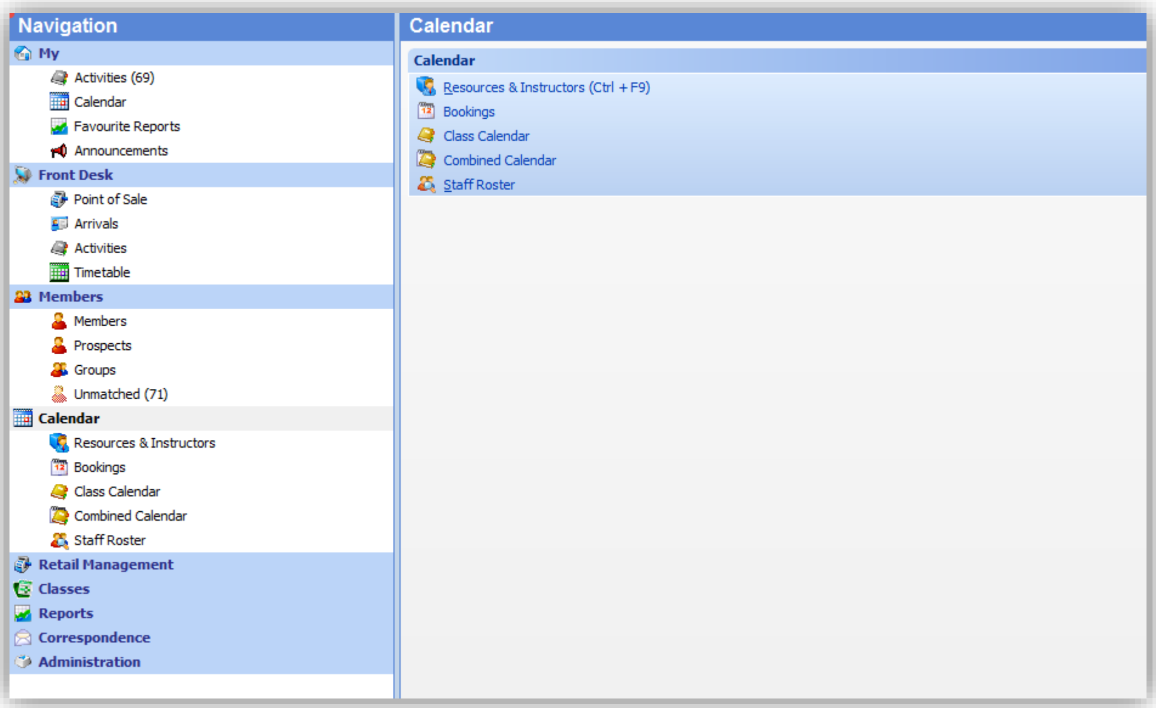
Information can be configured into different perspectives, depending on your requirements. A summary of the selected item can be viewed on the bottom right of the Calendar, or you can double click to open and view the item.

The Calendar displays a detailed view of a single day based on the day selected on the top right mini calendar.

You can select multiple days to change the calendar view.

You can also select different views by using the day **|** week **|** month icons on the main toolbar.

Views can be printed to help staff who work away from Clubware or don't have access to a PC.



Resources & Instructors

This view allows you to view any bookings and classes associated with a specific instructor and resource. Resources can be a physical piece of equipment or a location. You can select which Resources and Instructors bookings you wish to view based on each Clubware user who logs in.

Bookings

This view allows you to view all bookings within Clubware. You can also add and edit bookings from this calendar. You do not need a resource or instructor attached to the booking if it is added under Clubware Bookings section. A charge per person or per session can be added to any booking.

Class Calendar

This view shows individual sessions created in the Term Classes and Classes section of Clubware.

Combined Calendar

The combined view displays all of the above views in a single location.

Staff Roster

This view enables to view the roster for any of the staff for any given date and time. You need to set the available and unavailable times for each instructor if you enable the **Staff Roster**.

Note This feature must be enabled from the **Administration | Branches | Select Current Branch | Settings | Calendar** screen before the **Staff Roster** is visible from the calendar screen.

Charging via Bookings

You can charge for:

- a location,
- a resource,
- an instructor, or
- Manually set per session or per person rates.

With a per session charge, you can charge one attendee the whole amount, split the charge between all attendees, or manually set the amount for each person.

If you add a charge to an attendee via bookings, the payment must be taken via the booking.

A charge account is added to the member's record and keeps track of any charges attached to the attendee by creating an invoice with the due amount for the date of the booking.

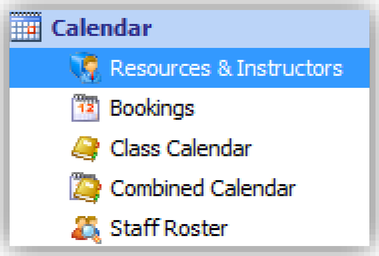
How To

Clubware Bookings

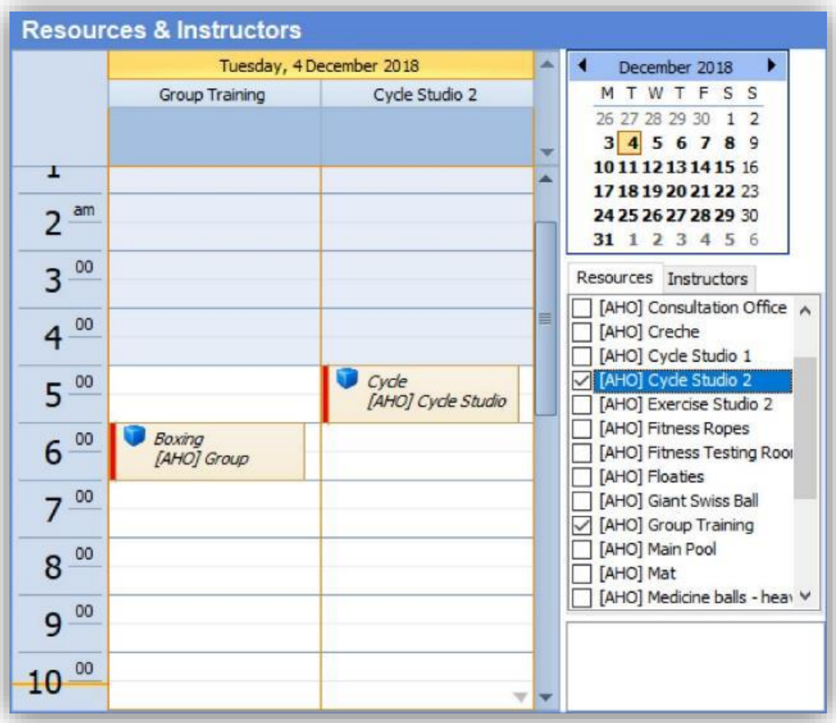
Adding a Booking

This tutorial describes the steps required to add a booking within Clubware.

Step 1. Select **Calendar | Resources and Instructors** in the navigation panel, as shown below.



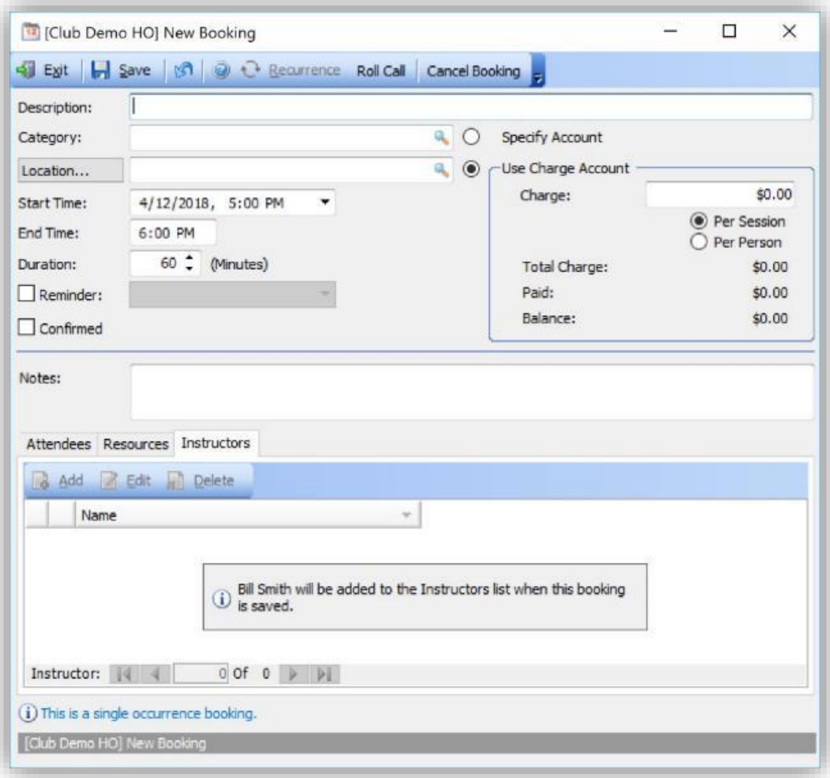
Step 2. The **Calendar** displays on the right in the main panel.
Click the **date** you require on the mini calendar on the top right of the main panel, as shown below.



Step 3. Click the **Resources** Tab and then the **Instructors** tabs and tick your selections.

Step 4. Double click on the required time slot in the calendar for the booking.
A blank **Booking** screen displays.

Complete the details as shown below.



Main Points:

Description: The description that appears on the Booking and Calendar.

Category: Select a category for the booked event (This field is optional).

Location: Select the location for the booked event. (This field is optional).

Start Time: Enter the date and time the event will start.

End Time: Enter the time the event will end.

Duration: Check the length of the booking.

Reminder: Check this box and select a time to display a reminder pop-up. This option is enabled in the Options screen.
Select **Branches | Edit Current Branch | Settings | Entry**. From here you can change the default time range.

Specify Account/Use Charge Account: You can select the method by which members pay their bookings.

By specifying the account used you can attach an account to the booking, which can be useful for items like PT sessions. If you link a concession account to the booking, each time the member attends the booking their concession card will be debited one concession.

You have the option to charge for bookings if you use the '**Use Charge Account**' option.

Charge: Enter the charge for the booking (if any). If a yellow warning symbol appears after you have entered the charge, use the Charge buttons under the Attendees tab to ensure the amounts charged to attendees equal the total charge for the booking.

Attendees: (This field is optional).
This tab shows a list of attendees for the booking.
To view or edit this list, you need to save the booking.
Click **Save** at the top of the Booking screen.

A booking can have multiple attendees. For more information on adding attendees, see the Adding a Booking tutorial in the Calendar – How to section.

Within this tab, charges can be split between attendees using the **Split Charge** button, charged to one attendee using the **Charge Selected** button, or set individually for each attendee by double-clicking the member's name.

How to take Payments

- Highlighting the member
- Click '**Payment'**
- Enter details of the payment.

How to make a Refund

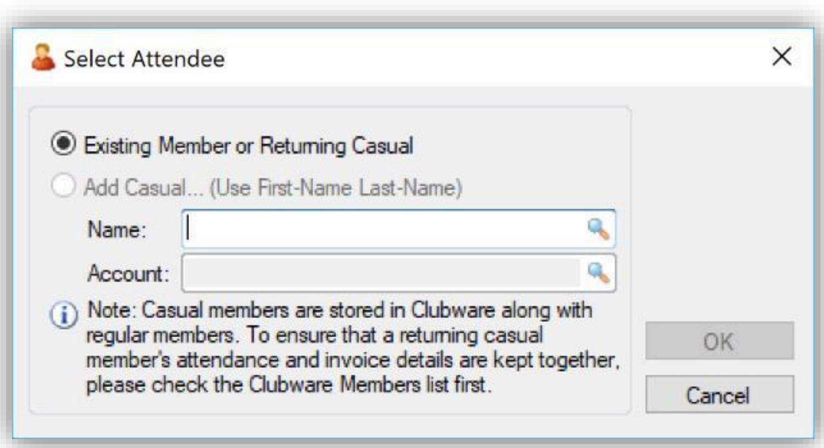
- Highlight the member
- Click 'Refund"
- Enter details of the refund.

Resources: (This field is optional). This tab shows a list of resources for the booking.
A booking can have multiple resources.
To view or edit this list, first save the booking as described in the Attendees paragraph above.

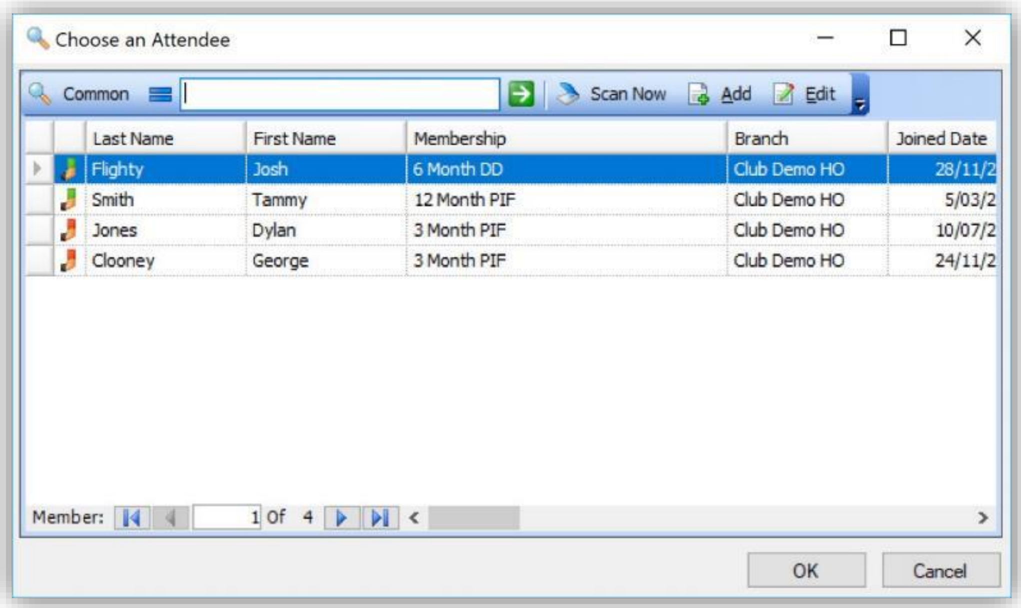
Instructors: (This field is optional).
This tab shows a list of instructors for the booking.
A booking can have multiple instructors.
To view or edit this list, first save the booking as described in the Attendees paragraph above.

Recurrence: A booking can be set up to recur at pre-determined intervals. See the tutorial Adding a Recurrence to a booking for more information.

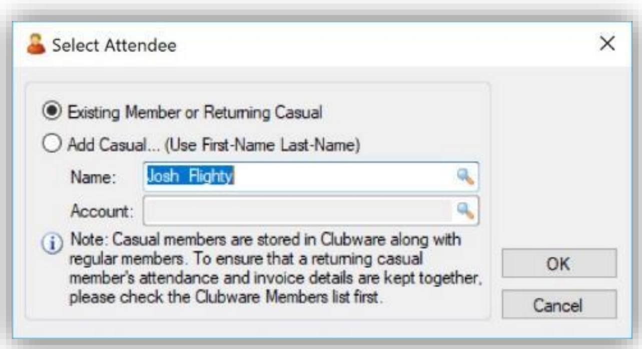
Step 5. Save the booking. The Attendee toolbar becomes enabled.
To add an Attendee, click **Add** on the Attendees tab.
The screen below displays.



Step 6. Select **Existing Member or Returning Casual.**
Click the magnifying glass to the right of the **Name** field.
The **Choose an Attendee** dialog box will display.
Select a member and click **OK**, as shown below.

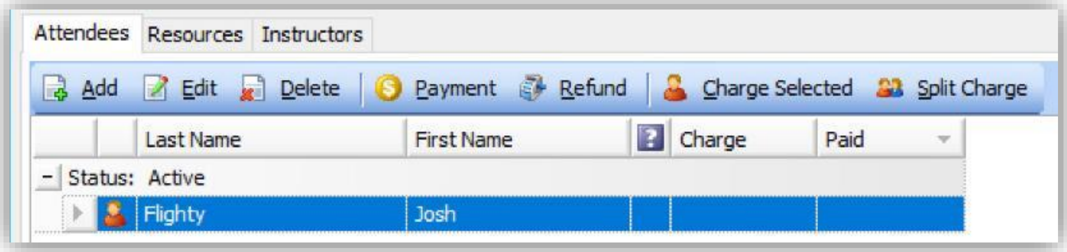


The screen below displays.



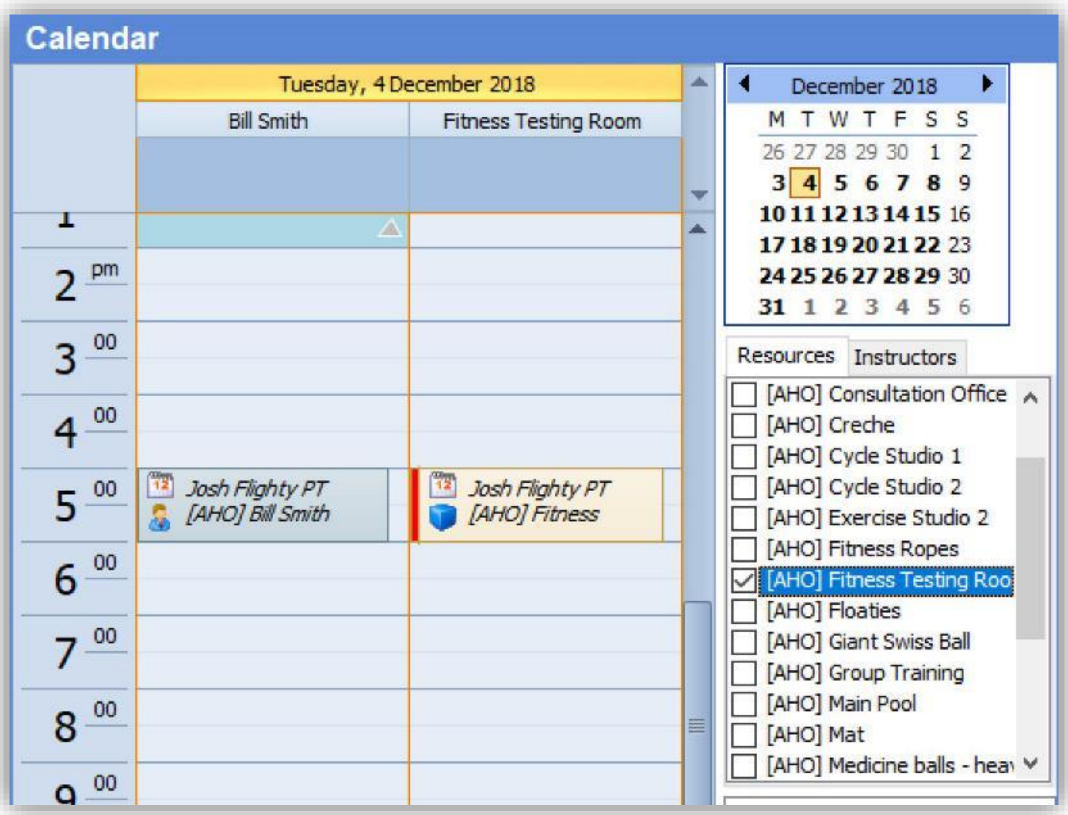
Step 7. Click **OK.**
If you want to add a Casual Member to a booking, click on **Add Casual** and type the person's name in manually. This will also add a new member record to Clubware so they can be contacted as a prospect and they will be available under the '**Existing Member or Returning Casual'** option next time.

The booking screen redisplays, and the member selected displays as shown below.



You can assign a resource or instructor to the booking.
Click the **Resources** or **Instructors** tab, then click **Add**.
(As with Attendees, you need to save the booking first).
A list will appear with appropriate choices. Add as required.

Step 8. Save and exit the form when entries are complete.
The booking will display in the Calendar, as shown below.



You have completed the steps required to add a booking to the calendar in Clubware.

Charging for a Resource or Instructor

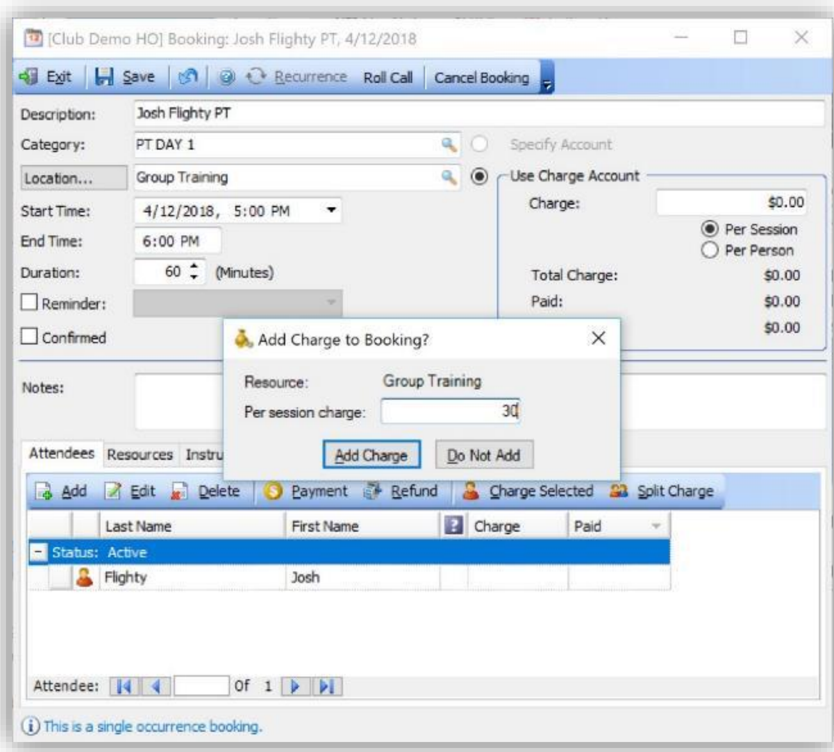
This tutorial describes the steps required to charge for a Resource or Instructor within Clubware.

Step 1. Select Calendar | Resources & Instructors from the Navigational Panel.

The Clubware Bookings screen displays.

Step 2. Double click on the required time slot in the calendar.

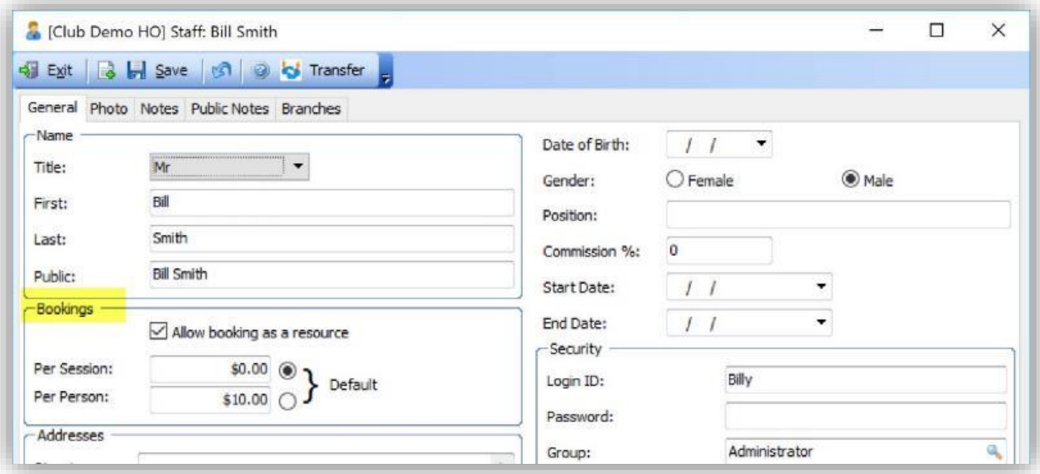
The New Booking screen displays as shown below.



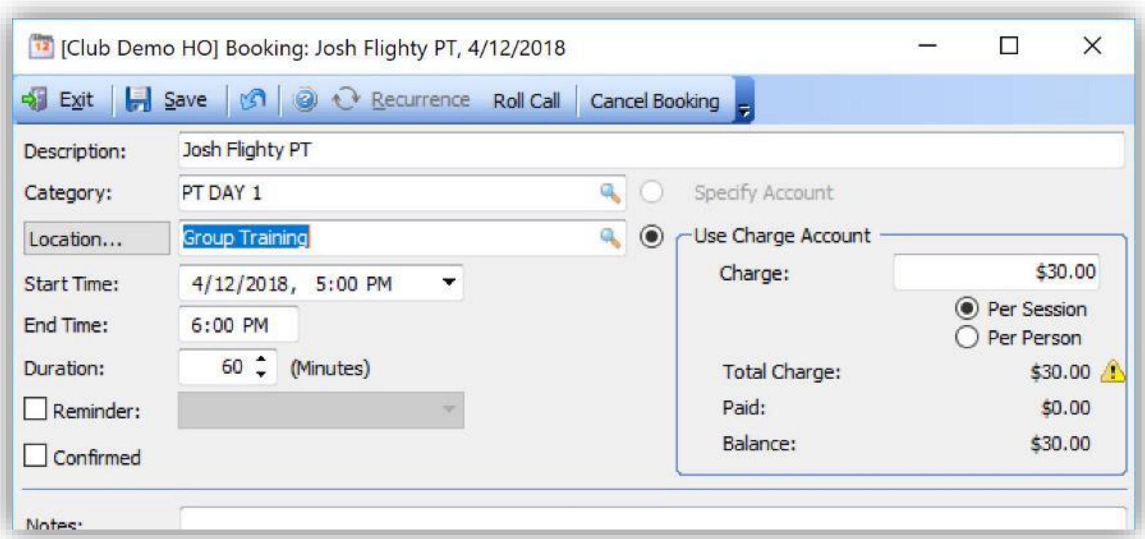
- Use the magnifying glass to display the **Choose a Location** screen.
- Highlight your choice and click **OK**.
- You will be prompted to add a charge for that resource.
- Type an amount and click **Add Charge** if you wish to add a charge

Note: You will receive the same prompt if you add a resource from the **Resources** tab or an Instructor from the **Instructor** tab.

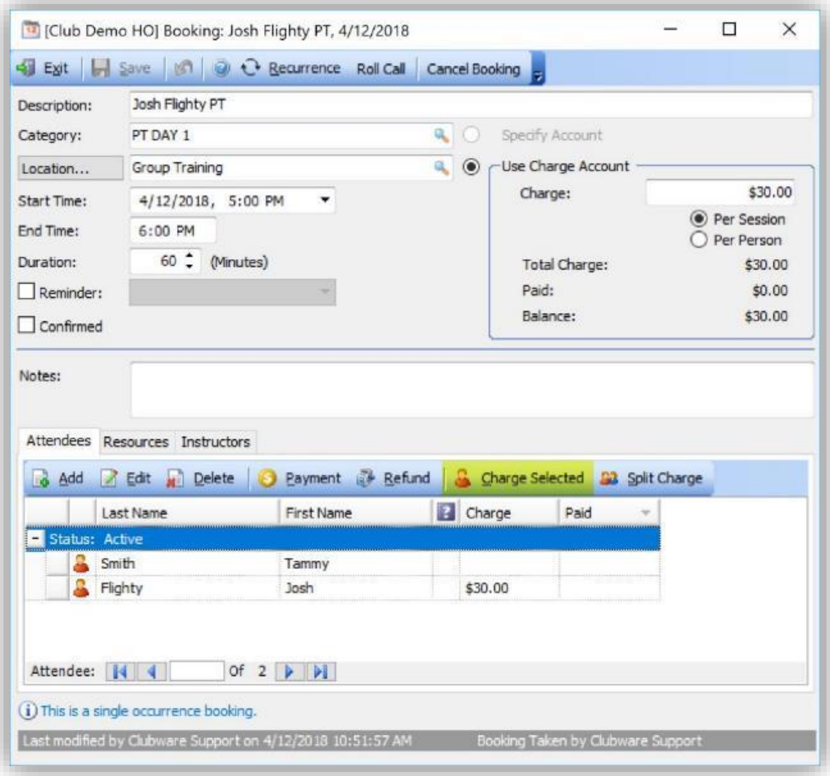
You can automatically add a charge based on an instructor, at a **per session** or **per person** rate from the staff member record (**Administration | Staff Members**).



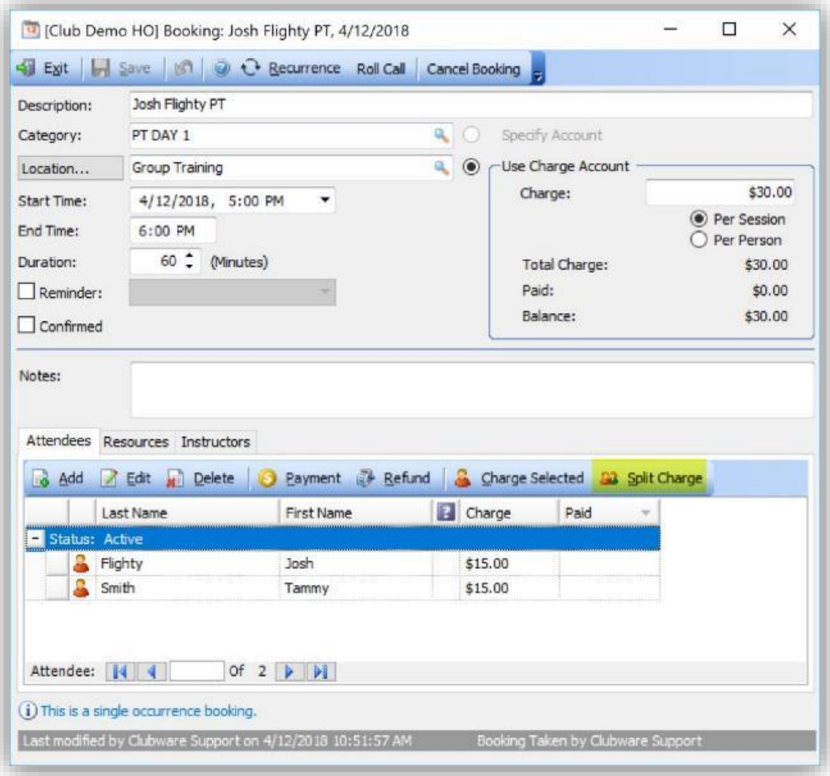
If you do not have the full amount allocated to attendees, a yellow triangle with an exclamation mark in it displays, as shown below.



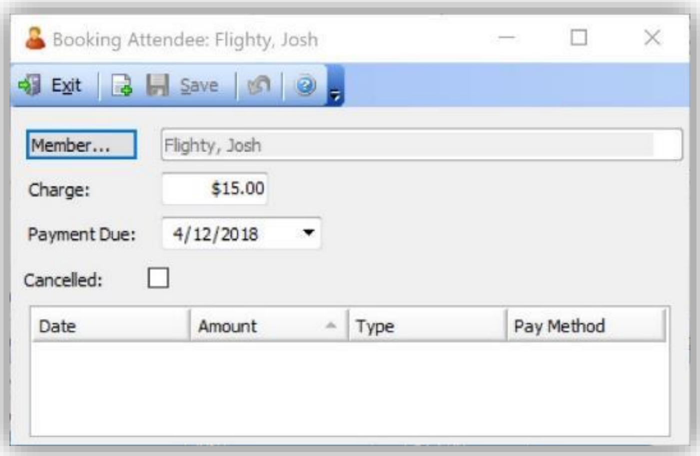
Step 3. Add your attendees and allocate the charge as required. The full session charge will automatically be assigned to the first attendee added to the booking. One person paying for the class:



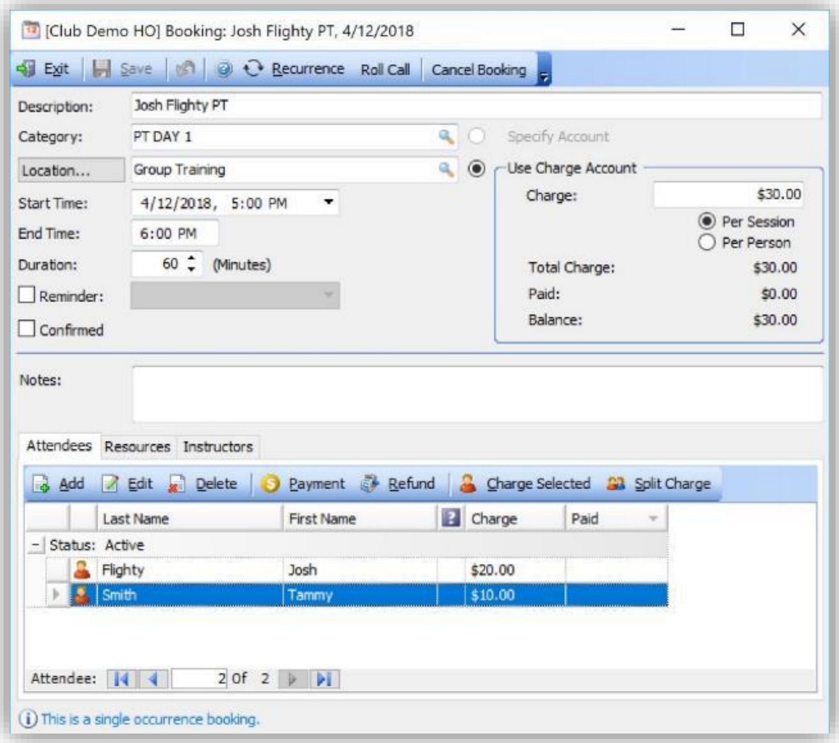
Click '**Split Charge**' to divide the cost amongst all attendees.



Step 4. Double click on an attendee to manually enter the amount they are paying.



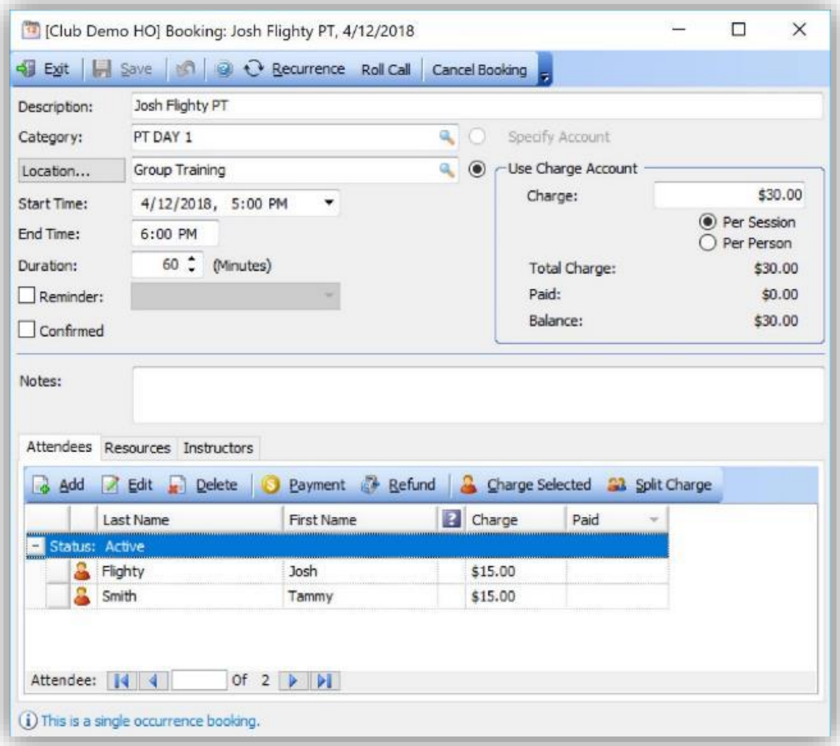
The allocated charges should total the charged amount.



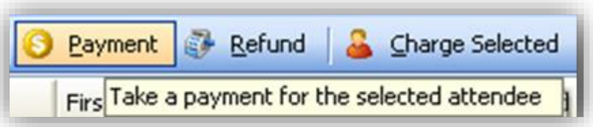
You have completed the steps required to charge for a Resource or Instructor in Clubware.

Taking a Payment for a Booking

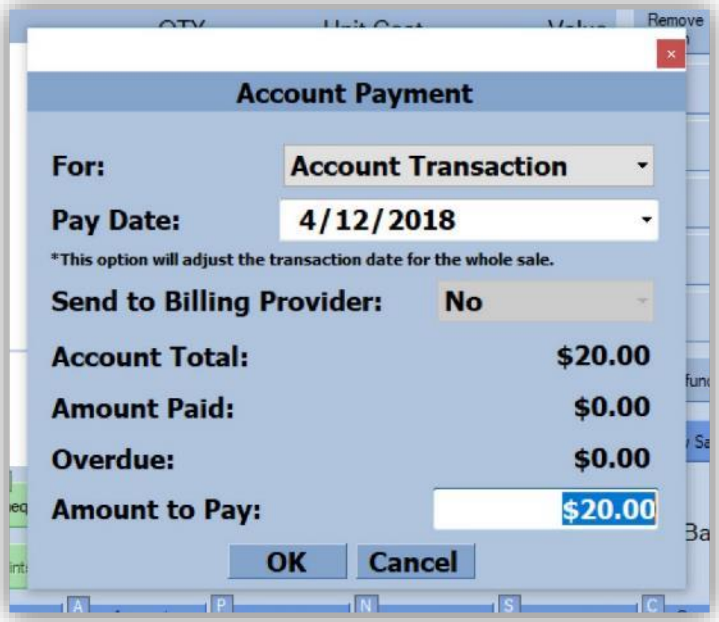
This tutorial describes the steps required to take a payment for a booking.



Step 1. Highlight the **Attendee** and click the **Payment** button.

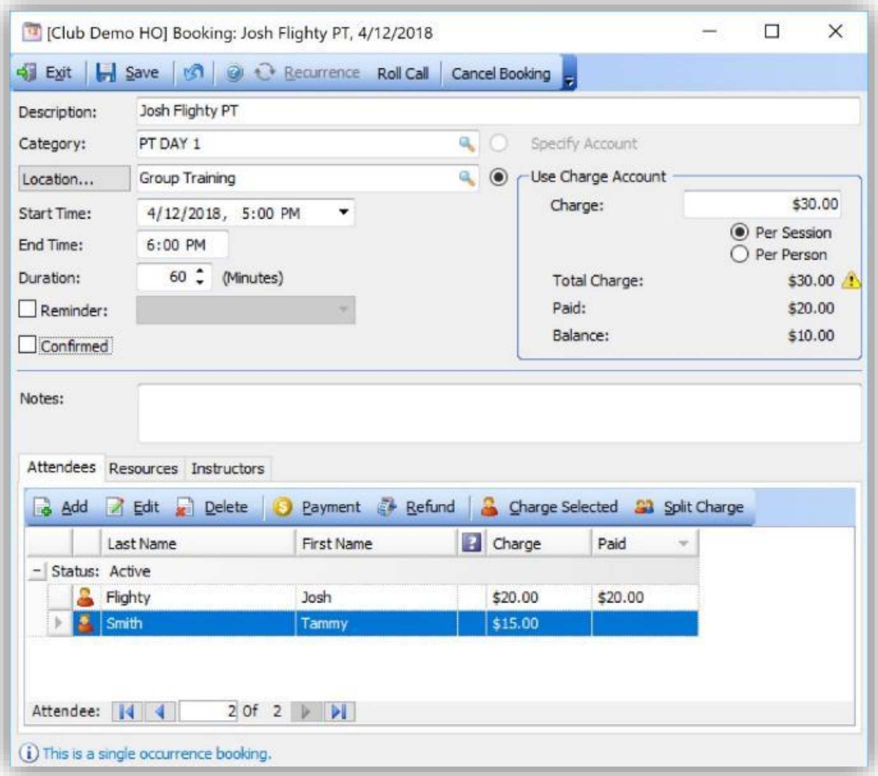


The **New Payment** screen displays.



Step 2. Enter the Amount to Pay and press **ok**. Process the payment through point of sale.

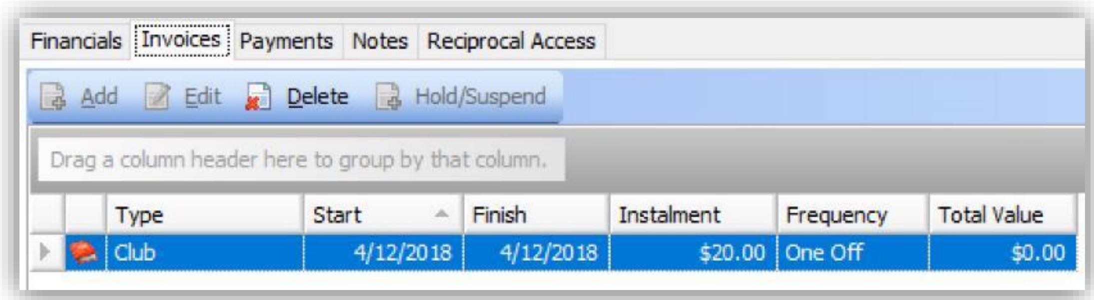
The payment will show in the **Paid** column next to the Attendee and in the **Paid** field in the top right corner. The remaining balance will be updated accordingly.



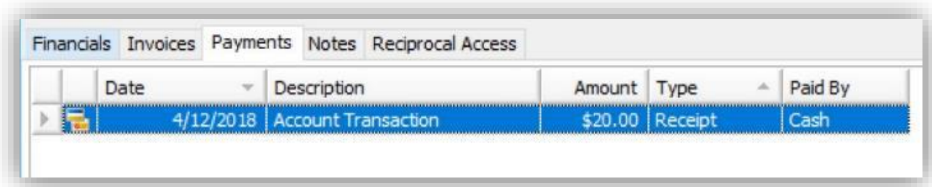
You can view the invoices and payments associated with bookings for members by accessing the member record and opening the member's charge account.

Below is a screenshot of the charge account for Josh Flightly and shows the $30 invoice.

The attendee should make the payment before attending the class, but this account will keep track of any amounts outstanding.



Below is a screenshot of the payment Josh made for the booking.

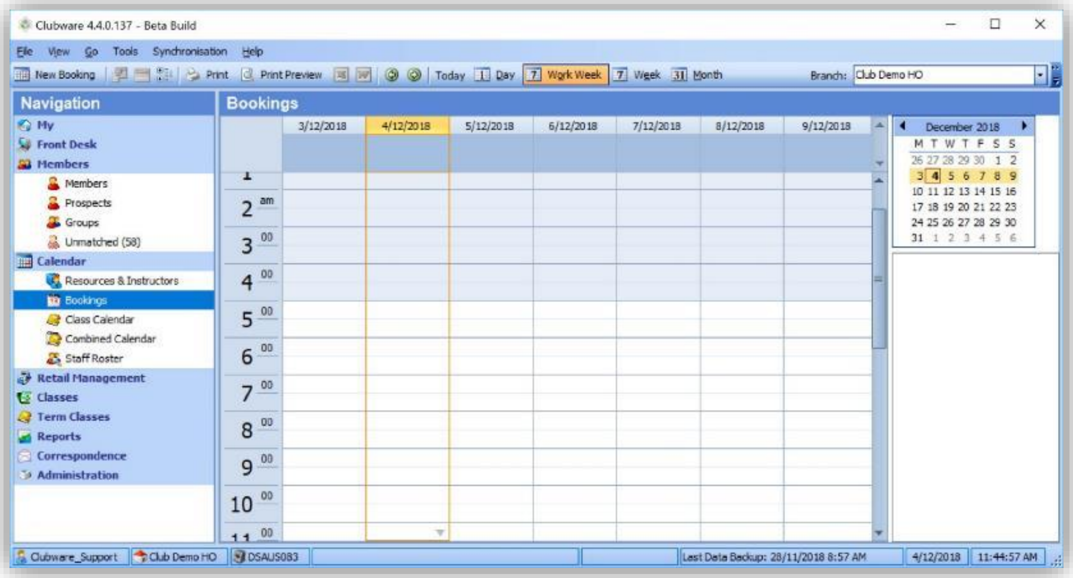


You have completed the steps required to take a Payment for a Booking in Clubware.

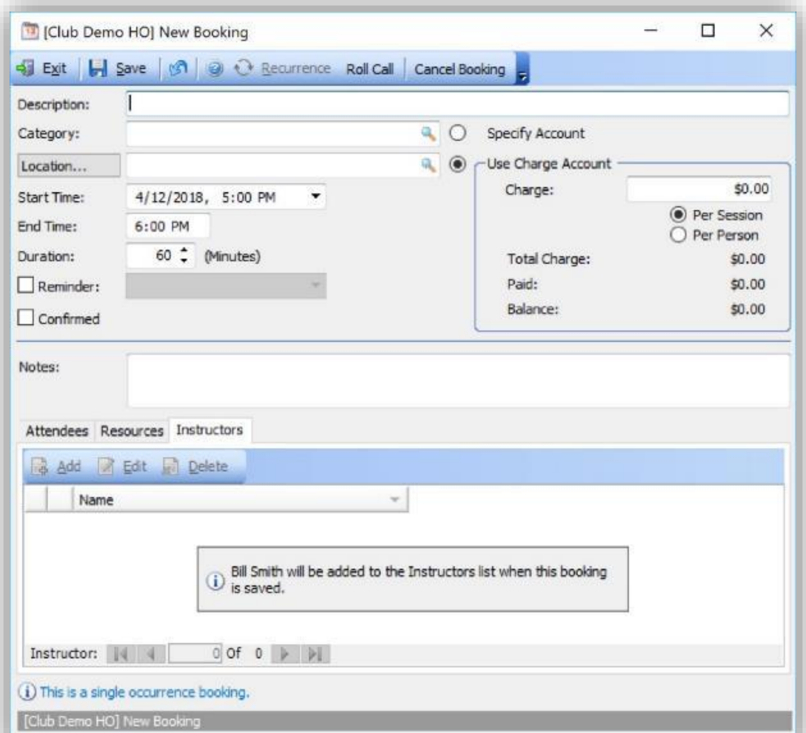
Adding a Specify Account Booking

This tutorial describes the steps required to add a **"Specify Account**" Booking.

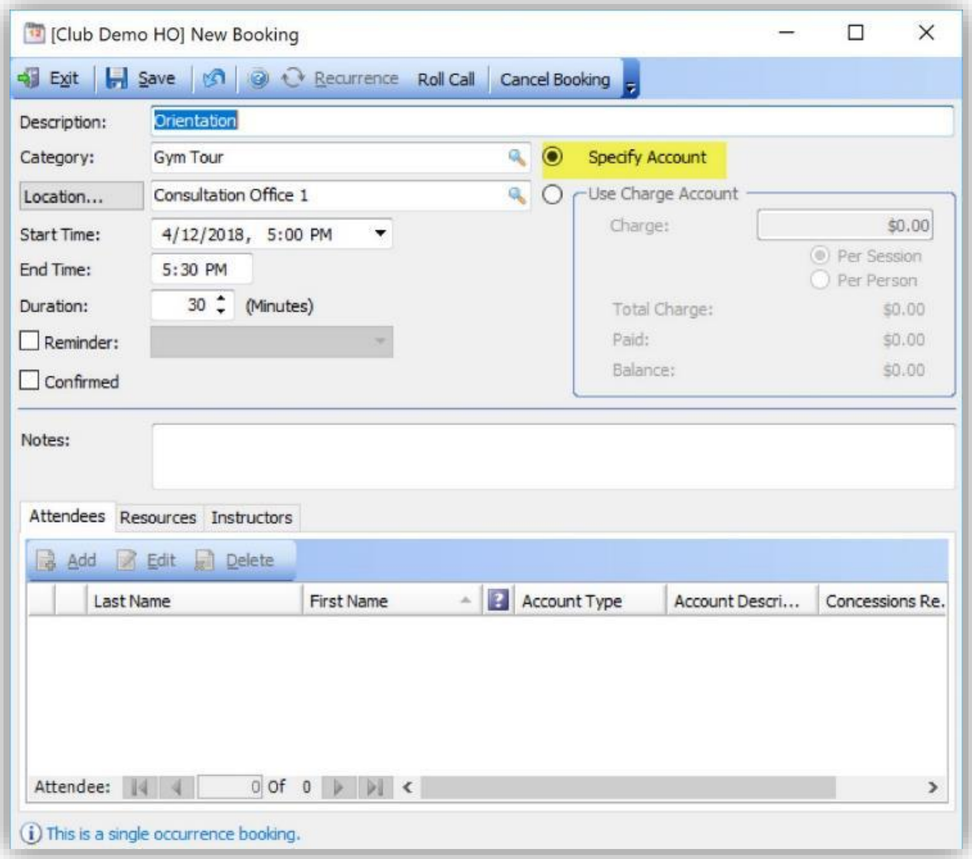
Step 1. Select Calendar | Bookings (or Calendar | Resources & Instructors) on the navigation panel as shown below.



Step 2. Double click at the time you would like the booking to be made. A **New Booking** screen displays.

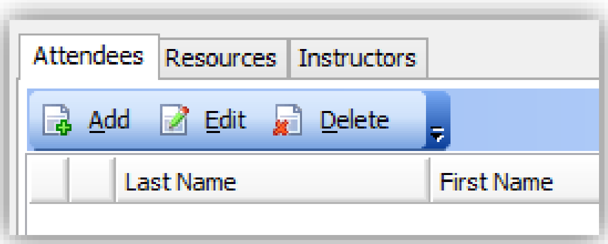


Step 3. Type a Description and select the '**Specify Account'** option.



Step 4. Click Save.

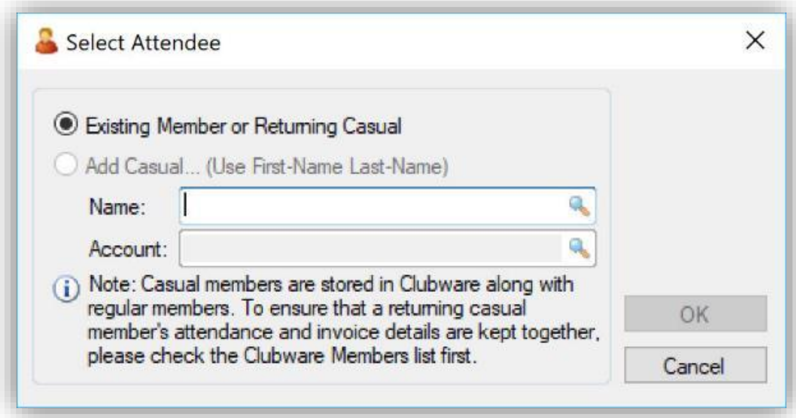
The Attendees | Resources | Instructors section is activated.



Adding Attendees to the booking

Step 5. Click the **Add** button under the **Attendees** tab.

The **Select Attendee** screen displays.

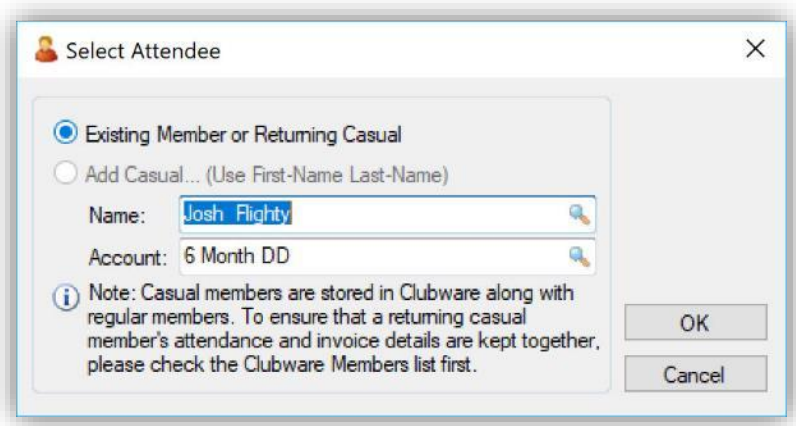


Step 6. Click the magnifying glass icon next to the 'Name' field and search for member and select (refer searching for member).

Note: with this type of booking casual attendees cannot be added.

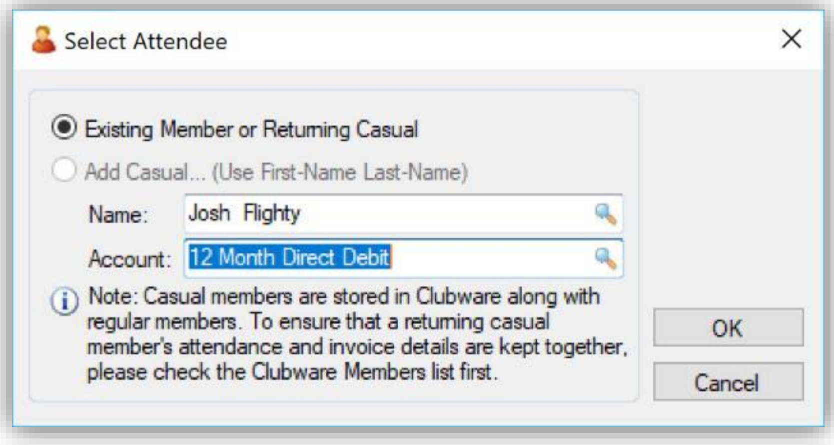
Step 7. When an Attendee is selected –

- **Click** the magnifying glass icon next to the 'Account' field.
- **Select** the account you wish to link to the booking.



Step 8. Click OK.

The **Select Attendee** screen now displays as shown below.



Step 9. Click OK.

Repeat the process for other attendees as required.

You can now add any resources, instructors, locations to the booking if required.

Note: When you have finished adding the booking you can set it as recurring if the same attendees plan to be attending the class in future bookings.

Alternatively you can set it as recurring prior to adding attendees and you can add attendees to individual occurrences of the recurring booking as you go.

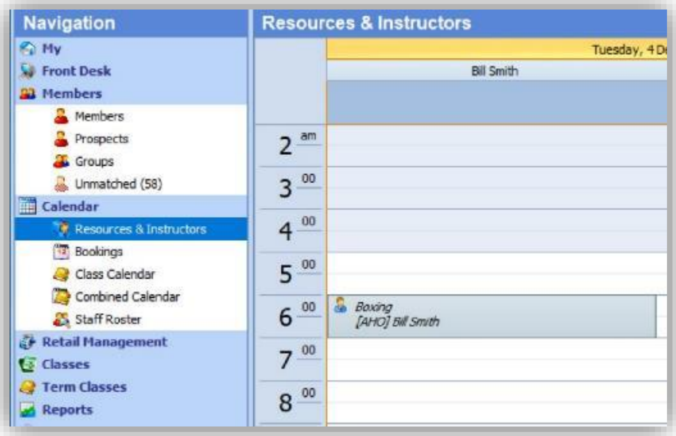
You have completed the steps required to add a specify account booking in Clubware.

Adding a Recurrence to a booking

This tutorial describes the steps required to add a recurrence to a booking.

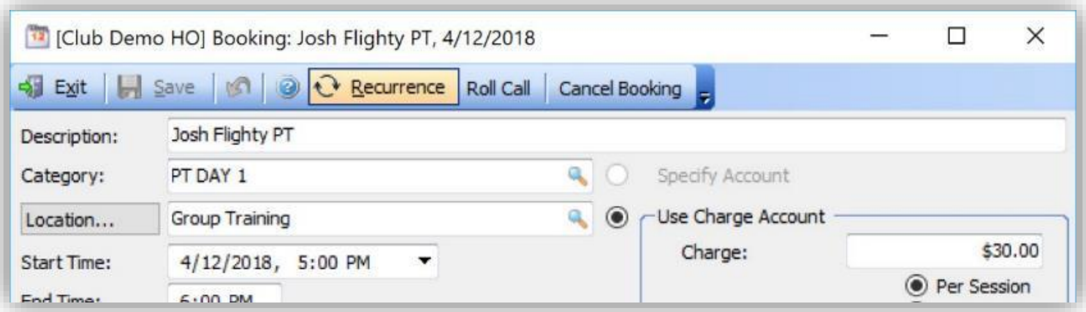
Step 1. Select **Calendar | Clubware Bookings** (or **Calendar | Resources & Instructors**).

Step 2. Double Click on an individual booking.

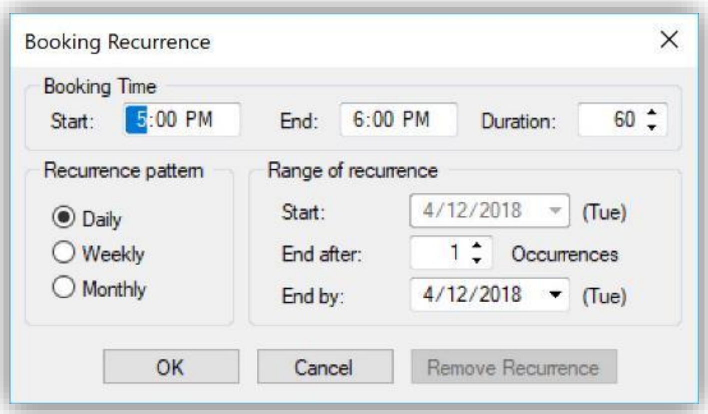


The selected booking screen will display .

Step 3. Click the Recurrence button.

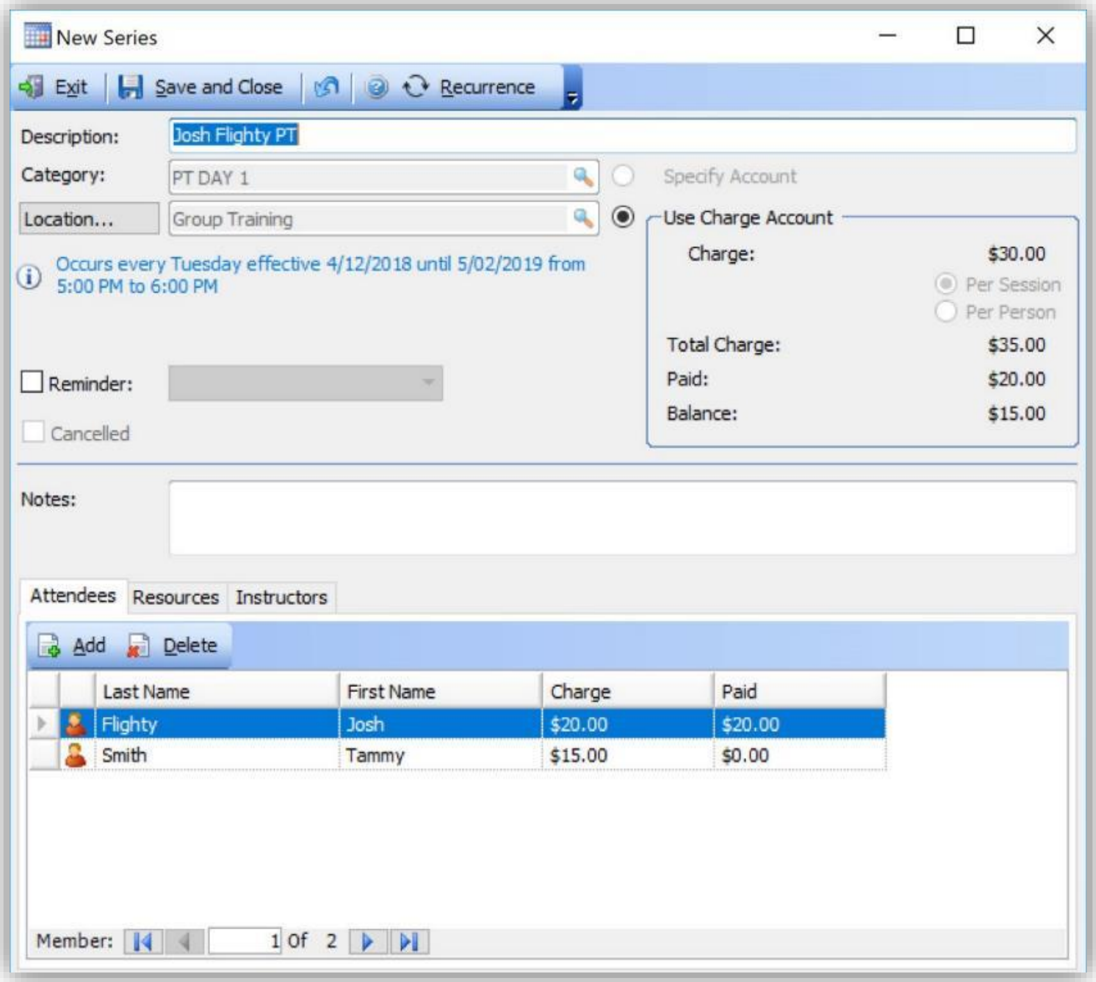


The **Booking recurrence** screen below will display.

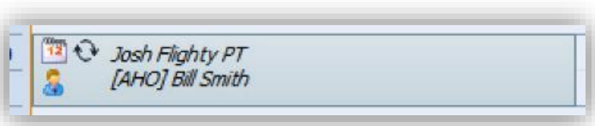


Change settings as required and click **OK.**

The **New Series** screen displays, with occurrence summary detailed.



Click Save and Close. The booking will now display as a Recurring Booking. Displaying the **Recurrence** icon 

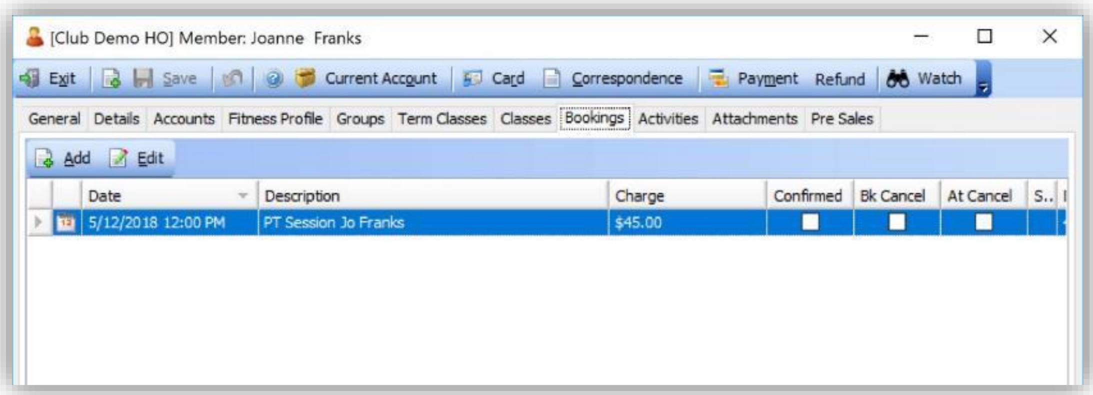


You have completed the steps required to add a recurrence to a booking in Clubware.

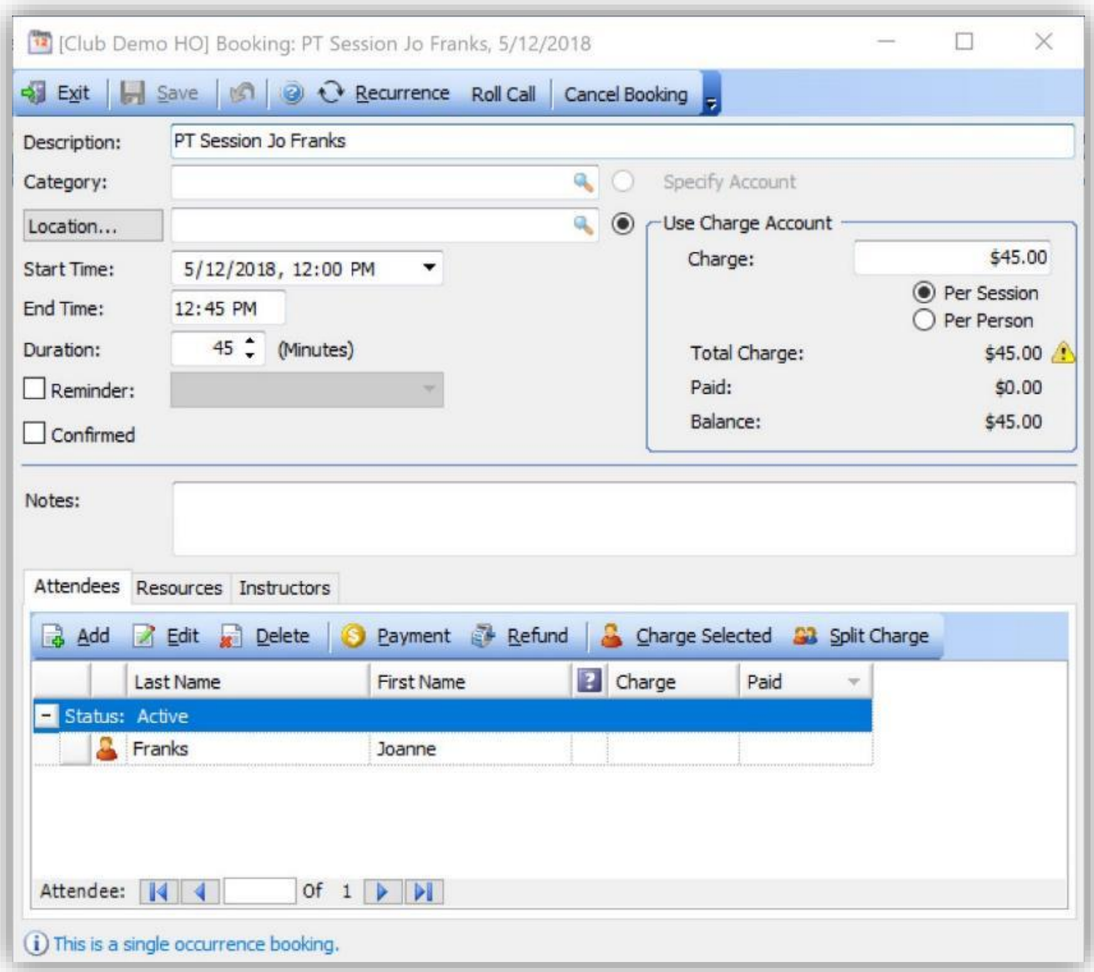
Adding a Recurrence to a booking for a member

This tutorial describes the steps required to add a recurrence for a booking within Clubware.

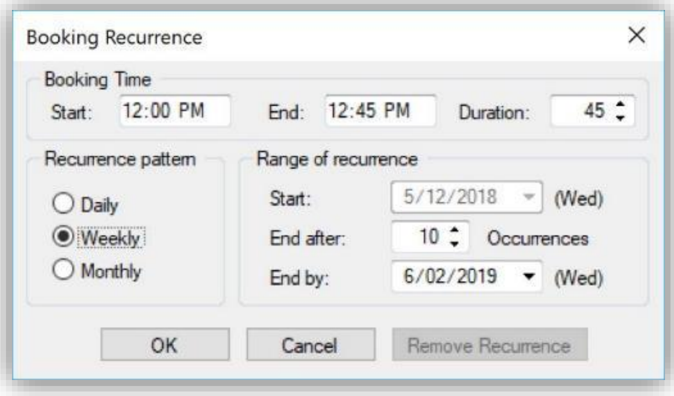
Step 1. Locate and open the required member's screen.
(See the tutorial Finding a Member).
Select the **Booking** tab, as shown below.



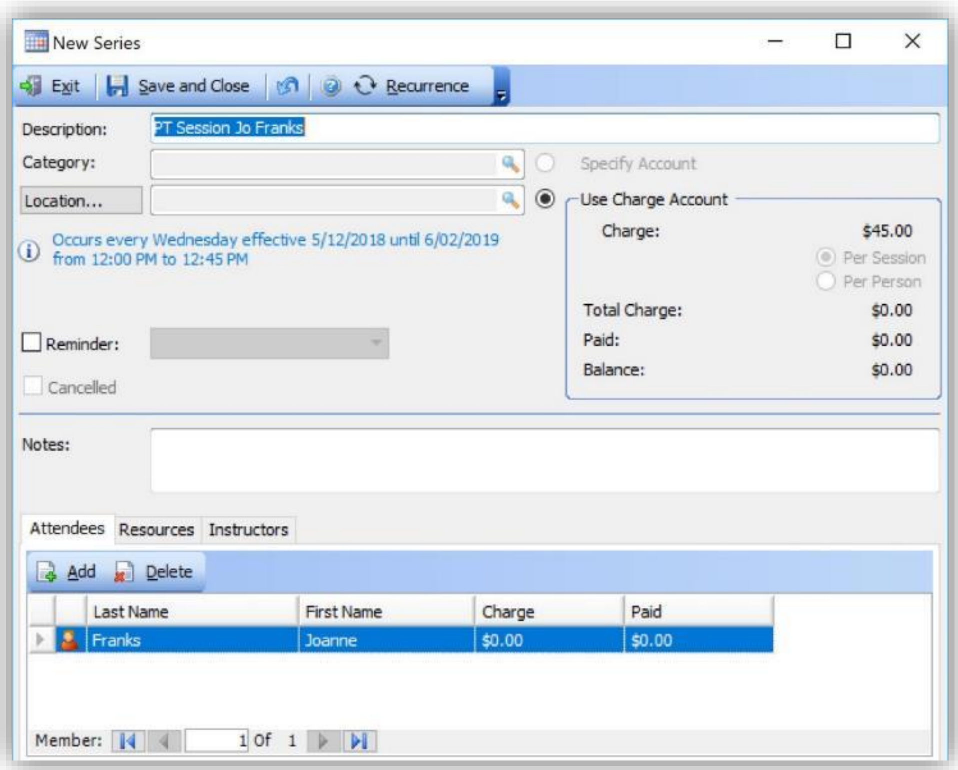
Step 2. Select the required booking from the list of bookings and click **Edit.**
The Booking screen will display as shown below.



Step 3. Click **Recurrence** on the Booking screen toolbar.
The Booking Recurrence screen displays.
Enter recurrence information as shown below.



Step 4. Click **OK.**
The Booking screen now displays the recurrence details, as shown below.



Step 5. Click **Save and Close** to close the form.

Note: You can **Add | Edit | Delete** attendees, resources and instructors from the whole series, or from this point forward.

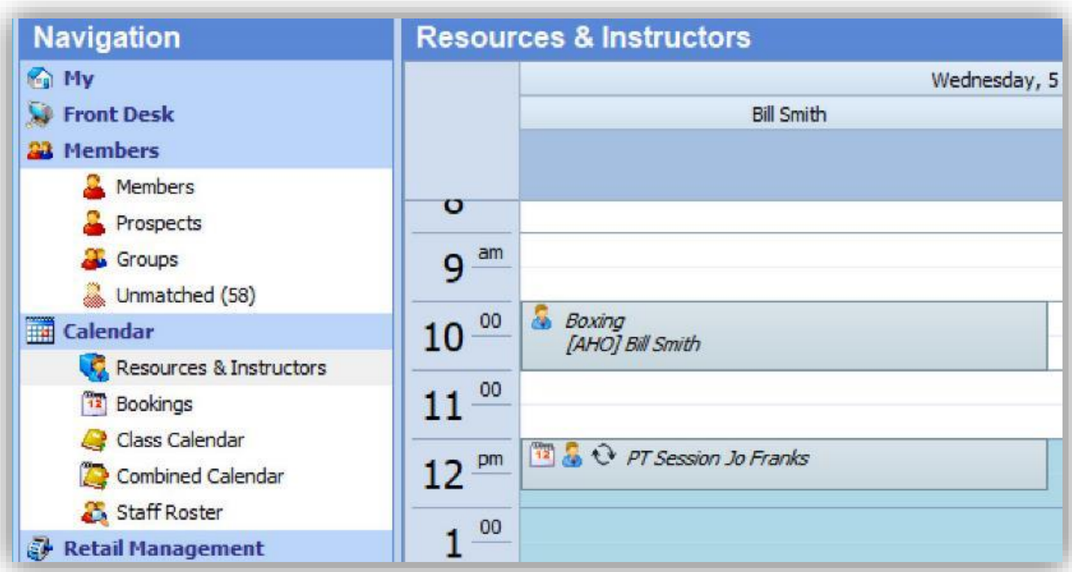
This is useful if you want to keep track of history or make changes to the instructor, or add an additional instructor part way through a series etc.

You have completed the steps required to add a recurrence to a booking for a member in Clubware.

Editing a Recurring Booking

This tutorial describes how to edit a Recurring Booking.

Step 1. Select Calendar | Bookings (or Calendar | Resources & Instructors) on the navigation panel as shown below.



Step 2. Double click on a recurring booking.

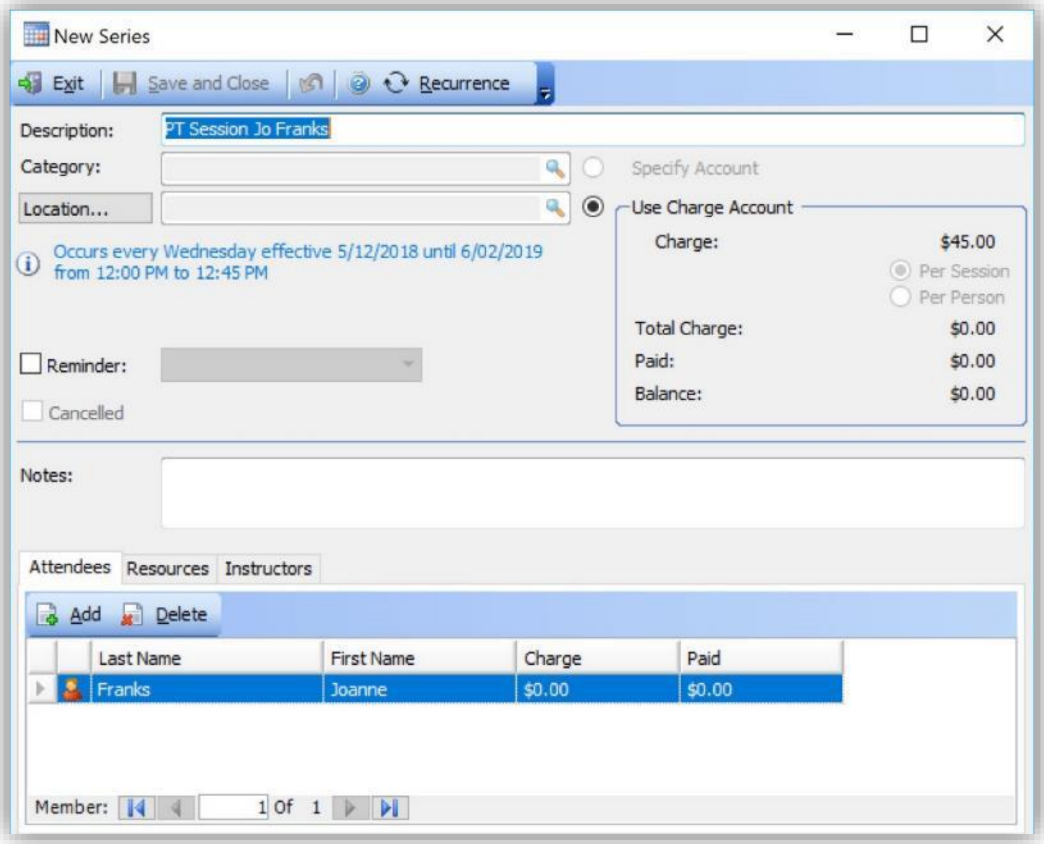
Note: If a booking is recurring it will have two arrows circling each other  on the calendar screen.

You will be prompted to either open the series or the occurrence.

Step 3. If you want to make changes to the booking for that day, select "**Open this occurrence**".

To make changes that will apply to the whole series select "**Open the series".**

Step 4. Click OK.
The screen below displays**.**



Step 5. To extend or reduce the number of occurrences, click Recurrence and extend or reduce the number of occurrences or end by date as required.

Step 6. To delete an attendee, highlight the attendee and click "**Delete**".

Note: The same options are available if you wish to add or delete resources or instructors. This option may be useful if you change the instructor taking the bookings part way through the series.

You have completed the steps required to edit a recurring booking in Clubware.

Using the "Automatically mark booking members as attended if within x hours" option.

You can automatically mark a member as having attended a booking when they scan in within a certain number of hours of attending the booking. This means that you do not have to do the roll call option on the booking.

It also allows you to scan a membership card that may not be the account that is linked to the booking.

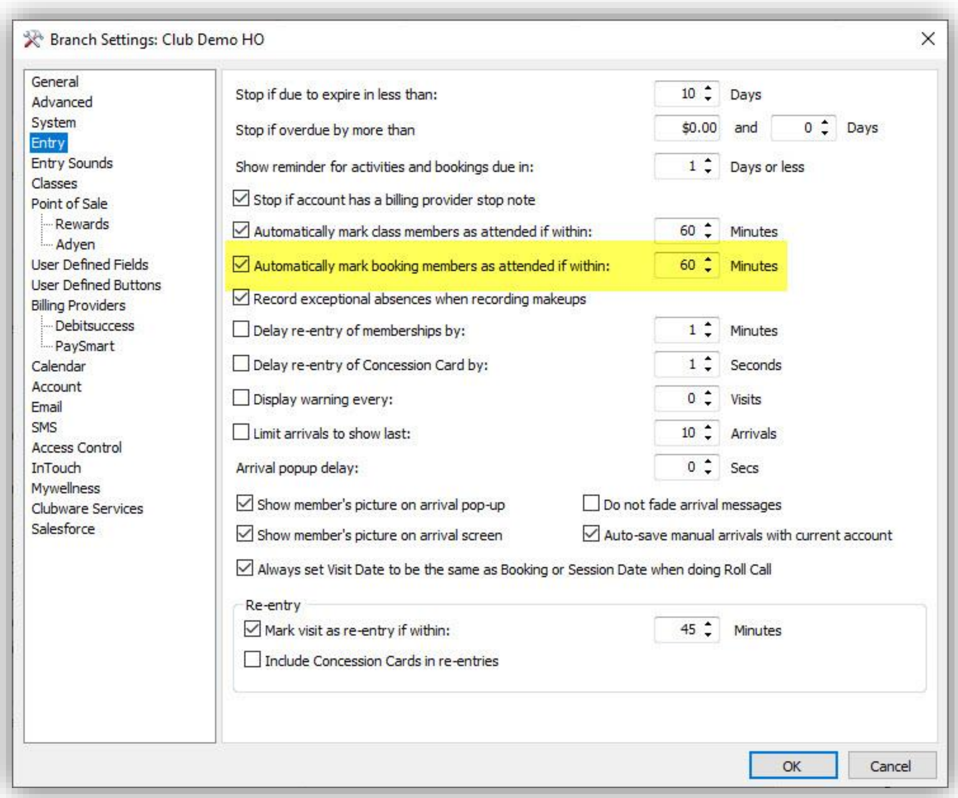
For example you may link a concession card account to a booking and the member scans the entry card that is associated with their membership account.

It will automatically deduct one concession from the concession account.

A benefit of this is not having to print a membership card and a concession card for the member.

Follow the steps below to enable this feature.

Select **Administration | Branches | Select Current Branch | Settings | Entry** from Administration to enable this feature.



Check the Automatically mark class members as attended within: box and select the required number of hours. Click OK.

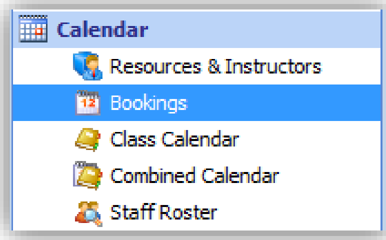
Note: From the same screen, you can also use the "*Automatically mark Class members as attended if within"* option, for members attending class sessions.

You have completed the steps required to use the "Automatically mark booking members as attended if within x hours" option in Clubware.

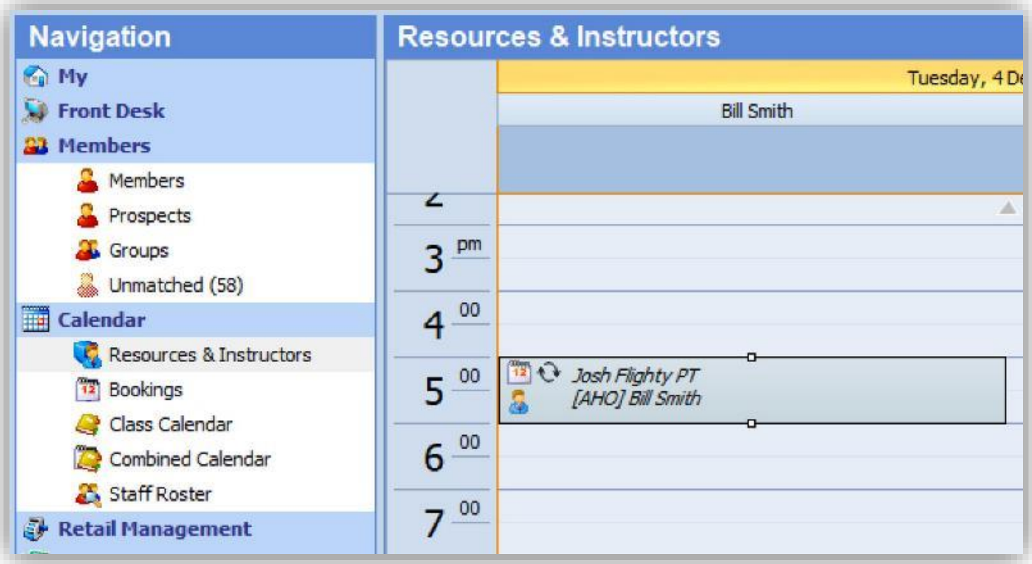
Taking the Roll Call for a Booking.

This tutorial describes the steps required to take a roll call for a booking in Clubware.

Step 1. Select **Calendar | Clubware Calendar | Resources & Instructors** from the navigation panel as shown below.

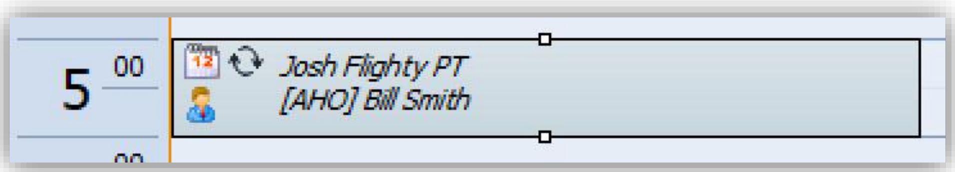


The Calendar will appear on the right in the main panel as shown below.



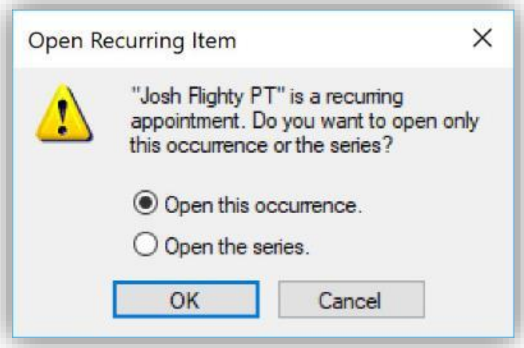
Step 2. Click a day in the mini-calendar. The schedule for that day appears in the main calendar screen.

Find and select the booking you want to take the roll for, as shown below.



Step 3. Double Click the selected booking.

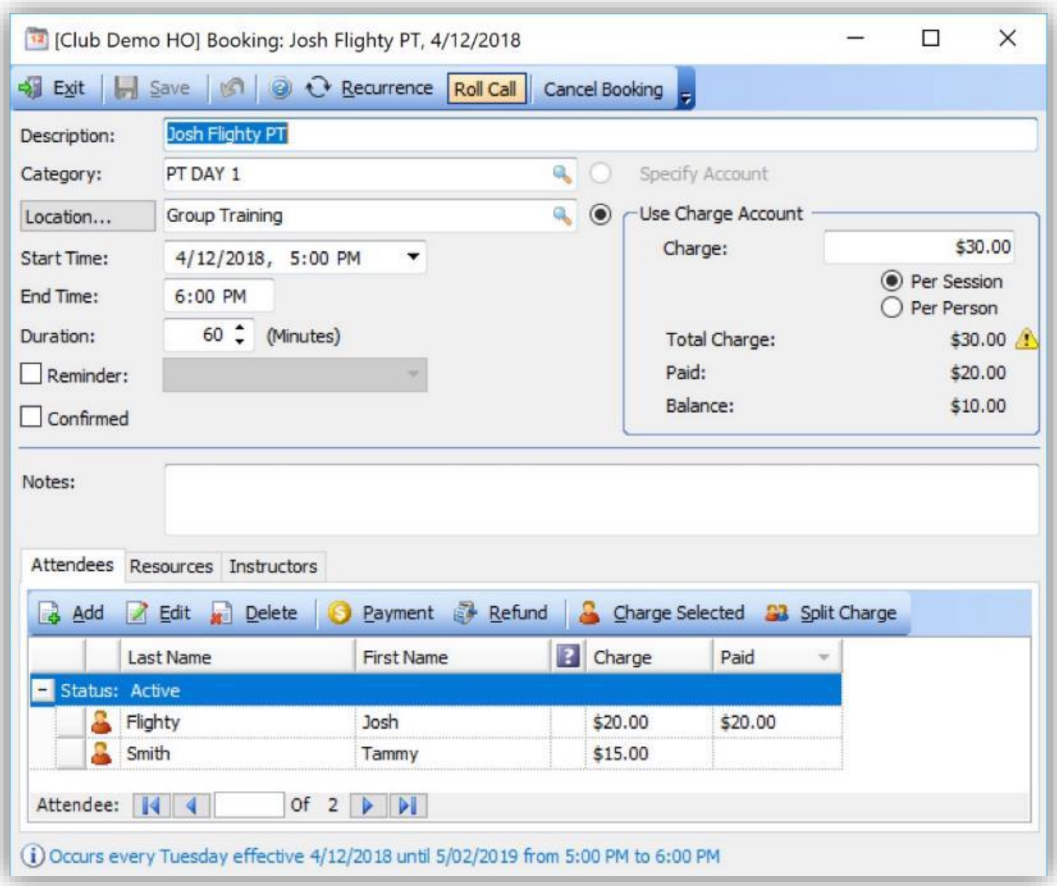
Note: If the booking is a recurring item, the 'Open Recurring Item' screen displays. (If not the Booking screen will display as shown below).



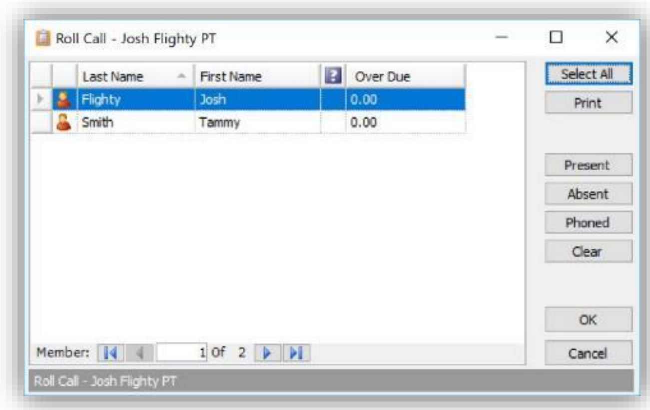
Step 4. Select 'Open this occurrence'.

Click OK.

The booking screen below will display, as shown below.



Step 5. Click **Roll Call**.
The Roll Call screen displays.



Step 6. Select each required member or click "Select All", then click one of the options below:

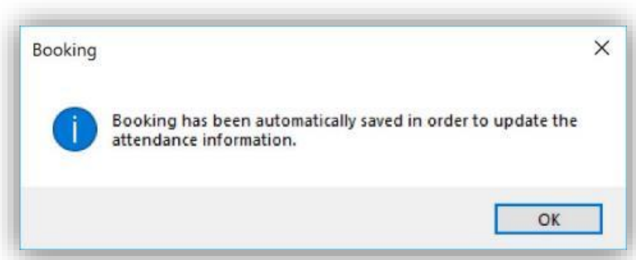
You can mark a student as **Present, Absent,** or **Phoned**, or you can **Clear** a member's record.

Present: The member has attended the booking.

Absent: The member is absent from the booking.

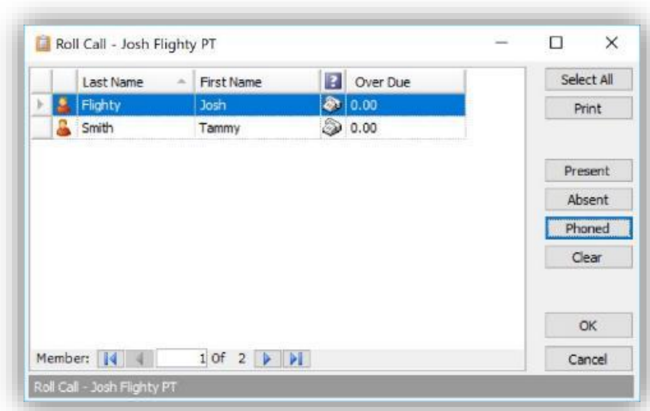
Phoned: The member phoned in advance to notify of booking absence.

Click **OK**. The Roll Call screen will close.
The information screen shown below displays.



Click **OK.**

The **Roll Call** screen now displays your choice(s).
In the example below both Attendees are shown as **phoned**.



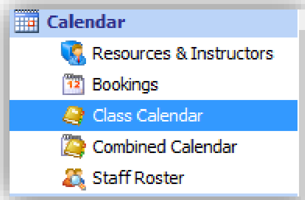
Note: By default the visit created when the roll call is taken will apply the current time. An option has been added to allow the visit to be recorded as at the time of the selected booking. You can enable this option via **Administration | Branches | Select Current Branch | Settings | Entry | Always set Visit Date to be the same as Booking or Session Date when doing Roll Call**.

You have completed the steps required to take a roll call for a booking in Clubware.

Taking the Roll for a Class from the Calendar

This tutorial describes the steps required to take the roll for a class.

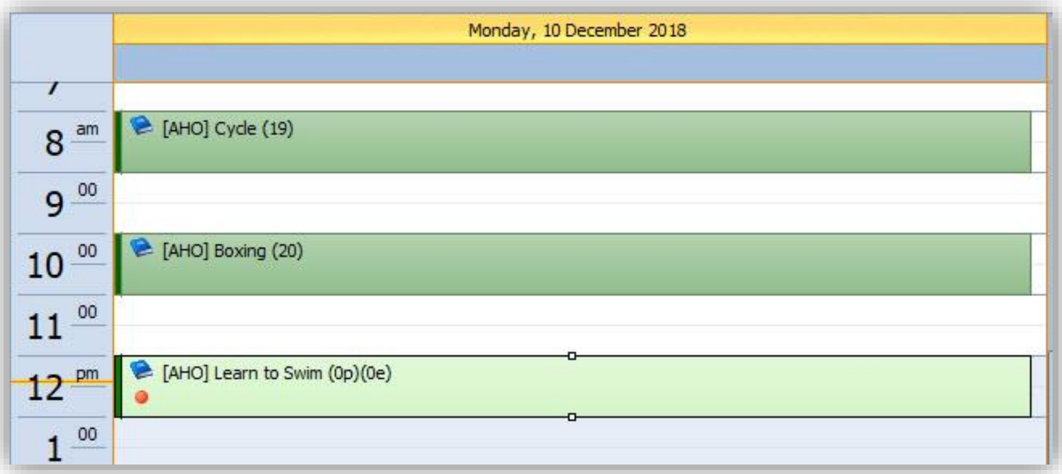
Step 1. Select **Calendar | Class Calendar** on the navigation panel as shown below.



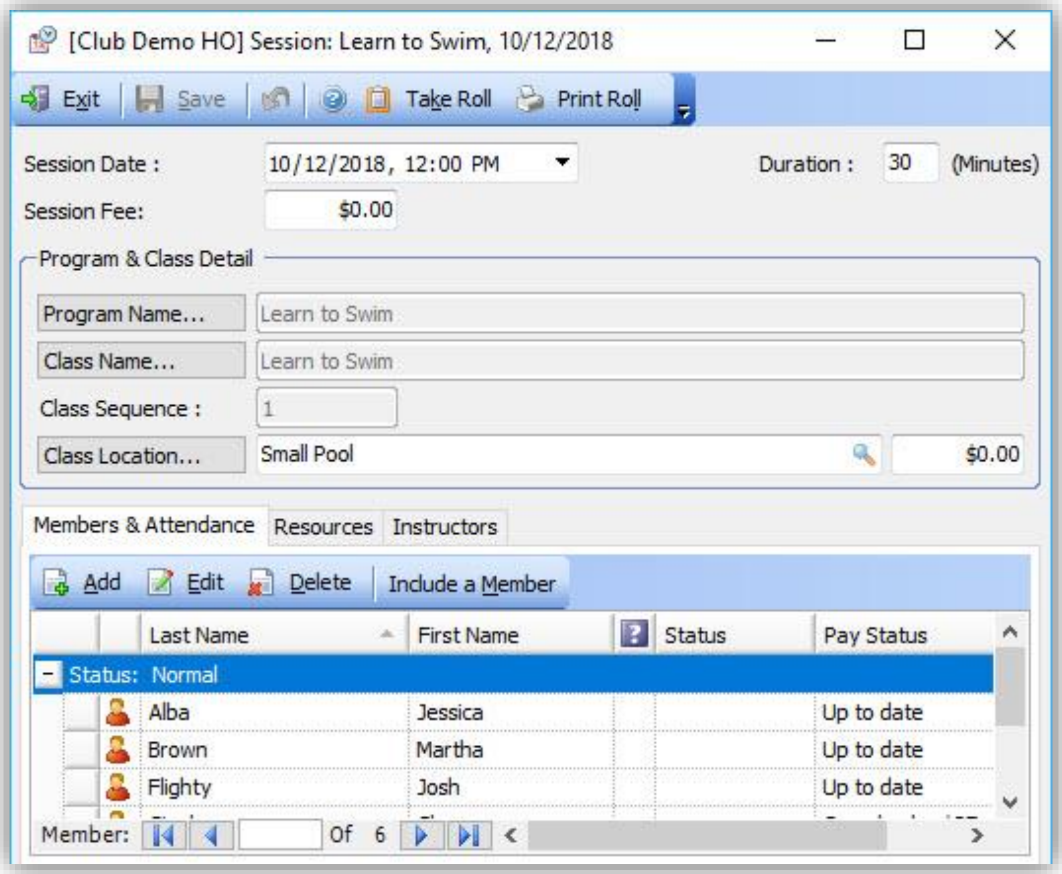
Step 2. The **Calendar** will appear on the right in the main panel.
Click the **date** you require in the mini calendar on the top right of the main panel, as shown below.

Days that have classes can be identified by the bold numbers in the calendar. When you click a day in the mini-calendar, the schedule for that day appears in the Calendar.

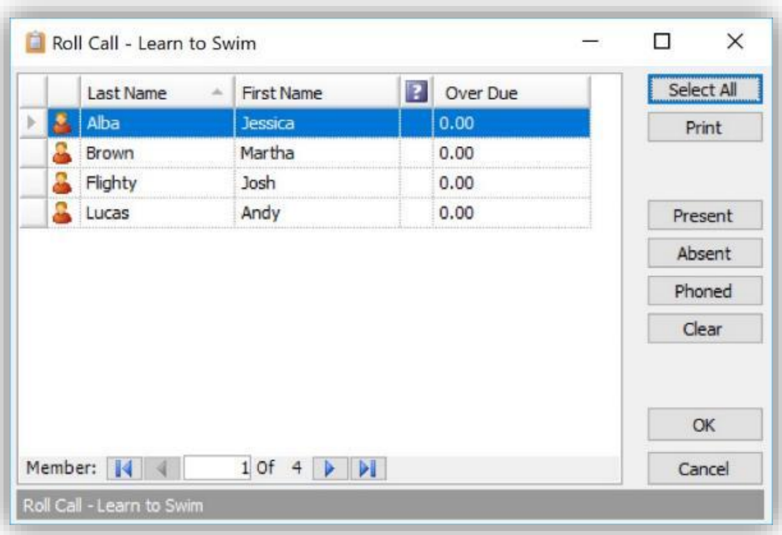
Step 3. Find the class you want to take the roll for, as shown below.



Step 4. Double click the selected class.
The **Session** screen will appear, as shown below.



Step 5. Click **Take Roll from** the toolbar.
The screen below displays,



Or, select **Print Roll**.
Then a staff member working away from the computer can take the roll manually and update Clubware at a later time.

Step 6. Select each required member, and then click one of the options below:

Present: The member has attended the class.

Absent: The member is absent from the class.

Phoned: The member phoned in advance to notify of class absence.

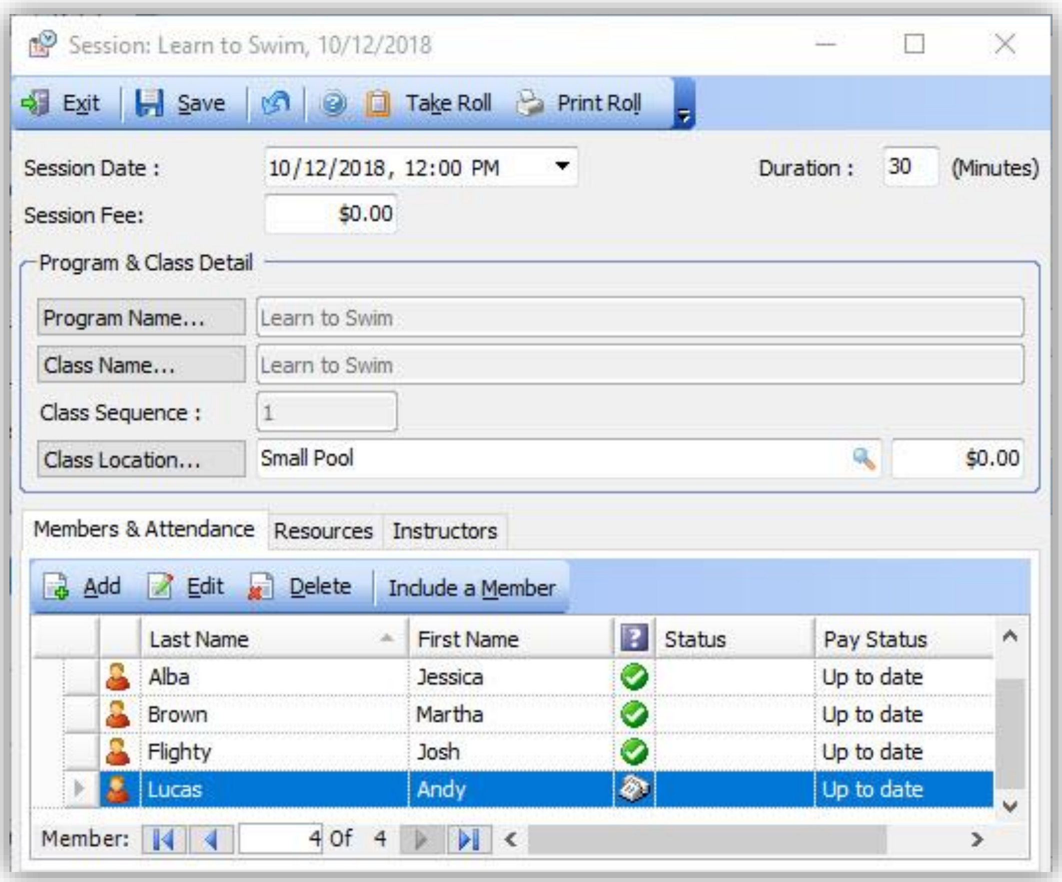
Clear: Reset to no status.

Note: If a member has an entry card for a swim class and they swipe the card at the front desk, the member will display as **Present** automatically if the option set out below is enabled.

Select **Administration | Branches | Select Current Branch | Settings | Entry t**o enable this feature.
Check the **Automatically mark class members as attended within:** box and select the required number of hours.

Click **OK.**

Step 7. When the roll is taken, click **OK** on the Roll Call screen. The Session screen will display, as shown below. The Attendee **Status column** will update.



Step 8. Save and **Exit** the Session screen.

Note: By default the visit created when the roll call is taken will apply the current time. An option has been added to allow the visit to be recorded as at the time of the selected booking. You can enable this option via **Administration | Branches | Select Current Branch | Settings | Entry | Always set Visit Date to be the same as Booking or Session Date when doing Roll Call**.

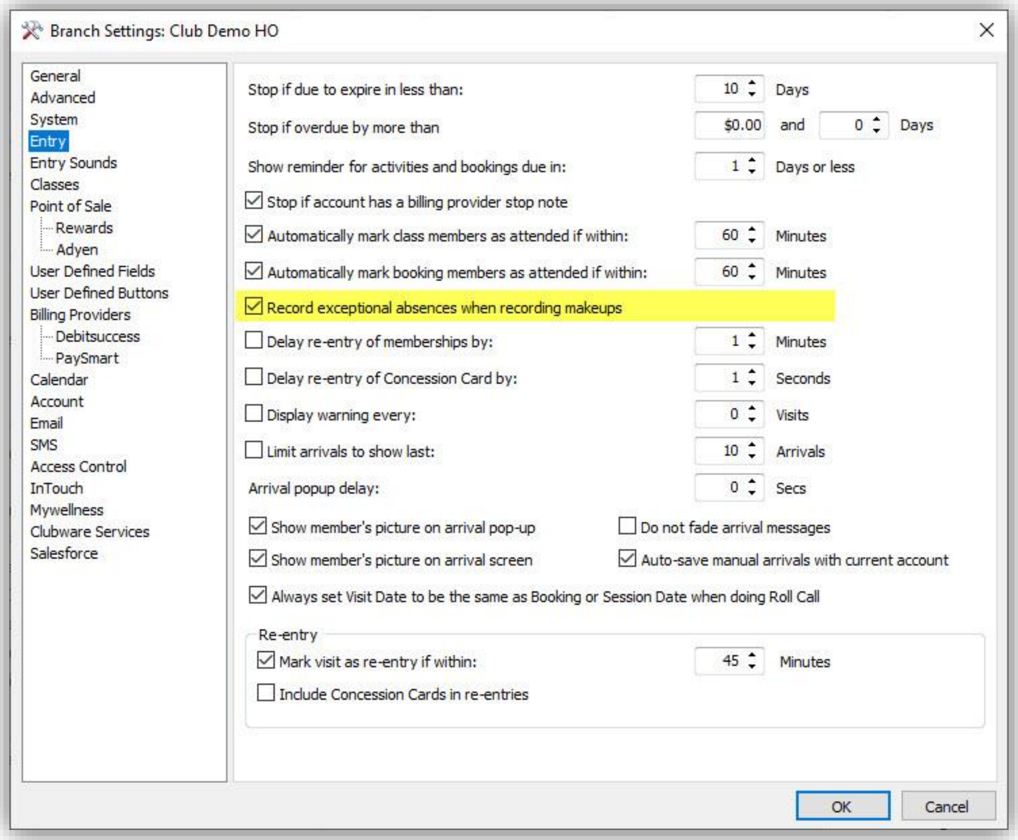
You have completed the steps required to take the roll for a class in Clubware.

Adding an exceptional attendance to a term class

The will be an occasion where a member enrolled in a term class is unable to attend a regular session.

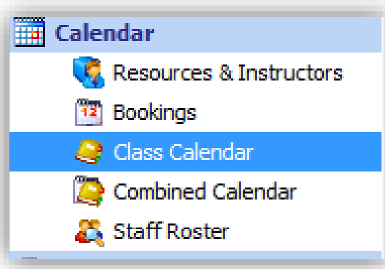
This tutorial describes the steps required to add an exceptional attendance to a term class.

Step 1. Click the “Record exceptional absences when recording makeups” box on the **Administration | Branches | Select Current Branch | Settings | Entry** screen.



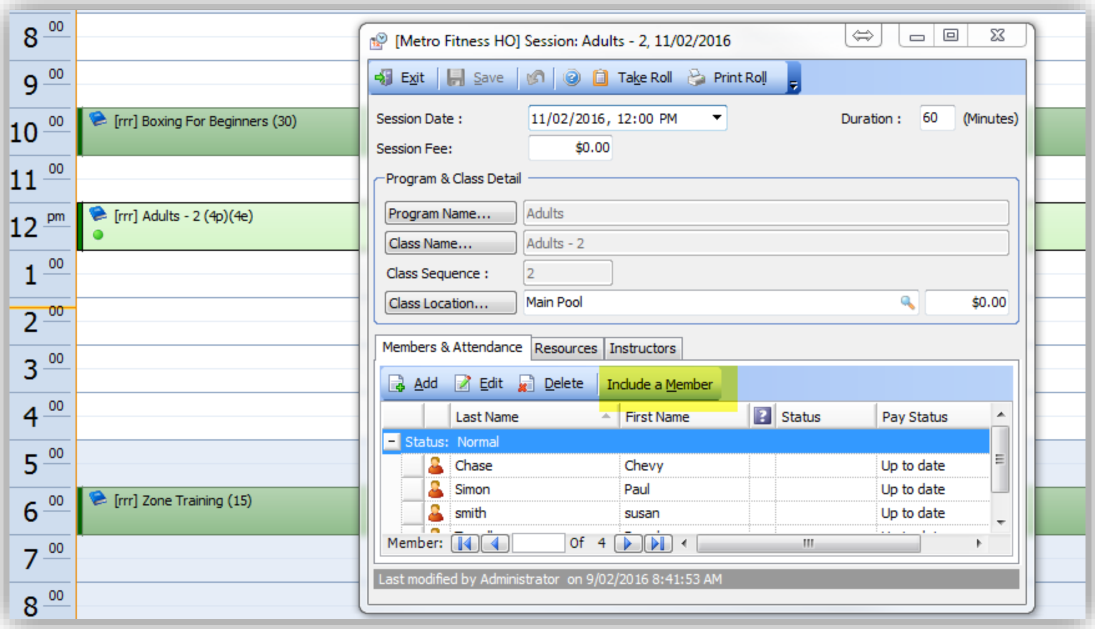
Click **OK**. Restart Clubware.

Step 2. Select **Calendar | Class Calendar** in the navigation panel, as shown below.

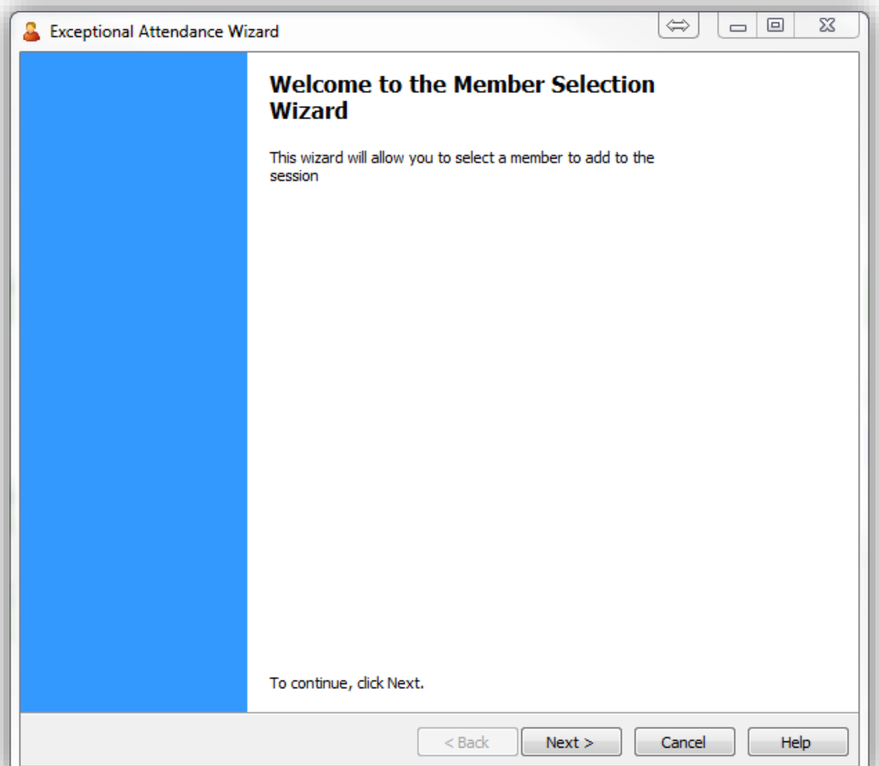


Step 3. Double click on the exceptional class to open it. The booking will open.

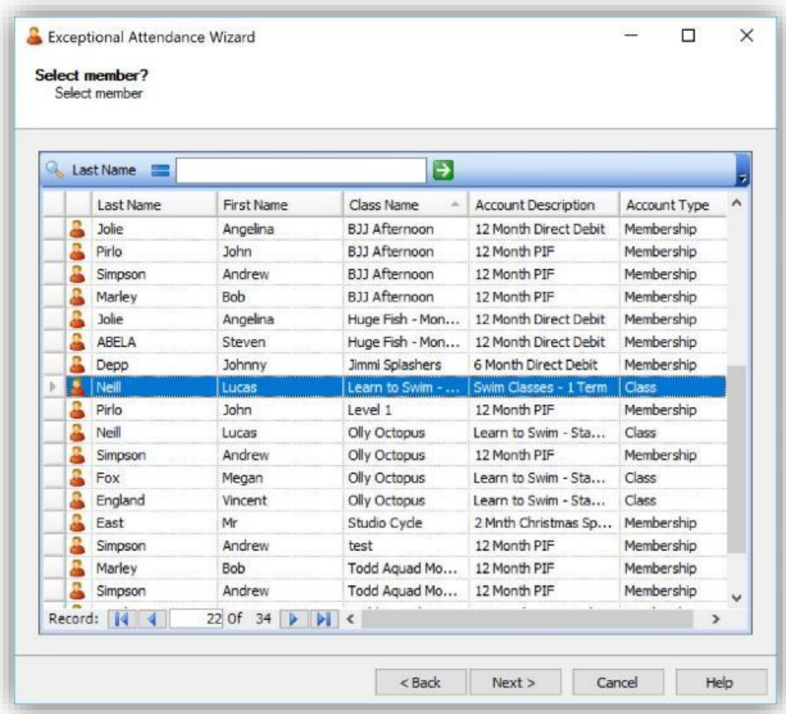
Then select Include a Member as shown below. This will open the **Exceptional Attendance Wizard.**



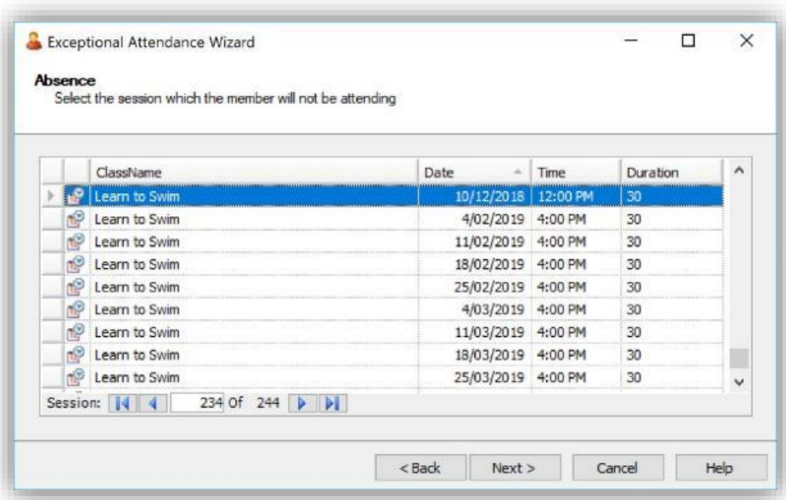
Step 4. Select **Next** to enter the **Exceptional Attendance Wizard.**



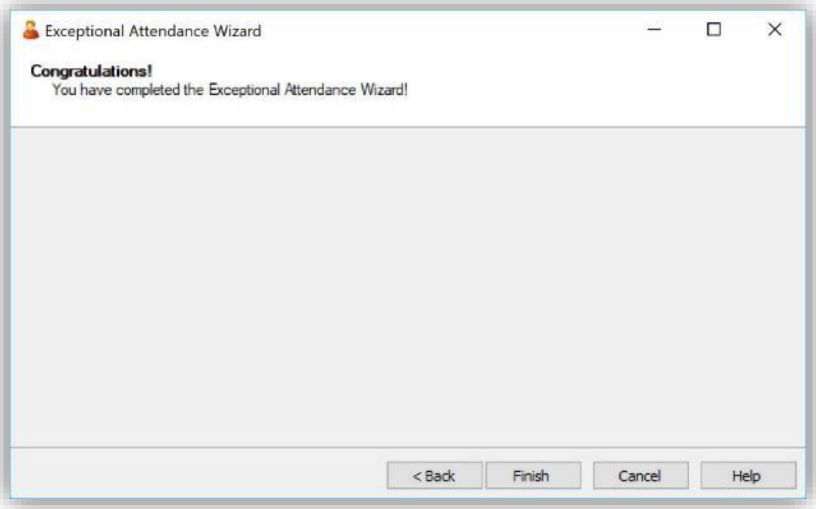
Step 5. Search for the member by either scrolling the list or typing in the search box. Select the member and click **Next**.



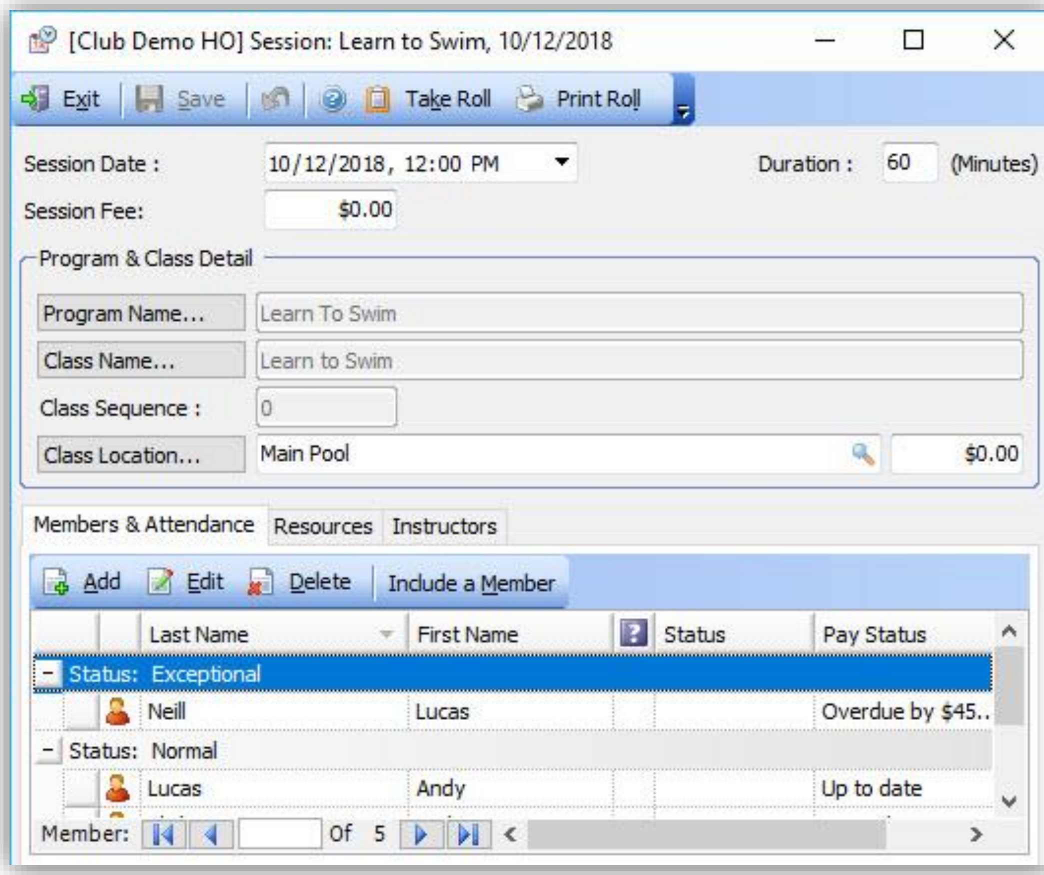
Step 6. Select the session the member will not be attending. Click **Next**.



Step 7. Select **Finish** to close the wizard.



The member will now be included in the class as an Exceptional member. In the original class the member will be marked as an exceptional Absence.

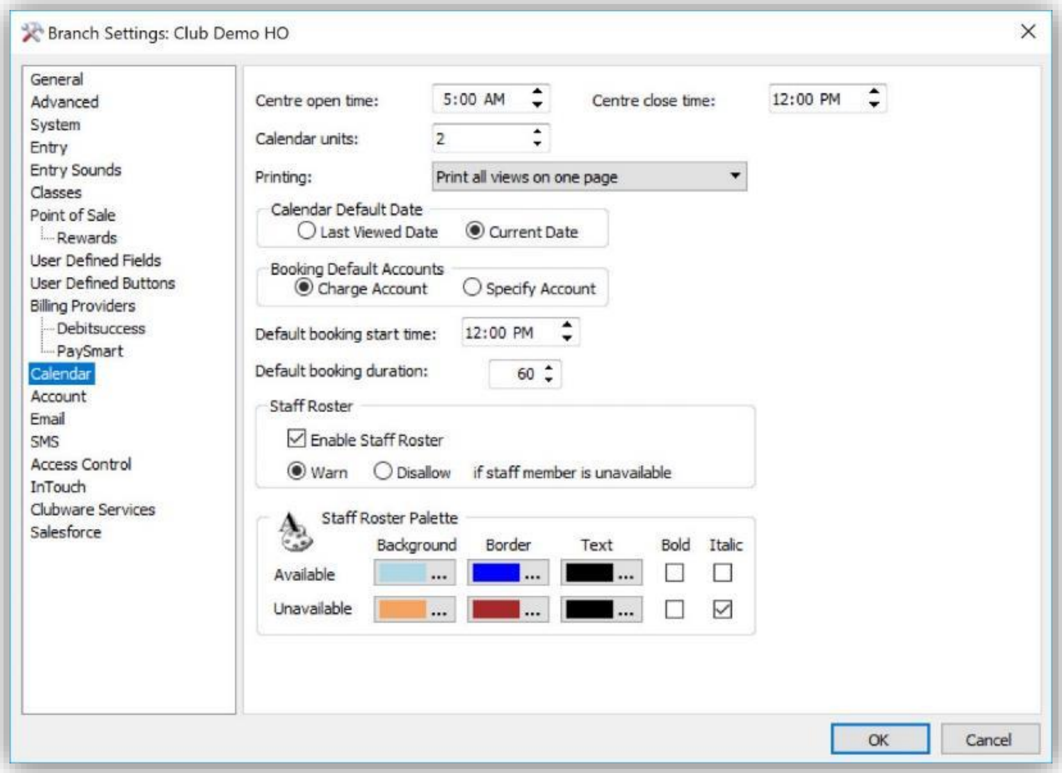


You have now completed the steps required to record exceptional attendances in Clubware.

Adding a Staff Roster

This tutorial describes the steps required to enable staff rostering and add staff rosters.

Step 1. Click the “Enable the Staff Roster” box on the **Administration | Branches | Select Current Branch | Settings | Calendar** screen.

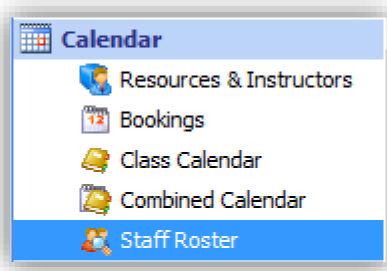


Select your choice **Warn** or **Disallow** if the staff member is unavailable.

Select your **Staff Roster Palette** options from the drop down menus.

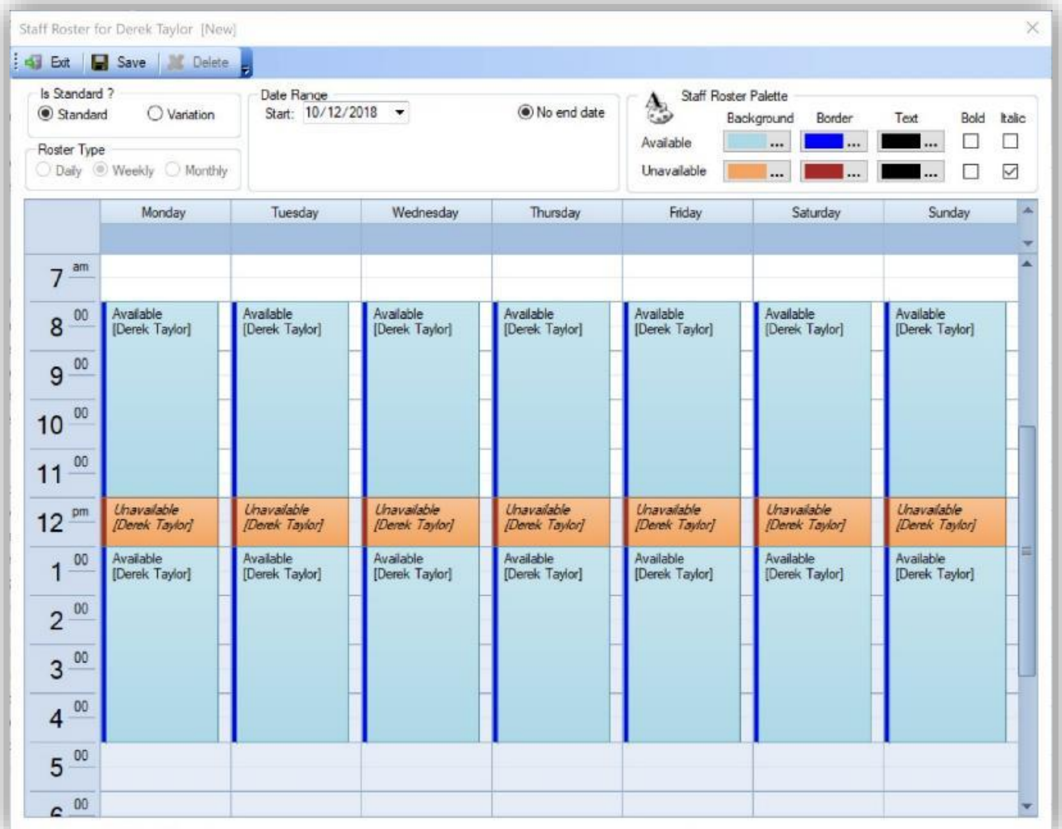
Click **OK**

Step 2. Select **Calendar | Staff Roster** in the navigation panel, as shown below.

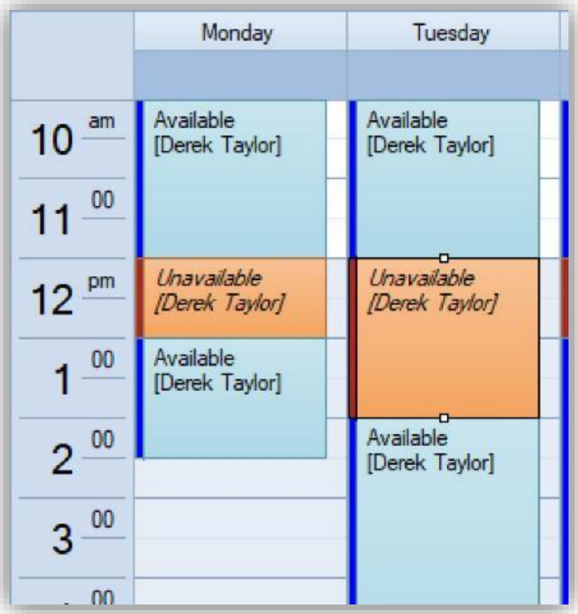


Step 3. Open the staff roster for an instructor by double clicking anywhere inside the calendar under the staff members name.

Step 4. Choose a standard or variation roster. A standard roster means that the instructor has the same hours each week. A variation roster is required if there is a change to the instructors' standard hours or if the instructors' hours vary week to week.

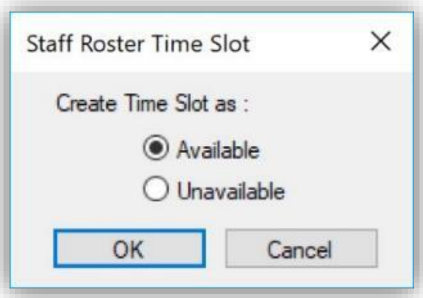


Step 5. Extend available/unavailable hours by dragging the segment up or down; or adjusting the borders.

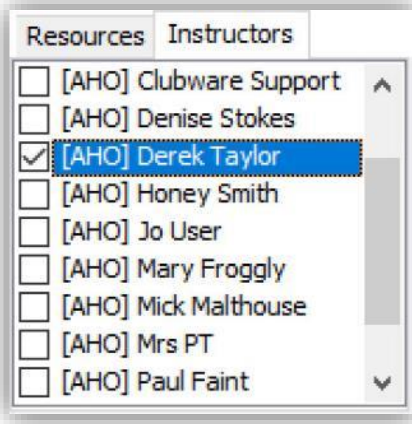


Step 6. Delete available**/**unavailable segments by right clicking on the selected segment and clicking **Delete.**

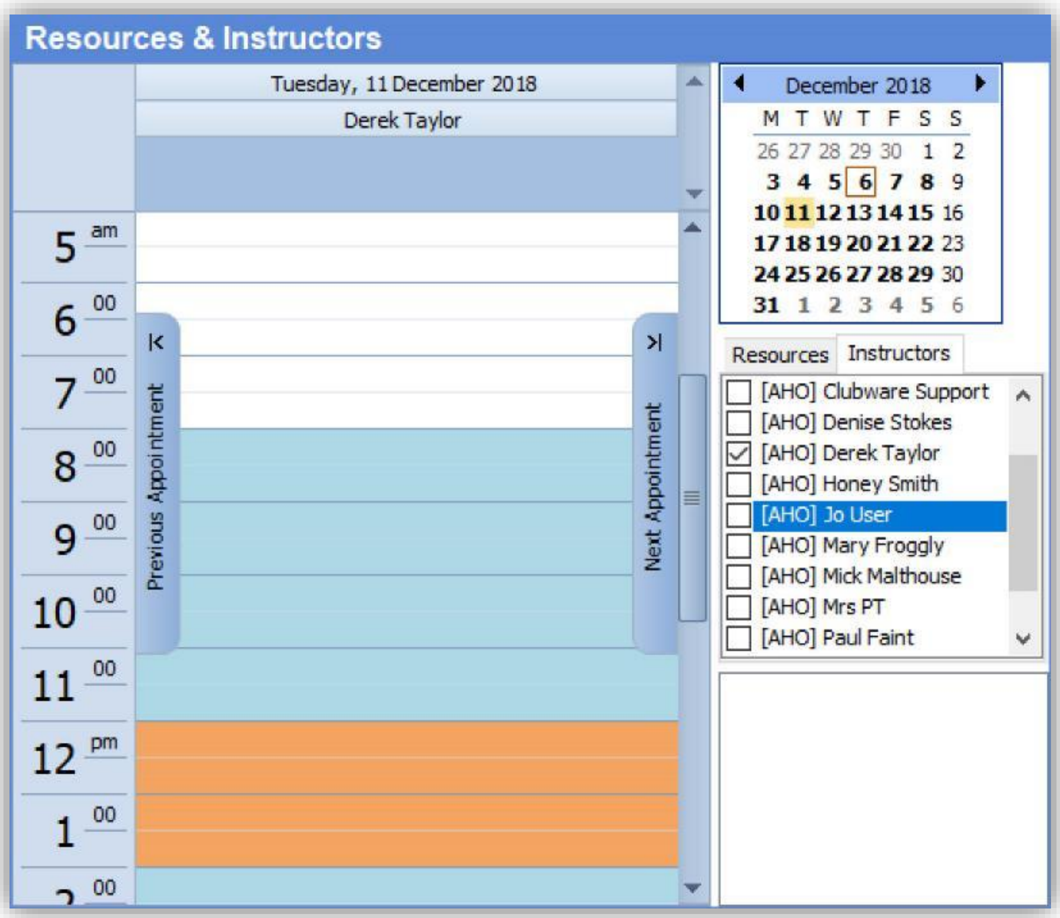
Step 7. Add additional available**/**unavailable segments by right clicking in an empty space and clicking **Add** and selecting **Available** or **Unavailable.**



Step 8. **Save and Exit**. Navigate to **Calendar | Resources & Instructors** and ensure the instructor is ticked



The background of the calendar will be highlighted the respective colours of the staff roster available/unavailable times.



Note: If staff rosters are enabled the time will be assumed unavailable if the instructor does not have an available time slot configured.

You have completed the steps required to add staff rosters in Clubware.

Retail Management

Overview

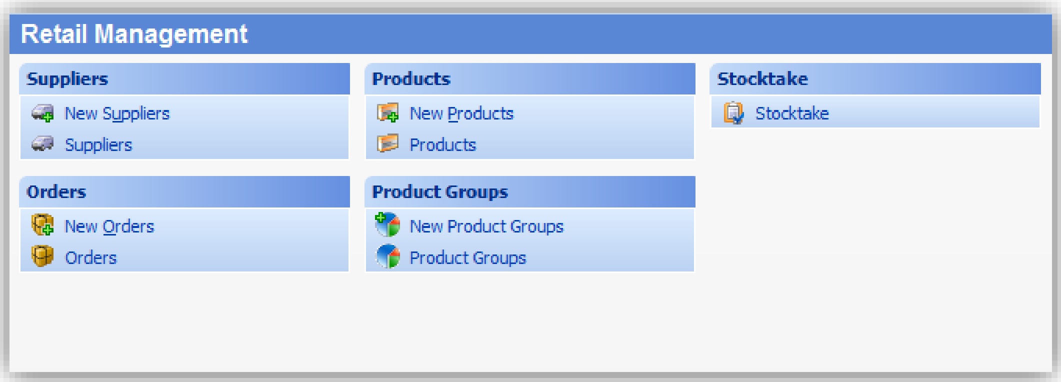
Retail Management is a comprehensive suite which includes:

- a touch screen-compatible POS screen
- Stock control and order systems
- Support for thousands of products.

This tool makes it easy to manage your stock levels, making retail a more profitable part of your business.

The Retail Management section allows users to manage point of sale (POS) and inventory at your facility.

Clubware handles full stock control, including suppliers, products, stocktakes and product re-ordering.



Suppliers

In this section, you can store relevant information regarding suppliers who provide products to your site, and maintain records of the products they sell and any orders you have placed with them.

You can email suppliers or visit their websites from the Suppliers screen, as well as adding and editing products and orders.

Products

Products are items and services you sell at your centre through the POS.

Clubware enables you to store product information including cost price, sell price, margin, barcode, reorder information and branches in which the product is sold, as well as historical sales information.

Clubware also handles products that you may sell but don’t want to stocktake. (Towel hire for example). Barcodes can be assigned to stock items to allow them to be scanned at the Point of Sale.

A zero quantity alert can also be set to warn users when stock item quantities have reached zero.

Products can now be set as Head Office items and permissions updated to allow the

Stocktake

When suppliers and products are set up within Clubware, users have the ability to count stock (stocktake). When a stocktake is performed actual stock information is recorded as at the time of the stocktake.

This allows users to identify shrinkage and wastage, as well as providing historical information and trends for reporting purposes.

Orders

When suppliers and products are configured, the correct method for entering stock into Clubware is through the order process. Orders allow sites to re-order products based on previous sales history and minimum re-order quantities.

When products are ordered, they are received into the system when the order is filled.

You can manually create an order or allow the system to calculate what is required via the **Generate Order** button from the toolbar of the New Order screen.

You can also view what orders have been completed and orders due to arrive by a selected date.

Product Groups

Product groups allow you to group products together. This feature allows you to report on a specific group of products within the reporting feature of Clubware. For more information on Reports, please see the reports section of the manual.

How To

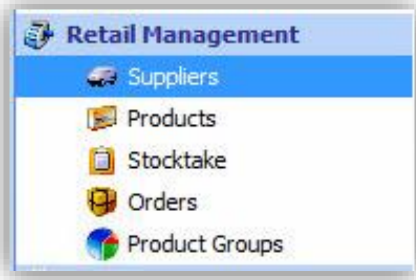
Suppliers

The following tutorials describe the most common actions associated with Suppliers.

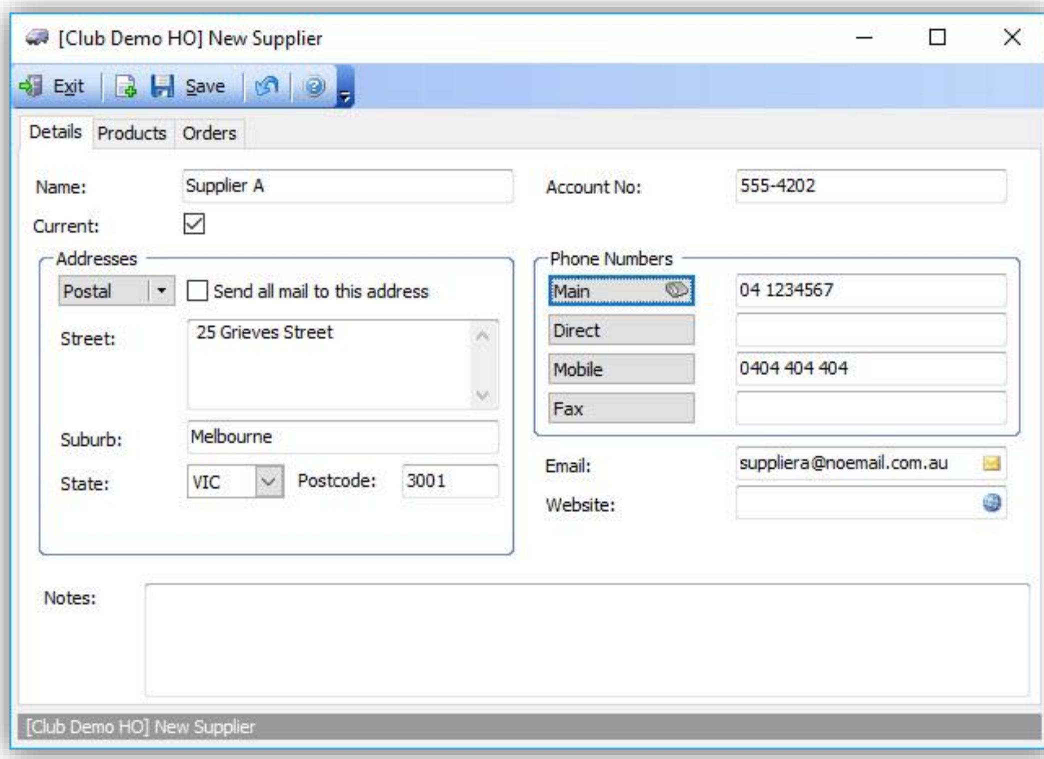
Adding a Supplier

This tutorial describes the steps required to add a supplier within Clubware.

Step 1. Select **Retail Management | Suppliers** from the section of the navigation panel. The suppliers and details display on the right of the navigation panel.



Step 2. Select **Add** from the toolbar on the Suppliers screen.
A **New Supplier** screen displays.
Enter information as shown below.



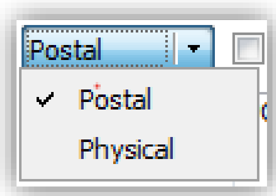
Main Points:

Name: This is the trading name for the supplier.

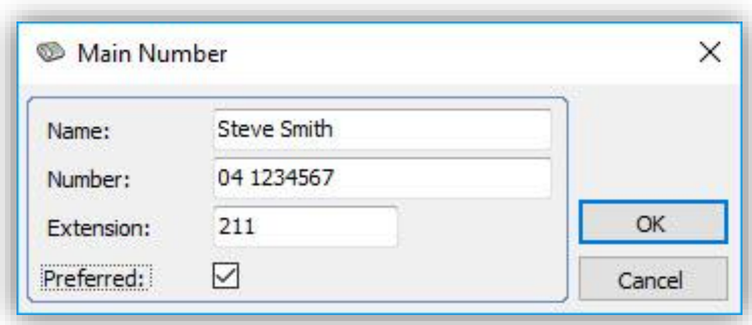
Account No: This is your account number with the supplier.
Enter the account number for it to appear on product orders.

Current: Indicates supplier status.

Addresses: Clubware can store several addresses for each supplier.
Select either **Physical** or **Postal** from the Postal drop down menu as shown below.



Phone Numbers: Clubware can store several phone numbers for each supplier.
Click the button to the left of each phone number to display detailed information about that number, as shown below.



Click the **Preferred** checkbox to select the main phone number, as shown above.

Note: You can choose any of the numbers to be your preferred number by checking the **Preferred** box on the screen your choice.

Products: This lists all products linked to this supplier.
A supplier can have unlimited products.
See the next tutorial, Adding a Product for more information.

Orders: This lists all the orders this supplier has.
A supplier can have unlimited orders.
See the tutorial, Ordering Stock for more information.

Step 3. Save and **Exit** the form when entries are complete.

You have completed the steps required to add a supplier in Clubware.

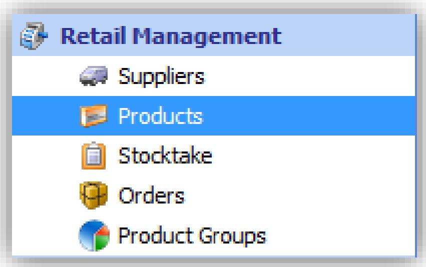
Products

The following tutorials describe the most common actions associated with Products.

Adding a Product

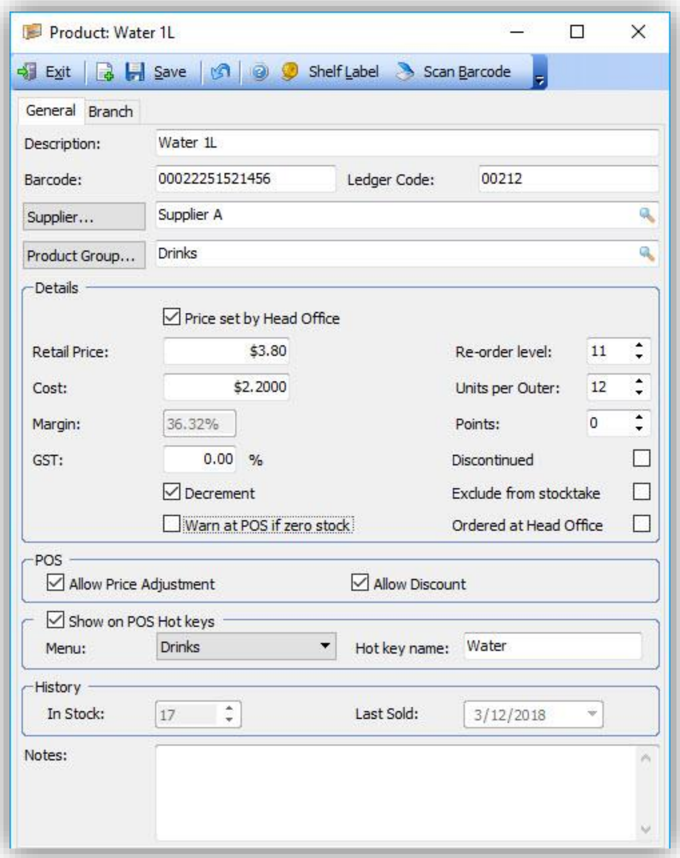
This tutorial describes the steps required to add a Product within Clubware.

Step 1. Select **Retail Management | Products** from the navigation panel, as shown below.



The Products screen will display to the right of the Navigation panel.

Step 2. Select **Add** from the toolbar on the Products screen.
A **New Product** screen will display.
Enter information as shown in the example below.



Main Points:

Description: This is the name of the product.

Barcode: This is the barcode on the product.
See the next tutorial Assigning a barcode to a product, for further information.

Ledger Code: Use this if you are exporting this information to an accounting system.

Supplier: You can assign a supplier to a product.
See the previous tutorial, Adding a Supplier for more information.

Product Group: This field allows you to group products for your convenience. You can add new groups by typing a new value in this field.

Price Set by Head Office: When this box is checked, all pricing is set to be updated at Head Office level.

Retail Price: This is the price you sell the product for inclusive of GST.

Cost: This is the price you pay for the product inclusive of GST.

GST: This is the tax rate you charge when selling the product.

Points: If you want to use the loyalty system and assign loyalty points to members who purchase products, enter the number of points to award here.
These will be awarded when a member makes a purchase of this product at the POS.

Re-Order level: When stock reaches this number or fewer, the system will allow a re-order of the product.

Units per Outer: This is the number of products that are packaged or shipped together in one physical unit, i.e. 12 cans of Coke in a tray.

Decrement: If you want the system to reduce the amount of stock each time the product is sold, check this box. The default setting is checked.

Warn at POS if zero stock: Check this box if you want Clubware to display a warning when stock levels for this product are zero.
The warning will be displayed when selling through the POS.

Discontinued: This box can be checked when marking an item as discontinued from the supplier. Orders can still be processed against items with this checked.

Exclude from Stocktake: Check this box if you are dealing with a service or any item NOT to be included in your stocktake.

Ordered at Head Office: Check this box if the item was ordered through Head Office and is not to appear as part of your stock.

Allow Price adjustment at POS: Ticking this box allows you to adjust the price at POS. The '**Apply Discoun**t' button becomes invalid and the '**Edit Price**' button becomes available.

Allow Discount: Ticking this box allows this product to be discounted at POS assuming the logged in user has access to give discounts.

Show on POS Hot Keys: These are buttons on the POS screen which can be setup as hot keys for your products and services.

(See the tutorial Configuring Hot Keys in the Front Desk – How To section).

Menu: This displays the name of the product's hot key Menu number and product name.

History: This shows amount in stock, last sold, and quantity sold.

Notes: Additional information regarding the product**.**

Step 3. Save and exit the **New Product** screen when entries are complete.

You have completed the steps required to add a product in Clubware.

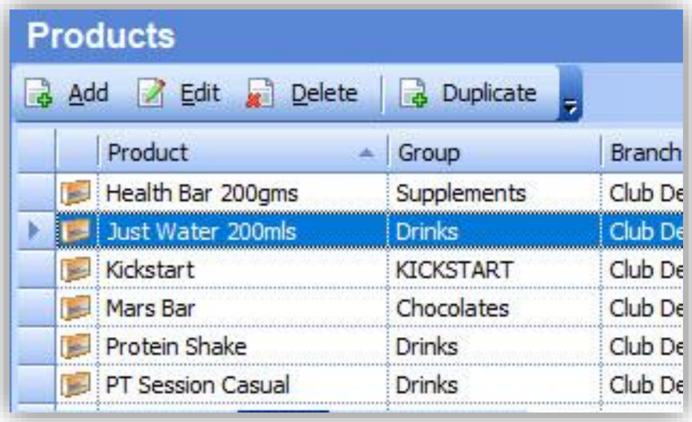
Assigning a barcode to a product

This tutorial describes the steps required to assign a barcode to a product.

Note: you must have a barcode scanner set up on your PC to complete this tutorial.

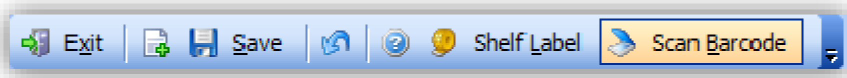
Step 1. Open the product you want to assign a barcode to.
Select **Retail Management | Products** from the navigation panel.

Step 2. The **Products** screen will display.
Select a product from the screen and click **Edit** as shown below.

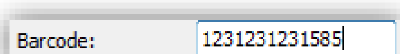


The Product screen displays.
Step 3. Click in the '**Barcode'** field.

Step 4. Select **Scan Barcode** from the toolbar, as shown below.



Scan the barcode on the product with the barcode scanner.
The barcode field will be updated with the value scanned, as shown below.



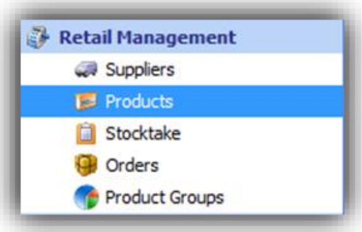
Step 5. Save and **Exit** the Product screen.

You have completed the steps required to assign a barcode to a product in Clubware.

Duplicate Products on a branch

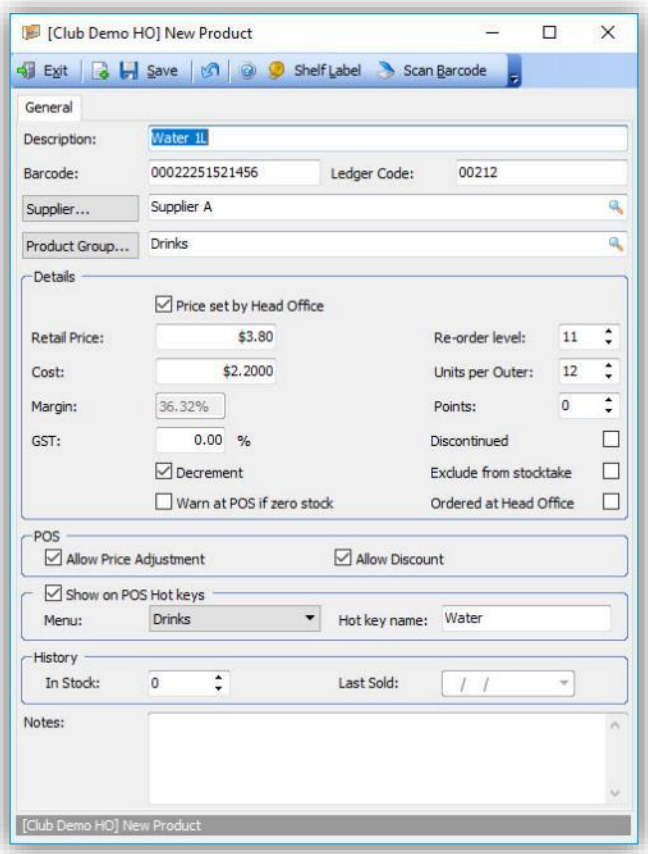
The following tutorial outlines the steps required to duplicate products in a single branch. This function can be used to create different varieties of the same product line.

Step 1. Select **Retail Management | Products** from the navigation panel, as shown below.



Step 2. Highlight Product and click **Edit** from the Product toolbar

Step 3. The product will display. Select the  button from the toolbar or use the shortcut **Alt + N.** This will create an exact duplicate for editing as shown below.



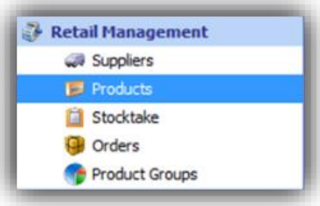
Step 4. Update the new product and select save and exit from the tool bar.

You have completed the steps required to steps required to duplicate products in Clubware.

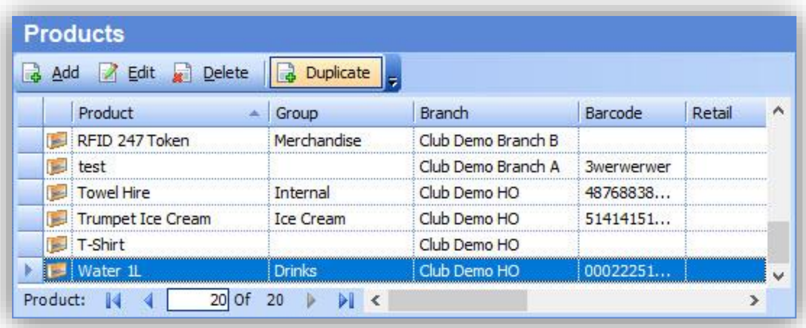
Duplicate Head Office Products to Branches

The following tutorial outlines the steps required to duplicate Head Office products to branches. This function can be used to create the same item in multiple branches.

Step 1. Select **Retail Management | Products** from the navigation panel, as shown below.

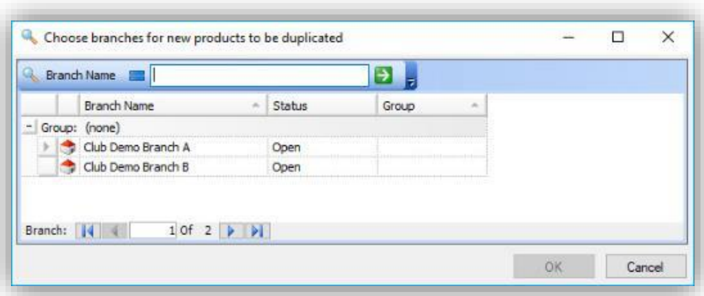


Step 2. Highlight Product and click **Duplicate** from the Product toolbar

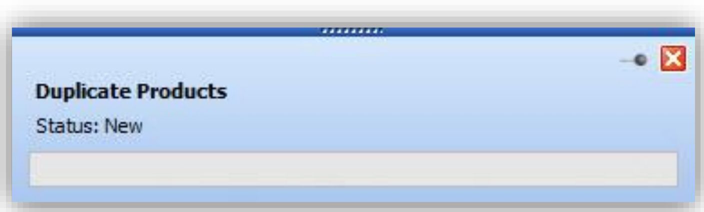


Step 3. Click **Duplicate**.

The choose branch box will appear. This box will display branches to add that product into. Multiple branches can be selected by holding **Ctrl** and clicking on the branches.



Step 4. A service job starts to create these products on the chosen branches.

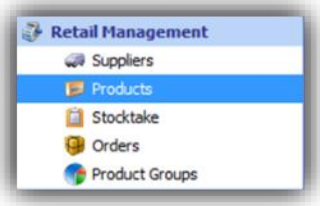


You have completed the steps required to duplicate Head Office products to branches in Clubware.

Link Branch Products to Head Office Products

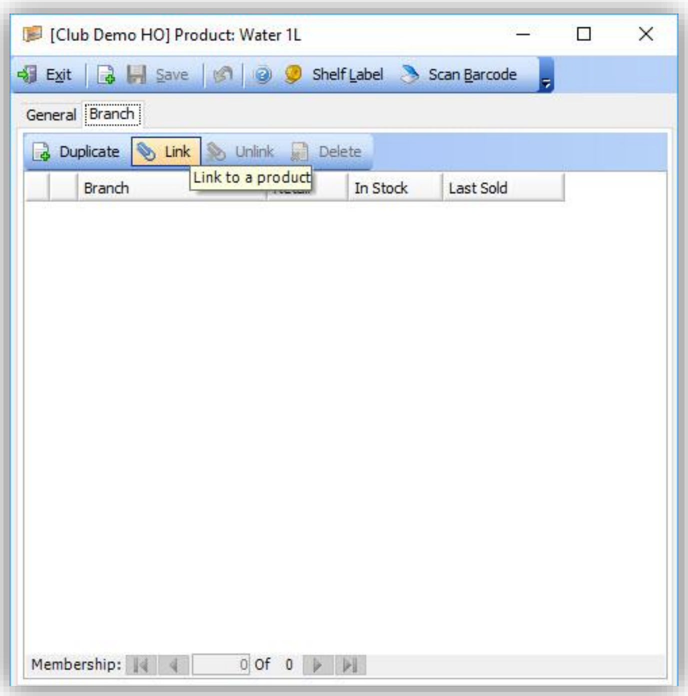
This tutorial outlines the steps required to associate branch products to a single head office product. This function matches based on product description and barcode.

Step 1. Select **Retail Management | Products** from the navigation panel, as shown below.

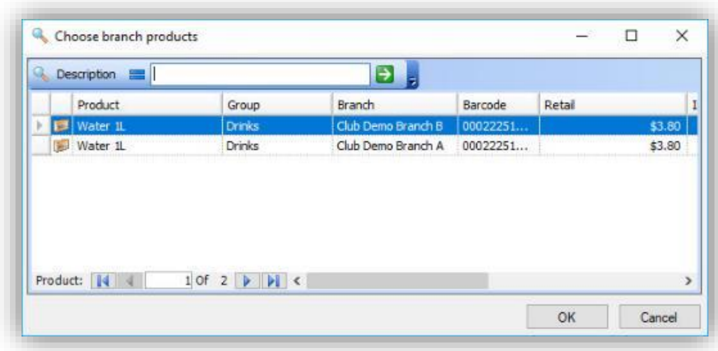


Step 2. Highlight Product and click **Edit** from the Product toolbar

Step 3. The product will display. Select the **Branch** tab. Click **Link**.as in the example below.

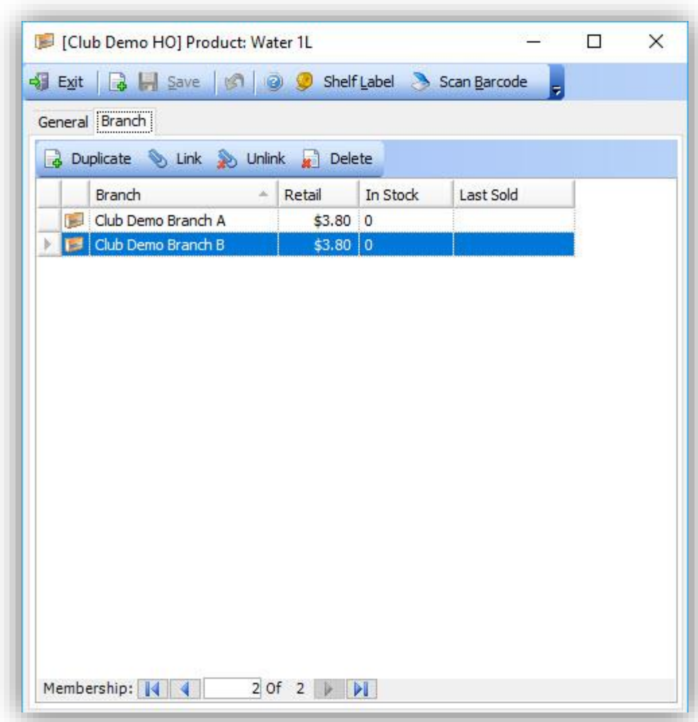


Step 4. The choose branch products box will appear. Type in the search field to locate the required products from branches if they do not populate in the grid.



Multiple products can be linked at the same time by hodling the CTRL key while clicking on the items.

NOTE: If the barcode on a Head Office product is different to the branch product then the head office barcode will transfer down to the branch. E.g. If the barcode on Head Office is blank, then the barcode on the branch product will also become blank.

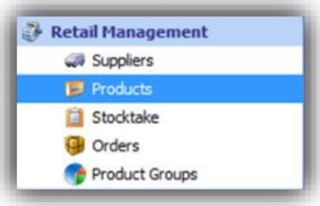


You have completed the steps required to link Branch and Head Office products in Clubware.

Unlink Branch Products from Head Office Products

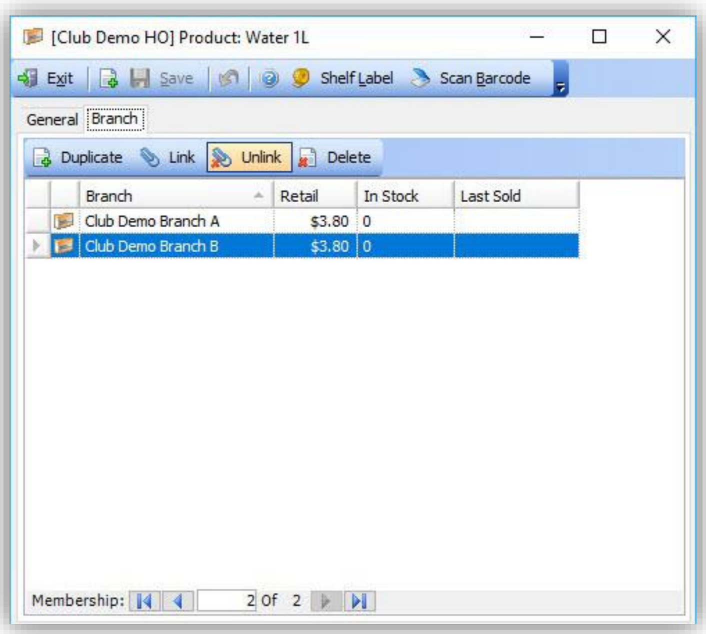
The following tutorial outlines the steps required to unlink branch products from a single head office product.

Step 1. Select **Retail Management | Products** from the navigation panel, as shown below.



Step 2. Highlight Product and click **Edit** from the Product toolbar

Step 3. The product will display. Select the Branch tab and then select the branch as in the example below.



Step 4. Click **Unlink to remove the branch from the list.**

You have completed the steps required to unlink Branch and Head Office products in Clubware.

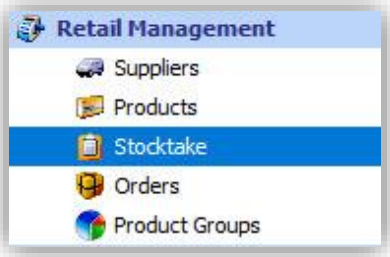
Stocktake

The following tutorials describe the most common actions associated with stocktakes.

Completing a Stocktake

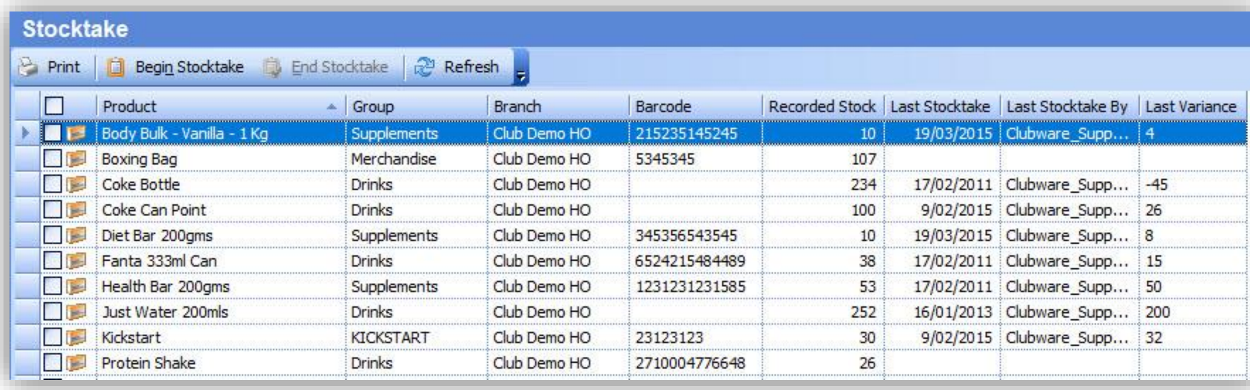
This tutorial describes the steps required to complete a stocktake.

Step 1. Select **Retail Management | Stocktake** from the navigation panel, as shown below.



Step 2. The **Stocktake** screen will display only those items that have not been excluded from Stocktake.

Note: You may need to click **Refresh** for the stock to display on the screen.

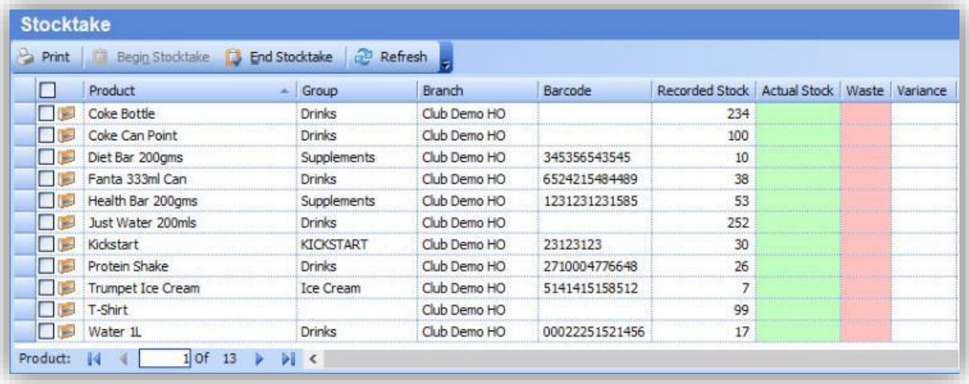


Product	Group	Branch	Barcode	Recorded Stock	Last Stocktake	Last Stocktake By	Last Variance
Body Bulk - Vanilla - 1 Kg	Supplements	Club Demo HO	215235145245	10	19/03/2015	Clubware_Supp...	4
Boxing Bag	Merchandise	Club Demo HO	5345345	107			
Coke Bottle	Drinks	Club Demo HO		234	17/02/2011	Clubware_Supp...	-45
Coke Can Point	Drinks	Club Demo HO		100	9/02/2015	Clubware_Supp...	26
Diet Bar 200gms	Supplements	Club Demo HO	345356543545	10	19/03/2015	Clubware_Supp...	8
Fanta 333ml Can	Drinks	Club Demo HO	6524215484489	38	17/02/2011	Clubware_Supp...	15
Health Bar 200gms	Supplements	Club Demo HO	1231231231585	53	17/02/2011	Clubware_Supp...	50
Just Water 200mls	Drinks	Club Demo HO		252	16/01/2013	Clubware_Supp...	200
Kickstart	KICKSTART	Club Demo HO	23123123	30	9/02/2015	Clubware_Supp...	32
Protein Shake	Drinks	Club Demo HO	2710004776648	26			

Step 3.

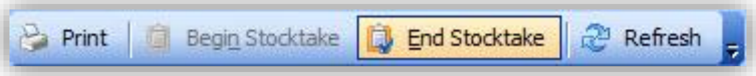
- To print the Stocktake Sheet, click the box below the 'Print' button. This will highlight all products in the stocktake screen.
- Click **Print** to print sheet. The stocktake sheet will be printed.
- Physically count the stock and update the printed sheet.
- Return to the screen above and click **Begin Stocktake**.

The columns **Actual Stock** and **Waste** will appear in the Stocktake screen, as shown below.



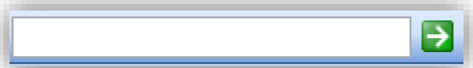
Enter the **Actual Stock** values and any **Waste** into the appropriate columns.

Step 4. Click **End Stocktake** as shown below.



Click the '**Refresh'** button, as shown above, to refresh the product totals, **or**

Click the **green arrow** in the toolbar, as shown below.



You have completed the steps required to complete a stocktake in Clubware.

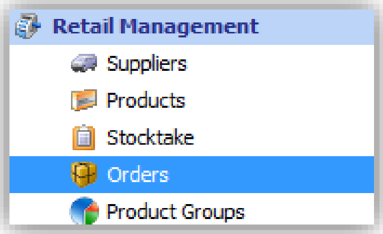
Orders

The following tutorials describe the most common actions associated with Orders.

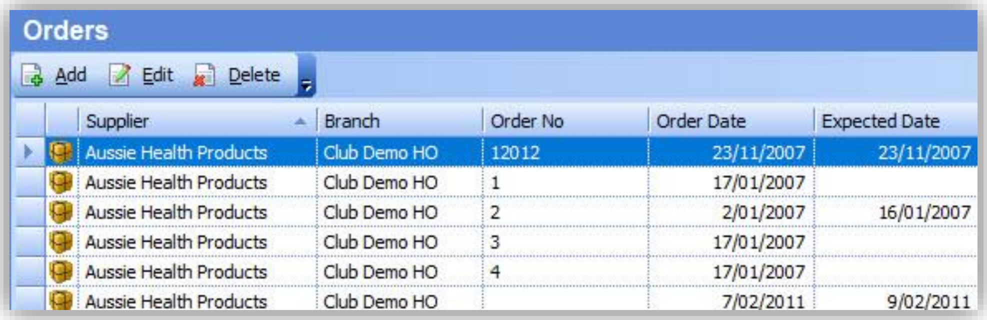
Ordering Stock

This tutorial describes the steps required to order stock within Clubware.

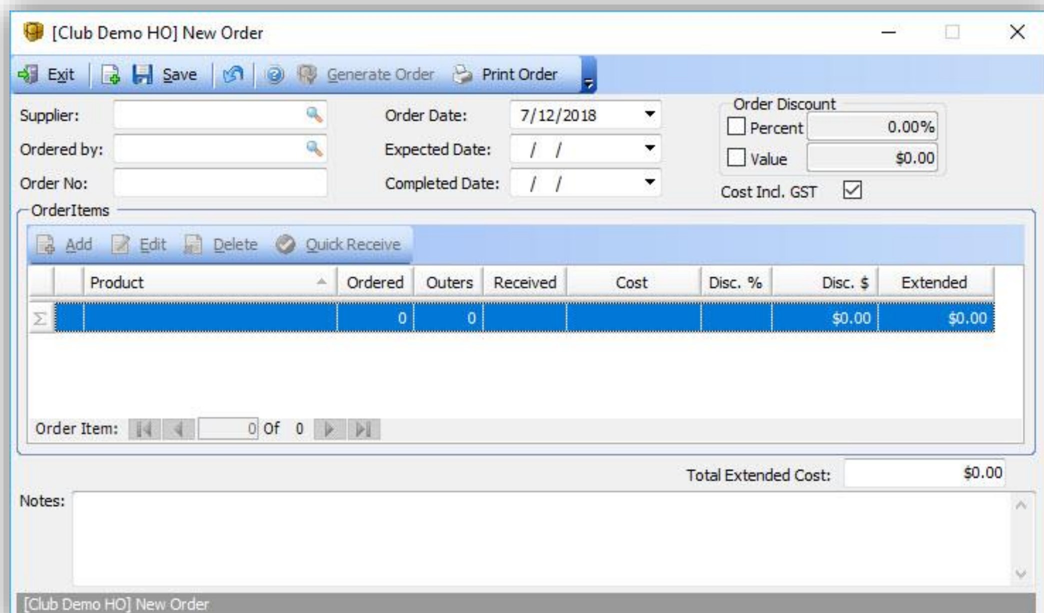
Step 1. Select **Retail Management | Orders** from the navigation panel, as shown below.



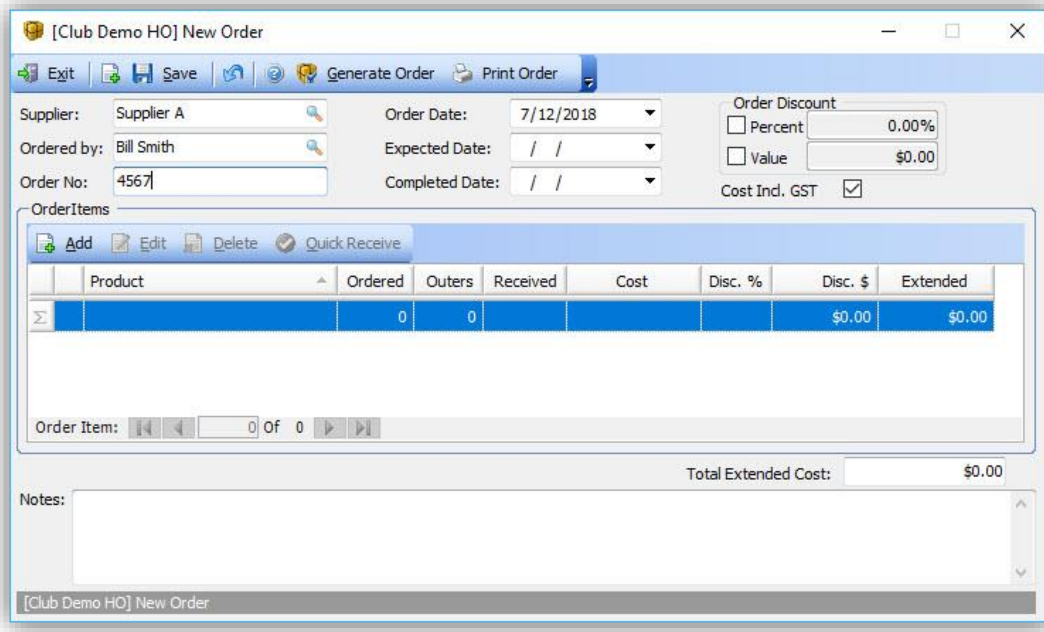
The **Orders** screen will display in the main panel.



Step 2. Click **Add** from Orders toolbar.
A **New Order** screen will appear.



Enter information as shown below.



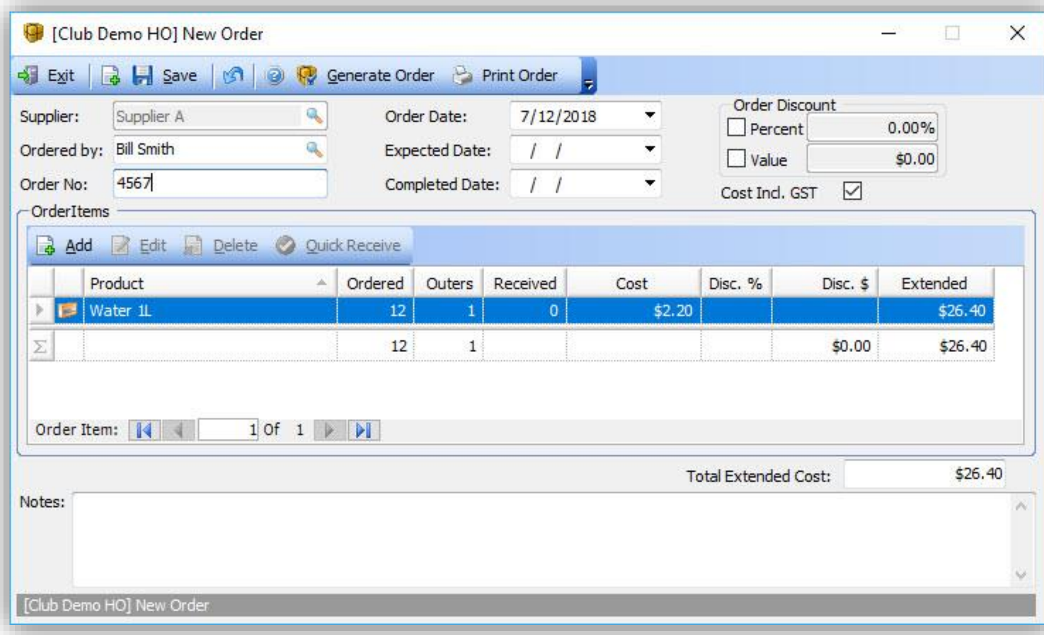
Select a **Supplier.**

Select **Ordered by:** using the drop down menu.

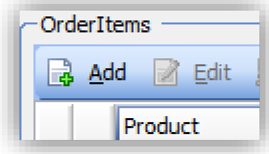
Click **Generate Orders from** the toolbar.

The system will automatically load any products with an in-stock quantity lower than the re-order level, as shown below.

(See the tutorial Adding a Product for more information about re-order levels).

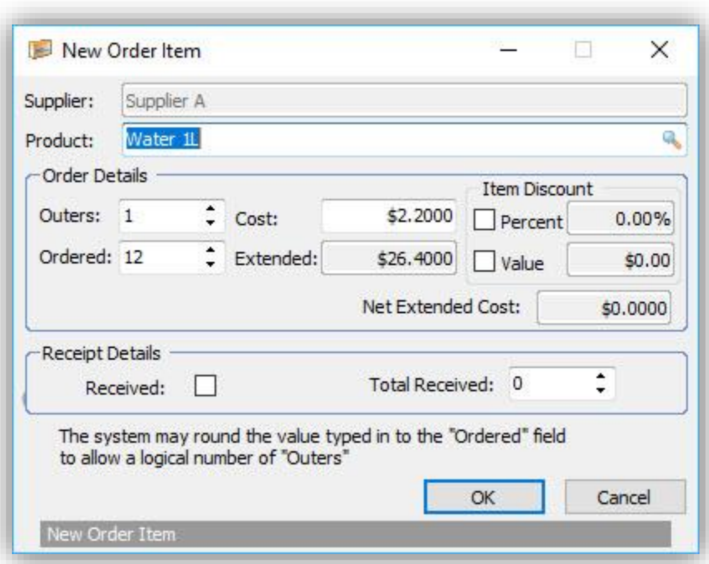


Step 3. You can also add products to the Order Items list manually.
Click **Add** on the Order Items toolbar, as shown below.



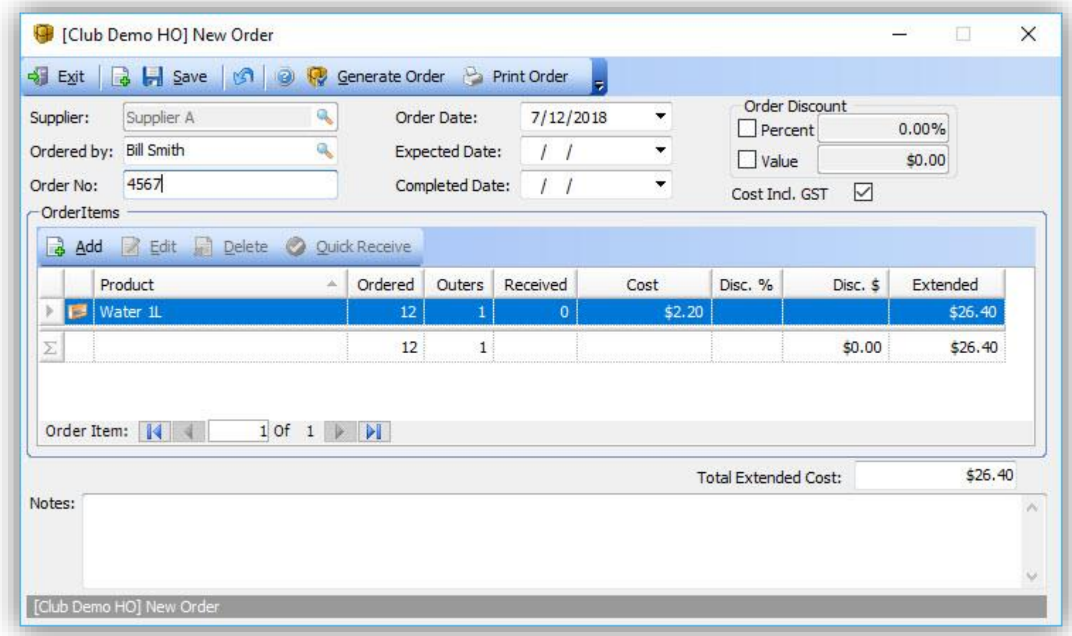
The screen below displays.
Note: only the products associated with this supplier will appear.
Select the product to add to this order, and then click **OK.**

The **New Order Item** screen will display, as shown below.



Ensure the information is correct.
Click **OK** to save the new order item.

It will be added to your order, as shown below.



Step 4. Click **Save**, then **Print Order** to print the order.
Fax or forward the order to the selected supplier.

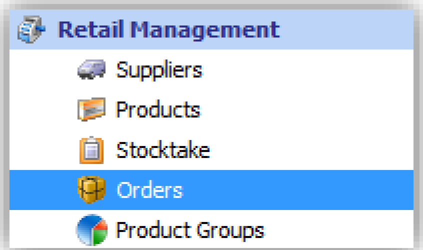
Step 5. Save and exit the **Order** screen.

You have completed the steps required to order stock in Clubware.

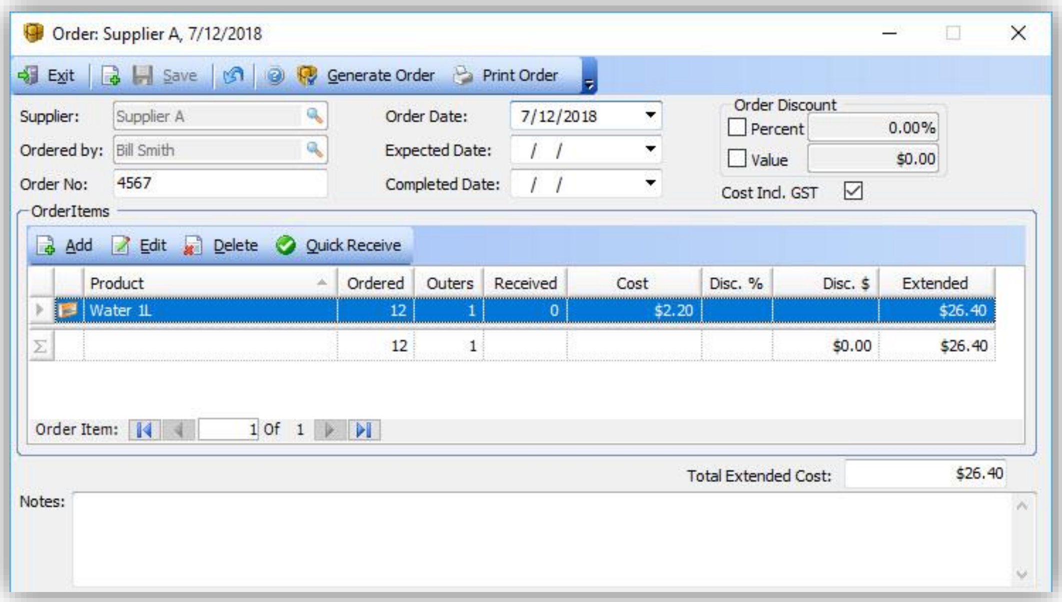
Receiving an Order

This tutorial describes the steps required to receive an order within Clubware.

Step 1. Select **Retail Management | Orders** from the navigation panel, as shown below.



Step 2. The Orders screen displays in the main panel.
Select the order you want to receive.
Click **Edit** in the toolbar at the top of the Orders screen.
The **Order** screen displays, as shown below.

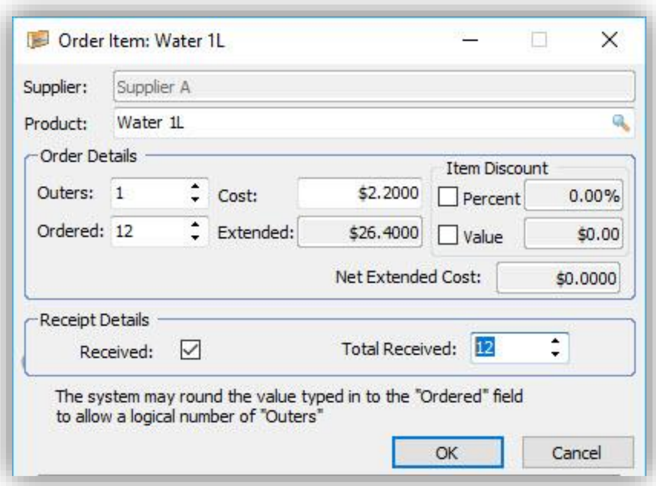


There are two options available, **Quick Receive** and **Individual Items**.

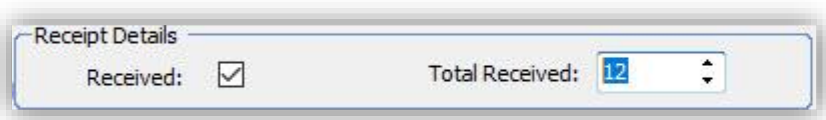
Quick Receive. To restock all the items in your order in one operation, click the **Quick Receive** button as shown below.

All items in your order will be restocked, as shown below. The 'completed' date for your order will be updated with the current date.

Individual Items. Select the item you want to receive stock for.
Click **Edit** on the Order Items toolbar.
The **Order Item** screen displays.



Step 3. Check the Received box, this will automatically set the Total Received to the full quantity, you can do a partial receipt of goods if you have not received all of the ordered stock at once by adjusting the quantity manually and reopen the order item screen again once the remaining goods have arrived to receipt in the remainder.



Click **OK** on the Order Item screen.
The screen will close, and the Received column on the Order Items list will be updated.
Continue down the list of products in order until completed.
Set the completed date once you have finished receipting in the order.

Note: When an item has been received and the order saved, that item can no longer be edited.

Step 4. Save and **Exit** the screen.

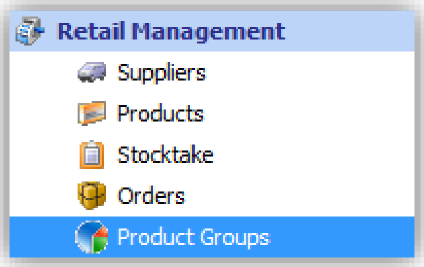
You have completed the steps required to receive an order in Clubware.

Product Groups

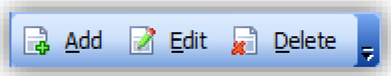
Adding a Product Group

This tutorial describes the steps required to create a Product Group within Clubware.

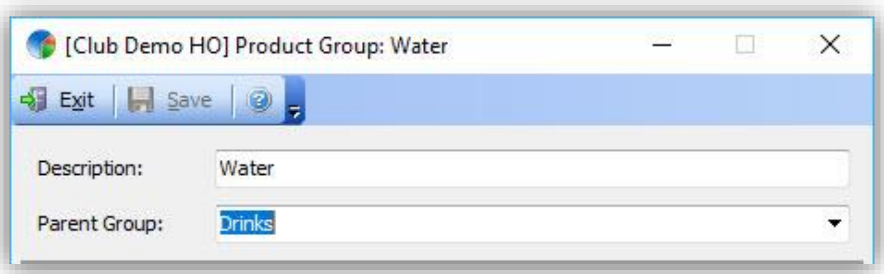
Step 1. Select **Retail Management | Product Groups** from the navigation panel, as shown below.



Step 2. Select **Add** to create a new Product Group



Step 3. Type the new **Product Group** into the **Description** field. You can add a **Parent Group** from the drop-down or create a new Parent Group by typing in the box. This will create a **Parent Group** that will be available in the future. **Parent Group** is not compulsory and may not be always required.



Step 4. Click Save and Close.

You have completed the steps required to create a Product Group in Clubware.

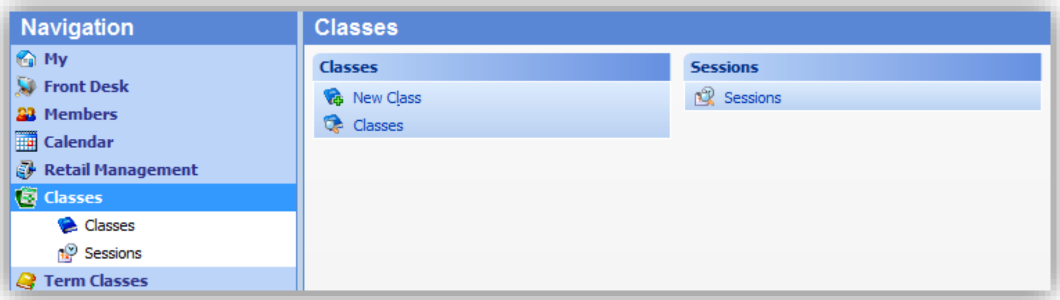
Classes

Overview

Classes allow for the creation of ad-hoc classes and sessions that can typically be booked from the timetable in the front desk or through the arrivals area. Classes can be configured to allow members, accounts, concessions account, casuals or anonymous attendees and a cost if required.

Classes can also be linked to resources, instructors and locations which will show in the relevant calendar.

The POS screen can be used to make a payment for a session and the purchasing of concession packs. A booking ticket can be printed for proof of booking when attending the session or to allow entry.



Classes

A Class can be created within this section. You can set which members are allowed to attend the class by either Members (Only allow active memberships), Accounts (Set a certain account that a member must have), Concessions (Same as accounts, although at a concession basis), Casuals (Allows prospects or previous members to attend) and Allow Anonymous (Allows anonymous access to attend the class).

Sessions

A session is an individual time slot for a class. These are generated/created once the class is created.

Information about a class, such as member and attendance, location, resources and instructors, is specified and stored at the Session level.

A session is typically viewed from the Timetable section. A user can look at a session and add notes or add an attendee from the Timetable section.

Attendees can also be added to the session from the Arrivals screen. See tutorial Arriving a member in a class.

Timetable

The Timetable area allows you to easily access and see past and upcoming classes. You can add members to classes and write notes regarding the class. You can also easily create a Session Attendance Report to take to the class to assist with attendance.

Online Bookings

The Online Bookings area allows Members to book Classes online through a desktop or mobile device browser. The member must have the Enable Member Website checked (on the Member Details Tab) and have a valid email address to be able to register and book online. See tutorial Online Bookings

How To

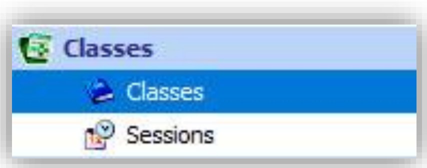
Classes

The following tutorials describe the most common actions associated with Classes.

Adding Classes

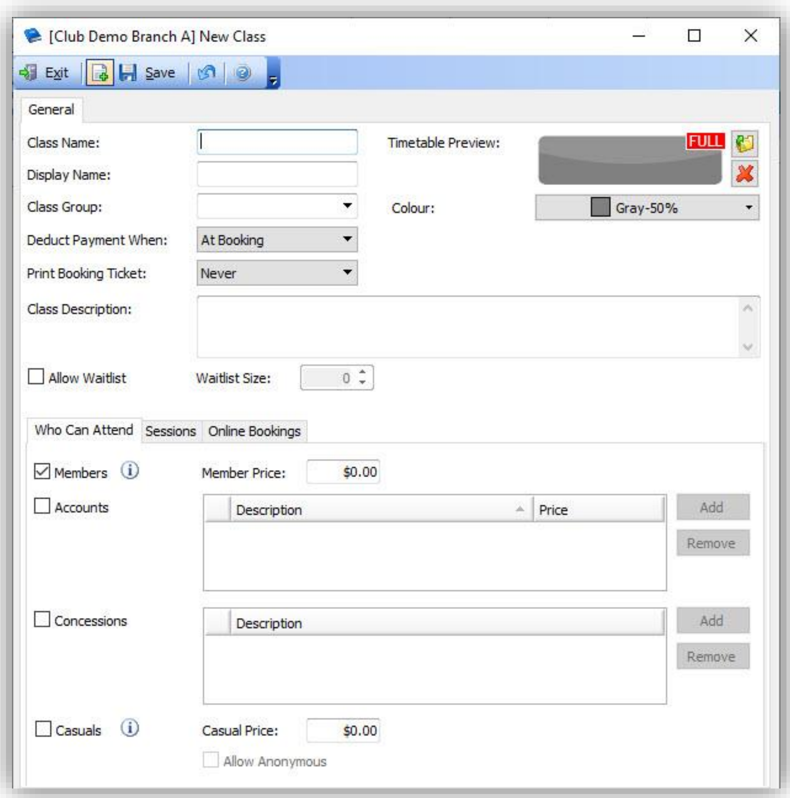
The following tutorial will show you how to create a class.

Step 1 Select **Classes | Classes** from the navigation panel, as shown below.



Step 2. Select **Add** from the toolbar of the navigation panel

A new class will be shown.



Main Points:

Class Name: A class name can be entered here.

Display Name: The display name that will be shown in the calendar is to be entered here. This may be different that the class name.

Class Group: The class can be grouped to allow for easier reporting at a later date. (Each facility can personalise Group names in this area).

Deduct Payment When: Choose when to take payment for the class. Either “At Arrival” or “At Booking”.

Print booking Ticket: Choose if a booking ticket should be printed for the class.

Class Description: It is useful to add a class description so other staff members can easily view information as to what the class involves.

Allow Waitlist: Allows members booking online to be added to a waitlist

Waitlist Size: Number of members allowed to be added to a waitlist.

Timetable Preview: This is a preview of the class as it will look in the Front Desk Timetable and Online if enabled. This can be changed to display an image.

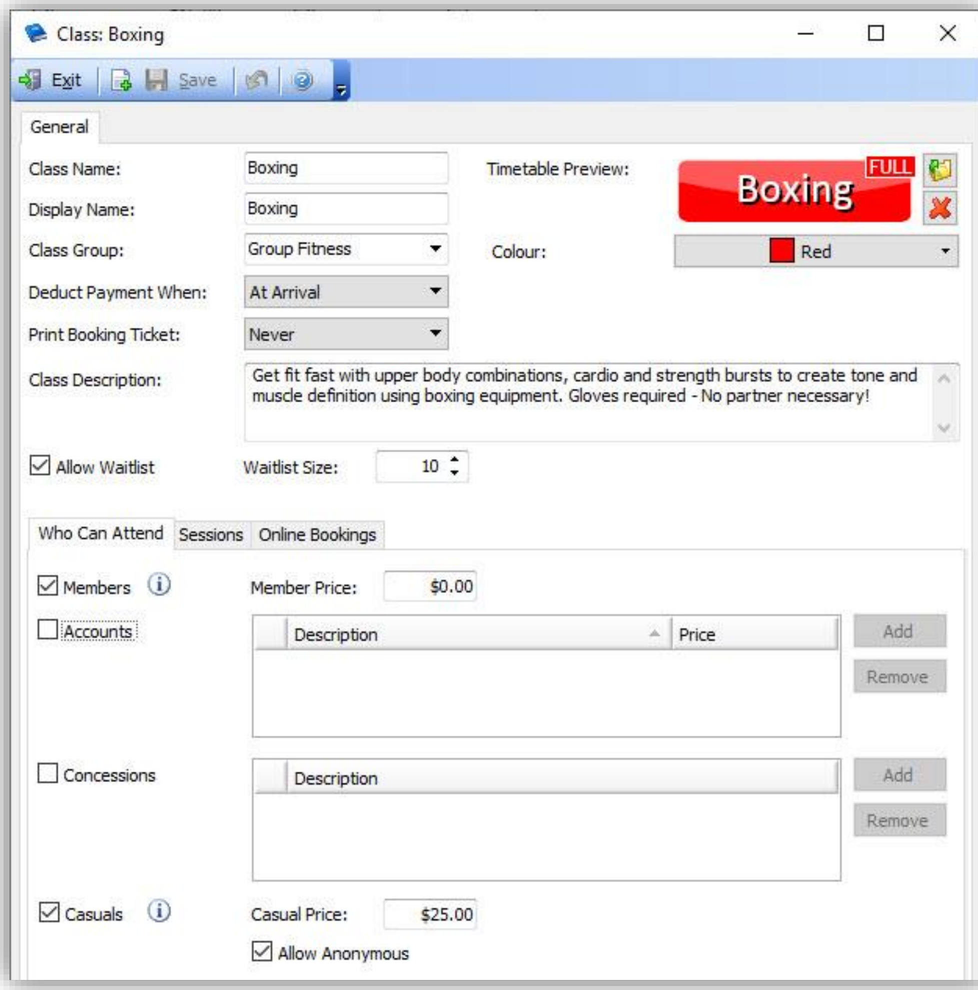
Colour: The background colour can be changed for each class for easy identification within the Timetable.

Who can attend: Here you can advise who can attend the class by either membership status or account specific. You can also choose if casual members/anonymous members are permitted.

Sessions: The sessions for the class will be created here.

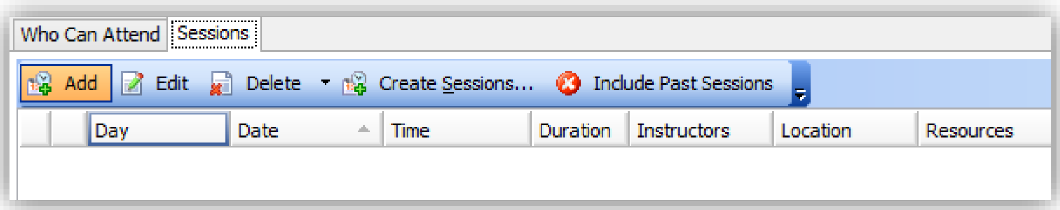
Online Bookings: The settings for online bookings are entered here.

Step 3. Enter the class details.

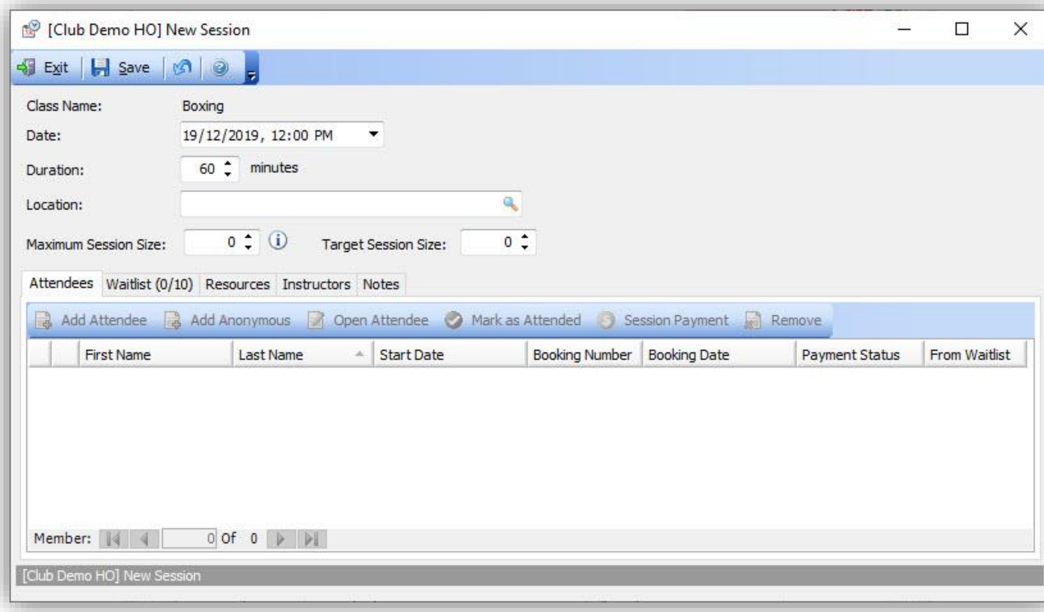


Step 4. To create an individual session, go to the “Sessions” tab and select **Add.**

Note: if the “Add” button is not active. Make sure you save first to create the class.



Enter the session date to start, duration of classes, location and maximum session size.

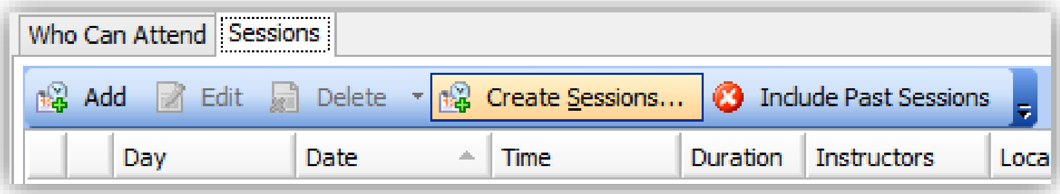


You can also add attendees, resources and instructors to the class here.

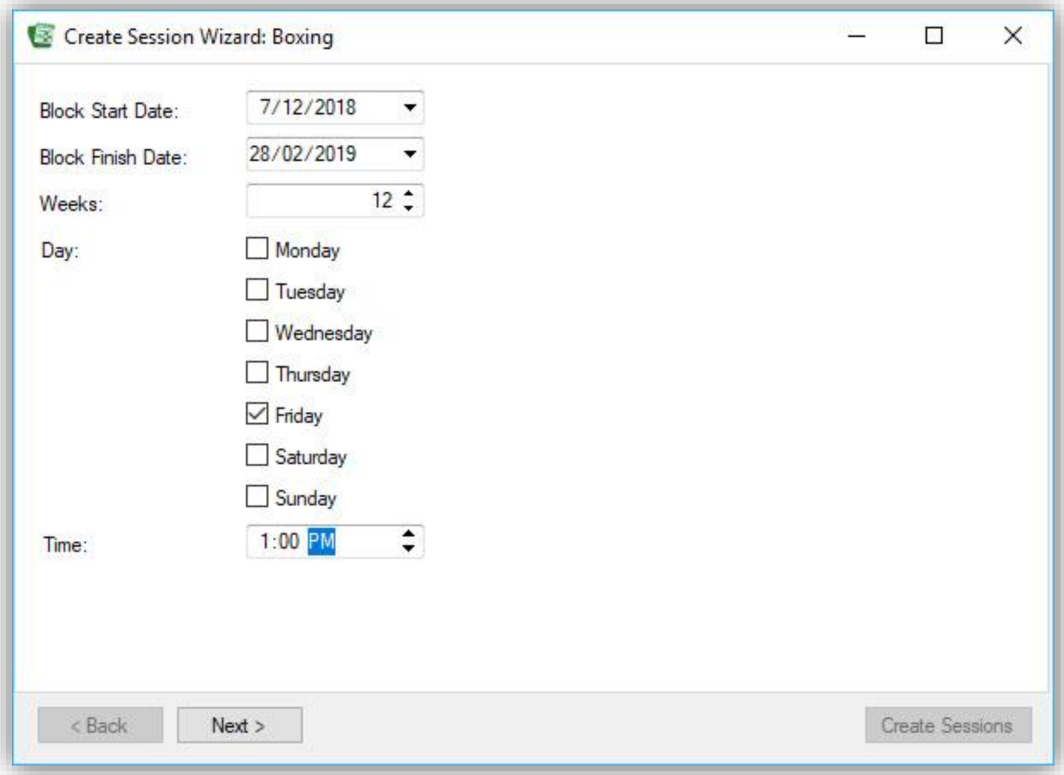
Target Session Size can be used to track performance of a class.

Click **Save** and **Exit**.

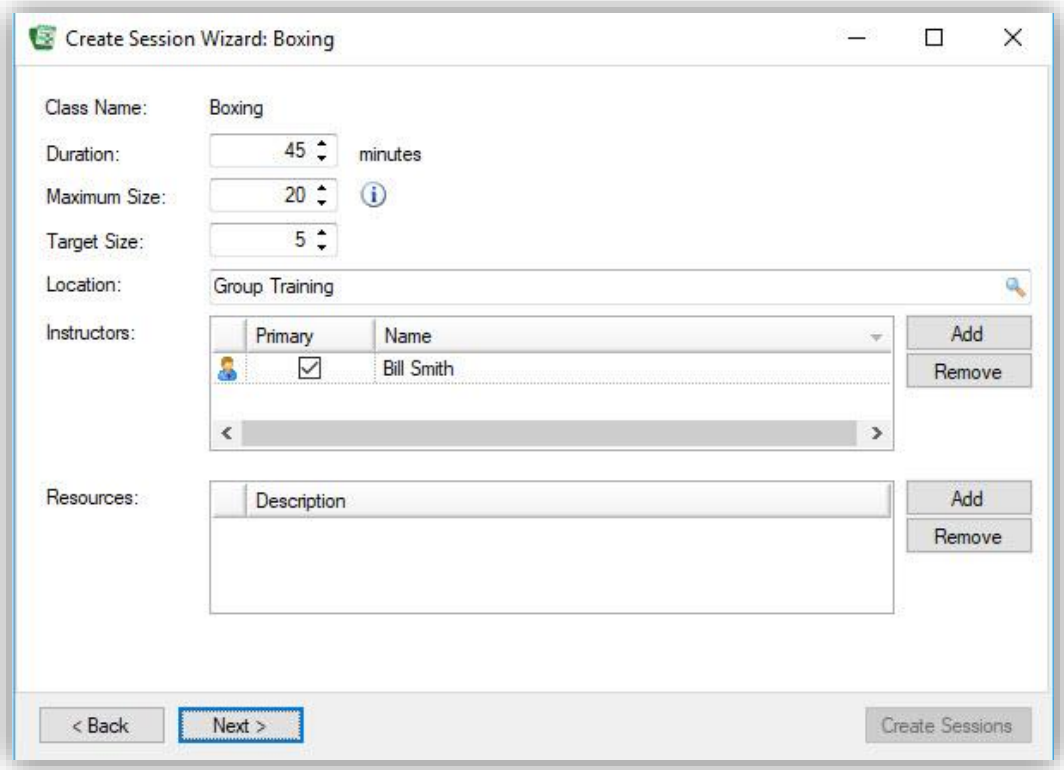
To create multiple sessions, under the sessions tab. Select **Create Sessions**.



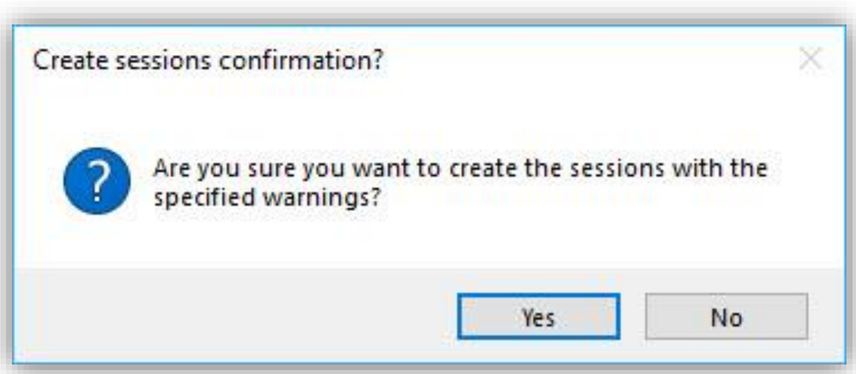
Step 5. Using the **Create Session Wizard,** choose the time and dates or how many weeks for the session.



Step 6. Click **Next,** and then choose the Duration of the class, Maximum size, Location, instructors and resources.

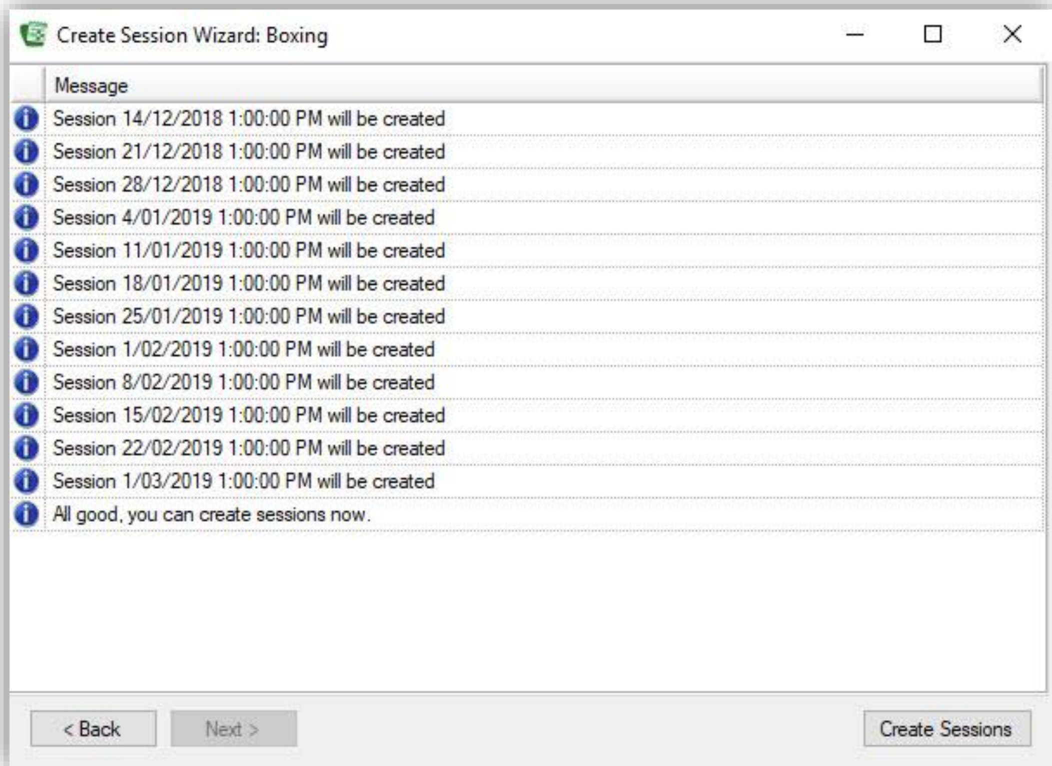


Step 7. Click **Next** and any conflicts will be shown, click **Next** again to see the sessions about to be created. Click **Create Sessions** to create the sessions shown.



Clicking **Yes** to the above will create the session. You will now see all the sessions have been created.

If you wish to add more sessions at different times/locations/instructors/resources, select **Create More** from the left hand side of the wizard and repeat the previous steps.



Click **Close**.

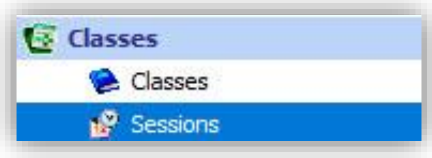
You have completed the steps required to create classes in Clubware.

Editing a session

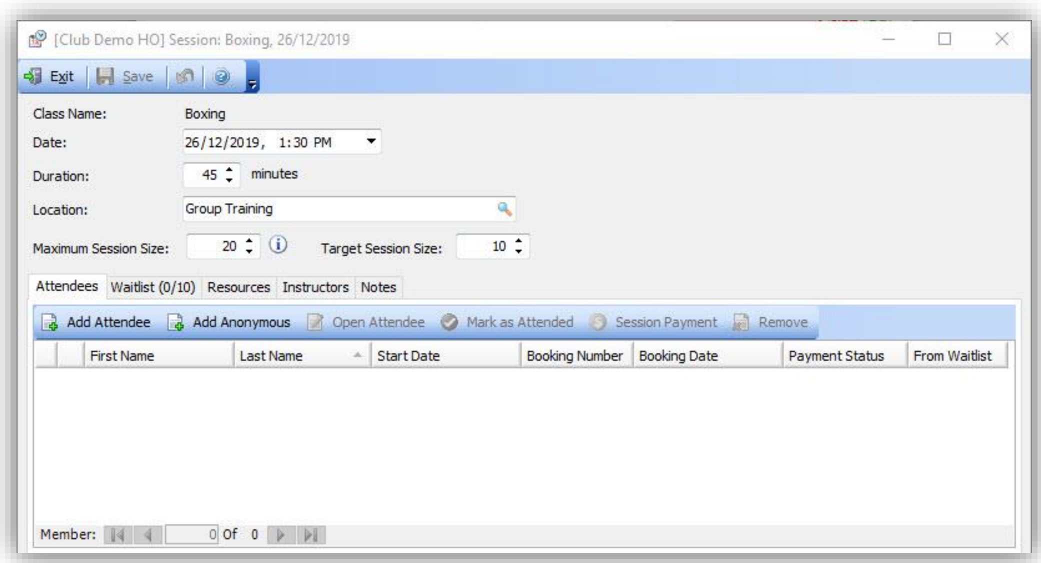
The following tutorial will show you how to edit a session.

You may need to edit an individual session if the instructor is unavailable for a class as an example.

Step 1 Select **Classes | Sessions** from the navigation panel, as shown below.



Step 2. Select the individual class that needs to be changed and select **Edit**.



Step 3. Make the changes as required.

You have completed the steps required to edit a class session in Clubware.

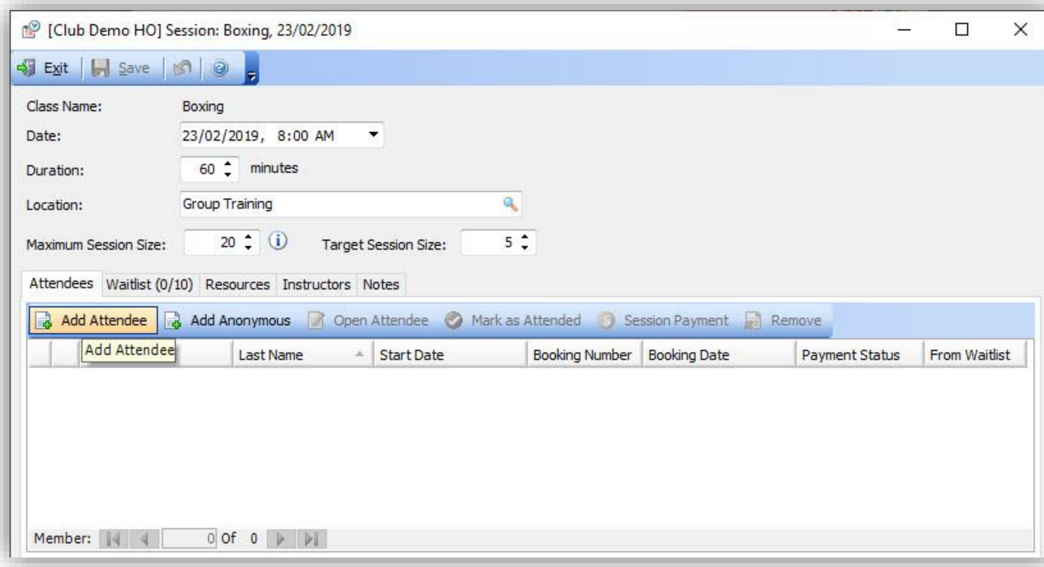
Adding a member to a session

The following tutorial will show you how add a member to a session.

Members can be added to sessions either within classes or from within the timetable. While completing the options below, you will be also be given the option to add anonymous/casual members if option has been setup during class setup.

Within Classes

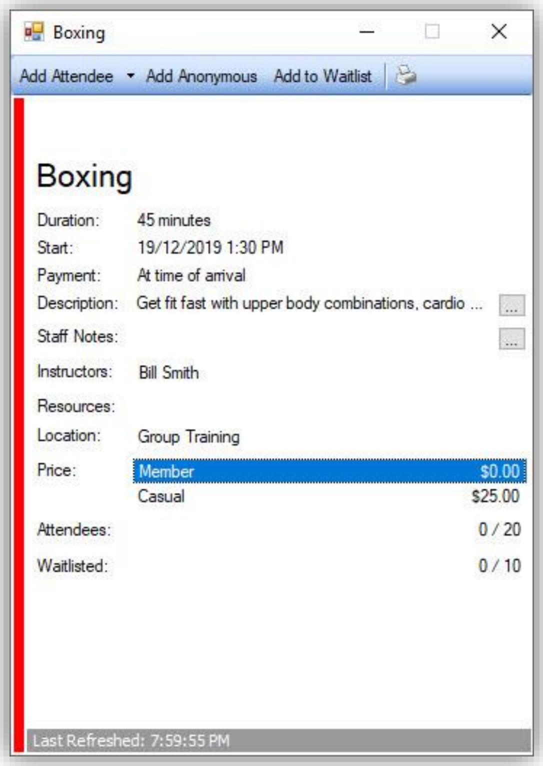
Follow the instructions within **Editing a session** and select **Add Attendees** where you can search for a member to add to the class.



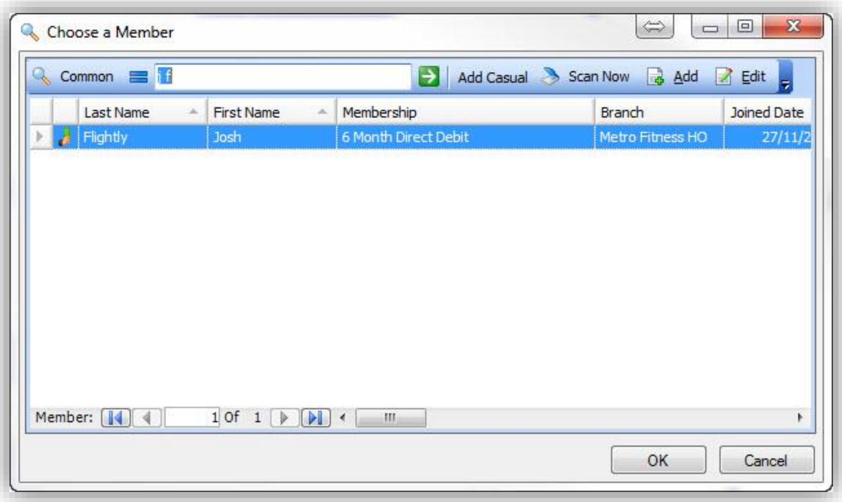
From the Timetable

Step 1. Within timetable; find the class the member would like to attend.

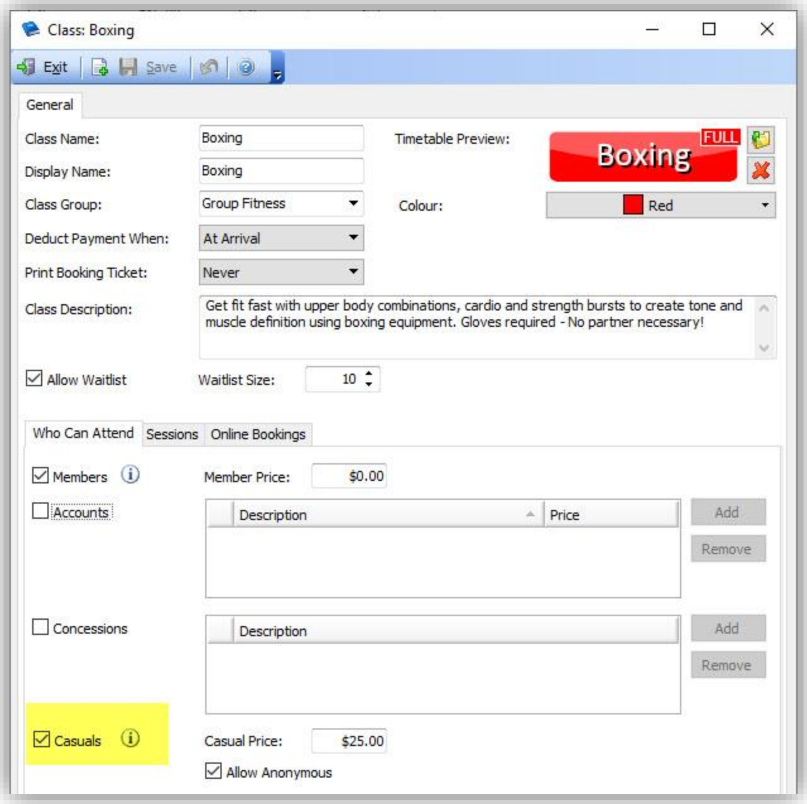
Step 2. Double click on the class and choose **Add Attendee**.



This will open a search where the member can then be selected once found.

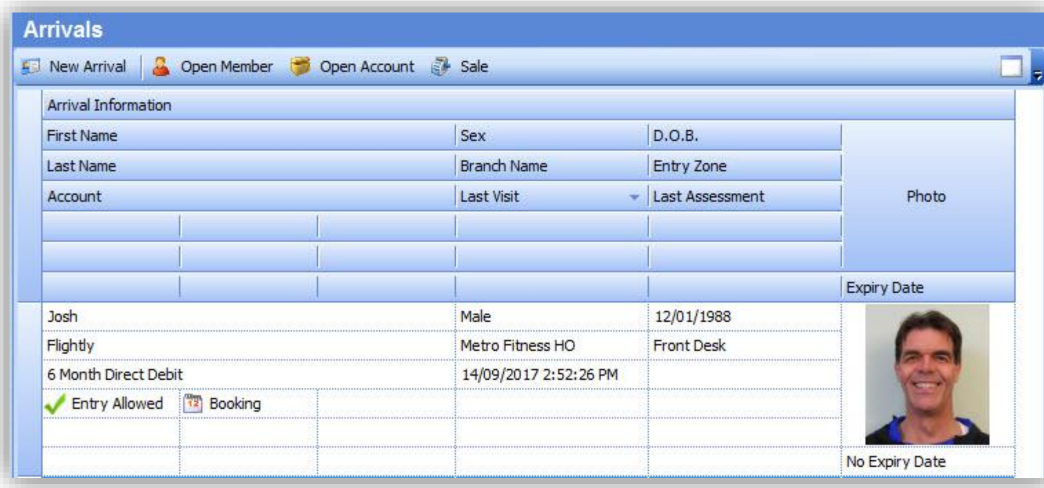


Note: To add a prospect to a class, the class must have **Casual** ticked within the classes information screen as shown below.

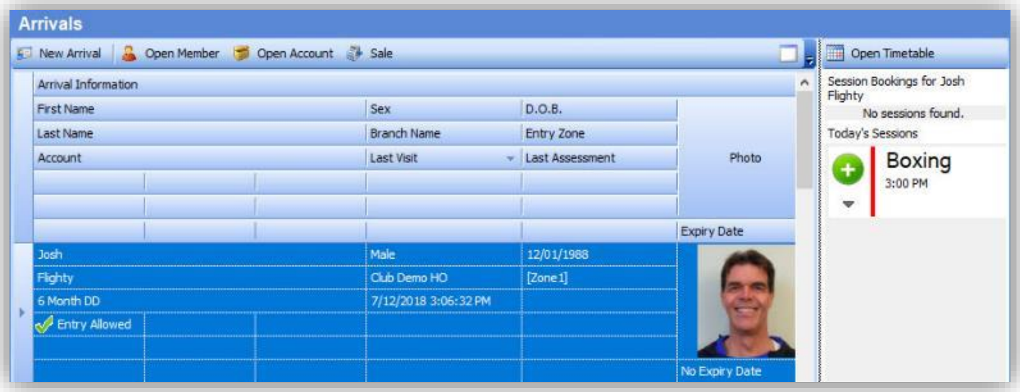


From Arrival Screen

Step 1. Arrive the member either manually or when they swipe their access card.



Step 2. Select the member and then hover the mouse over the classes under the heading “Todays Sessions” on the right of the screen and press the  symbol.



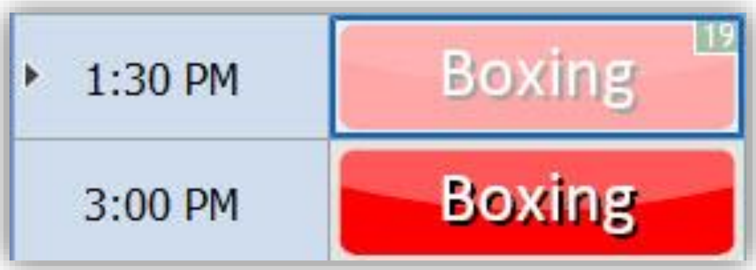
The member has now been added to the session.

Note: “Todays Sessions” will show all remaining classes for the day, as well as classes that are within 15 minutes of starting.

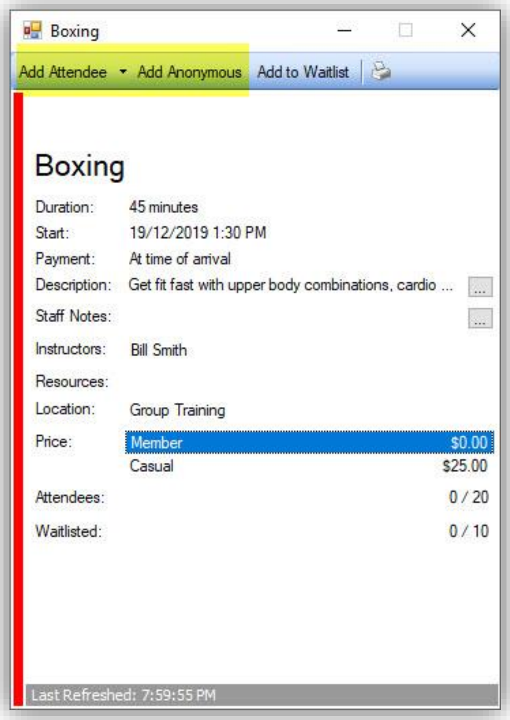
After the Class has finished

If the instructor would like to manually add the attendees to a class that has concluded.

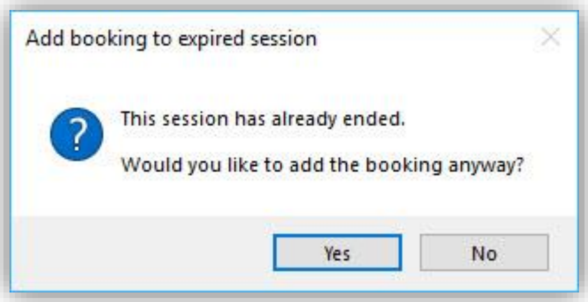
Step 1. Within the Timetable. Find the session that you would like to add members to.



Step 2. Double click on the class and select either **Add Attendees** or **Add Anonymous**



Step 3. Search and select the member to be added to the class. If **Add Anonymous** is selected and the time has passed you will see the following message.



Click yes to add the Anonymous person.

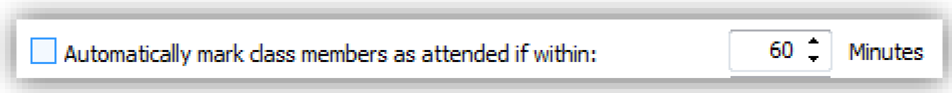
Note: If there is a charge to be paid by the Anonymous person, the POS screen will ask for payment.

You have now completed the steps to add a member to a session.

Marking as Attended

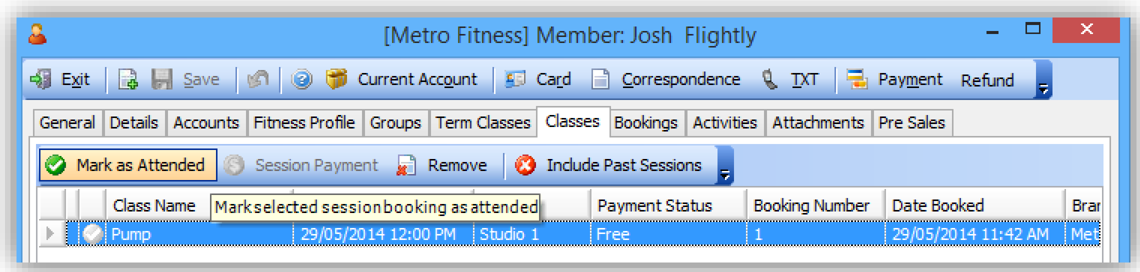
The following tutorial will show you how to mark a member as attended. There are multiple ways a member can be marked as attended. See below.

Step 1. Clubware can be setup to mark a member as attended within a certain timeframe of their arrival to the class. Go to **Administration | Branches | Select Current Branch | Settings | Entry** to set up the time.



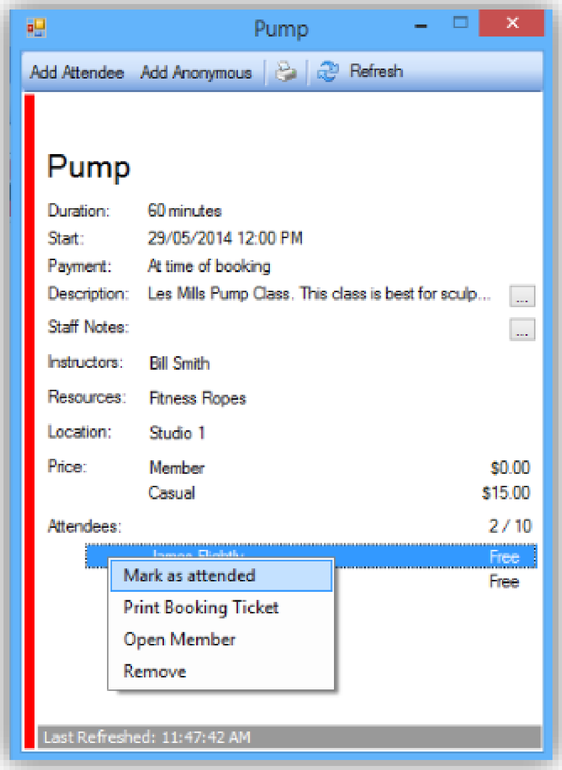
You can manually mark the member as attended via:

Step 2. The Classes tab on the Member Record on the classes tab (Select the class and then **Mark as Attended**)

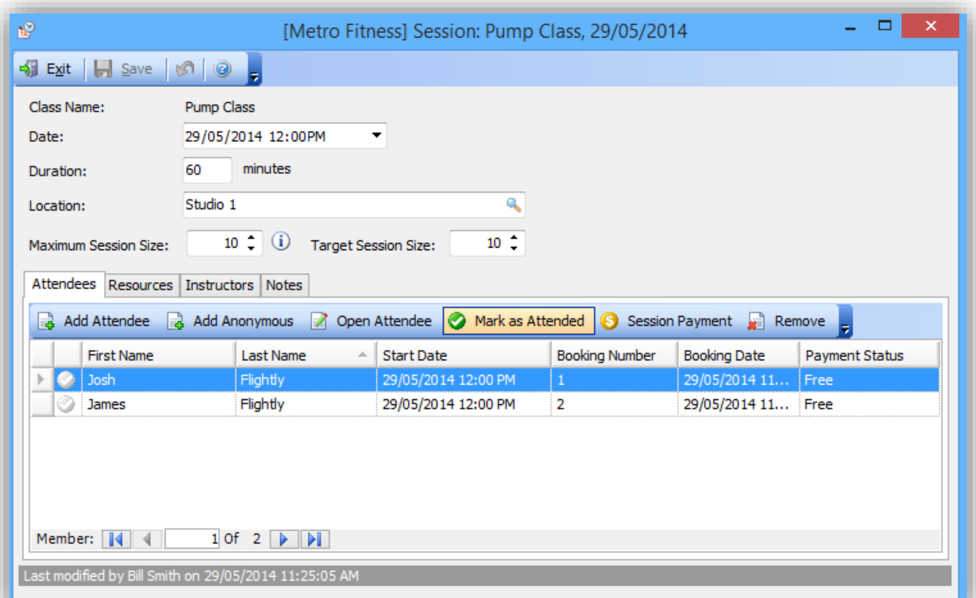


Step 3. The Arrivals screen (Click the drop down arrow and select **Mark as Attended**)

Step 4. The Timetable screen (Within Timetable, right click on the member and select **Mark as Attended**)



Step 5. The Session Screen (Within **Classes | Sessions,** select the class and highlight the member. Select **Mark as Attended**)



You have now completed the steps required to mark a member as attended to a class.

Adding Bulk Attendees to a Class

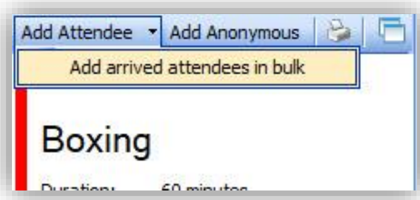
The following tutorial will show you how to add members to a class in bulk.

Note: The Class must have already completed, and the members scanned in.

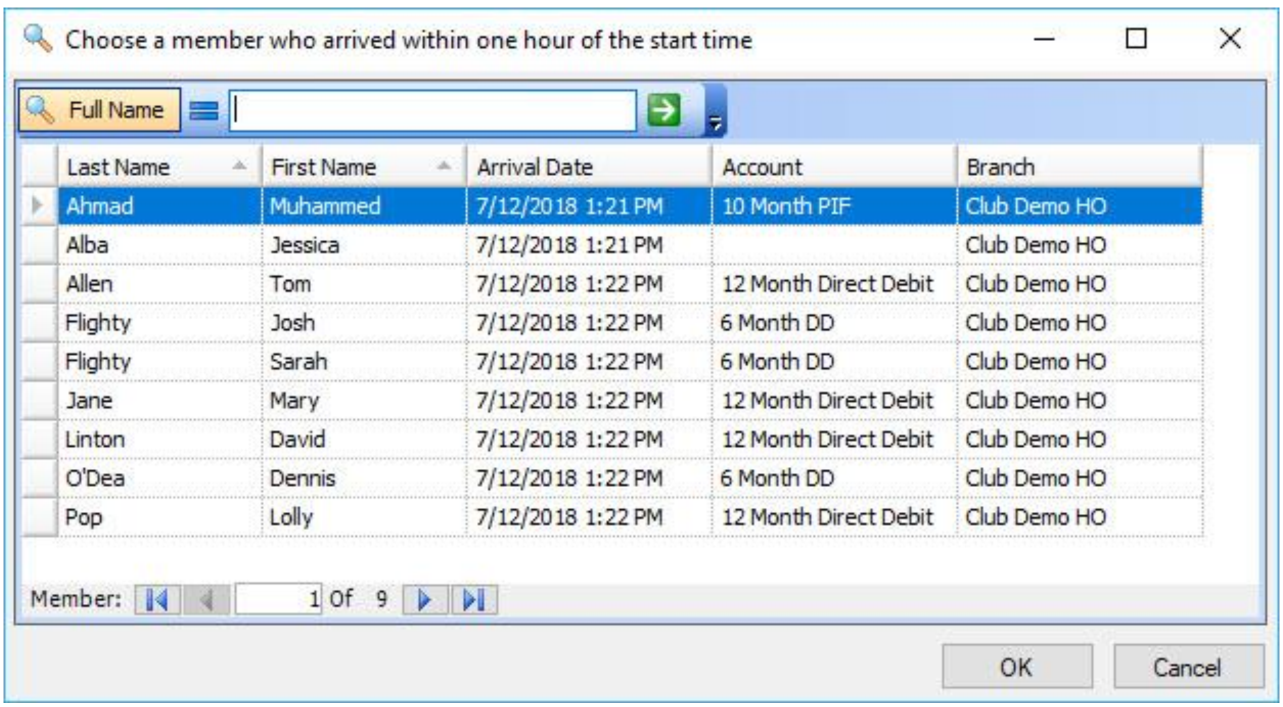
Through timetable

Step 1. Go to **Front Desk | Timetable** and locate the class.

Step 2. Use the drop-down arrow next to **Add Attendee** and select *Add arrived attendees in bulk*



Step 3. Choose all of the members who attended the class by holding the Ctrl key on the keyboard to select multiple members. Then select **OK**.



You have now successfully added members into your class in bulk.

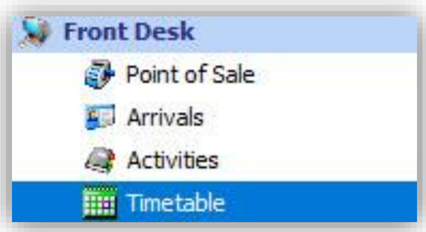
Removing an attendee

The following tutorial will show you different ways on how to remove an attendee from a session and give a refund if required.

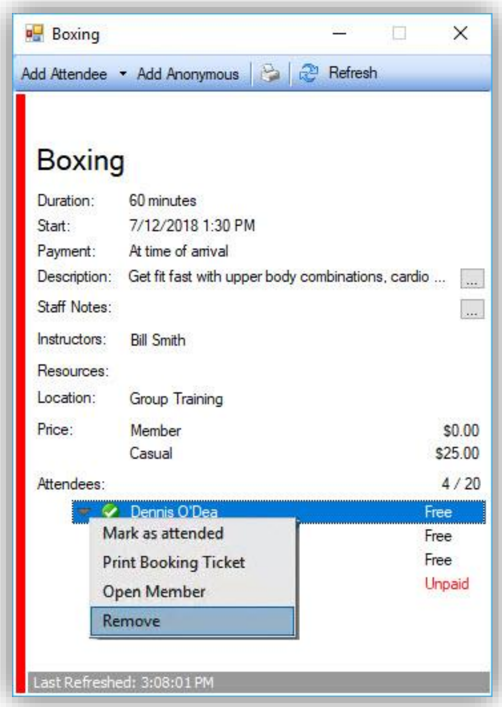
Note: The following presumes that there was a charge for the class. If no charge is made, then the choice to refund will not be given.

Through timetable

Step 1. Go to **Front Desk | Timetable** and find the class the client is enrolled in.

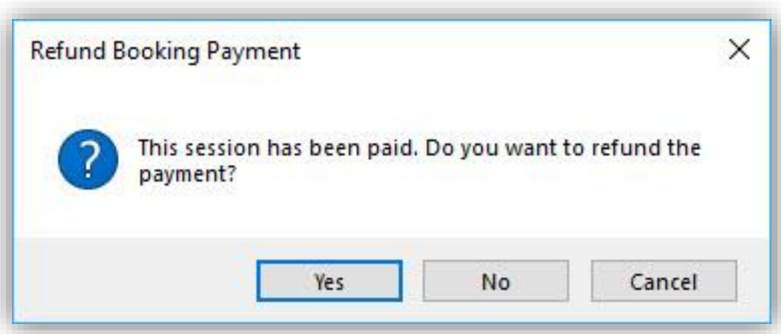


Step 2. Hover the mouse of the member and press the dropdown list as shown below.



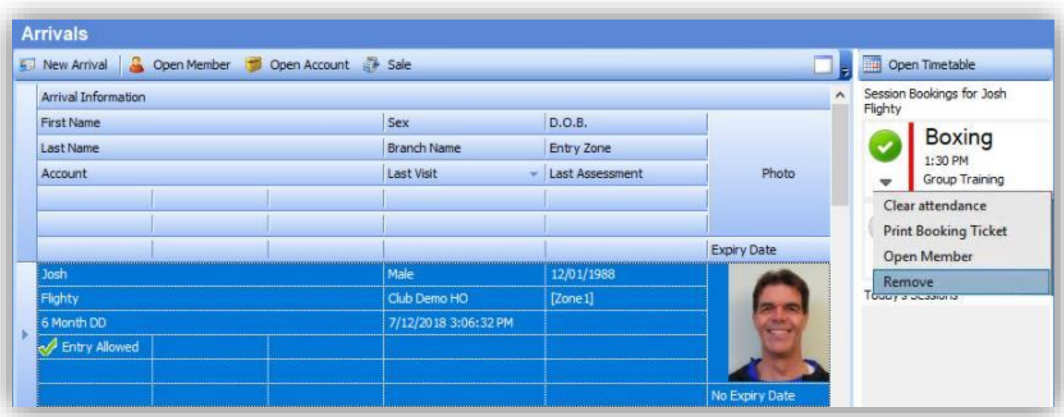
Step 3. Confirm that the member will be removed.

Step 4. Choose yes to refund the member if there was a payment taken previously.

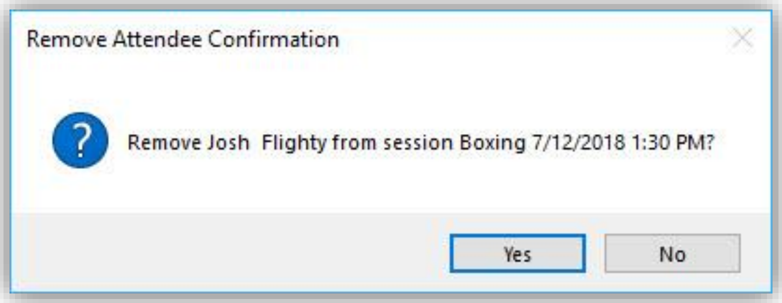


From Arrival

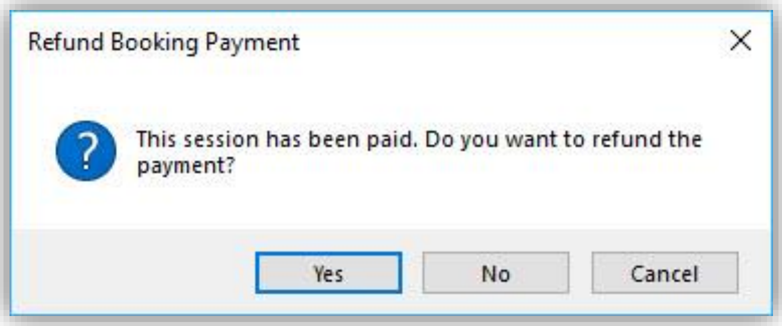
Step 1. From **Front desk | Arrivals** select the member and choose remove as shown below.



Step 2. Confirm that the member will be removed.



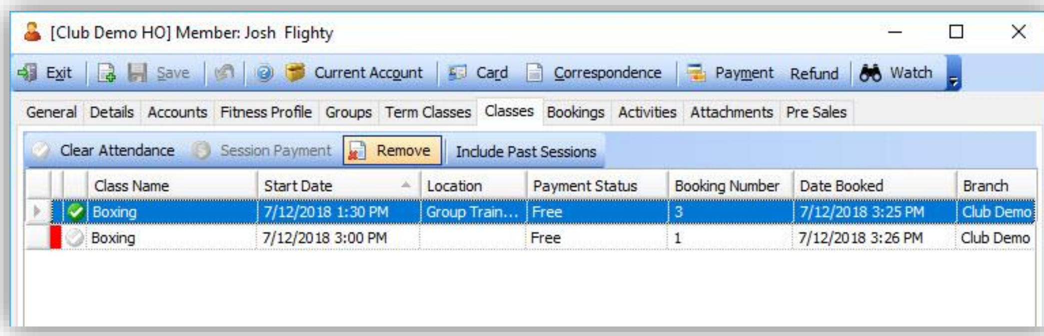
Step 3. Choose yes to refund the member.



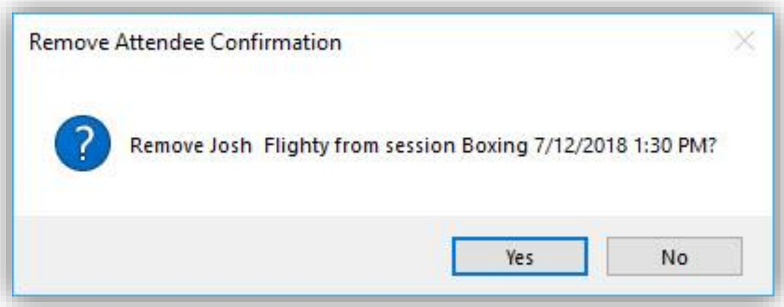
From Member screen

Step 1. Find the member in **Member | Members** and double click or choose edit on the member.

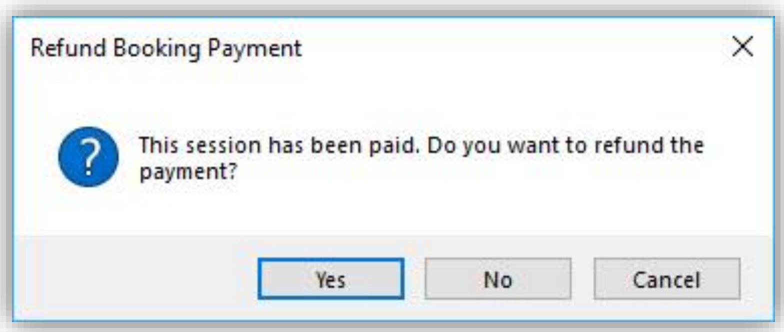
Step 2. Click the **Classes** tab and remove the member from the class.



Step 3. Confirm that the member will be removed.



Step 4. Choose yes to refund the member.



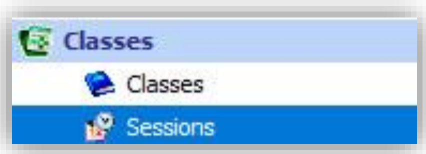
You have now successfully completed the steps to remove an attendee from a class.

Adding a member to a waitlist

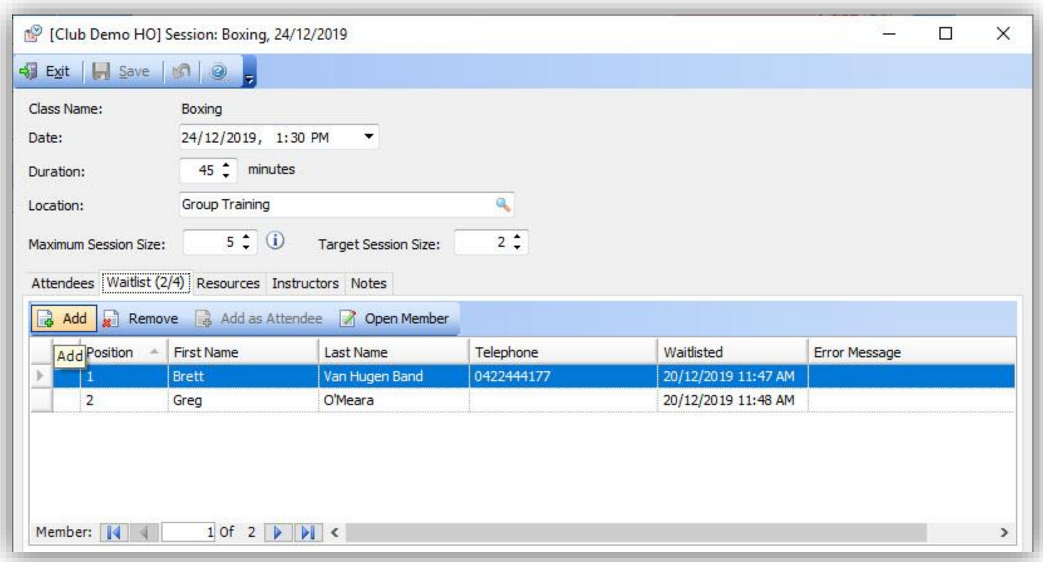
The following tutorial will show you how to manually add members to a class waitlist

Note: The following presumes that waitlist has been allowed for the class.

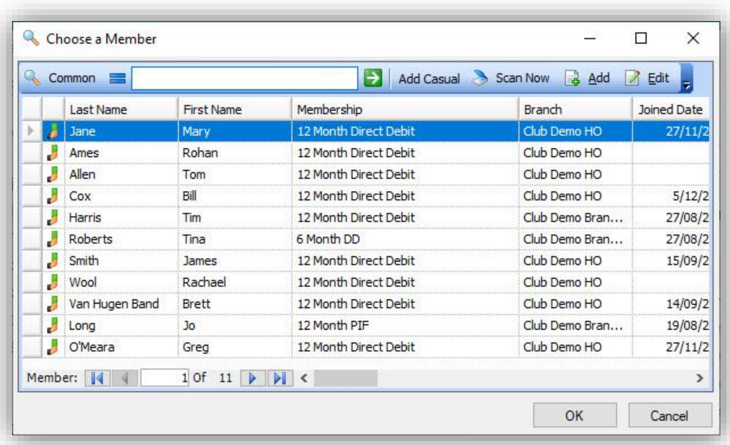
Step 1. Go to **Classes | Sessions** and open the session the member would like to be waitlisted for.



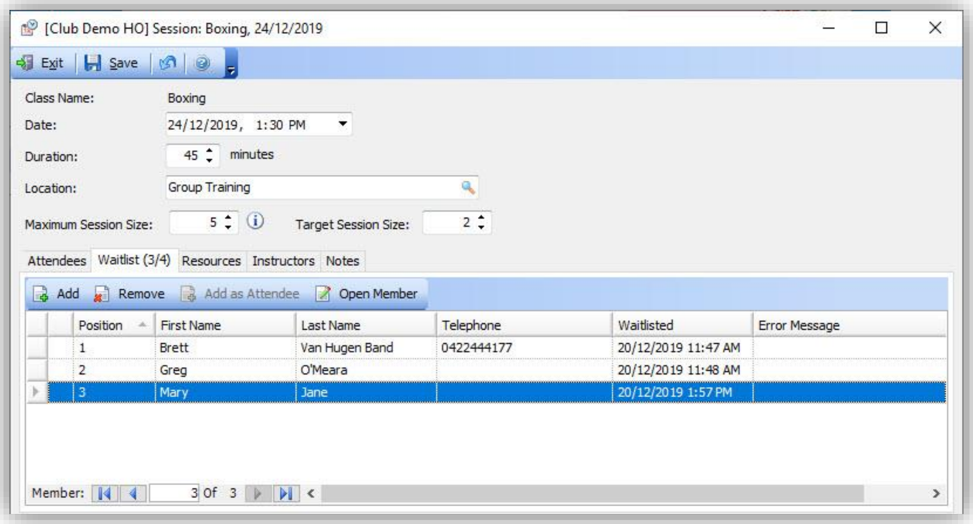
Step 2. Select the Waitlist tab and select Add to search for the member.

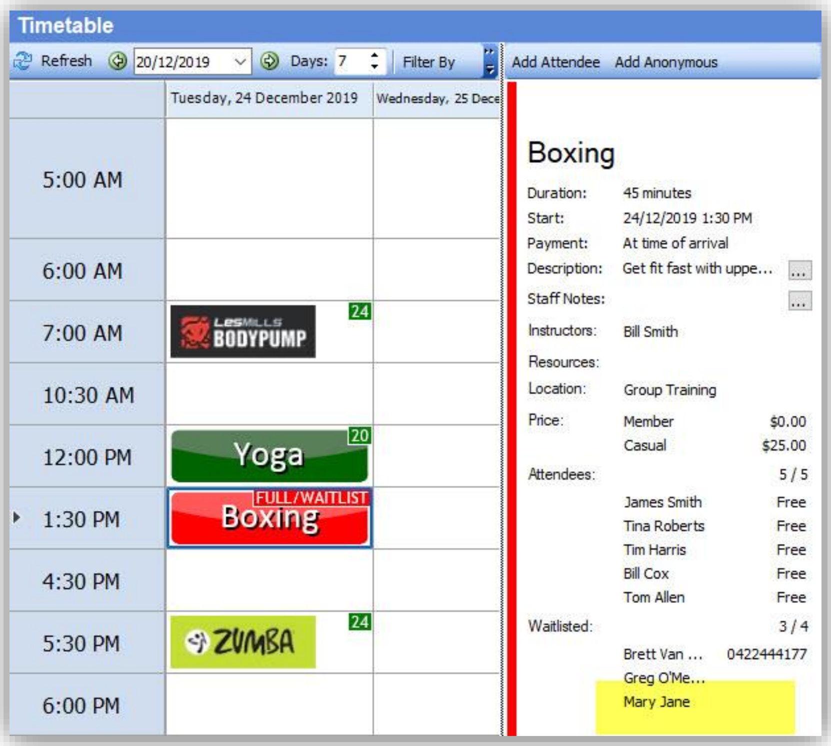


Step 3. Confirm the member to be added.



Step 4. The member appears in the session and on the timetable with a position number. It will always put the last person on in the last position. If a member cancels a booking, the person in position 1 will be added as an attendee and notified via email of the booking change.





You are unable to add a member to a session from the timetable.

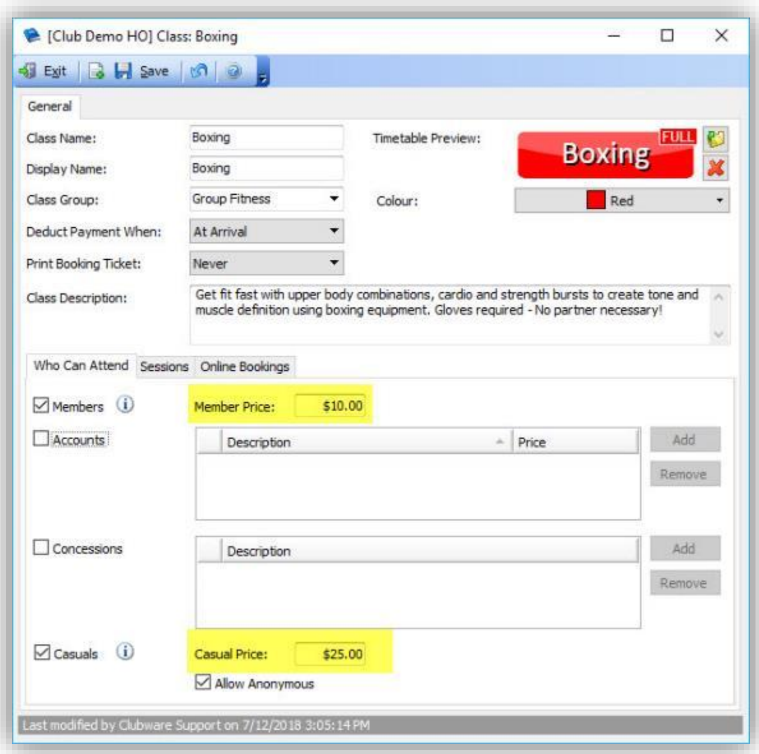
If you have online bookings/mobile app enabled, the member can also add themselves to the waitlist when booking.

You have now successfully completed the steps to remove an attendee from a class.

Taking Payment

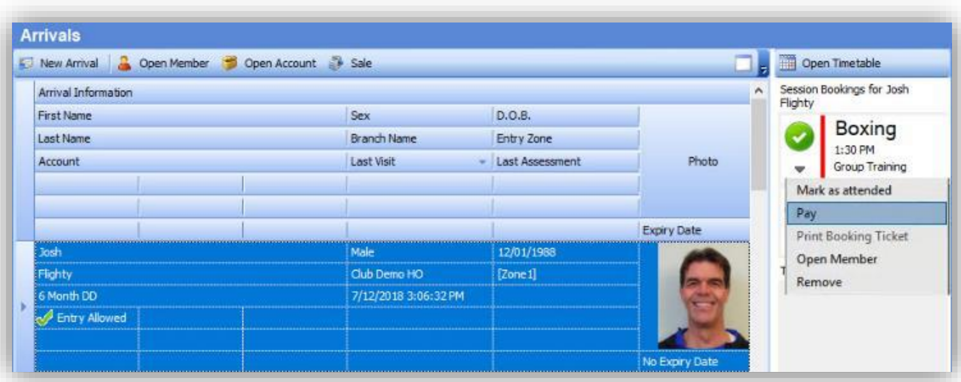
The following tutorial will show you different ways to take payment for a session from within Clubware.

The amount to be charged to members or casuals must first be entered into the Class. Complete this by, going to **Classes | Classes**. Select the class you would like to change and enter the prices as below.



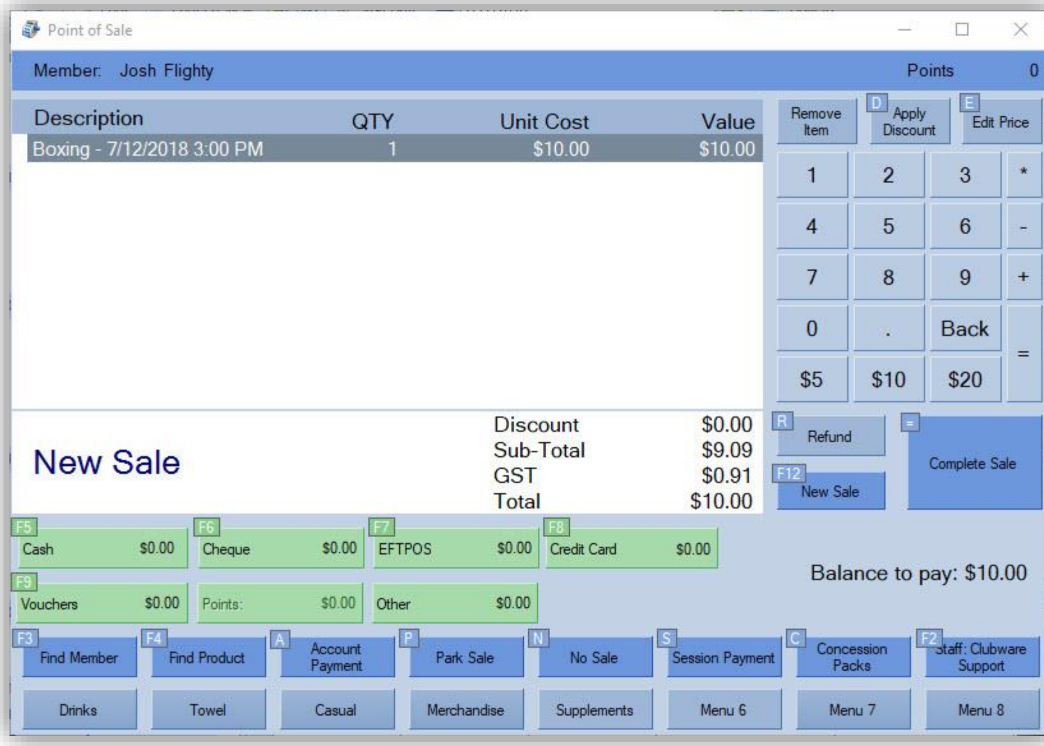
On Arrival

When the member enters the club, the payment can be taken for the class. Select **Front Desk | Arrivals**. Select the member and press the arrow under the icon. Choose **Pay** and the POS screen will open for payment.



Payment for members

When adding the member to the class the POS screen will prompt for payment as above.



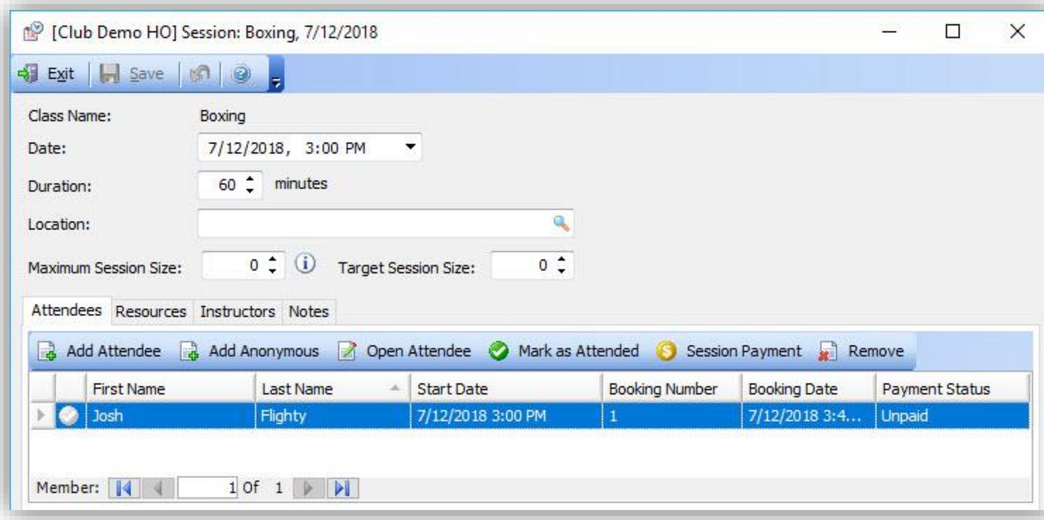
For anonymous clients

Select the class you would like to add the member to and select **Add Anonymous**. This will evoke the POS screen where you can take payment for the member.

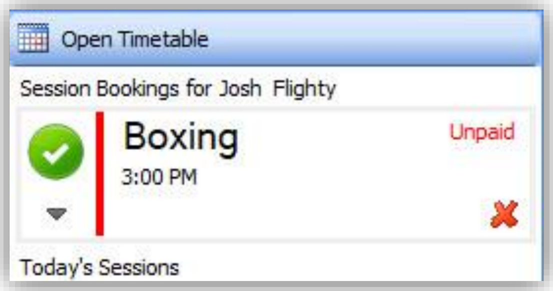
See **Adding a member to a session** for information on how to add members to sessions.

Payment later

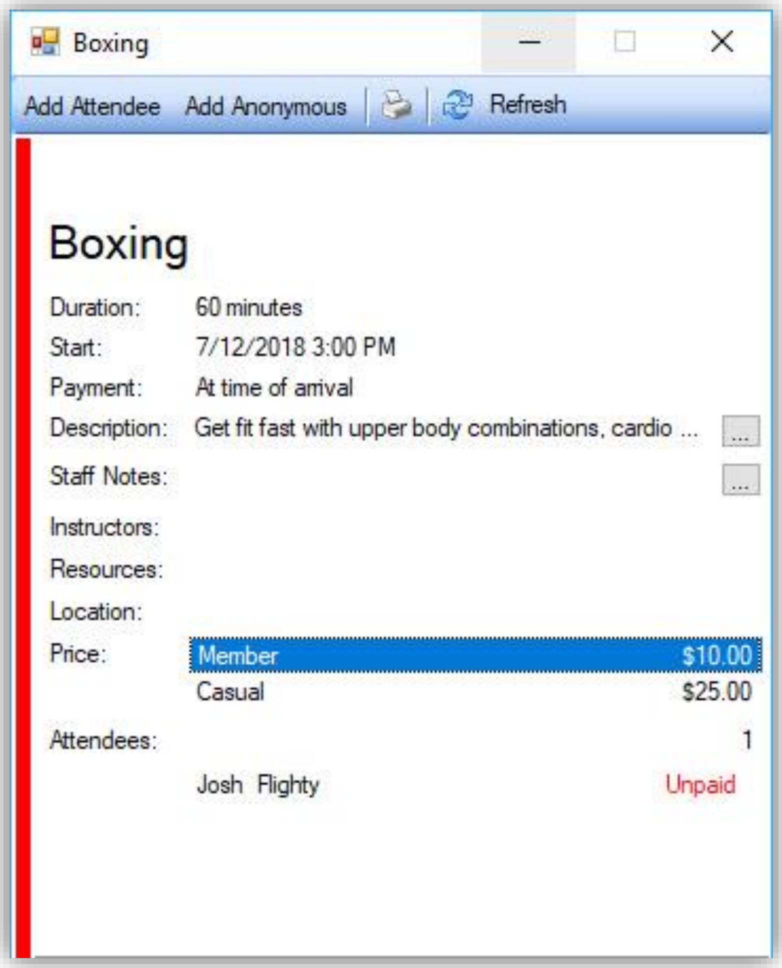
When a member booked into a class, they may not be able to pay at the time. When the POS screen comes up as above, the sale can be discarded by closing the POS screen and choosing discard. The member will have a payment status of “Unpaid”.



On arrival to the club, the member will be shown as “Unpaid” for the class. Payment can be made on the arrival screen. See **On Arrival**.



The timetable can also advise the attendees that have not yet made payment.

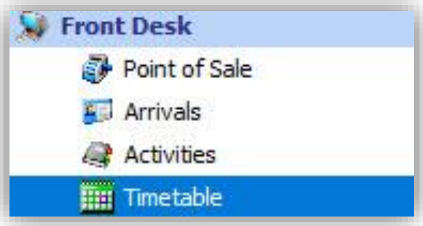


You have now completed the steps to take a Class payment in Clubware.

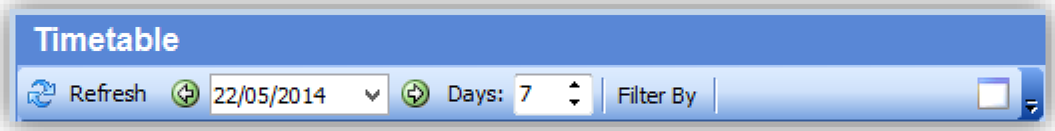
Timetable

The following tutorial will show you how to access and use the Timetable from within Clubware.

Select **Front Desk | Timetable** from the navigation panel, as shown below.

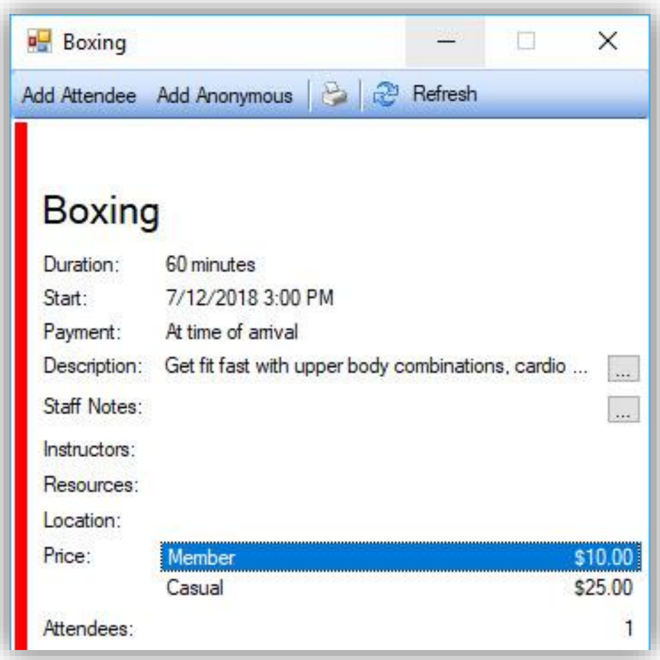


From the Timetable you can easily go between a set amount of days using the arrows that are either side of the date and selecting the amount of days to filter the search by.

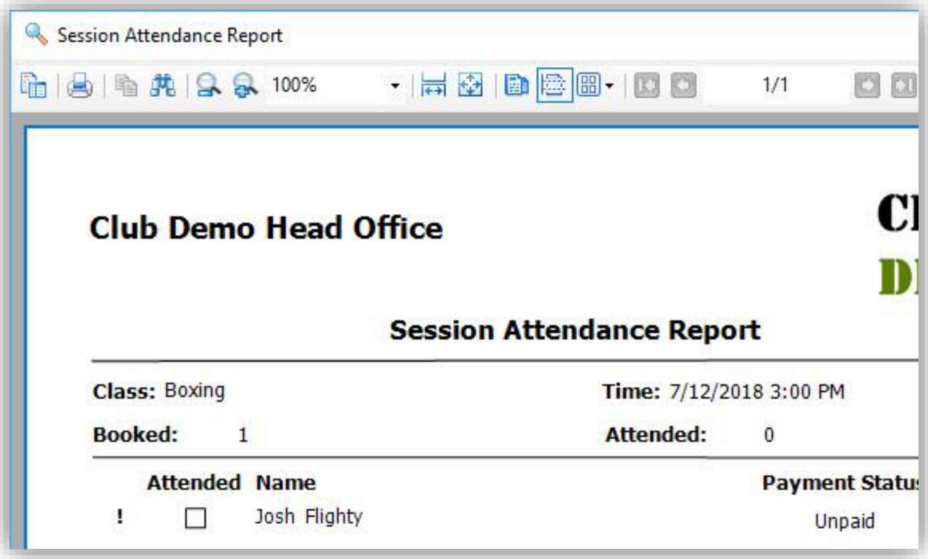


The above example will go between 7 day durations on the timeline. If this is changed to 3 then you will only see the 3 days, then you can use the arrows on each side of the date to move throughout the days back or ahead.

On the left hand side panel, you can **Add Attendees** or **Add Anonymous** to classes making sure that you have selected the exact class that you would like to add the client to.



Using the  icon allows you to run a Session Attendance Report.



You have now completed the steps to access and use the class timetable in Clubware.

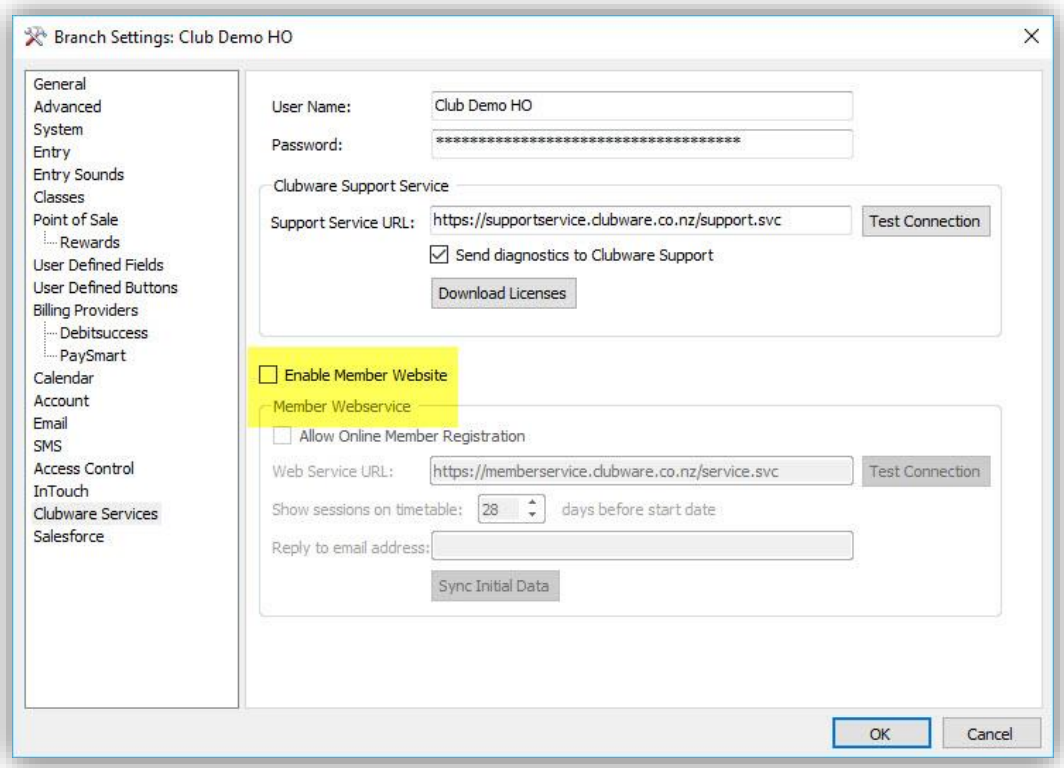
Configure Online Bookings

The following tutorial will show you how to enable your facility to use Online Bookings.

Step 1. (You may need to work with Clubware Support to ensure your details are correct.)

Select **Administration | Branches** from the navigation panel. Double click on the applicable branch

Step 2. Select Settings from the top and the **Options** screen will appear. From here select **Clubware Services.**



Main Points:

Enable Member Website: This must be ticked to ensure member information is passed to the website.

Allow Online Member Registration: This must be ticked to allow non-members to register using the Online Bookings portal.

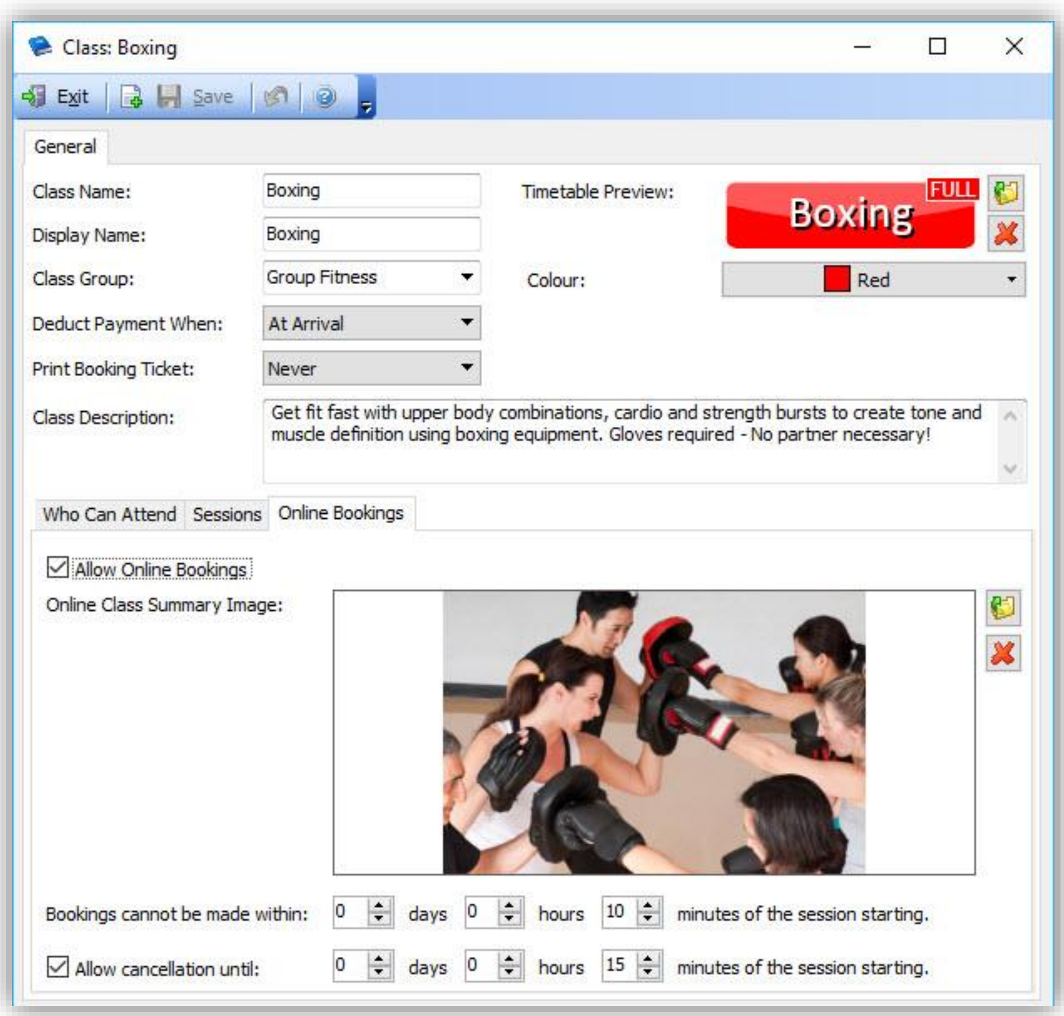
Web service URL: URL which talks to the member website. Will be pre-populated

Show session on timetable: Control how many days in advance should classes visible

Reply to email address: Will display on the website and when the member registers

Sync Initial Data: Sync member data to the website for the first time.

Step 4. Apply and restart Clubware. Once open, go to **Classes**. Open a class and select the **Online Bookings** tab, as shown below.



Main Points:

Allow Online Bookings: Tick this box to allow the Class to be available for Online Bookings

Online Class Summary Image: An optional image displayed when the member clicks for further details or to book the class online.

Booking cannot be made within: Used to determine the latest time a member can book the class online.

Allow Cancellation until: An optional setting used to determine the latest time a member can cancel the class online.

Step 5. Go to Synchronisation | Sync with Member Website. This will force the classes to upload to the member website in preparation for online bookings to be used.

Step 6. Your Clubware Support Consultant will provide you with a URL. This is for the facility, in conjunction with any external website creator to embed on the company website.

You have completed the step to set up online bookings in Clubware.

Instruct members to use Online Bookings

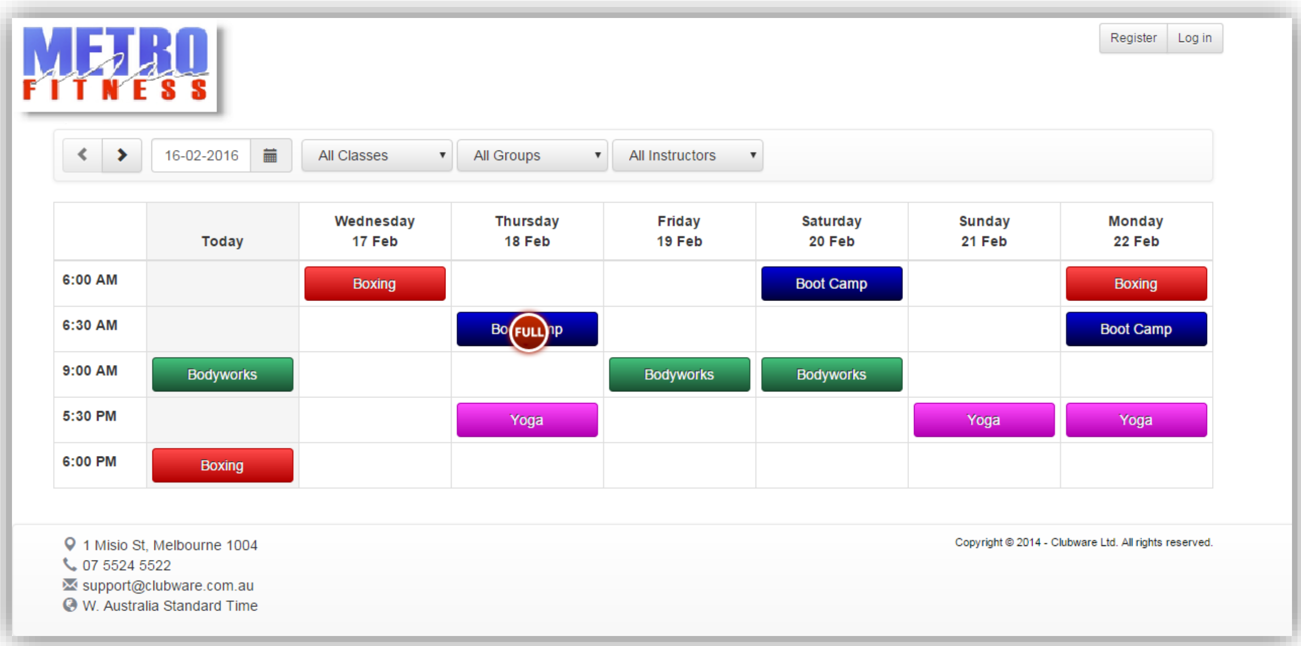
Once you have set up your online bookings and placed the URL under a button on your website, your members can access online bookings.

The following tutorial will provide instruction for you to guide your members in the use of Online Booking in Clubware.

Note: For members to be eligible to use online bookings, they must have a valid email address in Clubware. They also must have the **Enable Member Website** box ticked on the Details tab of their member record (see tutorial Adding a Member)

Step 1. Navigate to your website and select the online bookings button.

Step 2. Your timetable should now display, as shown below.



Main Points:

Register: The first time your member uses the online bookings portal, they will have to register.

Log in: This is where your member will log in after receiving confirmation that they have been successfully registered.

Date: Date classes are shown from on the online bookings calendar

All Classes: This filter can be changed to show a specific class e.g. Boxing.

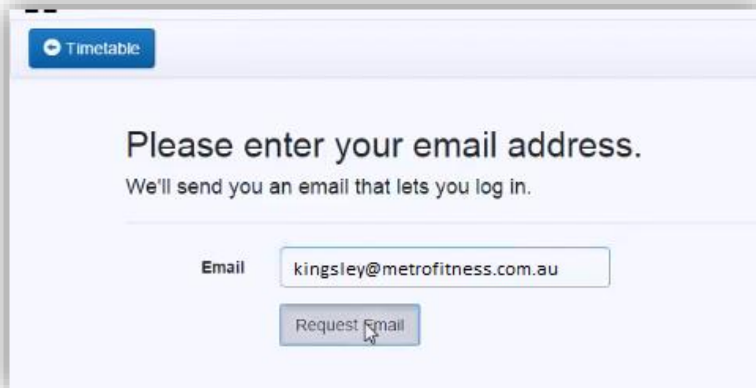
All Groups: If groups have been designated in a class e.g. Cardio, then the end user will be able to filter to show either all or only a specific group.

All Instructors: If instructors have been allocated to the class then the end user will be able to apply a filter to show either all or a specific instructor.

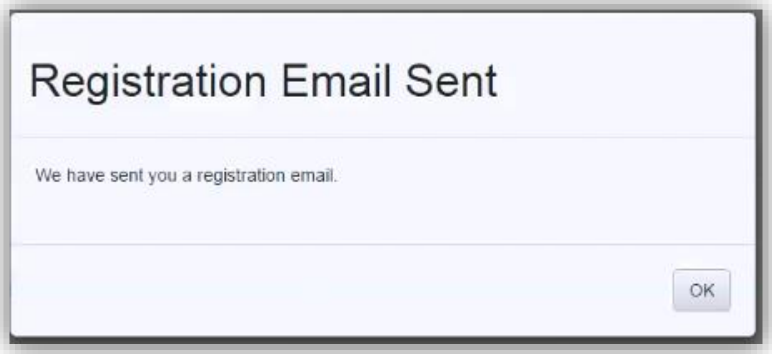
Full Stamp: The full stamp as displayed above shows the end user the class is booked to capacity

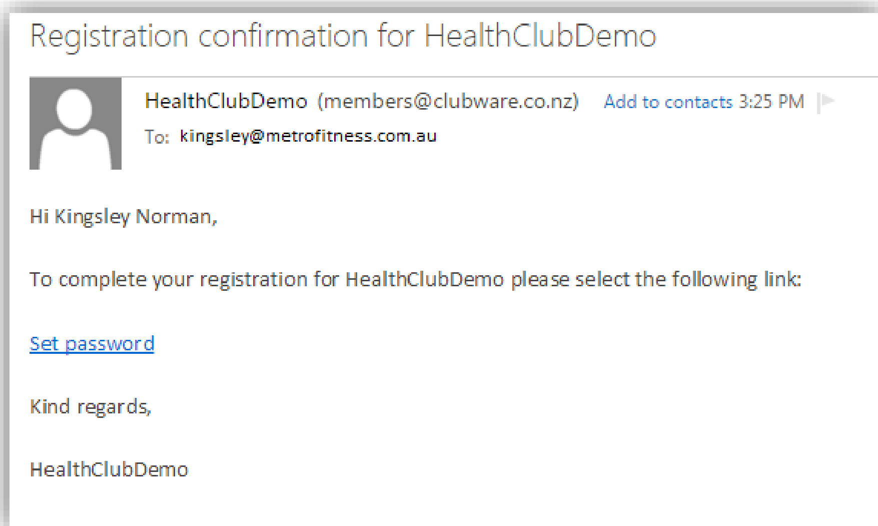
Facility Contact details: These details, along with the logo, will automatically populate from your branch settings.

Step 3. The member must register the first time they intend on using online bookings. Selecting register will take them to the screen below.



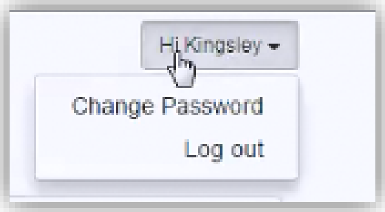
This will send an email to the provided email address and prompt them to register via the Set password link in the email.



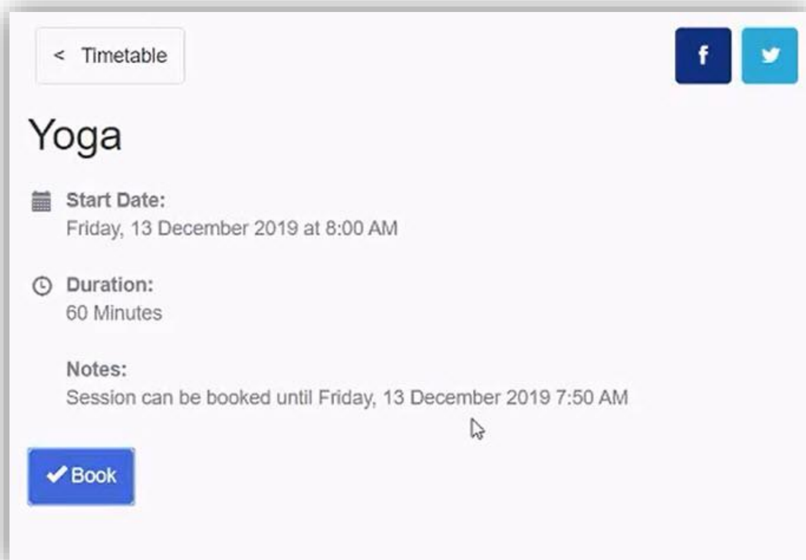


Step 4. The member must finalise their registration for online bookings.

Clubware will then log the member into the online bookings portal. In the top right hand side of the screen, it will indicate that the member has logged in and the drop down with show options for this log in.



Step 5. Members can select a class and reserve a place by selecting book.



Main Points:

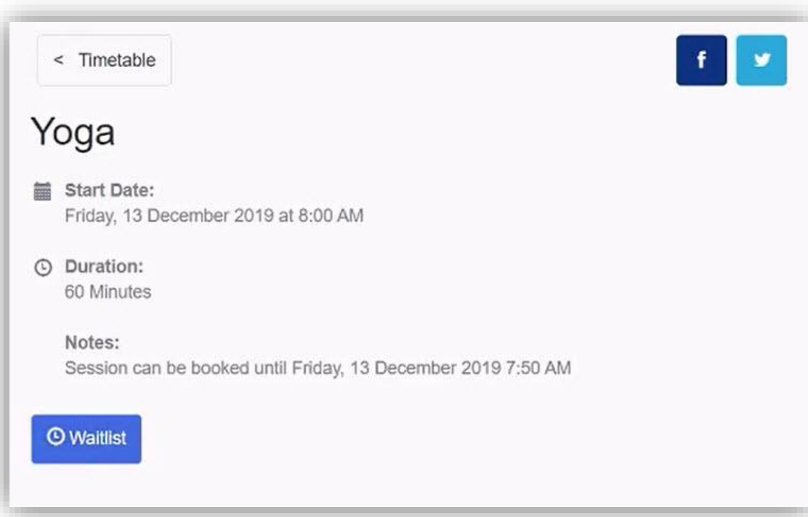
Timetable: Takes your member back to the timetable.

Booked: Displays to the member they have successfully booked in for this class.

Cancel booking: If the permissions have been created in Clubware, the member will have the ability to cancel the booking through the online bookings portal.

Social Media links: Allows your member to share their activities with their friends and followers.

If the class is full, the member may be able to register for the class waitlist. They will be notified by email their position on the waitlist and will be notified again once the reservation is converted to a booking to the main class.



This will mark the classes as booked with a tick, as shown below. This will also update the booking in Clubware. This can be viewed on the timetable.

Note: Classes which are full cannot be booked.

Classes marked as full with an orange clock symbol have waitlist spots available.

Your member has now completed the steps to booking a Class using online bookings in Clubware.

Clubware Mobile App Registration

This tutorial is a guide for you to assist users attending classes in registering the Clubware mobile app.

Note: Regardless of status, all names in your Clubware database should be able to use the mobile app two criteria are met:

The email address they are registering with is on their profile in Clubware.

The 'Enable member website' box is ticked on the details tab.

There are 3 scenarios that can occur as out lined below.

Example 1

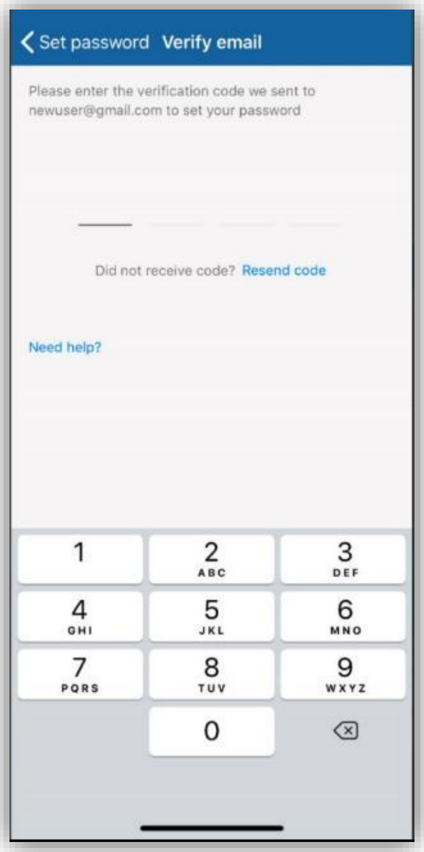
Previous user of the Online Bookings portal:

Step 1. After downloading the App from either the Apple App store or Google Play store, the user should be able to log in and start using immediately by entering the same credentials.

Example 2

User has not registered for the Online Bookings portal but is in the Clubware database:

Step 1. After downloading the App from either the Apple App store or Google Play store, the user will enter their email address and be sent a verification code which will act as a password.



Step 2. This verification code will expire after 90 days inactivity and can be resent simply by re-entering the email address and a new verification code will be sent.

Example 3

User's email is not in the Clubware database:

Step 1. After downloading the App from either the Apple App store or Google Play store, the user will enter their email address.

Step 2. The user will receive a notification stating email address is not recognised and should contact the club.

Step 3. The user can be added as a prospect with their email address. The 'Enable Member Website' option is ticked by default.

Or

The user can go to the online bookings portal to register. This will load them as a prospect in Clubware

Step 4. Follow Steps in Example 2

You have now completed the steps to assist your users in registering to use the Clubware mobile app

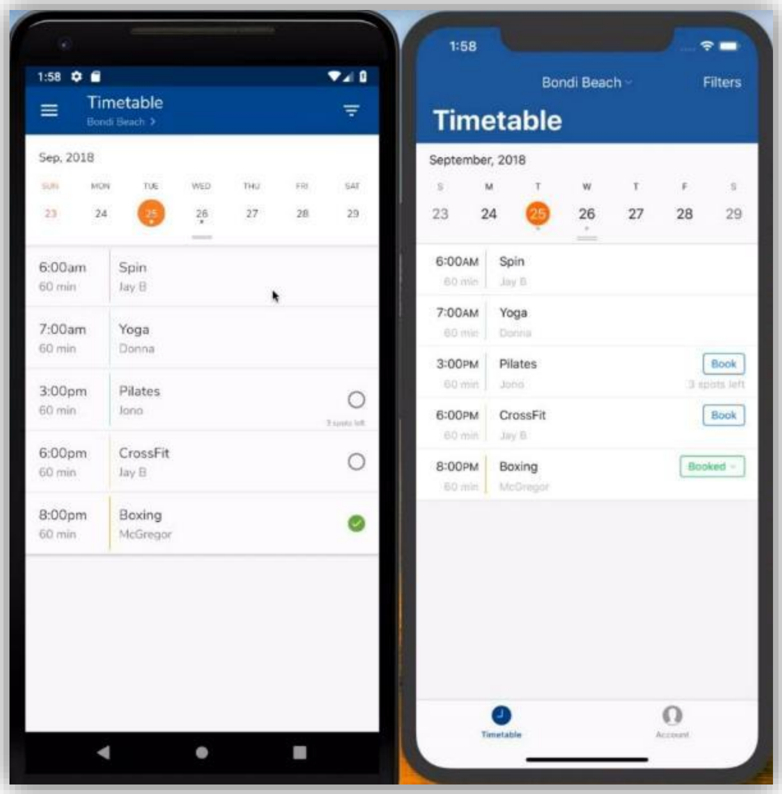
Book Classes using the Clubware mobile app

This tutorial is a guide for you to assist users in registering for classes in the Clubware mobile app.

Note: The first time a user books into a class they will be prompted to accept the terms and conditions.

Step 1. The user will have previously registered for the Mobile App. (See tutorial Clubware Mobile App Registration)

Step 2. After logging in, the user can navigate to the class they wish to use.



Step 3. Either tick the box (Android) or select book (iOS) to book into the class.

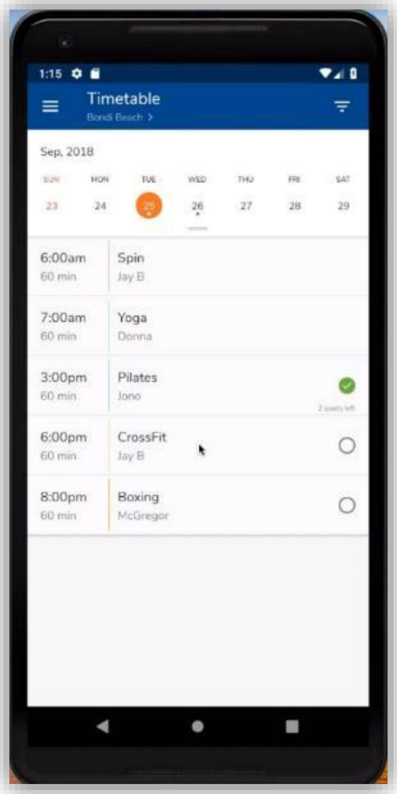
You have now completed the steps to assist your users booking classes using the Clubware mobile app

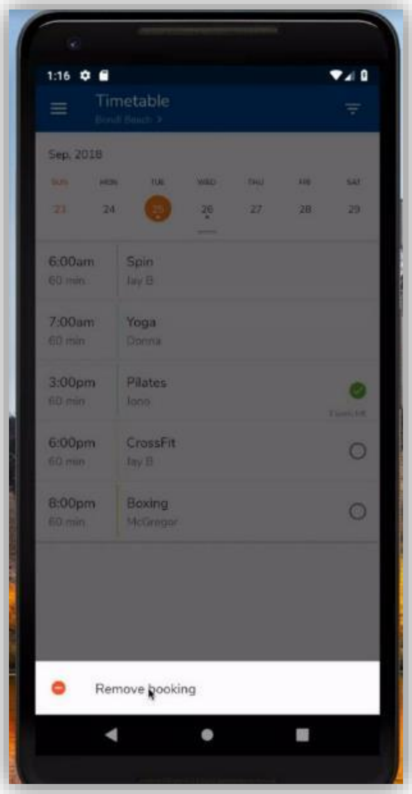
Cancel a class booking using the Clubware mobile app

The following tutorial is a guide for you to assist users in removing bookings for classes in the Clubware mobile app.

Step 1. The user will have previously booked into a class.

Step 2. After logging in, the user can navigate to the class they are no longer able to attend.





Step 3. Untick (Android) or select Booked (iOS) and follow the screen prompts to remove the booking.

You have now completed the steps to assist your users to remove class bookings using the Clubware mobile app

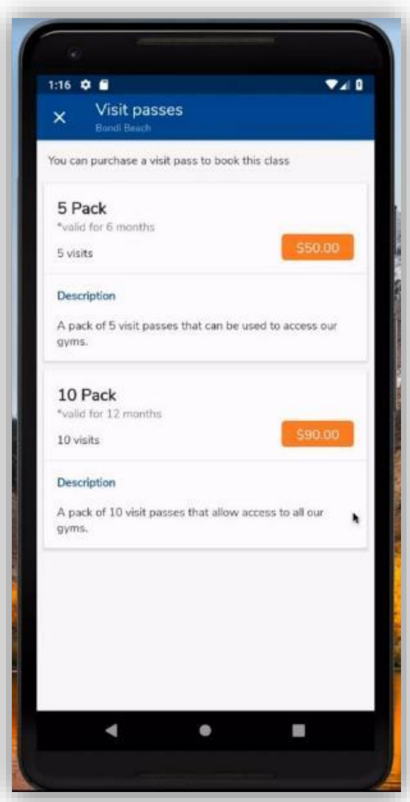
Purchasing a concession card using the Clubware mobile app

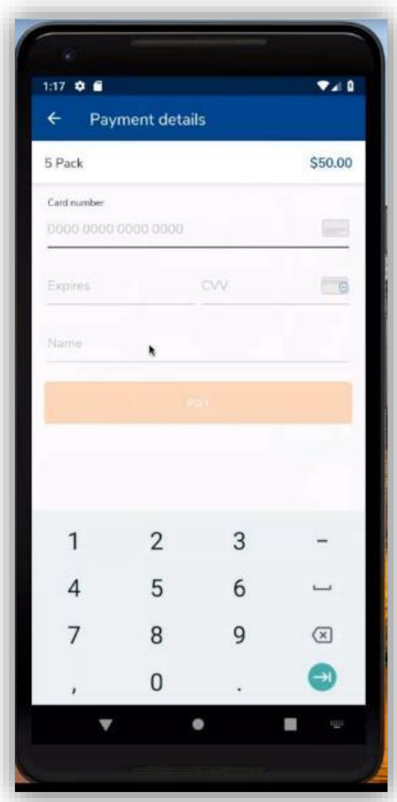
The following tutorial is a guide for you to assist users purchasing concession cards for classes in the Clubware mobile app. Please see the tutorial ** to assist in configuring account templates for purchase online.

In Clubware, the class must be configured for concession cards to allow non-active users to attend. The class can be set up with a concession card with a single visit or the user can purchase multiple visits.

Step 1. The user will have previously registered for the Mobile App. (See tutorial [Clubware Mobile App Registration](#))

Step 2. The user attempts to book into a class which they do not have the correct membership for. The Clubware mobile app recognises this and offers the user the ability to purchase concession cards linked to the class.





Step 3. When the user selects the concession pack, they are prompted to enter their credit card details and select **Pay**. This payment is then sent to the billing company and processed.

Step 4. The user will become an active member in Clubware until the concessions are exhausted.

You have now completed the steps to assist your users to purchase concession cards using the Clubware mobile app

Suspending a membership using the Clubware mobile app.

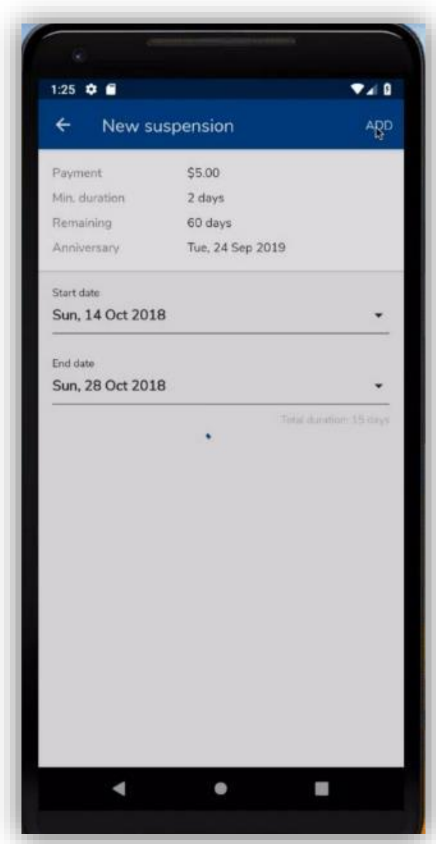
The following tutorial is a guide for you to assist members in suspending their account on the Clubware mobile app. When a suspension is added via the mobile app, it will send to the billing company and feed into Clubware.

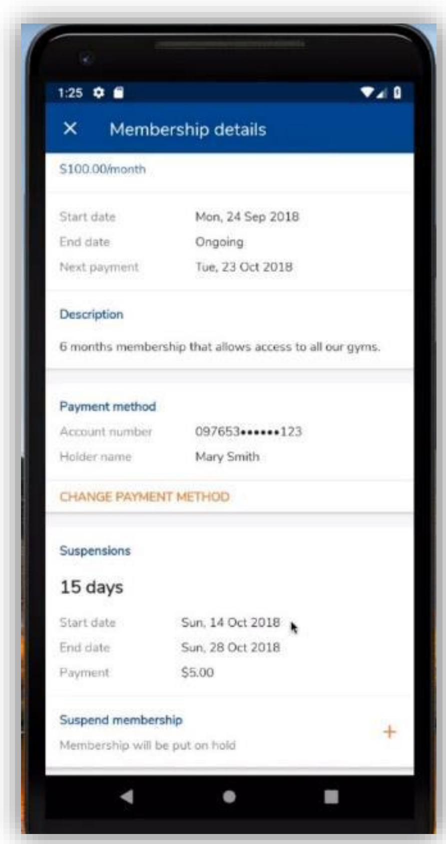
The account template must be configured to accept self-service suspensions. (See tutorial Configuring Online Settings)

Step 1. The user will have previously registered for the Mobile App. (See tutorial Clubware Mobile App Registration)

Step 2. The member will need to navigate to their account details on the mobile app, either by using the iOS account button or the Android hamburger.

Step 3. Select the account to be put on suspension and then scroll to the bottom of the form. Select **Suspend Membership** from this form.





Step 4. Update the suspension details from the New Suspension screen and then select Add to complete the suspension. The suspension will show on the Membership details screen.

You have now completed the steps to assist your users to suspend memberships using the Clubware mobile app

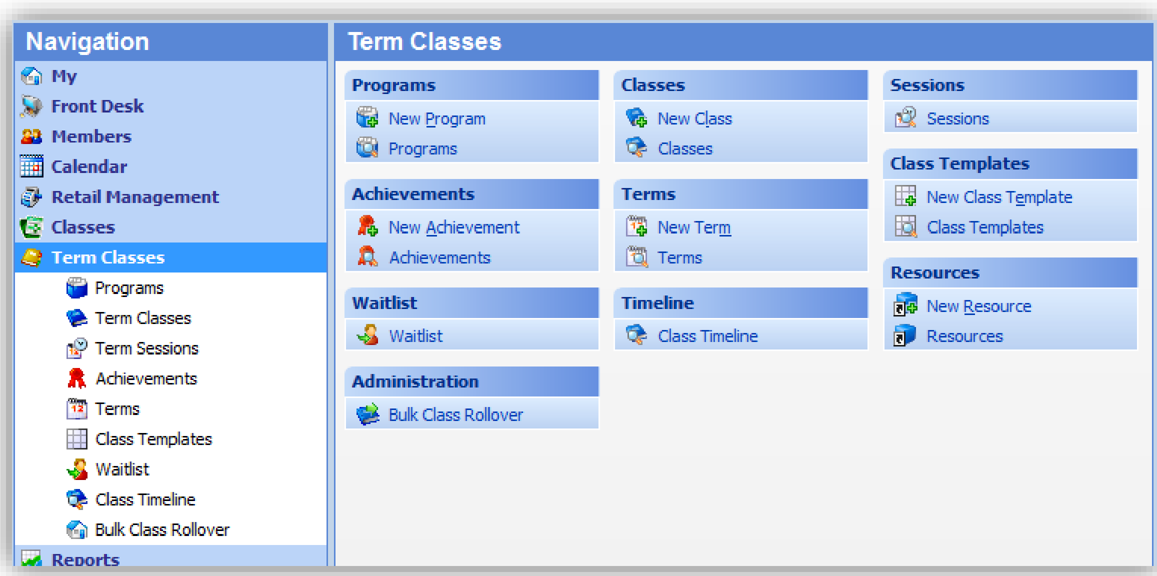
Term Classes

Overview

Term Classes simplifies administration of classes, resources, attendance and student payments.

The Term Classes section within Clubware is designed to handle all levels of term classes, from small one-off events to multi-site programs.

Term Classes handles all aspects associated with managing all types of classes, from small groups to thousands of students.



Programs

A program contains a class or a series of classes that occur sequentially. A program is a container for classes and all items associated with classes.

Term Classes

A class is created as part of a program. A class has sessions (time slots), session templates, waitlists, attendance history, resources, instructors, goals and achievements.

Term Sessions

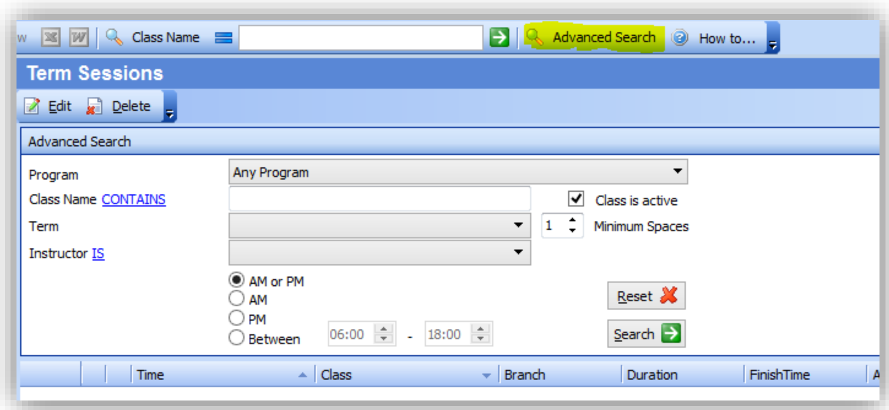
A session is an individual time slot for a class. These can be generated from a session template or added manually.

Information about a class, such as members and attendance, location, resources and instructors, is specified and stored at the Session level.

A session can be viewed from the Calendar section. A user can take or print the roll for a session from this view or from the Calendar section.

Note: The Classes and **Sessions** tabs on the Term Classes Navigation Panel have an Advanced Search feature added to the toolbar.

This allows searching by Program, Class Name, Term, Minimum spaces, Instructor Name, Day of Class (Class screen only, Time of Class, or whether the class is Active/Inactive. An example is shown below.



Achievements

Achievements are milestones that can be assigned to classes and used to reward students for achievements within classes. An achievement can be assigned a document, which can be printed as a certificate when students graduate from classes.

Terms

Terms outline the start and end dates of classes. Terms are completely flexible and can be designed to cover any time period specified by the user. This allows users editing a specific class to automatically schedule sessions within term dates.

Class Templates

When a class has been set up it can be saved as a class template. This reduces the need to spend time re-keying data that is already stored. A new class template can also be created. Templates can include location, goals and achievements.

Waitlist

Members can be waitlisted for individual classes (those that are full) or class templates. From the waitlist section, a member can be enrolled when places become available.

Class Timeline

The class timeline shows all classes scheduled for a particular day. To view classes in the timeline, select the day required from the mini calendar on the top right of the Class Timeline view.

How To

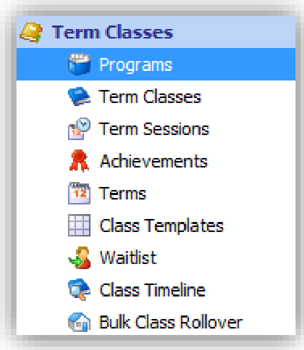
Programs

The following tutorials describe the most common actions associated with Programs.

Adding a Program

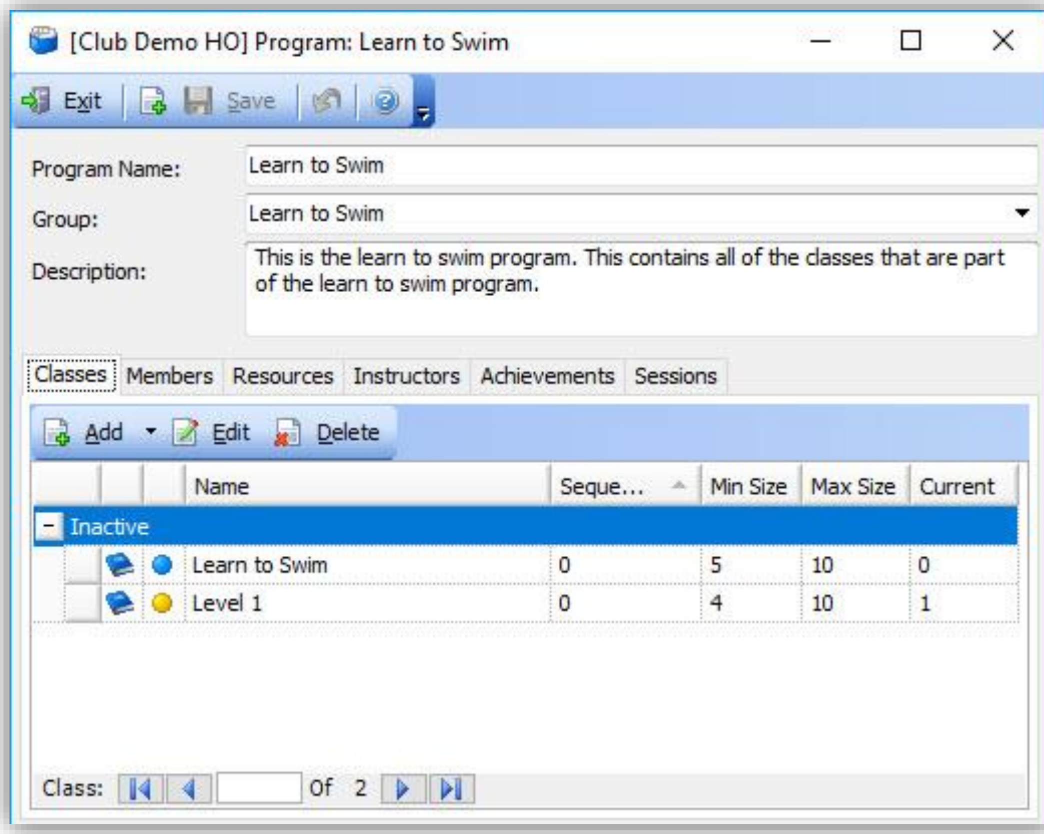
This tutorial describes the steps required to add a Program within Clubware.
A program is the holding container for classes and sessions.

Step 1. Select **Term Classes | Programs** from the navigation panel, as shown below.



Step 2. The **Programs screen** will appear in the main panel.
Select **Add** from the toolbar at the top of the Programs screen.
A **New Program** screen will appear.

Enter information as shown below.



Main Points:

Program Name: This is the name of your program.

Group: This is the category your program belongs to.

Description: This is more detailed information about your program.

Classes: These are the Classes that make up your program.
You can add or edit classes here when you have saved your program. See the next tutorial, Adding a Term Class, for more information.

Members: This is a read-only view of the members who are enrolled in your program. Members are enrolled in classes.

See the tutorial Adding a Class and Enrolling Members for more information about adding members to classes.

Resources: This is a read-only view of the resources associated with this program. Resources are added to sessions of classes.

Instructors: This is a read-only view of the instructors associated with this program. Instructors are added to sessions of classes.

Achievements: This is a read-only view of the achievements associated with this program. Achievements are added to sessions of classes.

Sessions: Sessions are the individual class times associated with classes of this program. Sessions are added to classes.
You can edit or delete sessions from this section.

Step 3. Click **Save**.

The following tutorial Adding a Term Class describes the steps required to add classes to this program.

You have completed the steps required to add a program within Term Classes in Clubware.

Term Classes

The following tutorials describe the most common actions associated with Term Classes.

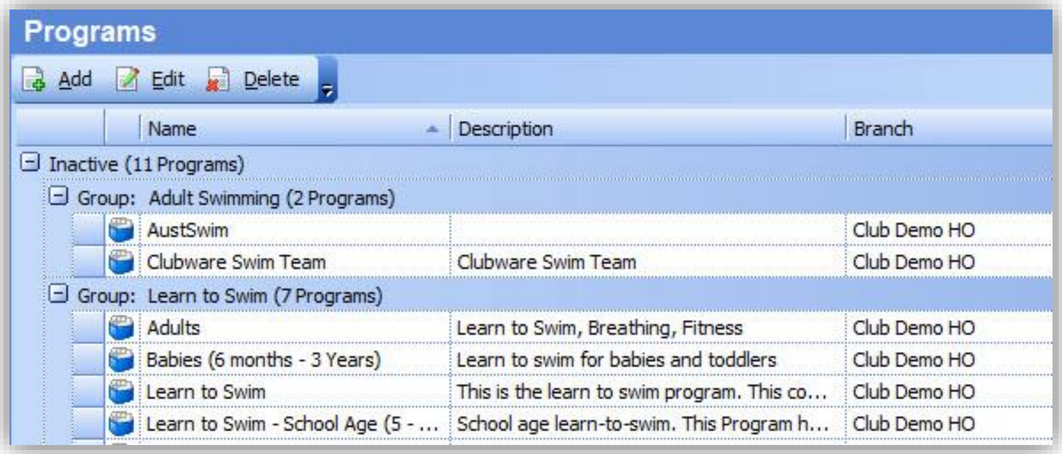
Adding a Term Class

This tutorial describes the steps required to add a term class.

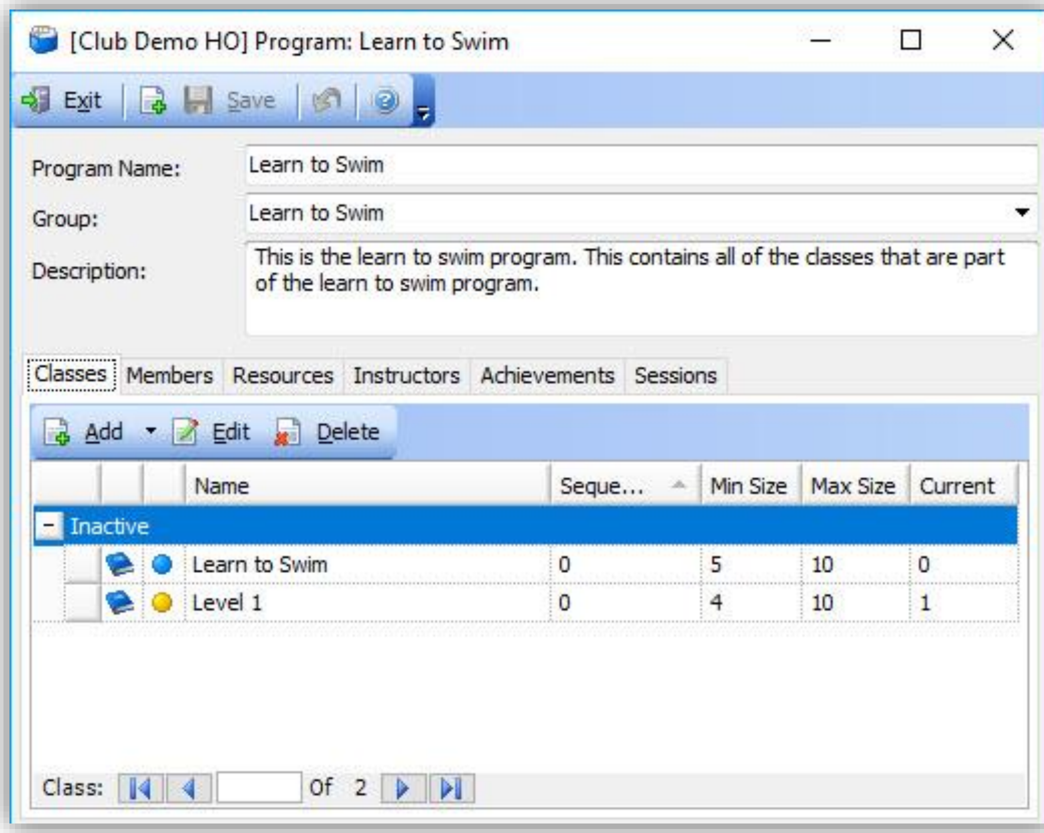
When you have set up your program as outlined in the previous tutorial, Adding a Program you can add classes.
Classes contain sessions and members.

Step 1. Select **Term Classes | Programs** from the navigation panel.
The **Programs** screen displays in the main panel.

Step 2. Select the program you want to add term classes to, as shown below.

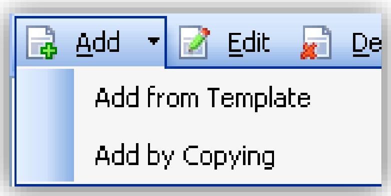


Double click on your selection, the screen below displays.



Step 3. Click the **Classes** tab as shown above, then click **Add**.

Note: Click the drop down triangle to display **Add from Template** and **Add by Copying** options**.**



Select your option:

Add: This adds a new blank class.

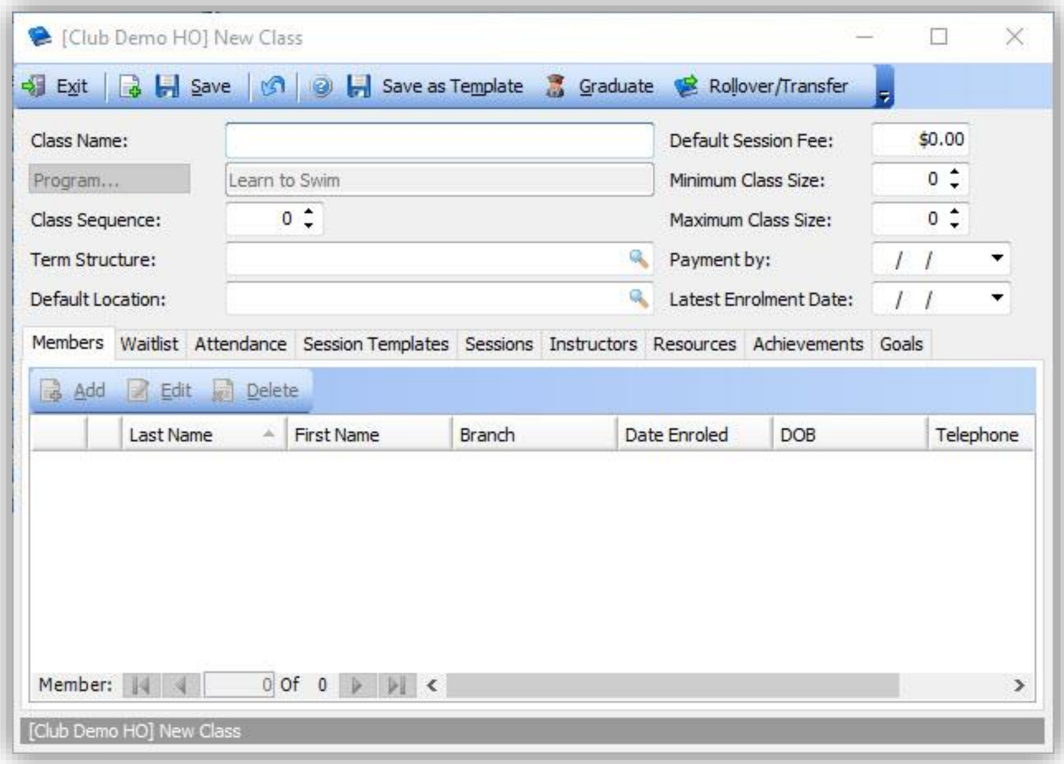
Add from Template: This allows you to use a template as a starting point for your new class. The template includes basic information on a class.

Add by Copying: This allows you to copy an existing class, including session templates.

For this tutorial use the first option.

Click **Add.**

A **New Class** screen will appear.
Complete the form as shown below.



Main Points:

Class Name: This is the name you use to identify your class.

Class Sequence: The sequence number is used to order classes according to student progression, such as Learn to Swim.
When a student graduates from one class in a program, they are automatically enrolled in the next class in the sequence.

Default Session Fee: This is the default charge if members are being charged on a per session basis.

Minimum Class Size: This is the minimum size for the class.

Maximum Class Size: This is the maximum size for the class, which if exceeded will trigger a waitlist.

Term Structure: Select start and end dates (defined in the Terms section of Class Management). Session templates within those dates can be created for you automatically. See the tutorial Adding Session Templates for more information.

Default Location: Select where sessions of this class will usually be held. See the tutorial_d2h_bmk__D2HTopic_421_121 Adding a Resource for more information about how to add locations to this list.

Latest Enrolment Date: Enter the last date enrolments will be accepted for the class.

Payment By: Enter the due date for payments for the class.

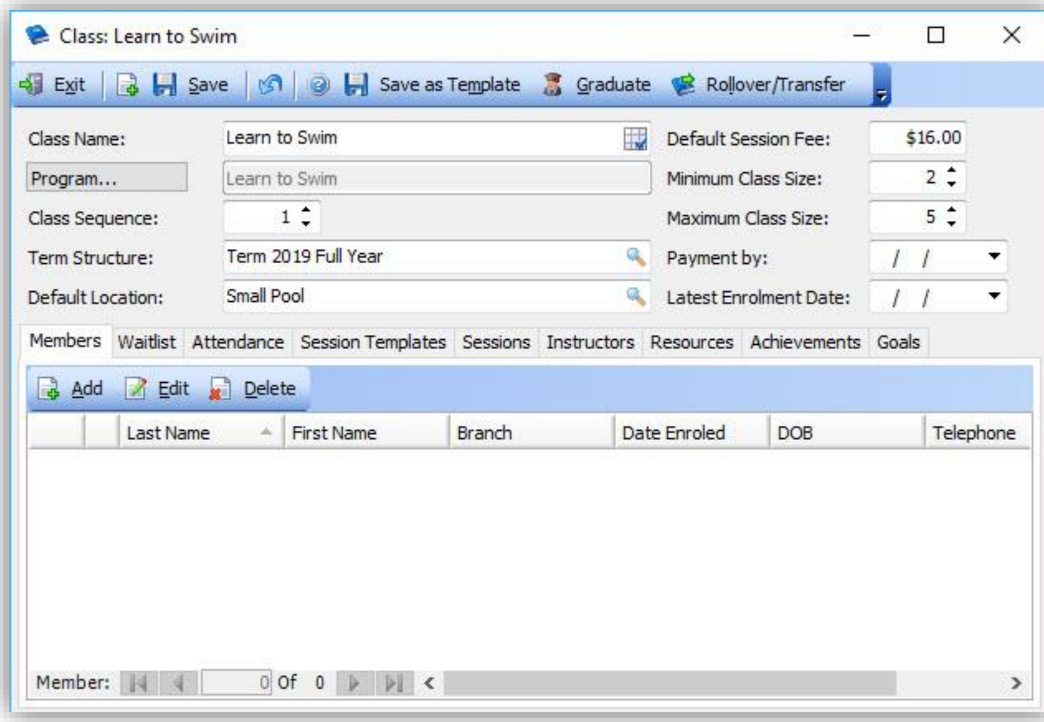
Toolbar options:

Save as Template: This button allows you to save basic details from this class as a template for re-use later.

Graduate: Click this option to select members who are ready to graduate from this class to the next class in a program sequence or the end of the program.
When you graduate members, you can print achievement awards or certificates.

Rollover/Transfer: This is used to move a member from their current enrolment to the next instance of the same class (re-enrolment).

Step 4. Click **Save.** The screen now displays as shown below.



Add any further classes by repeating the process above.
To schedule sessions of the class, see the tutorial Adding Session Templates.

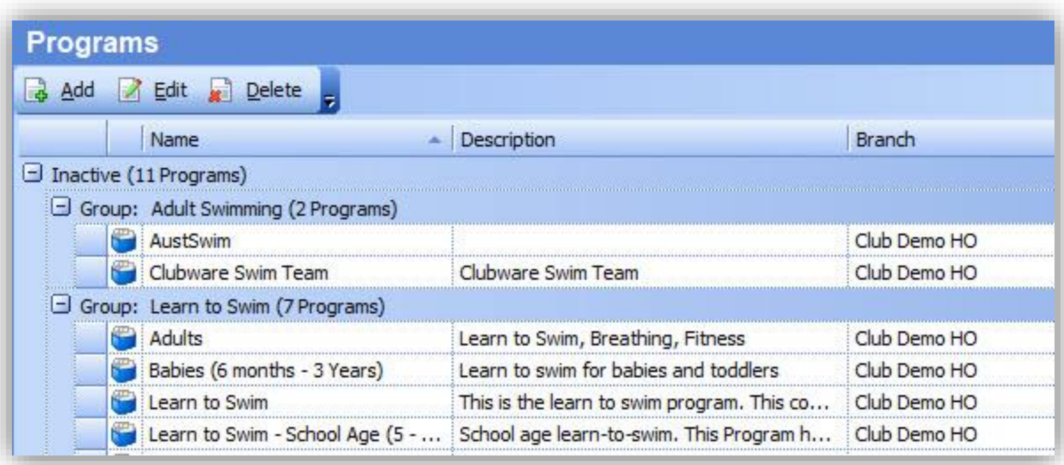
You have completed the steps required to add a class within Clubware.

Adding a Class using a Class Template

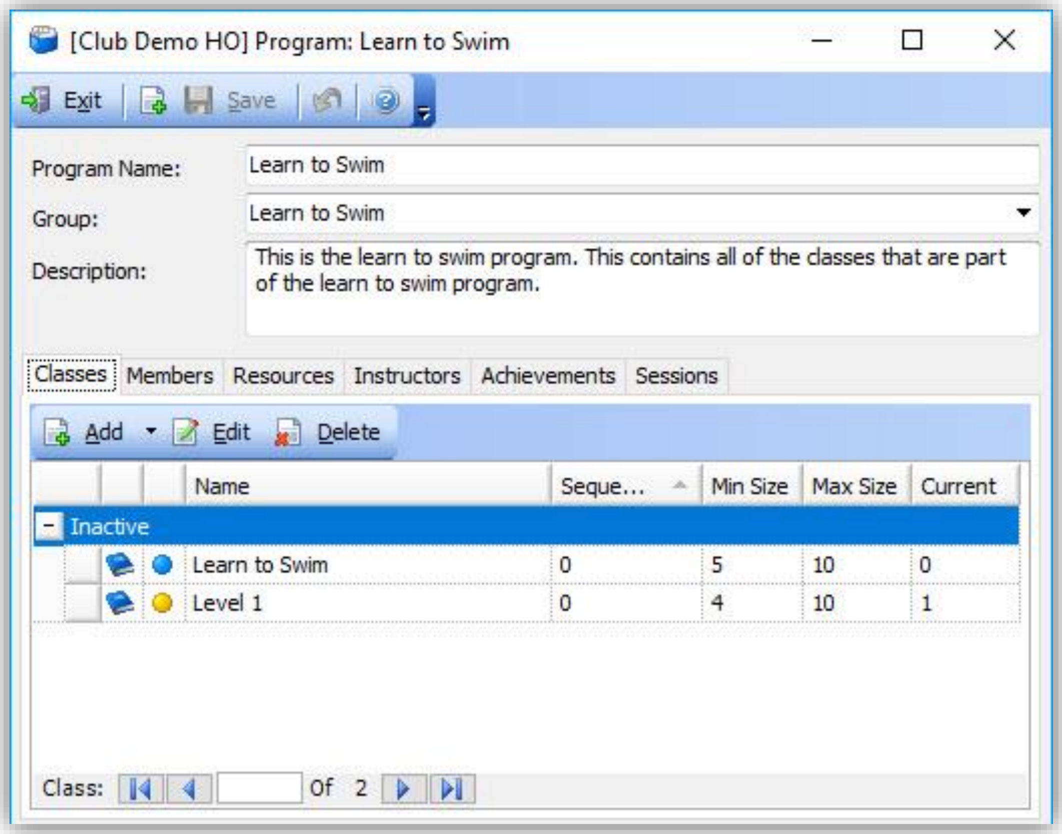
This tutorial describes the steps required to add a class using a class template.

When you have set up your program as outlined in the tutorial Adding a Program you can add classes.
Classes contain sessions (class meeting times) and members (students).

Step 1. Select **Term Classes | Programs** in the navigation panel.
The **Programs** screen will display in the main panel.

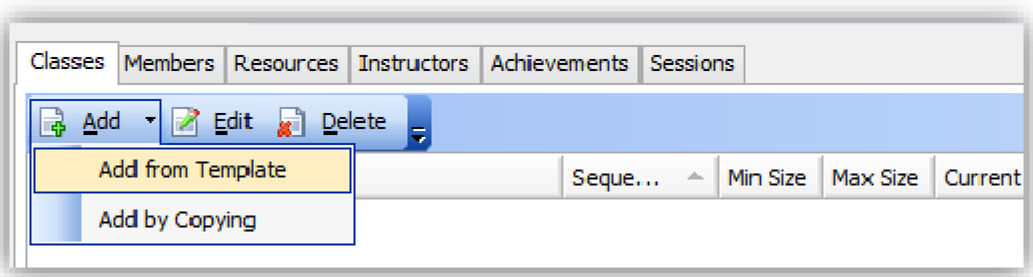


Step 2. Select and open the program you want to add classes to.
The screen below displays.



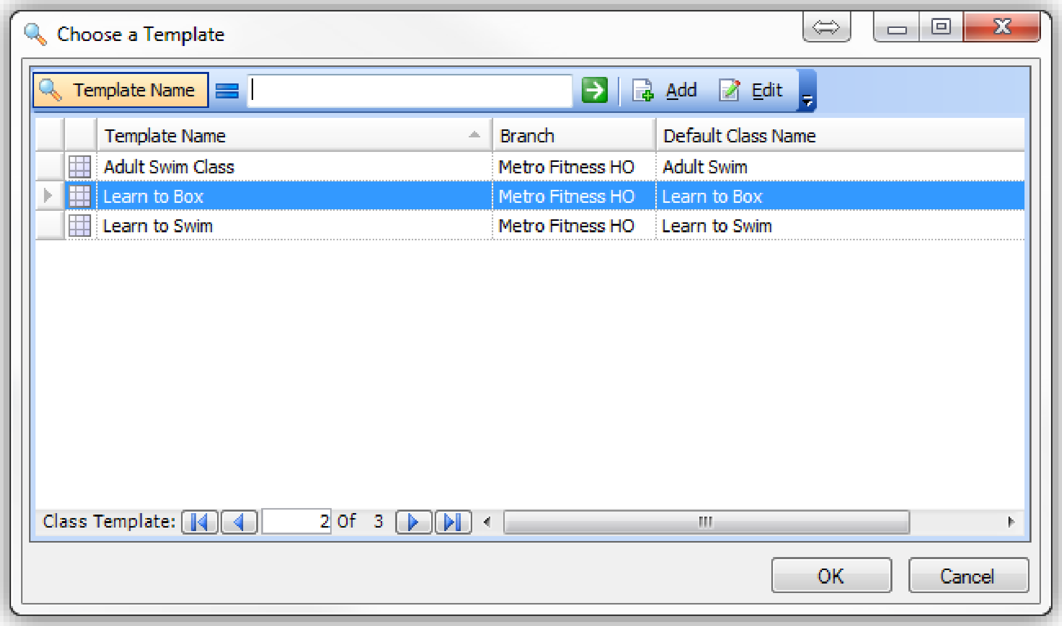
.

Step 3. Click the Classes tab as shown above.
Click the dropdown button (small triangle) next to the **Add** button.
There are two extra options, as shown below.

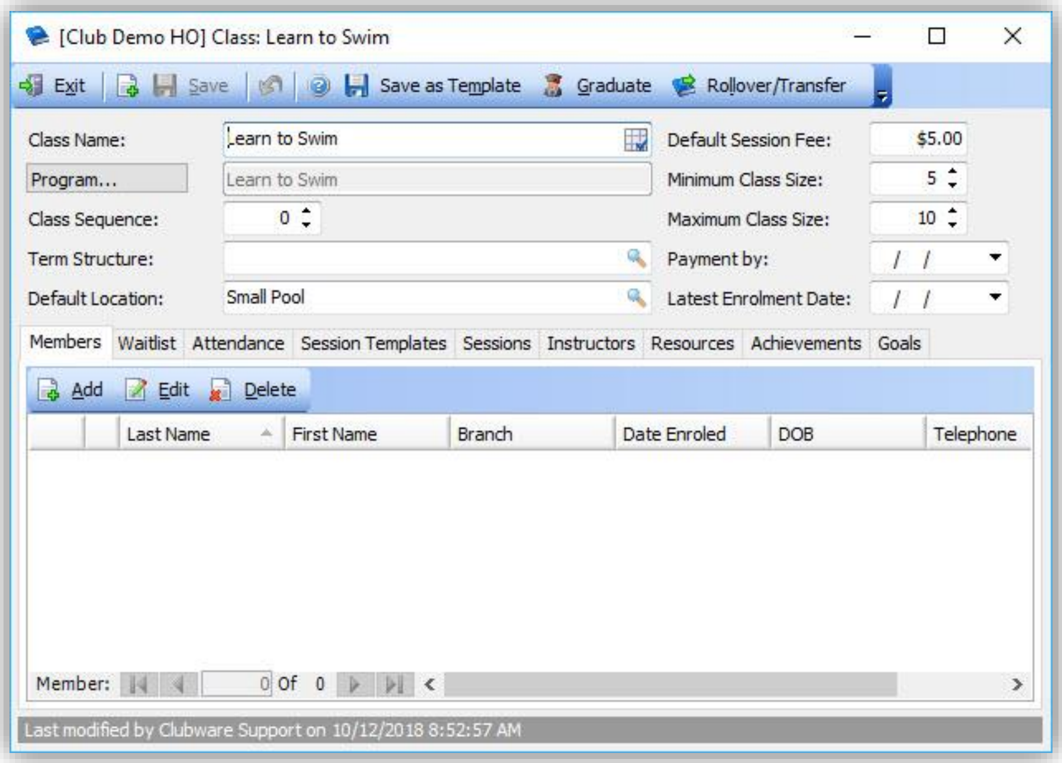


Step 4. Select **Add from Template**.
The **Choose a Template** dialog box displays.

Select the class template you want to use and click **OK**, as shown below.



Step 5. The new class will display, with information from the template as shown below.



Main Points:

Class Name: This is the name you use to identify your class.

Class Sequence: The sequence number is used to order classes according to student progression, such as Learn to Swim.
When students graduate from one class in a program, they are automatically enrolled in the next class in the sequence.

Default Session Fee: This is the default charge if members are being charged on a per session basis.

Minimum Class Size: This is the minimum size for the class.

Maximum Class Size: This is the maximum size for the class, which if exceeded will trigger a waitlist for the class.

Term Structure: Select start and end dates (defined in the Terms section of Term Classes). Session templates within those dates can be created for you automatically.
See the tutorial Adding Session Templates for more information.

Default Location: Select where sessions of this class will be held.
See the tutorial Adding a Resource for more information about how to add locations to this list.

Latest Enrolment Date: Enter the last date enrolments will be accepted for the class.

Payment By: Enter the due date for payments for the class.

Toolbar options:

Save as Template: This button allows you to save basic details from this class as a template for re-use later.

Graduate: Click this option to select members who:

Are ready to graduate from this class to the next class in a program sequence, or

Have completed the program.

When you graduate members, you can print achievement awards or certificates.

Rollover: This is used to move members from their current enrolment to the next instance of the same class (re-enrolment).

Step 6. Save and exit the **New Class** screen.
Add further classes by repeating the process above.
To schedule sessions of the class, see the next tutorial, Adding Session Templates.

You have completed the steps required to add a class using a class template within Clubware.

Sessions

The following tutorials describe the most common actions associated with Sessions.

Adding Session Templates

Before a session can be added to a class, a session template needs to be created.

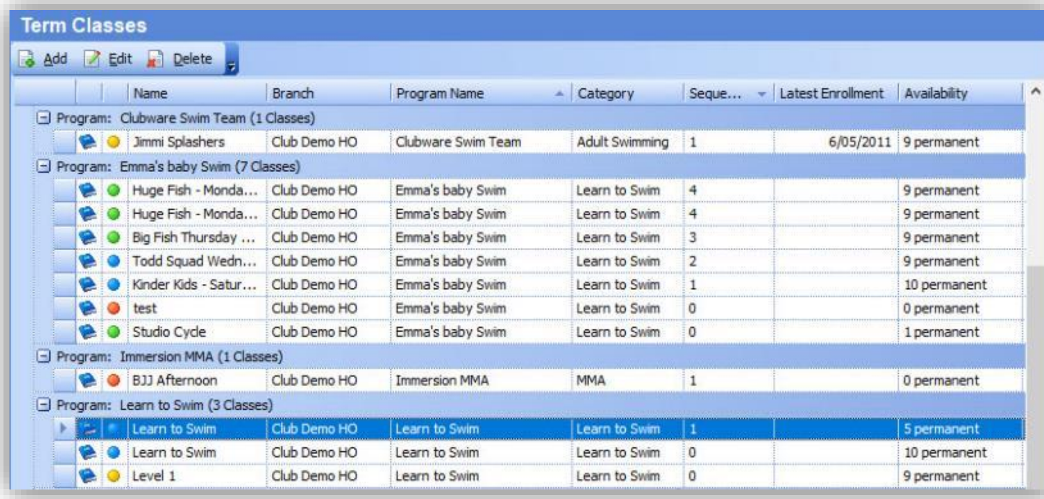
A session template supplies the day and time of a session or sessions, while the term template supplies the date boundaries for the sessions.

Using these definitions, Clubware calculates the sessions required for the class.

This tutorial describes the steps required to add session templates.

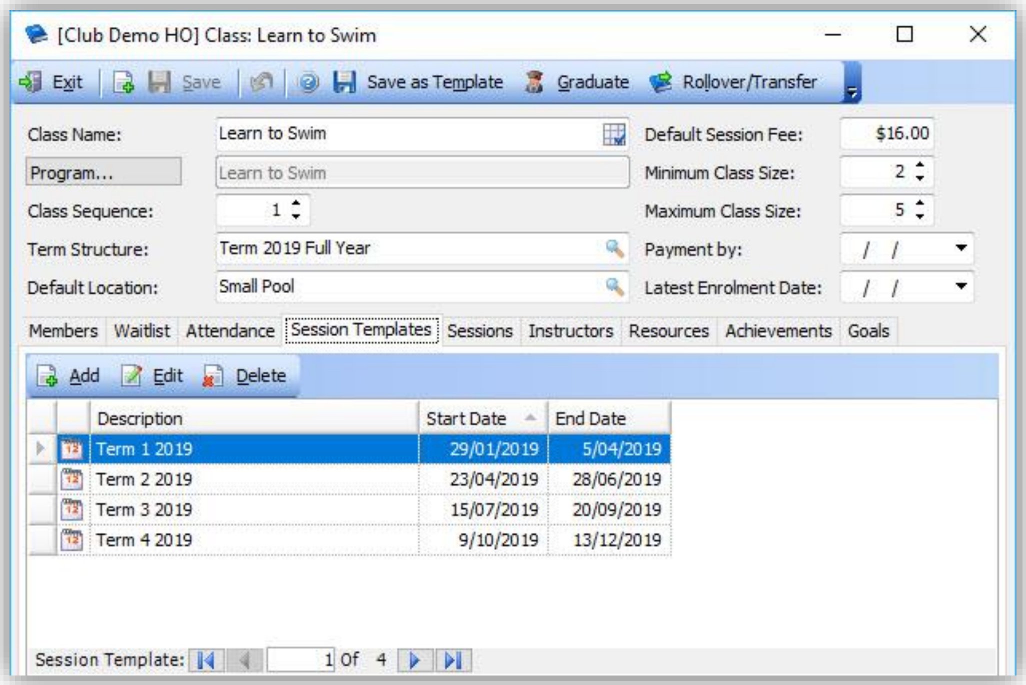
Step 1. Select **Term Classes | Term Classes** from the navigation panel.
The Classes screen will display in the main panel.

Step 2. Click the class you want to add the session templates to, then click **Edit**, as shown below.

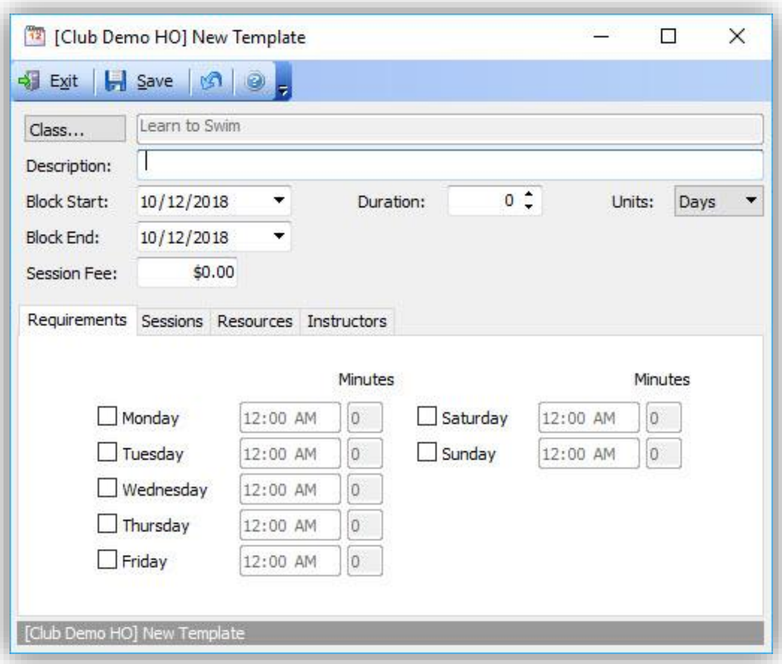


Name	Branch	Program Name	Category	Seque...	Latest Enrollment	Availability
Program: Clubware Swim Team (1 Classes)						
Jimmi Splashers	Club Demo HO	Clubware Swim Team	Adult Swimming	1	6/05/2011	9 permanent
Program: Emma's baby Swim (7 Classes)						
Huge Fish - Monda...	Club Demo HO	Emma's baby Swim	Learn to Swim	4		9 permanent
Huge Fish - Monda...	Club Demo HO	Emma's baby Swim	Learn to Swim	4		9 permanent
Big Fish Thursday ...	Club Demo HO	Emma's baby Swim	Learn to Swim	3		9 permanent
Todd Squad Wedn...	Club Demo HO	Emma's baby Swim	Learn to Swim	2		9 permanent
Kinder Kids - Satur...	Club Demo HO	Emma's baby Swim	Learn to Swim	1		10 permanent
test	Club Demo HO	Emma's baby Swim	Learn to Swim	0		0 permanent
Studio Cycle	Club Demo HO	Emma's baby Swim	Learn to Swim	0		1 permanent
Program: Immersion MMA (1 Classes)						
BJJ Afternoon	Club Demo HO	Immersion MMA	MMA	1		0 permanent
Program: Learn to Swim (3 Classes)						
Learn to Swim	Club Demo HO	Learn to Swim	Learn to Swim	1		5 permanent
Learn to Swim	Club Demo HO	Learn to Swim	Learn to Swim	0		10 permanent
Level 1	Club Demo HO	Learn to Swim	Learn to Swim	0		9 permanent

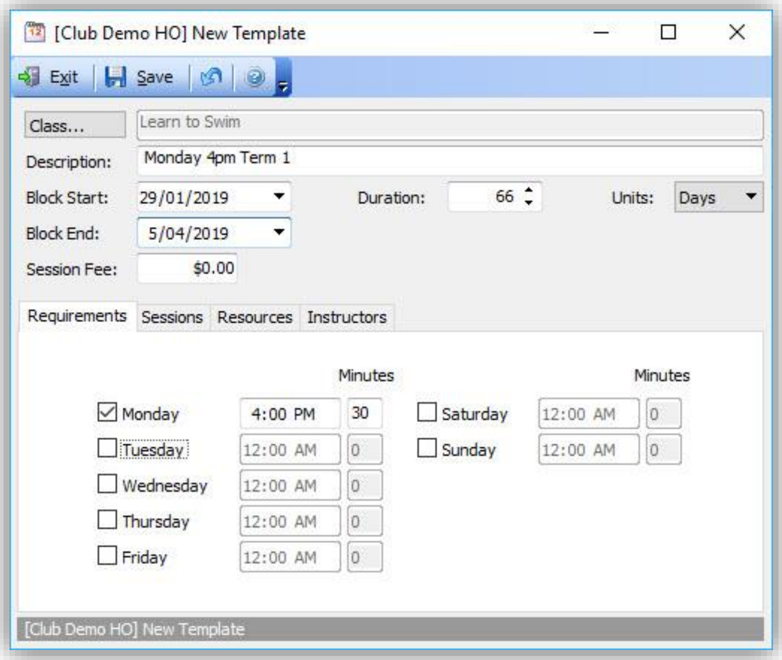
Step 3. The class screen will display.
Click the **Session Templates** tab, as shown below.



Step 4. In the **Session Templates** tab, click **Add.**
The **New Template** screen will display.



Complete information as shown below.



Main Points:

Description: Enter a name to describe your session template.

Block Start: Select the date the sessions start.

Duration and **Units:** Select a length of time during which the block of sessions should be scheduled, such as 10 weeks or 4 months.

Block End: This is calculated automatically from the Block Start and Duration fields.

Session Fee: This is the default fee that applies to sessions created from this template.

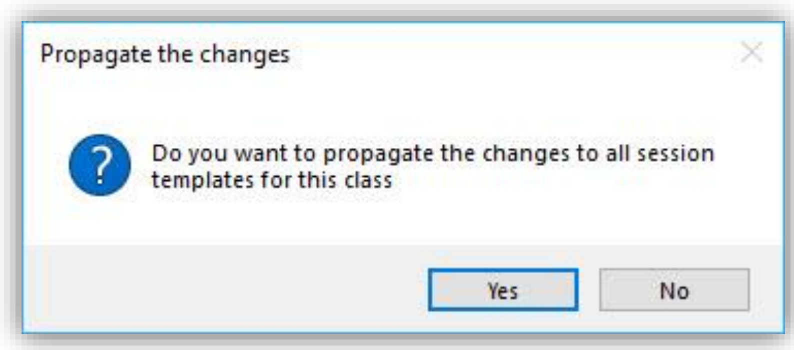
Requirements: These are the days and times when sessions will be created when using this template.

Sessions: This is a read-only list of sessions created by this template. See the next tutorial, Adding Sessions, for more information.

Resources: When you add a resource to the template, the resource will be added automatically to all sessions created from this template.

Instructors: When you add an instructor to the template, the instructor will be added automatically to all sessions created from this template.

Step 5. Save when all entries are complete. You will be asked to confirm the changes.



Step 6. Save and close the form.

See the next tutorial, Adding Sessions, to create sessions from this template.

You have completed the steps to add a session template to a class in Clubware.

Adding Sessions

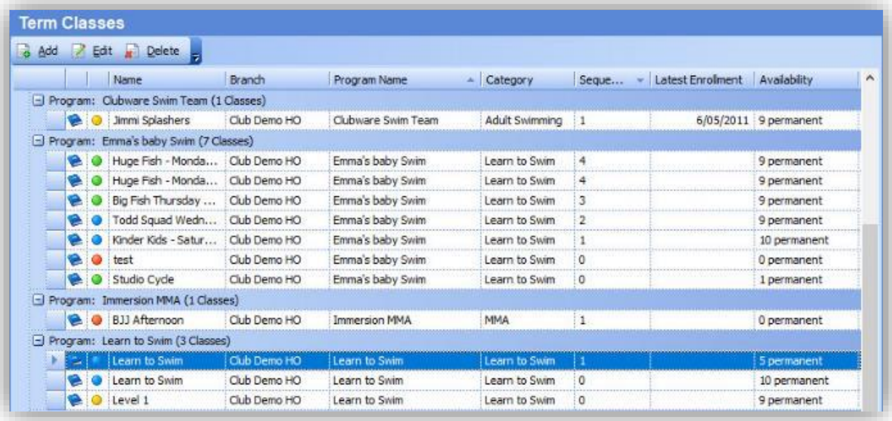
Before you can add sessions for a class, Clubware requires that session templates be created.

A Session Template provides Clubware with the information it needs to create a series of sessions.

This tutorial describes the steps required to add a Session within Clubware.

Step 1. Select **Term Classes |** Term **Classes** from the navigation panel.
The Classes screen will display in the main pane.

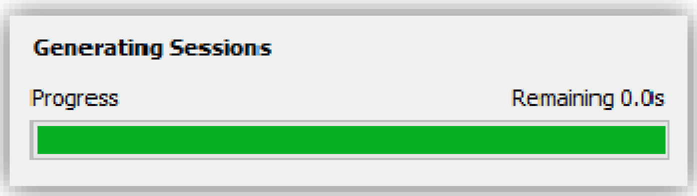
Step 2. Click the class you want to add sessions to, then click **Edit**, as shown below.



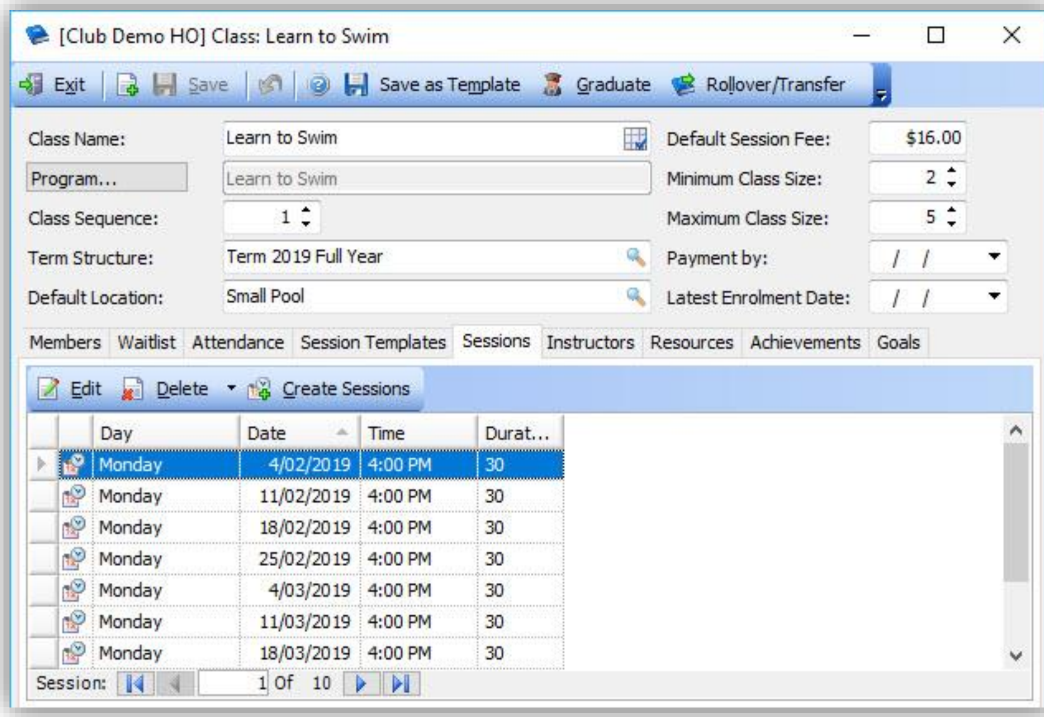
Step 3. The class screen will display.
Click the **Session** tab, as shown below.

Step 4. Click **Create Sessions** in the toolbar, as shown below.

The Generating Sessions dialog box will display as sessions are created.



Step 5. Based on the session templates you have created sessions will appear in the Sessions screen, as shown below.
(See the tutorial Adding Session Templates).



A session is created for every day selected in the session template.

Step 6. Save and close the form.

You have completed the steps required to add sessions to a class within Clubware.

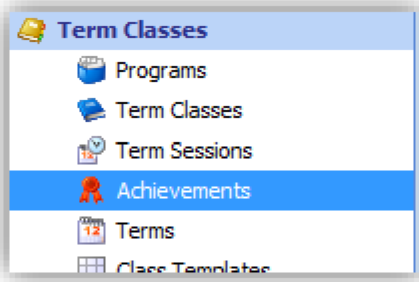
Achievements

The following tutorials describe the most common actions associated with Achievements.

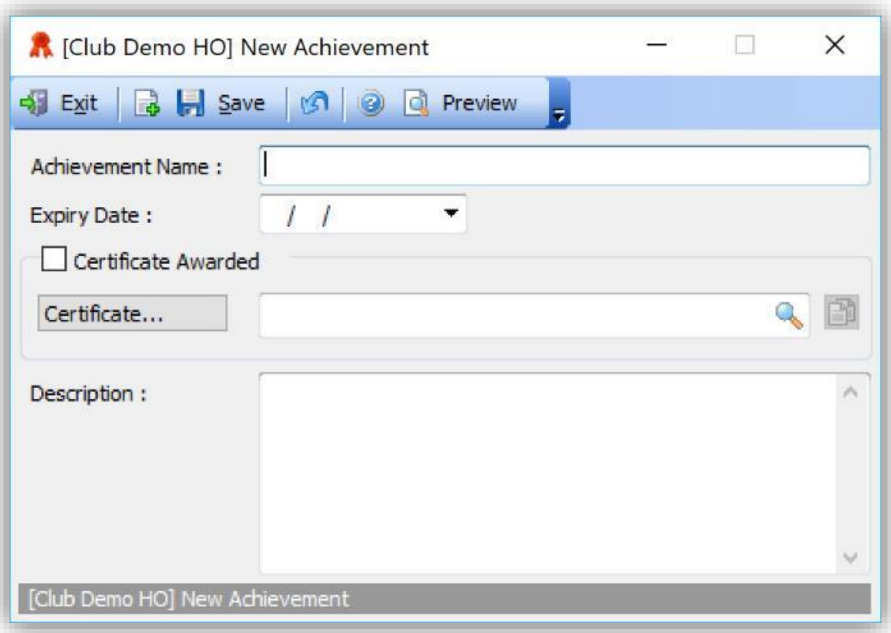
Adding Achievements

This tutorial describes the steps required to add an achievement within Clubware.

Step 1. Select **Term Classes | Achievements** in the navigation panel, as shown below.



Step 2. The **Achievements** screen will display in the panel.
Select **Add** from the toolbar.
A **New Achievement** screen will open.
Add information similar to the example below.



Main Points:

Achievement Name: Enter the name that best describes your achievement.

Category: Select the category this achievement belongs to. This will determine where it is available when adding an achievement to a class.

Note: A class can only be linked to an achievement in the same category as the program the class belongs to.

Expiry Date: Enter the last date this achievement is valid (optional).

Certificate: This is the document that will be printed when graduating members from classes linked to this achievement.
See the next tutorial Adding an Achievement to a Class for more information.

Description: Enter a detailed description of the achievement.

Preview: Click to preview the certificate within Microsoft Word.

Step 3. Save and exit the form.

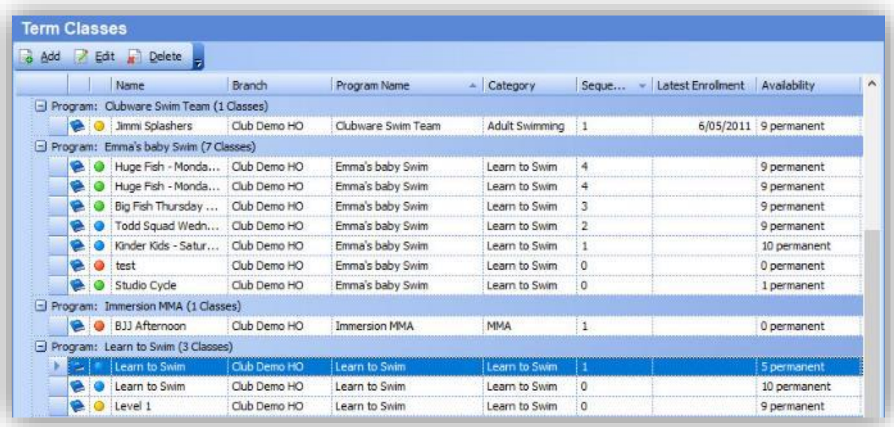
You have completed the steps required to add an achievement in Clubware.

Adding an Achievement to a Class

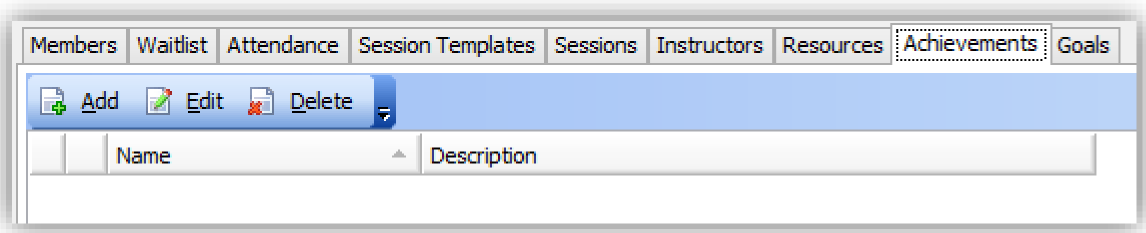
This tutorial describes the steps required to add an achievement to a class.

Step 1. Select **Term Classes |** Term **Classes** from the navigation panel.
The **Classes** screen displays in the main panel.

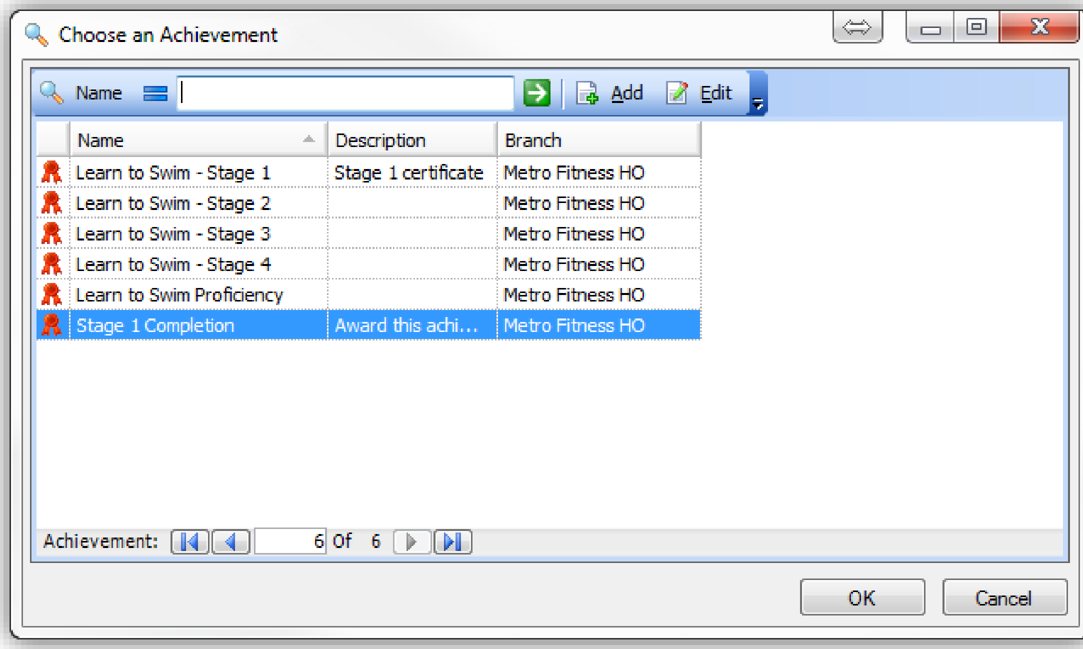
Step 2. Select the class you want to add the achievement to, as shown below.



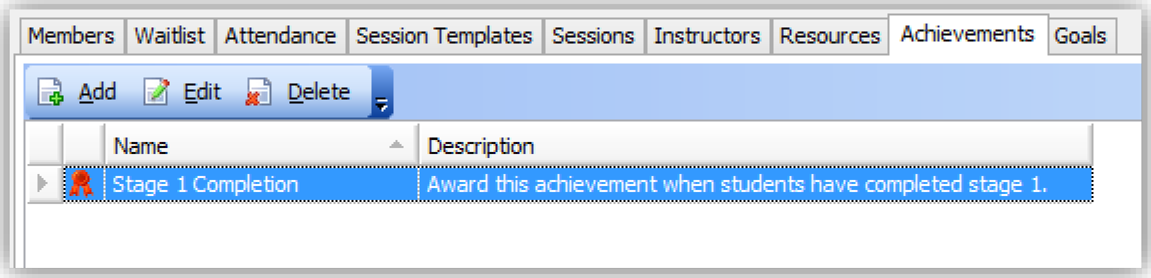
Step 3. Click **Edit** to open the Class screen.
Click the **Achievements** tab, as shown below.



Step 4. Click **Add.** The screen below displays.



Step 5. Select the achievement you require and click **OK**.
The achievement will be displayed in the Achievements tab within the class, as shown below.



Add more achievements as required.

Step 6. **Save** and exit the form.

You have completed the steps required to add an achievement to a class in Clubware.

Terms

The following tutorials describe the most common actions associated with Terms.

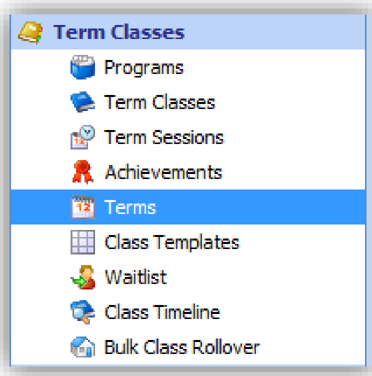
Adding Terms

When creating sessions**, terms** are used to define the start and finish dates for all sessions created within a term.

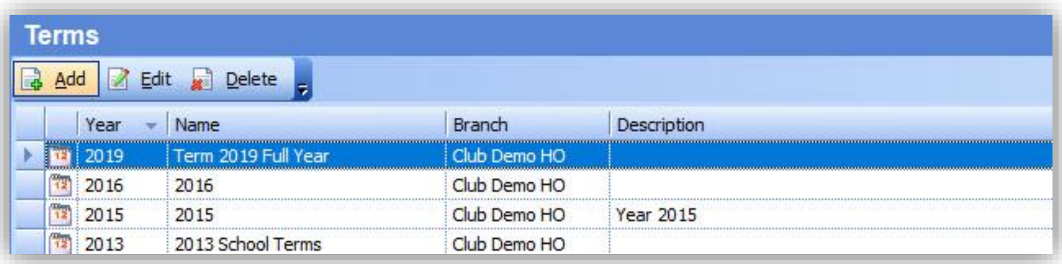
Terms can be for any time period and don't need to align with school terms.

This tutorial describes the steps required to add terms.

Step 1. Select **Term Classes | Terms** in the navigation panel, as shown below.

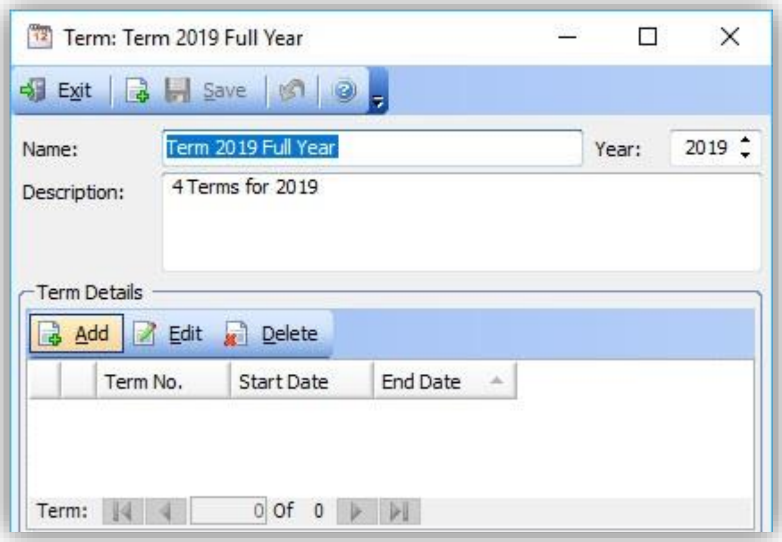


Step 2. The **Terms** screen will display in the main panel.



Select **Add** from the toolbar.

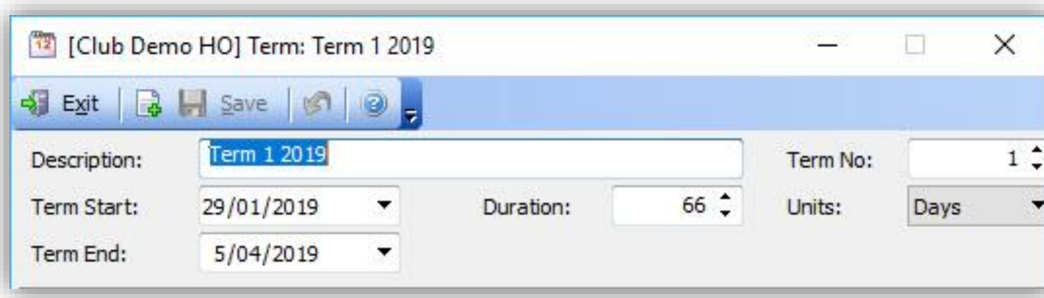
The **New Standard Term** screen will display as shown below.
Enter a name, year and description, as in the example below.



If your term includes more than one year, you can select the starting or ending year of the term. This field is for reporting purposes only.

Step 3. Click **Save** when your entries are complete.
The **Term Details** toolbar will become enabled.
Click **Add** to add an individual term, as shown below.

Step 4. The **New Term** screen displays. Add the information shown below.



Main Points:

Description: Enter the name of the term.

Term No: Enter the sequential number of the term.
Terms will display on the Terms screen according to their Term Numbers.

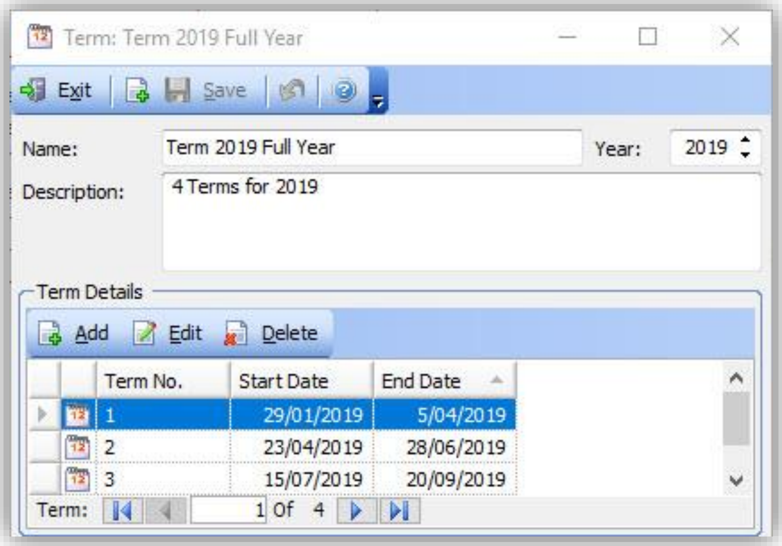
Term Start: Enter the date the term starts.

Duration: Enter the length of the term.

Units: Select the time units for the duration period.

Term End: This is calculated automatically from the Term Start and Duration.

Continue the process for each term required. Use the example as a guide.



Step 5. Click **Save** and exit the form.

Term structures can be associated with classes.
See the tutorial Adding a Term Class for more information.

You have completed the steps required to add a new term structure in Clubware.

Class Templates

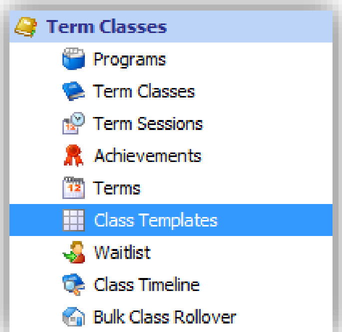
The following tutorials describe the most common actions associated with Class Templates.

Adding Class Templates

Class templates can be used when adding classes to programs.
By using a template, you can avoid repetitive data entry by having the template automatically enter common information for you.

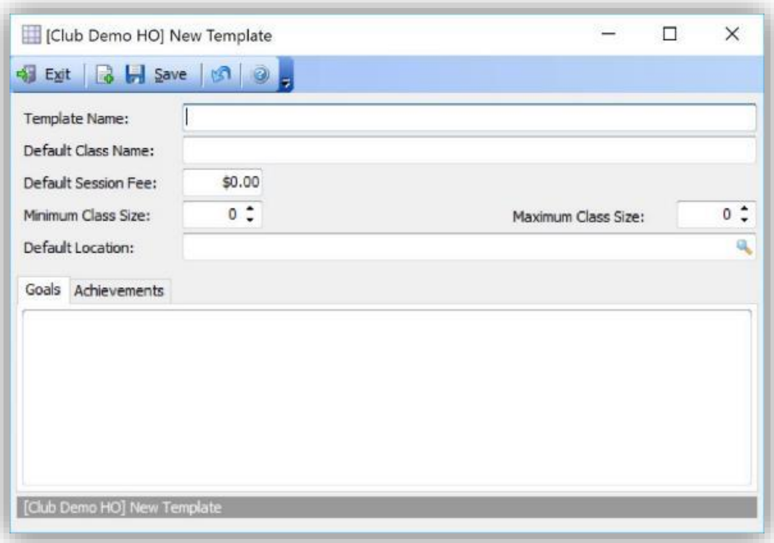
This tutorial describes the steps required to add class templates.

Step 1. Select **Term Classes | Class Templates** in the navigation panel, as shown below.

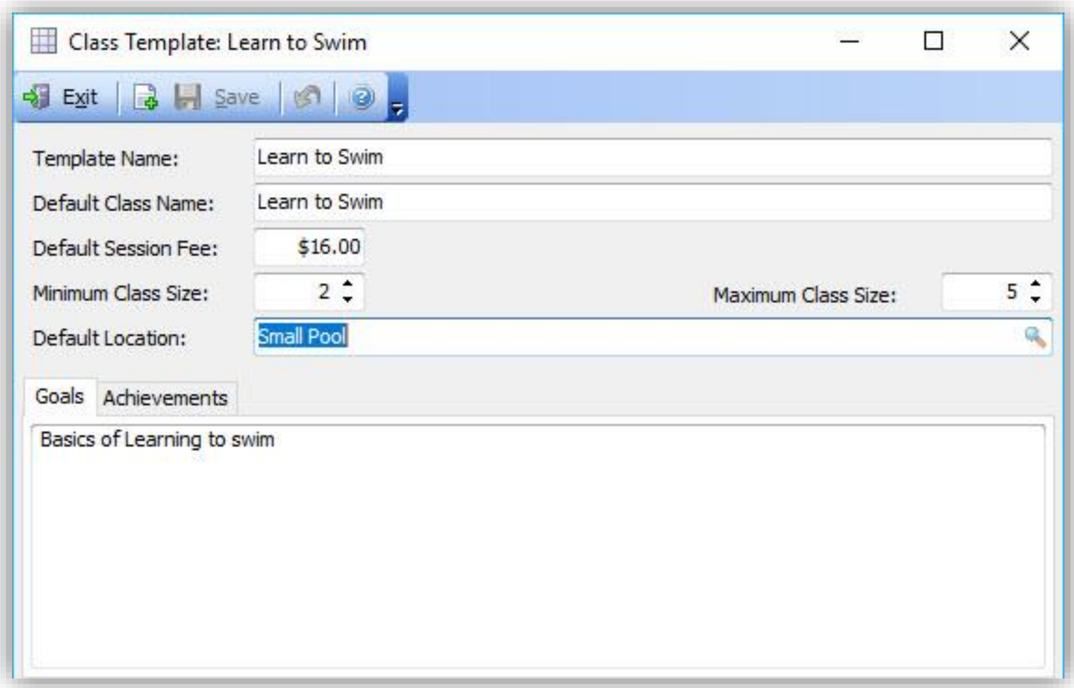


The Class Templates screen will display in the main panel.

Step 2. Select **Add** from the toolbar at the top of the Class Templates screen.
The **New Template** screen will display.



Enter information as shown below.



Main Points:

Template Name: This is the name that best describes the template.

Default Class Name: This is the default name that will appear in classes derived from this template.

Default Session Fee: Enter the default fee per member for classes derived from this template.
(If required, this can be overwritten when you use the template to create a class).

Minimum Class Size: Enter a minimum class size for classes derived from this template.

Maximum Class Size: Enter a maximum class size for classes derived from this template. This is also a trigger for waitlists.

Default Location: This is the default location for classes derived from this template.

Goals: These are the default goals for classes derived from this template.

Achievements: These are the default achievements for classed derived from this template.

Step 3. Save and exit the form.
To use a class template see the tutorial Adding a Class using a Class Template.

You have completed the steps required to add a class template in Clubware.

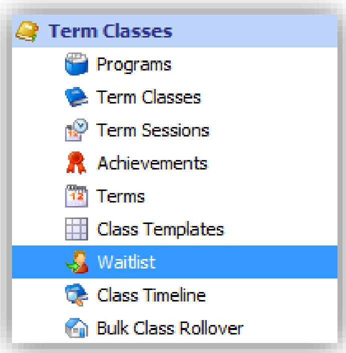
Waitlists

The following tutorials describe the most common actions associated with Waitlists.

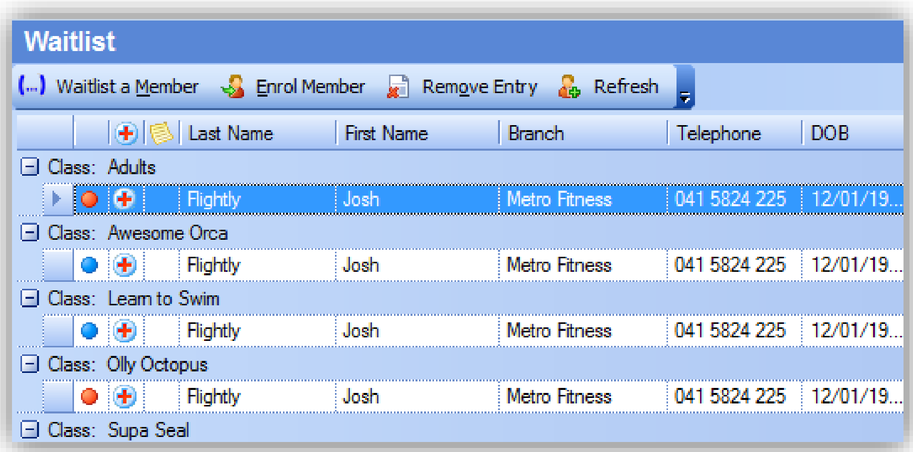
Adding a Member to a Waitlist

This tutorial describes the steps required to add a member to a waitlist.

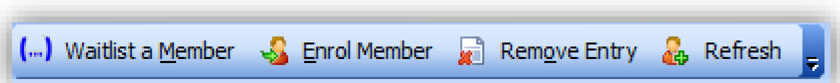
Step 1. Select **Class Management | Waitlist** from the navigation panel, as shown below.



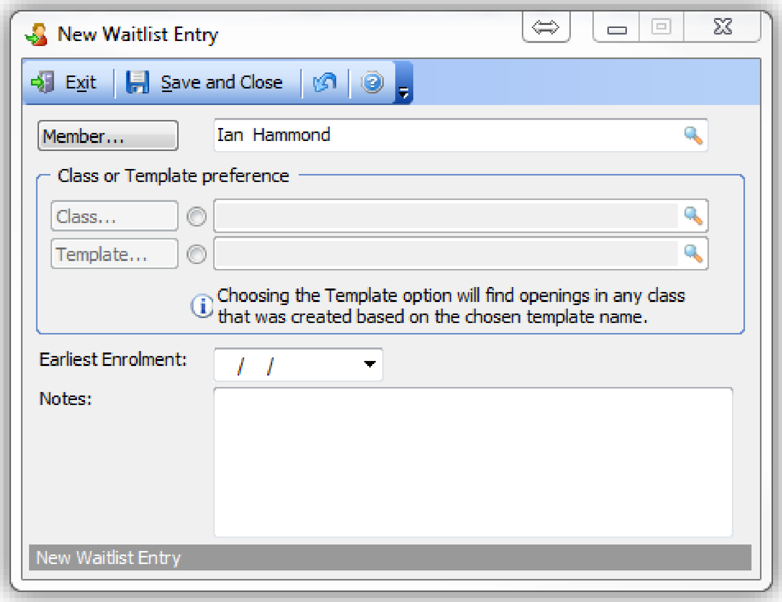
Step 2. The **Waitlist** screen displays in the main panel.



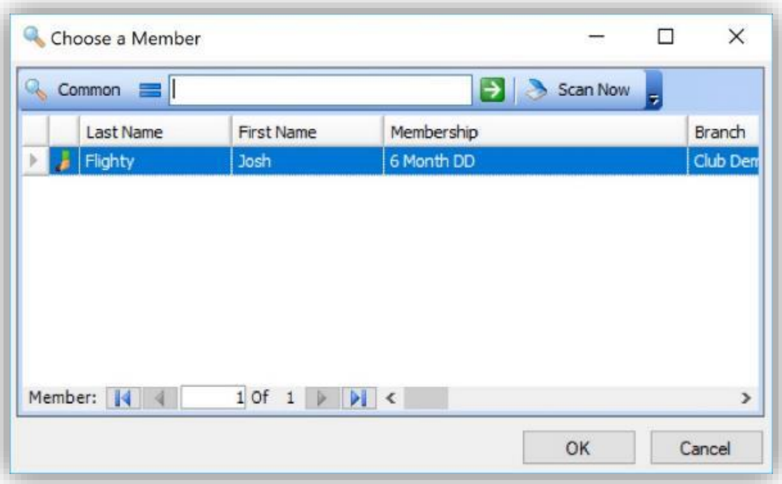
Step 3. Select **Waitlist a Member** from the toolbar, as shown below.



The **New Waitlist Entry** screen displays.
Step 4. Click the magnifying glass on the right of the Member field to browse for the member you want to waitlist.

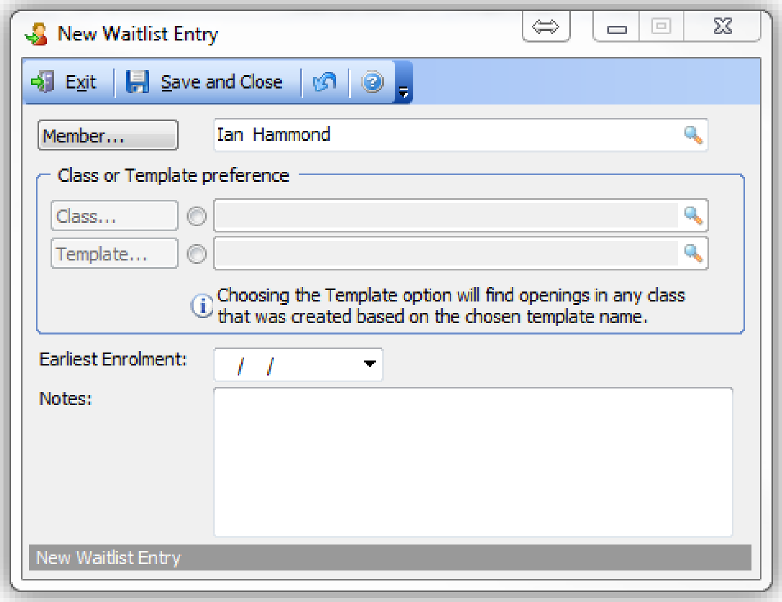


The **Choose a Member** screen, displays as shown below.

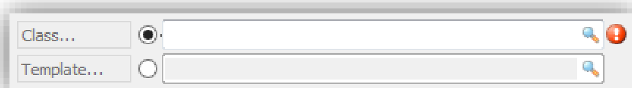


Step 4. Select the member you want to add to the waitlist and click **OK**. The **Choose a Member** screen will close.

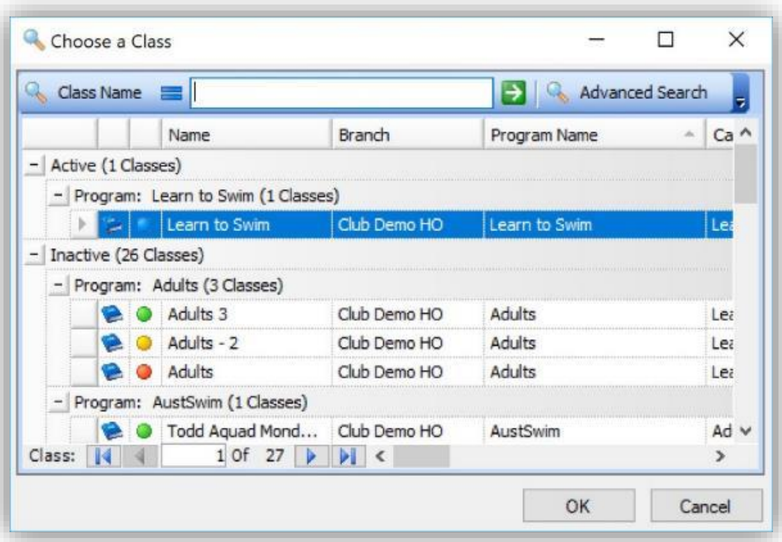
The **New Waitlist Entry** screen now displays as shown below.



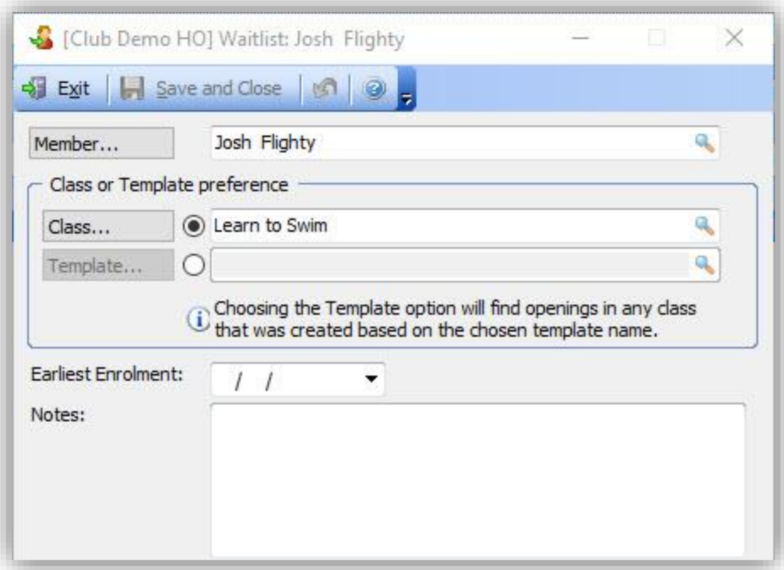
Step 5. Add the member to the waitlist for either a Class or Class Template.
In this example add the member to the waitlist for the class.
Click the radio button to the left of the Class or Template field, as shown below.



Step 6. Click the magnifying glass.
The **Choose a Class** screen displays, as shown below.



Step 7. Select the class you want the member to be waitlisted for and click **OK.**
The **New Waitlist Entry** screen now displays as shown below.



Step 8. Enter the earliest date the member should be enrolled in the class, and any notes as required.

Step 9. Click **Save and Close** to exit the screen.

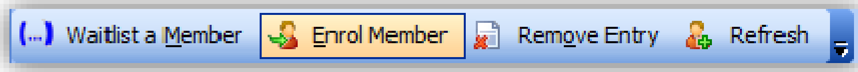
You have completed the steps required to add a member to a waitlist in Clubware.

Enrolling a Member from a Waitlist

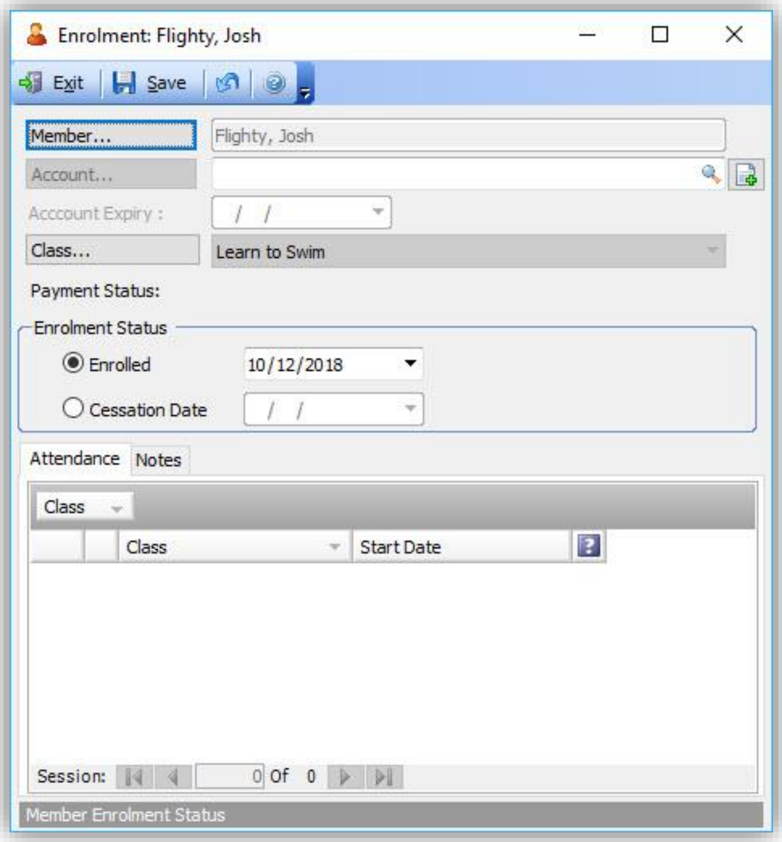
This tutorial describes the steps required to enrol a member from a waitlist.

Step 1. Select **Term Classes | Waitlist** from the navigation panel, as shown below.

Step 2. The **Waitlist** screen will open in the main panel.
Select the member you want to enrol from the screen.
Click **Enrol Member** from the toolbar, as shown below.

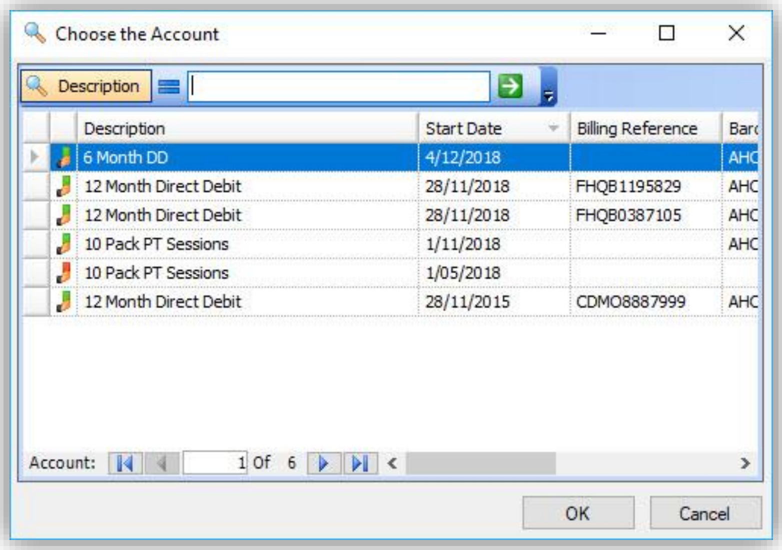


The **Enrolment** screen displays.

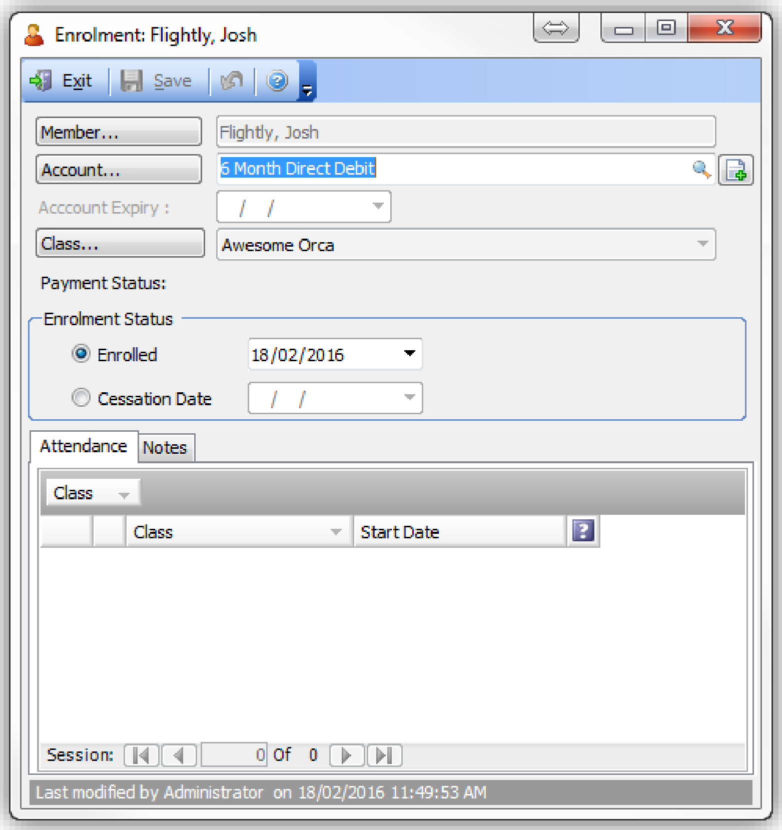


Click the magnifying glass on the right of the **Account** field to select the **account** to add to the member.

The **Choose the Account** screen displays as shown below.



Select the required account and Click **OK**.
The **Enrolment** screen displays as shown below.



Step 3. Click **Save** and **Exit** to exit the screen.

The member no longer displays on the **Waitlist** screen and has been enrolled in your selected class.

You have completed the steps required to enrol a member from a waitlist in Clubware.

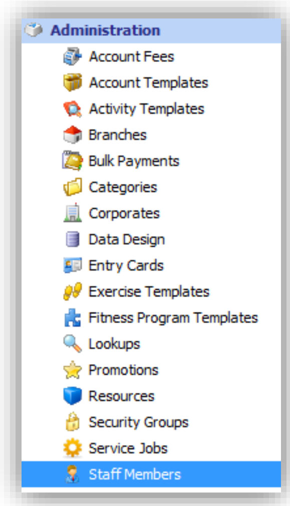
Instructors

The following tutorials describe the most common actions associated with Instructors.

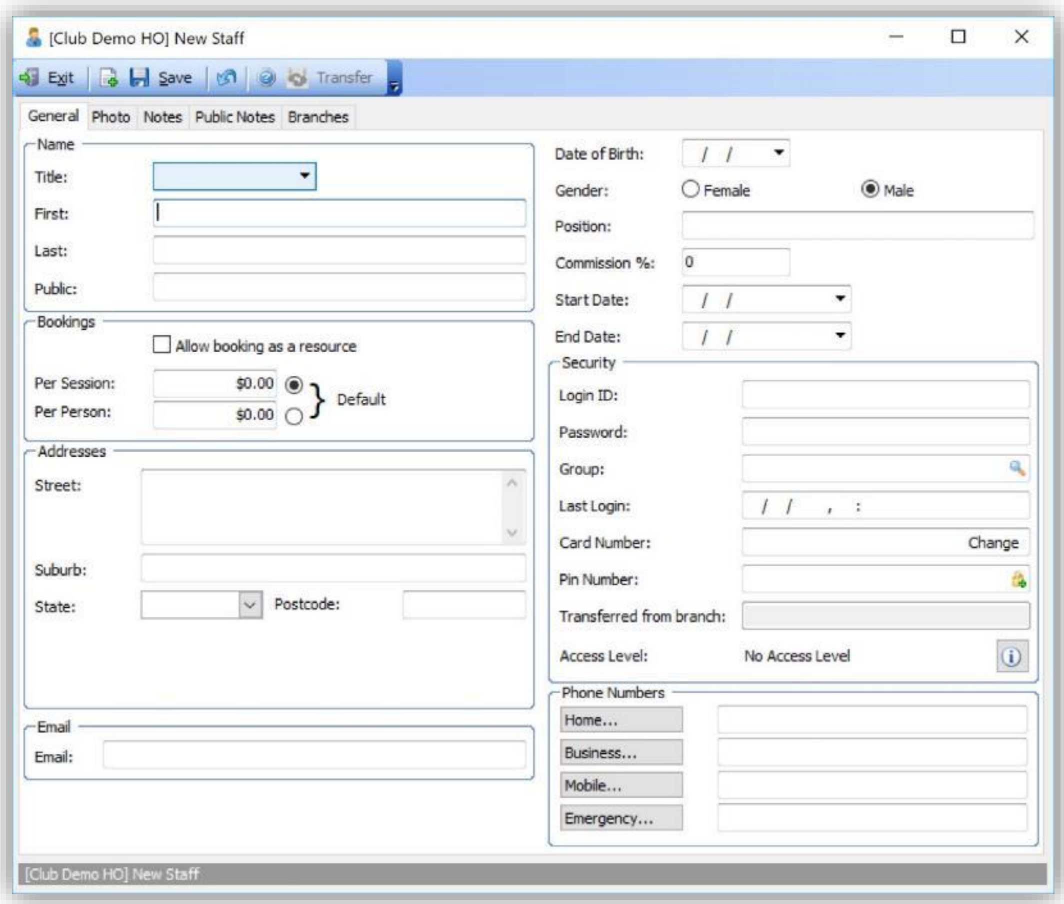
Adding Instructors

This tutorial describes the steps required to add instructors within Clubware.

Step 1. Select **Administration | Staff Members** from the Navigation Panel.
The Staff Members screen displays in the Main Panel.

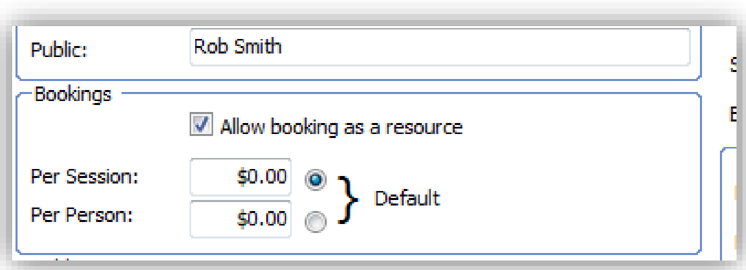


Step 2. Select **Add** from the toolbar.
The **New Staff** screen displays as shown below.



Note: See the tutorial Adding a Staff Member, for more information.

Step 3. Enter required details on the **General** tab, ensuring you select the **Allow booking as a resource** is checked, as shown below.



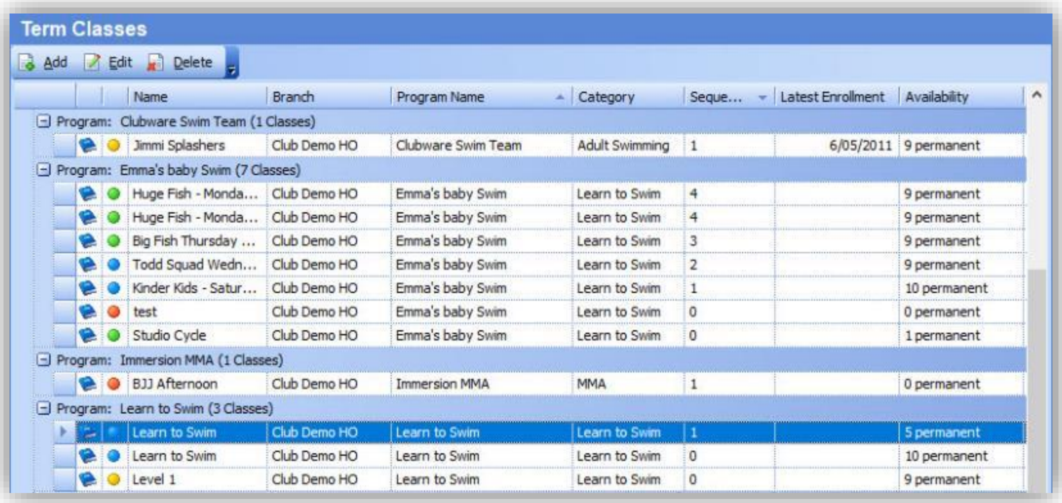
Step 6. Save and exit the form.

You have completed the steps required to add an instructor in Clubware.

Adding Instructors to Classes

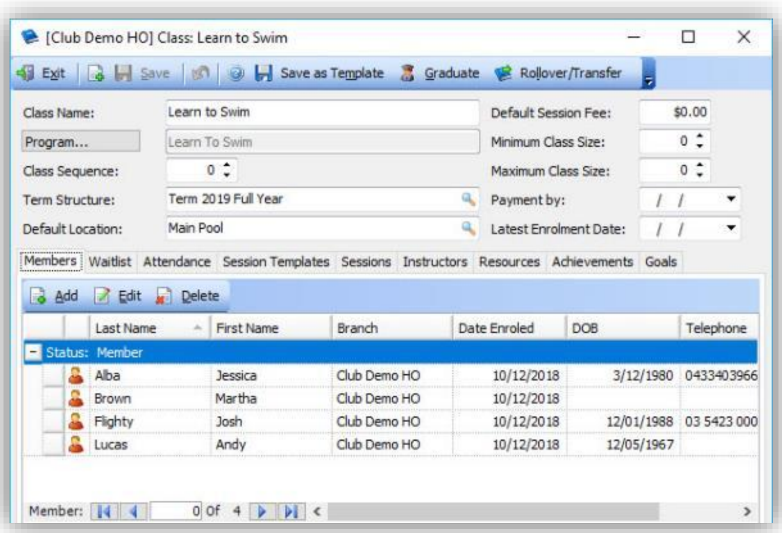
This tutorial describes the steps required to add instructors to classes.

Step 1. Select **Term Classes | Term Classes** from the navigation panel.
The **Term Classes** screen displays in the main panel.



Step 2. Select the class you want to add the instructor to.

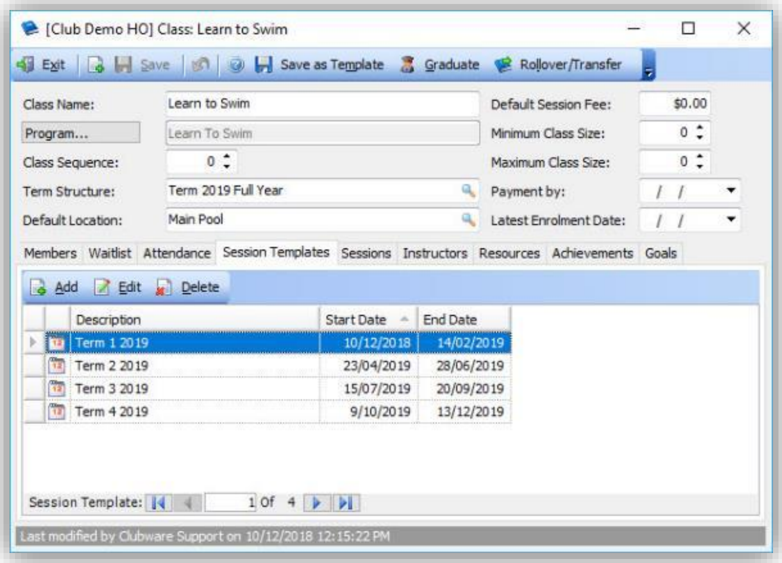
Click **Edit**. The class screen displays as shown below.



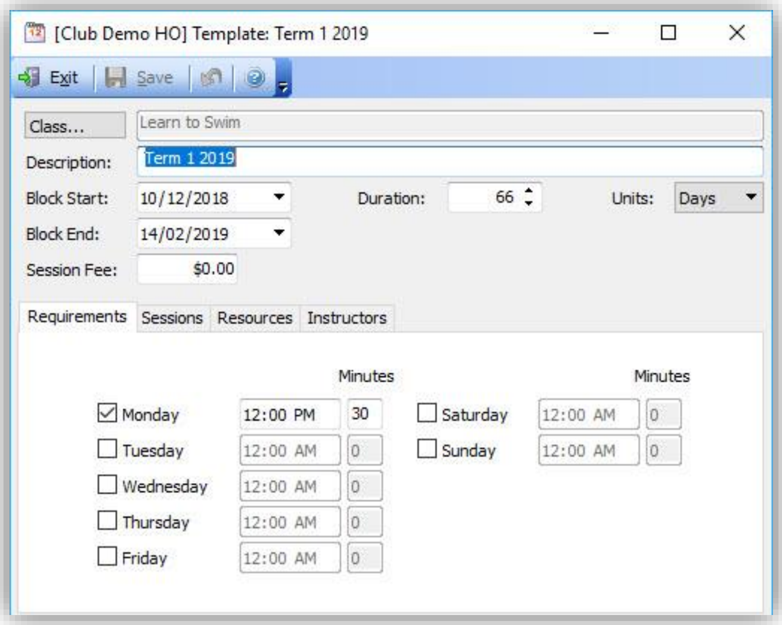
Step 3. An instructor must be added to either a **session template** (before you create sessions) or an individual **session**.

> **Session Template:**
> If you add an instructor to a session template, the instructor will be added to every session created from the session template.
> You must add the instructor **before** the sessions are created.

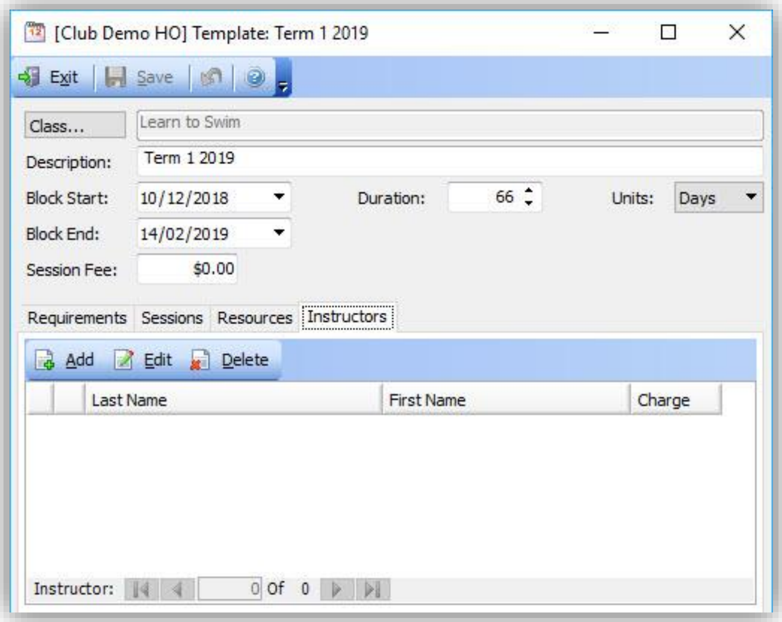
Click the **Session Templates** tab
Select the session template to add an instructor to.
Click **Edit**, as shown below.



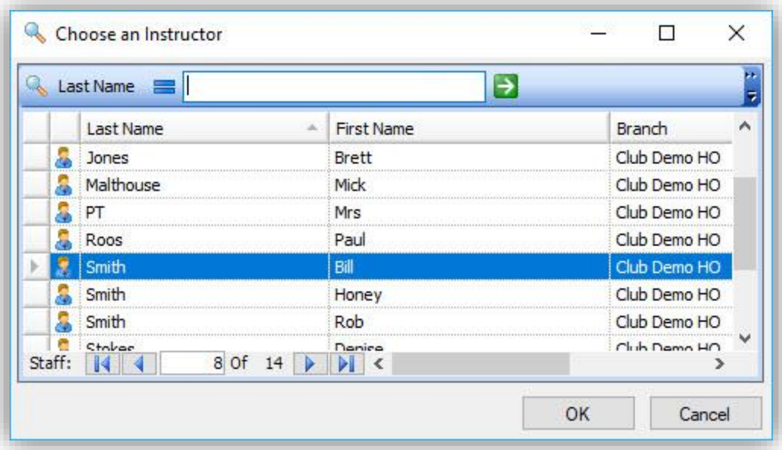
The **Session Template** screen displays.



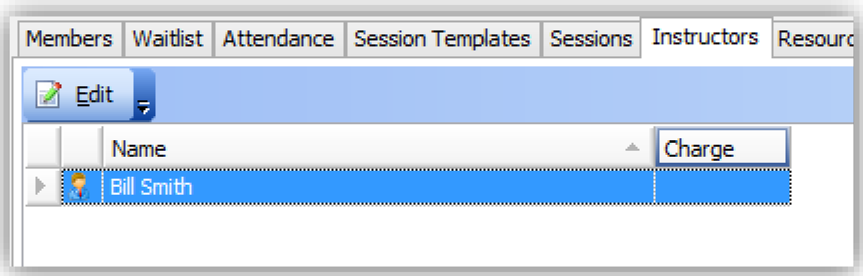
Click the **Instructor** tab and click **Add**, as shown below.



The **Choose an Instructor** screen shown below displays.



Select the instructor you want to add and click **OK.** The instructor displays in the **Session Template** screen, as shown below.

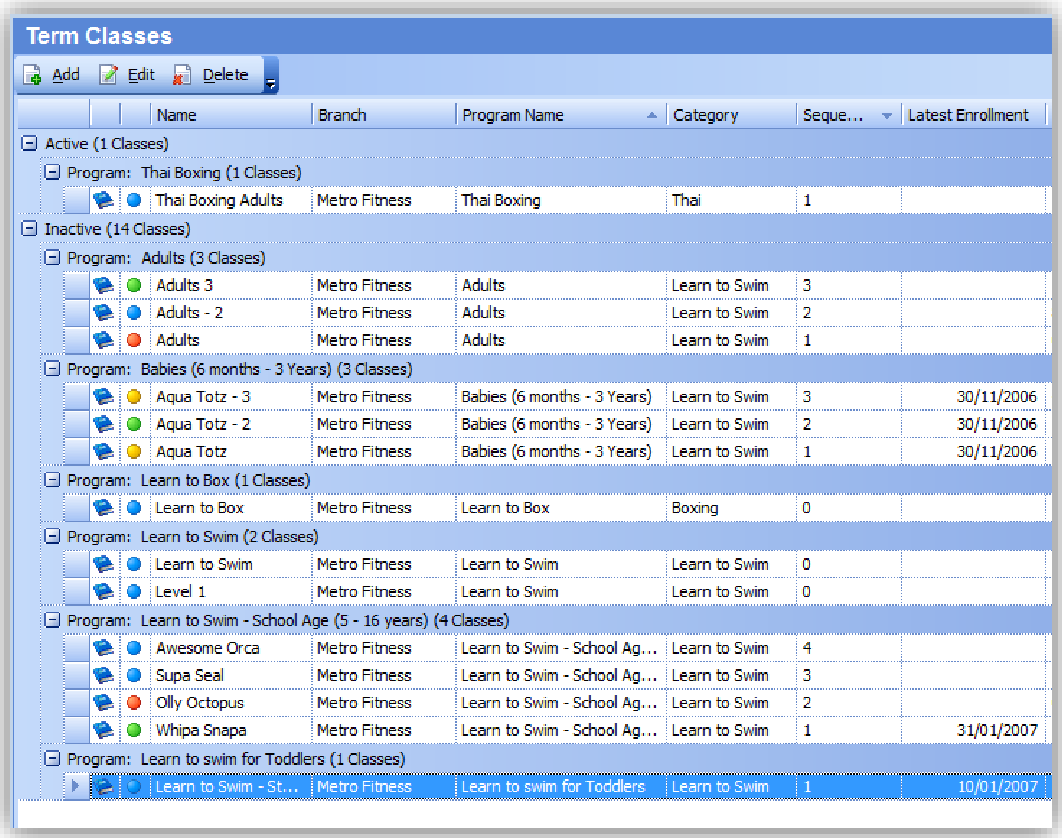


All sessions created from this template will have the instructors listed in the template.

Session:

You can add instructors to individual sessions.
(Useful if an instructor is away for an individual session and a substitute is needed).
You can also edit instructors for sessions by editing the appropriate session.

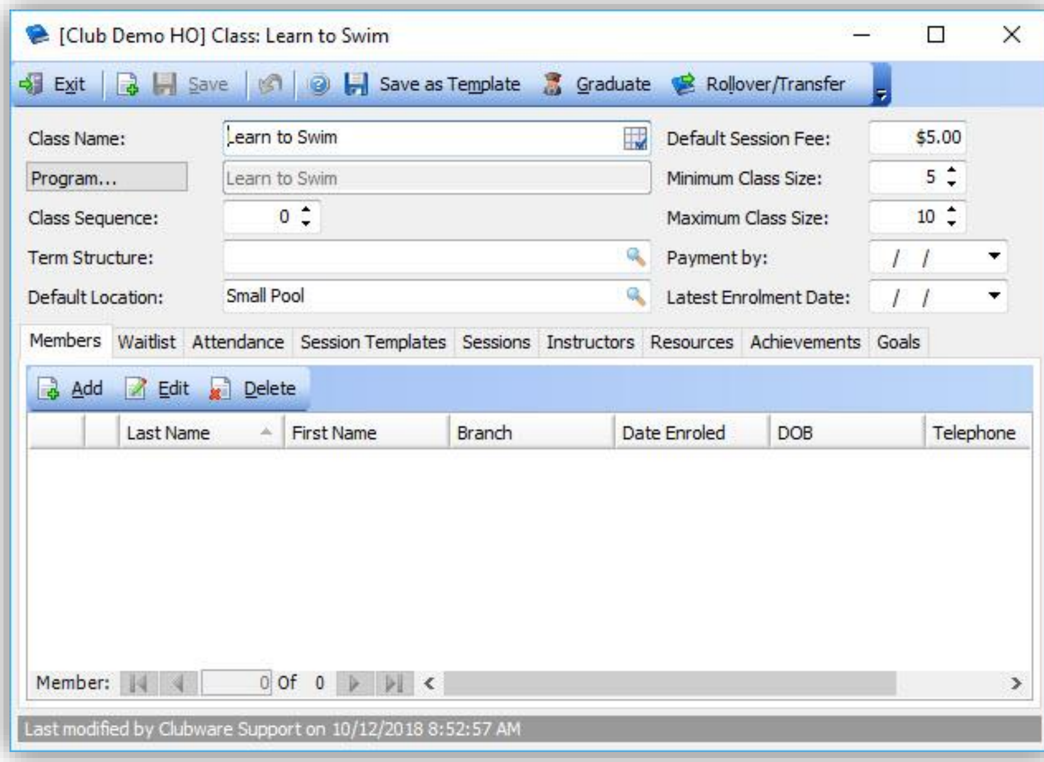
Select **Term Classes | Term Classes** from the navigation panel.
The **Classes** screen displays in the main panel.


Term Classes

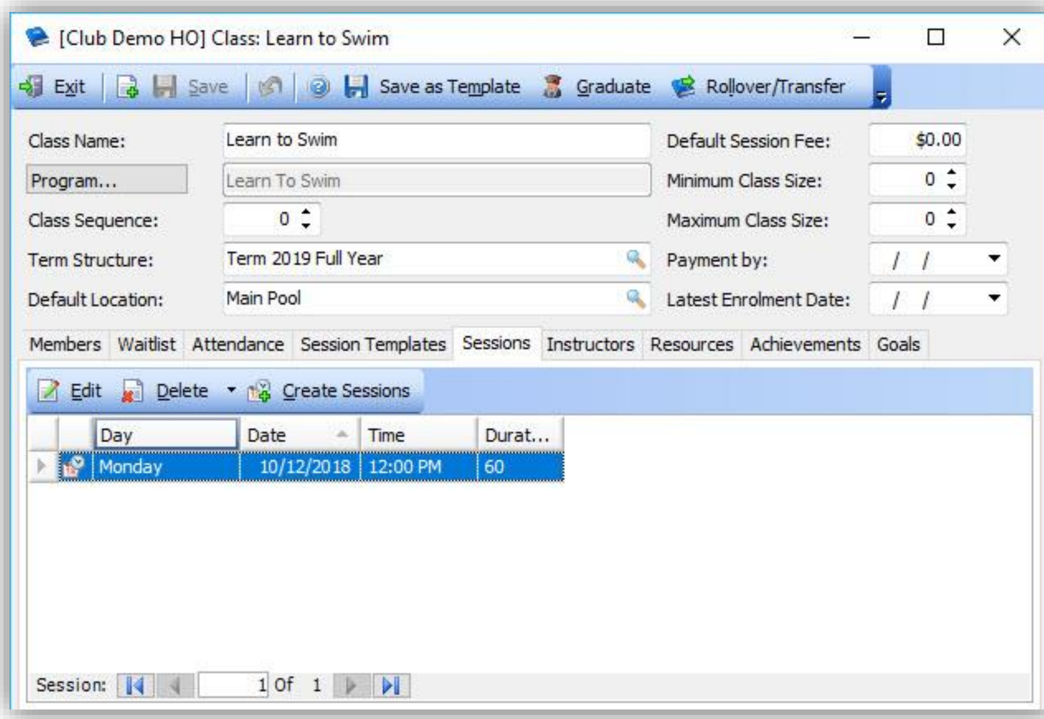
Add Edit Delete

Name	Branch	Program Name	Category	Seque...	Latest Enrollment
Active (1 Classes)					
Program: Thai Boxing (1 Classes)					
Thai Boxing Adults	Metro Fitness	Thai Boxing	Thai	1	
Inactive (14 Classes)					
Program: Adults (3 Classes)					
Adults 3	Metro Fitness	Adults	Learn to Swim	3	
Adults - 2	Metro Fitness	Adults	Learn to Swim	2	
Adults	Metro Fitness	Adults	Learn to Swim	1	
Program: Babies (6 months - 3 Years) (3 Classes)					
Aqua Totz - 3	Metro Fitness	Babies (6 months - 3 Years)	Learn to Swim	3	30/11/2006
Aqua Totz - 2	Metro Fitness	Babies (6 months - 3 Years)	Learn to Swim	2	30/11/2006
Aqua Totz	Metro Fitness	Babies (6 months - 3 Years)	Learn to Swim	1	30/11/2006
Program: Learn to Box (1 Classes)					
Learn to Box	Metro Fitness	Learn to Box	Boxing	0	
Program: Learn to Swim (2 Classes)					
Learn to Swim	Metro Fitness	Learn to Swim	Learn to Swim	0	
Level 1	Metro Fitness	Learn to Swim	Learn to Swim	0	
Program: Learn to Swim - School Age (5 - 16 years) (4 Classes)					
Awesome Orca	Metro Fitness	Learn to Swim - School Ag...	Learn to Swim	4	
Supa Seal	Metro Fitness	Learn to Swim - School Ag...	Learn to Swim	3	
Olly Octopus	Metro Fitness	Learn to Swim - School Ag...	Learn to Swim	2	
Whipa Snapa	Metro Fitness	Learn to Swim - School Ag...	Learn to Swim	1	31/01/2007
Program: Learn to swim for Toddlers (1 Classes)					
Learn to Swim - St...	Metro Fitness	Learn to swim for Toddlers	Learn to Swim	1	10/01/2007

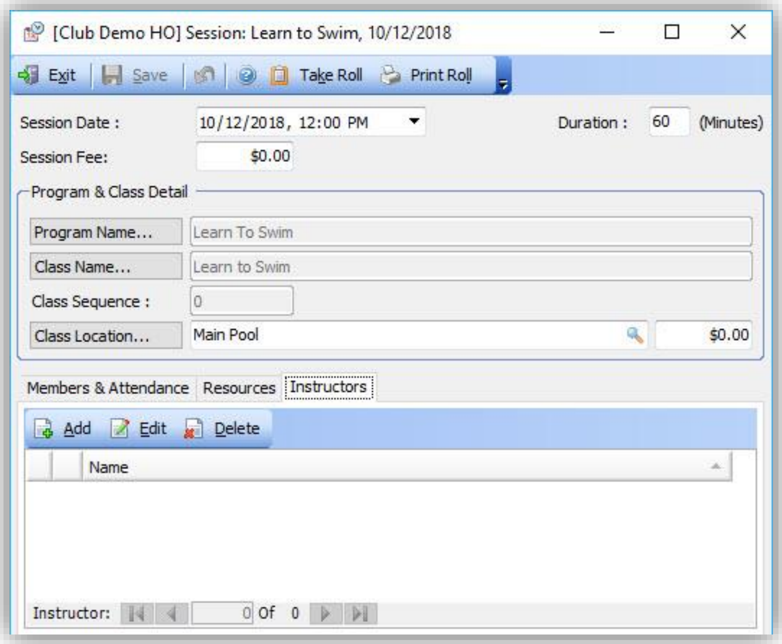
Select the class you want to add the instructor to.
Click **Edit**. The class screen displays as shown below



Click the **Sessions** tab from the Class screen.

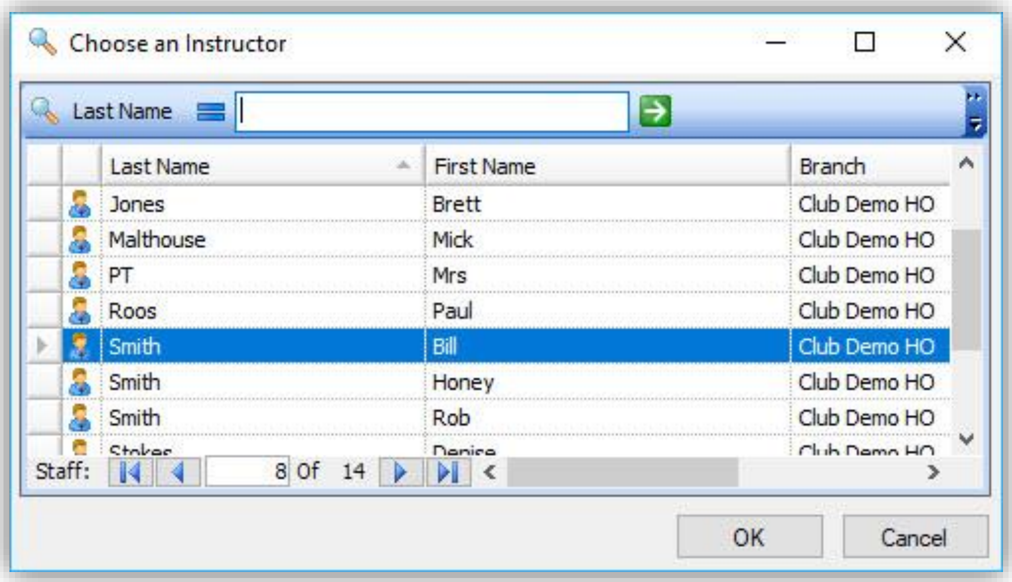


Select the session you want to add an instructor to and Click **Edit**.
The session screen displays.

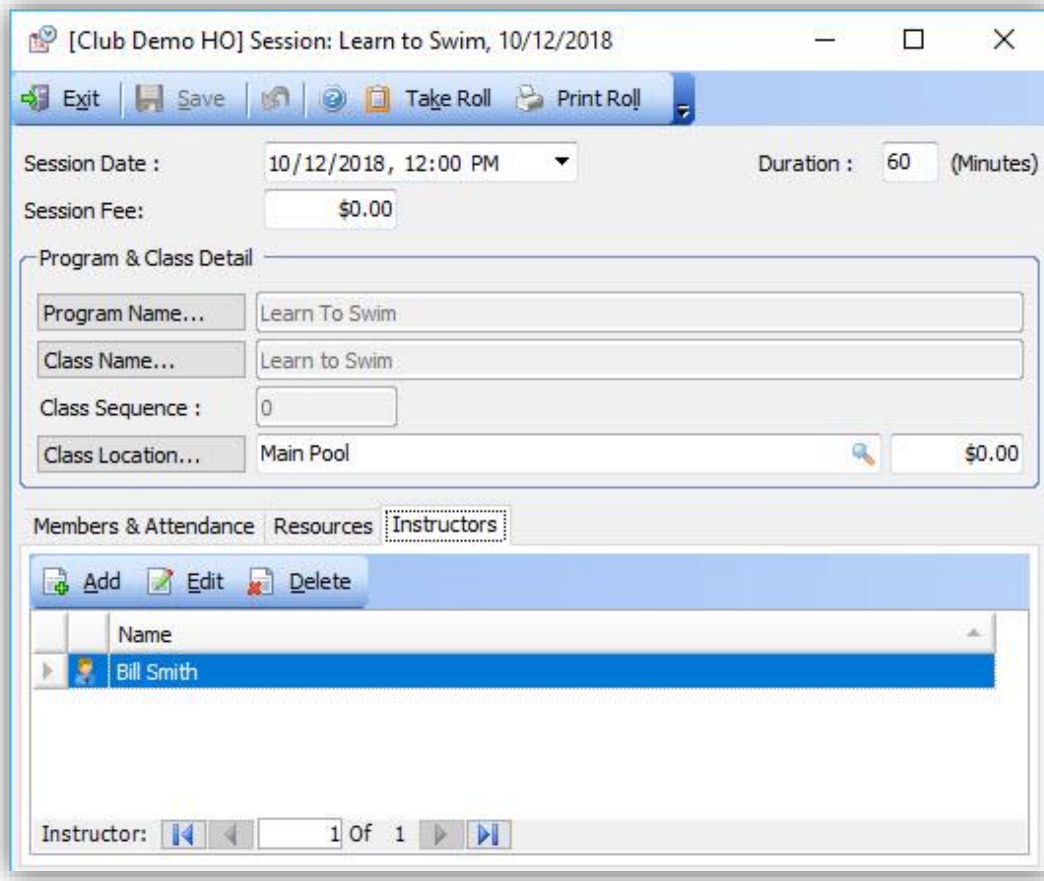


Click the **Instructors** tab

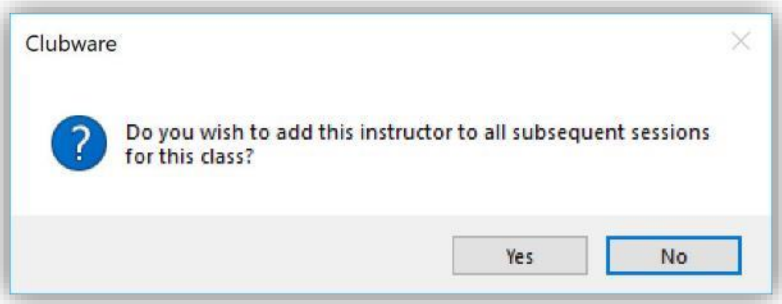
Click **Add**. The **Choose an Instructor** screen displays.



Select the instructor you want to add, click **OK**.
The instructor will appear in the Session screen, as shown below.



You will receive a prompt asking if you would like to add the instructor to all subsequent sessions for the class.



Click **Yes** if you would like the instructor to be added to all subsequent sessions.

Click **No** if you only want to add the instructor to the individual session.

Repeat as necessary. A session can have unlimited number of instructors associated with it.

Step 4. Save and **Exit** the Session screen.

You have completed the steps required to add an instructor to a class in Clubware.

Setting up Classes and Enrolling Members

This tutorial describes how to organise and run a swim school for a term.

Note: There are several ways Clubware can handle swim schools, this tutorial is a guide only.

Before starting this tutorial, ensure you have instructors, categories, achievements and resources set up within Clubware.

Adding a Class and Enrolling Members

This tutorial describes the steps required to add a class.

Background

Your site is setting up a ‘learn to swim’ class for toddlers for a single term.

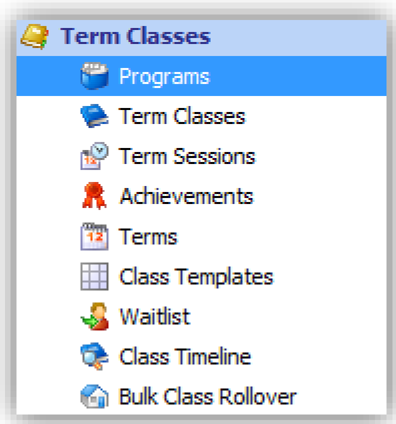
Each child will attend several sessions of the class during the term.

When the children have completed the class, they will each be awarded a certificate for their achievements.

This tutorial describes the steps required to set up and run this program.

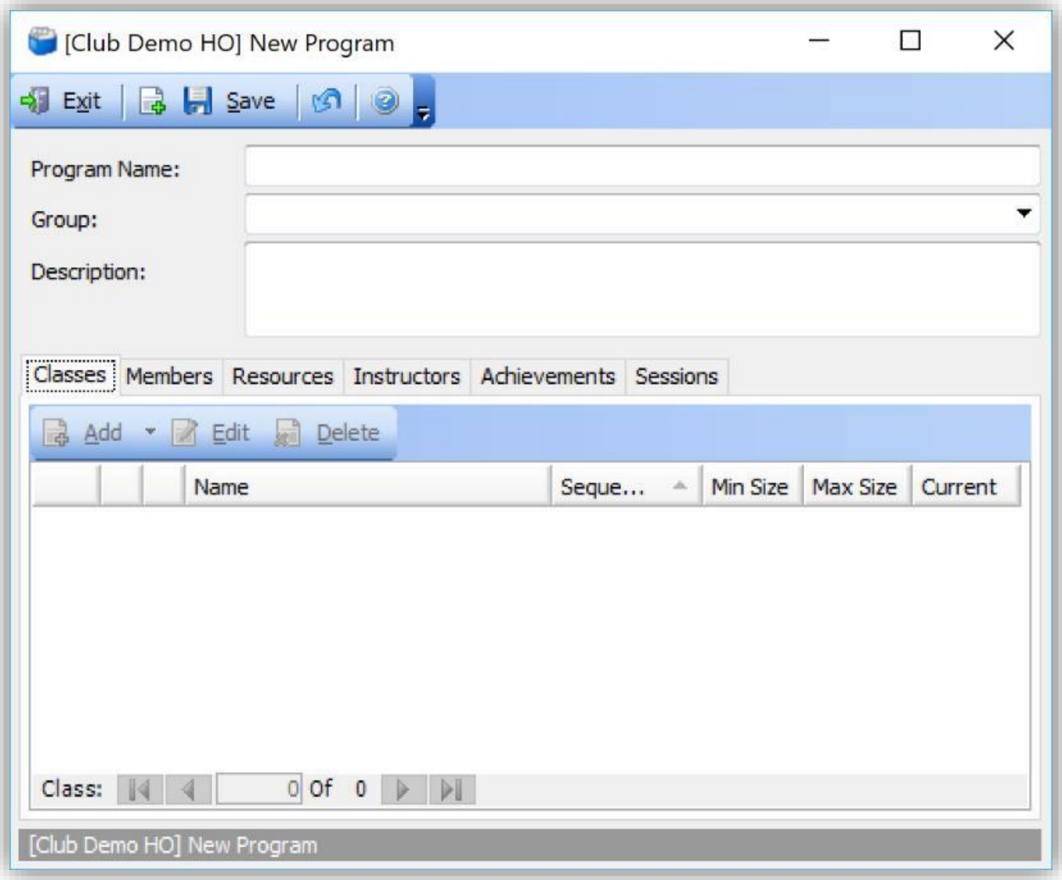
Step 1. Set up the program

Select **Term Classes | Programs** from the navigation panel, as shown below.



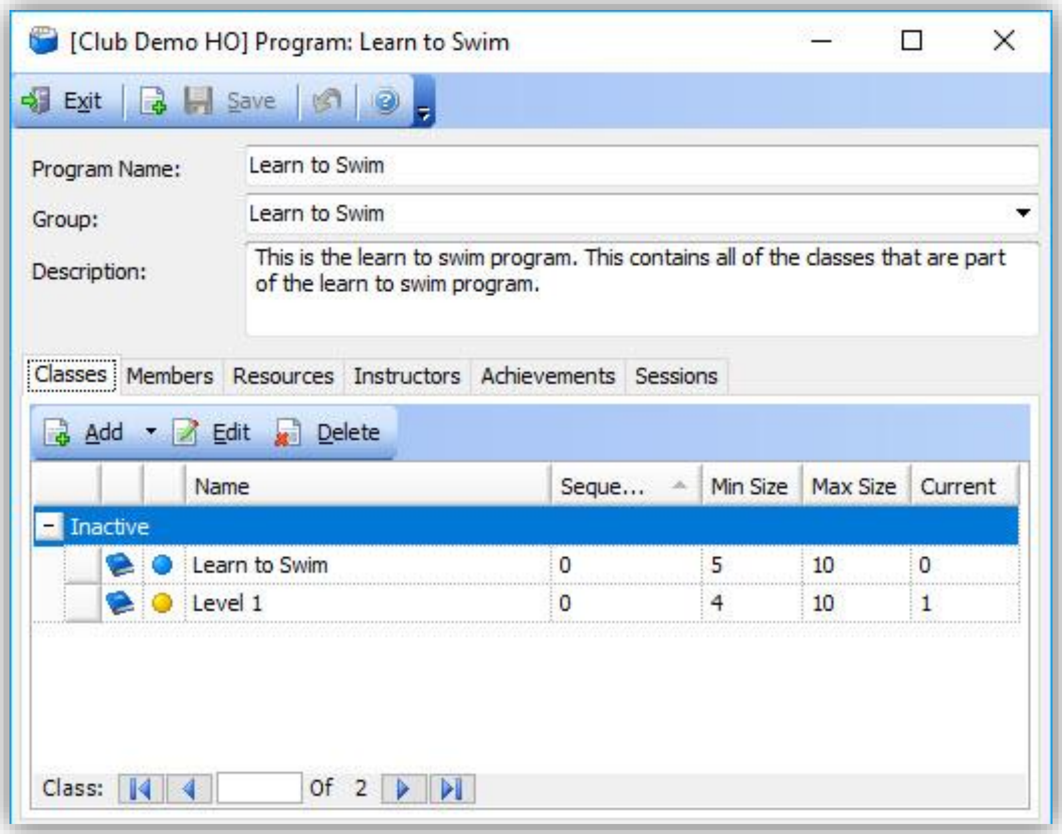
The **Programs** screen displays in the main panel.
Click **Add** from the toolbar.

A **New Program** screen displays.



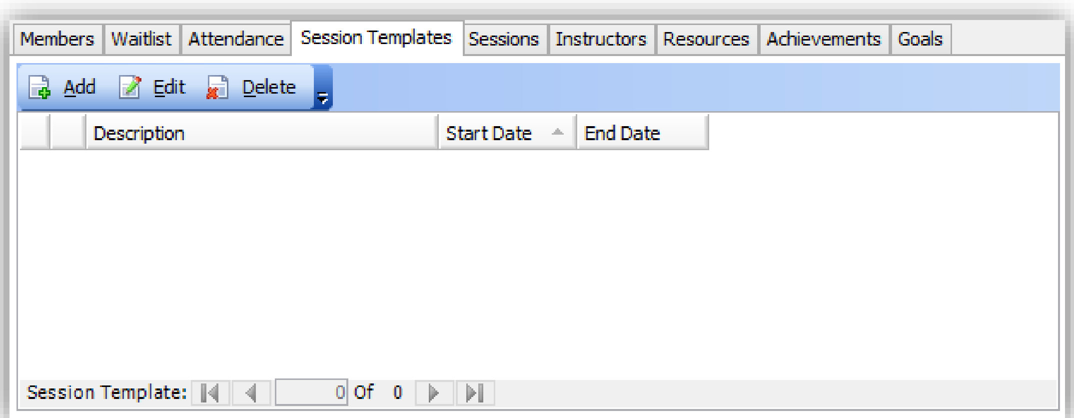
Complete the form as shown. (If you don't have a category called 'Learn to Swim', leave the Category field empty).

Click **Save**.



Step 2. Add Classes

Click the **Classes** tab, then click **Add**.
Complete the information as shown.
Click **Save,** then select the **Session Templates** tab as shown below.

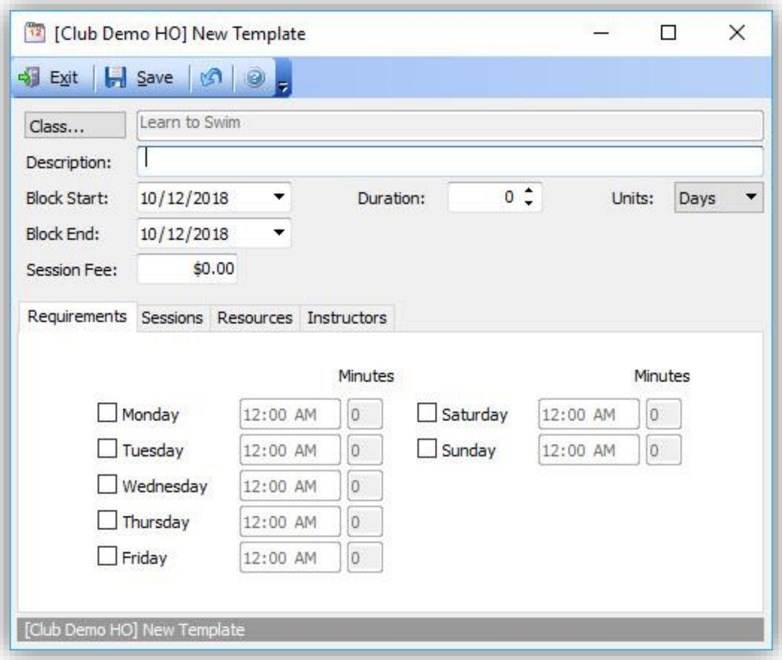


Step 3. Add Session Templates

A Session Template:

- Defines what times sessions will occur during a week within a pre-determined block of time.
- Provides the system information it requires to create each session for a class for a set period.

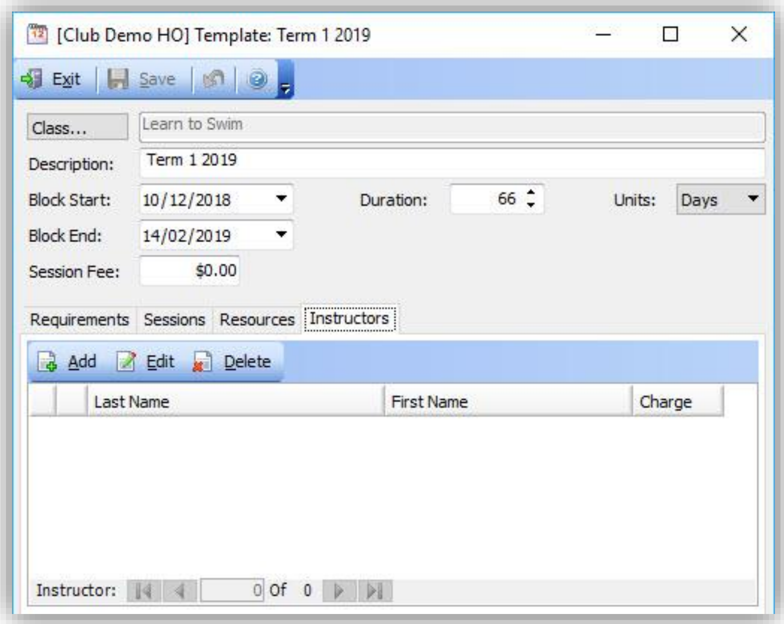
Click the **Requirements** tab, and complete as shown below.
Click **Save.**



Step 4. Add an Instructor

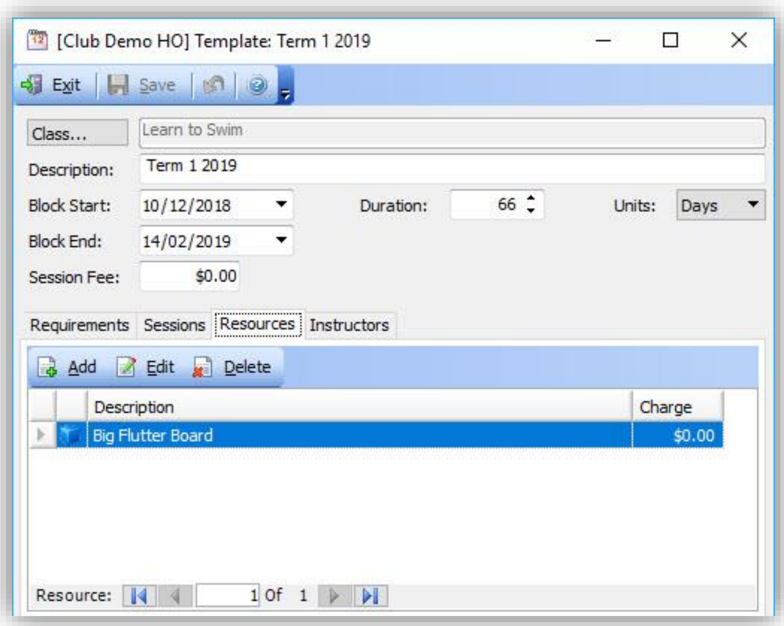
Click the **Instructors** Tab.
Click the **Add** button and select an instructor to teach the class.

The Template screen then displays as shown below.



Step 5. Add a Resource

Click the **Resources** Tab.
Click **Add,** and select a resource from the list.
Your screen displays as shown below.



Step 6. Create Sessions

When a session template is completed, **sessions** need to be created for a **class**.
The resources and instructors added to the template in the previous steps will be added to the new sessions you create.

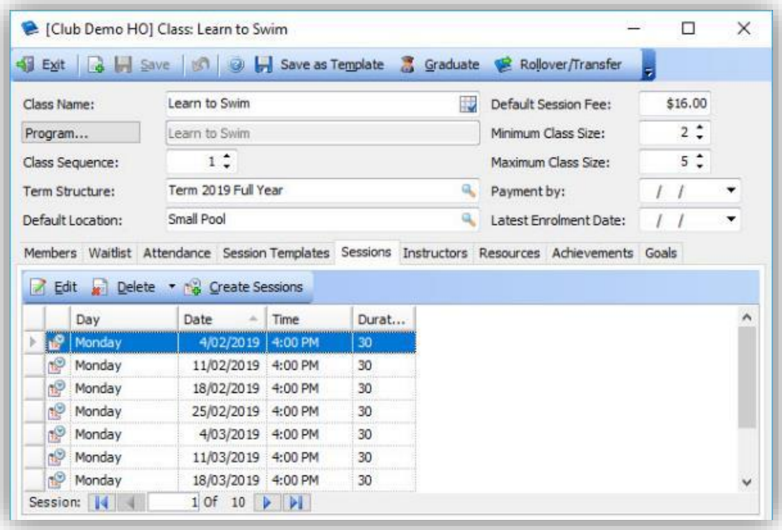
Close the **Template** screen and return to the **Class** screen.

The **session template** you created displays in the list of session templates.

Click the **Sessions** tab.

Click the **Create Sessions** button and all the sessions for your class will be created.

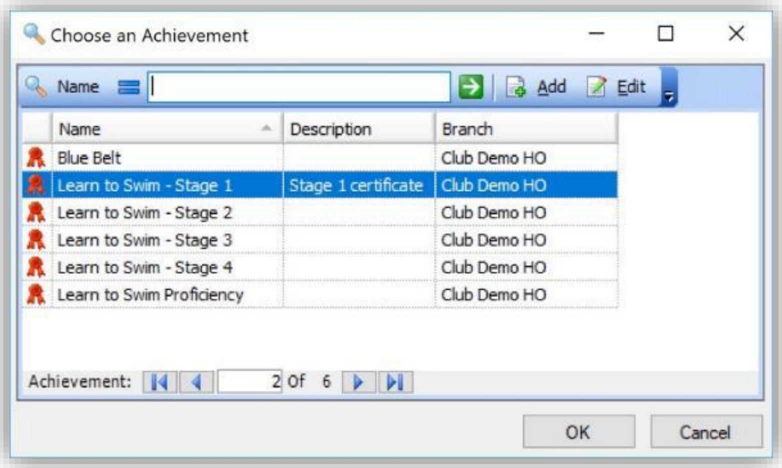
The system extracts this information from your template. This will be similar to the example below.



Step 7. Add an Achievement

If you want to print a certificate or note students' achievements, an achievement can be added for the class.

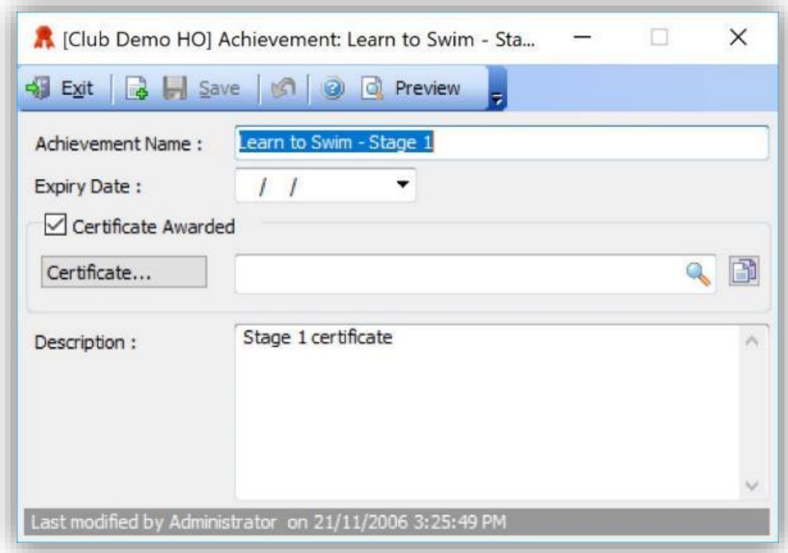
Click the **Achievements** tab, then click **Add.** The screen below displays.
Note: Refer to the *Adding Achievements* tutorial if no achievements are set up.



Select the achievement you want to associate with this class and click **OK.**
(If no achievements are set up, go to the *Adding Achievements* tutorial).

The achievement will appear in the list of achievements for the class.
To edit the achievement, select it in the list and click **Edit**.

The screen below displays.



The **Certificate Awarded** will print when a class is graduated (see Step 10).

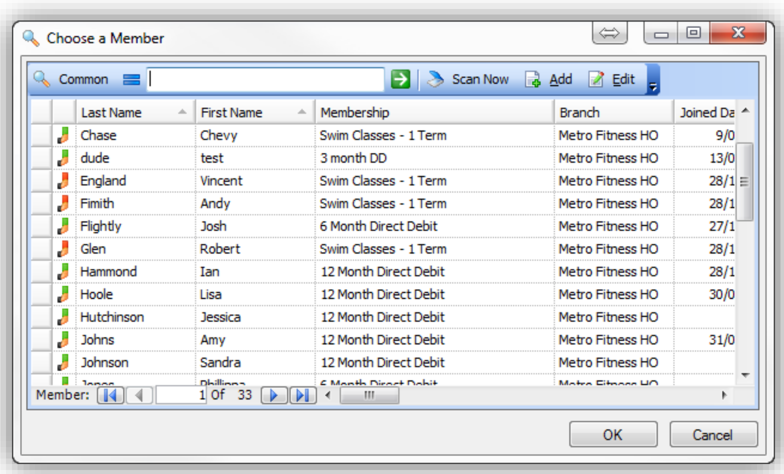
Step 8. Enrol Members

When you have created your basic class structure and the sessions associated with your class, you can enrol members into your class.

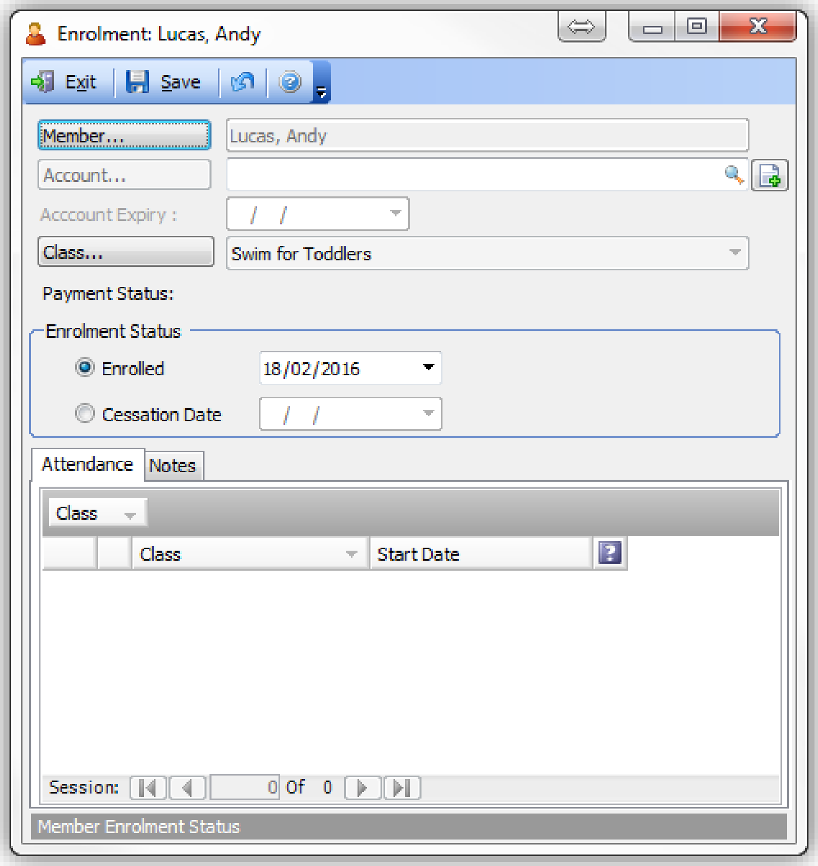
Click the **Members** tab on the **Class** screen.

Click **Add**, the **Choose a Member** screen will display.

Enter the last name of the member you want to add to the class and click the small **green arrow** on the right of the search text box.
The search results display on the screen, as shown below.



Select the member you require and click **OK**. The screen below displays.



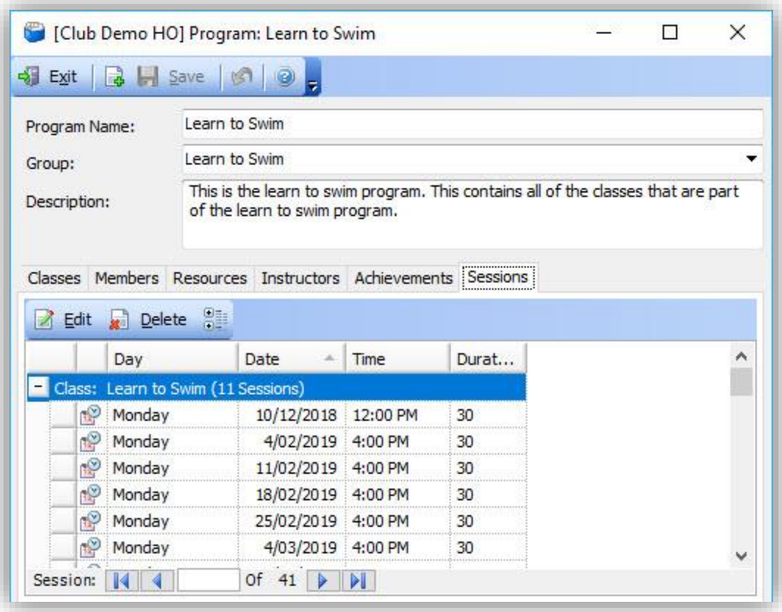
Choose an account for the member for this class.
(If the account template is not set up, see the tutorial Adding an Account Template for more information).

Click **Save,** The member will appear in the class, and an account to pay for the class will also be set up.

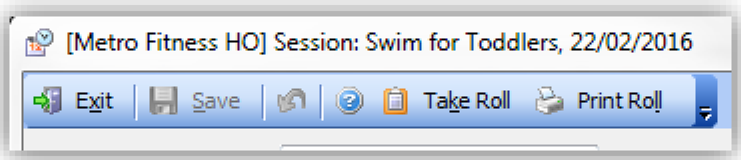
Step 9. Taking the Roll | Attendance

When a class is set up, the class instructor will need to take the roll for the first session when it occurs.
This task can be completed from several different areas of the system.
For this exercise, complete this from the **Program** screen.

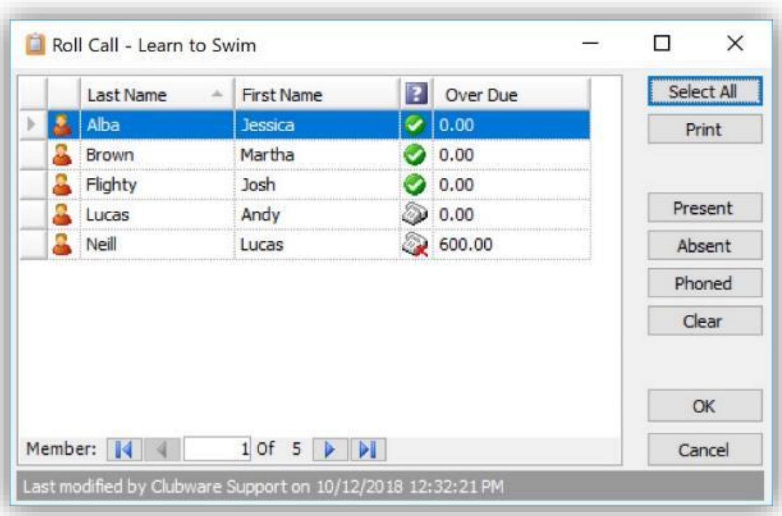
Open the program you created. Click the **Sessions** tab, as shown below.



Select the session you want to take the roll for.
Click **Edit.**
The **Session** form will open and display the session you selected.



Click **Take Roll** from the toolbar on the top of the form. The screen below displays.



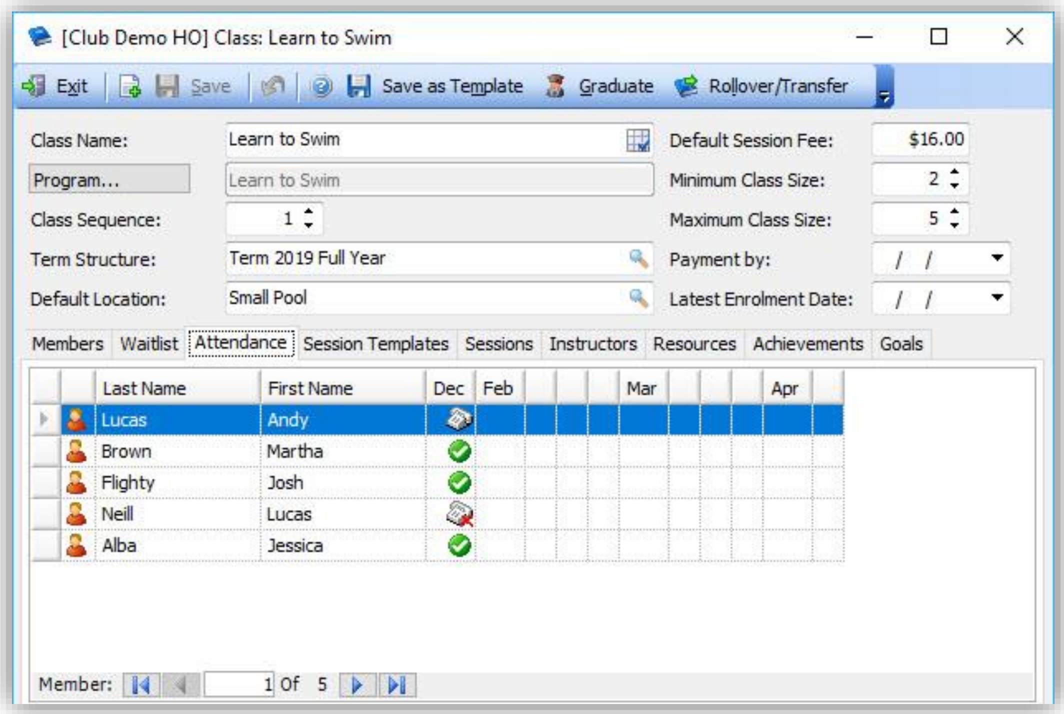
You can mark a student as **Present, Absent,** or **Phoned**, or you can clear a student's record.

The example above shows both members as **Present** (green tick).

Click **OK**. The Roll Call screen will close.

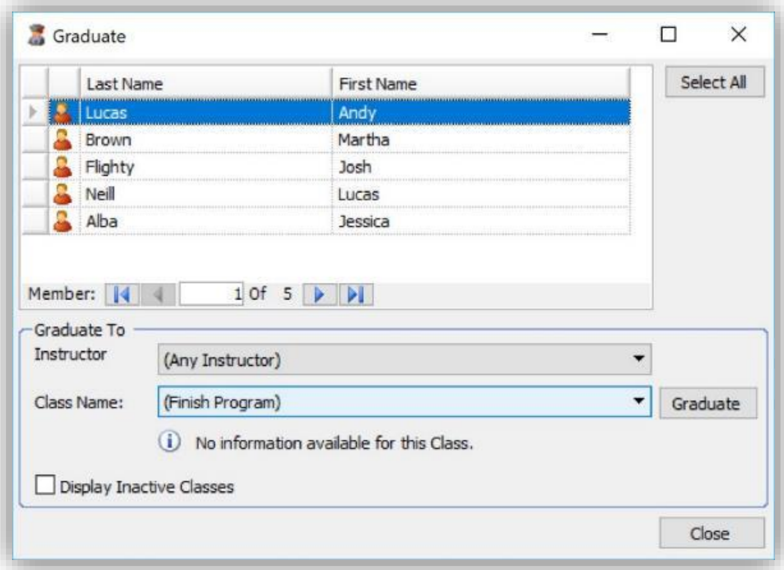
Save and exit the **Session** screen.

If you have returned to the Program screen, select the **Class** tab.
Select your class and click **Edit**.
The **Class** screen will display.
Click the **Attendance** tab.
A graphical representation of students' attendance history displays, as shown below.



Step 10. Graduating a Class
At the end of a class, you can **graduate** students who have completed the class.
You can print certificates (Achievements) and graduate a student to a new class if required.
Open the class you want to graduate members from.

Click the **Graduate** button on the **Class** screen. The screen below displays.



Select the members you want to graduate. Print certificates as required.
If you are graduating students to a new class, select the **Class Name** in the **Graduate To** panel. (In this example, we are graduating to a Stage 2 class).

Click **Graduate** to complete the action.

Note: The student has been removed from your current class and enrolled in the class chosen to graduate to.

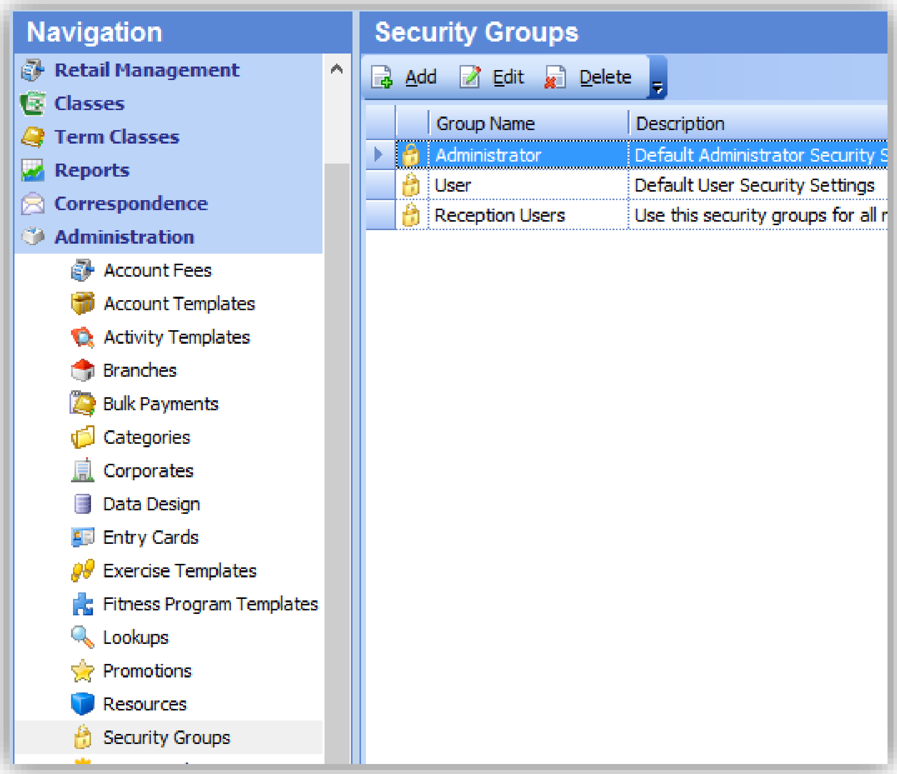
You have completed the steps required to set up a class and enrol members in Clubware.

Bulk Class Rollover

An option is available to roll over an entire term of classes within a year, or from one year to the next.

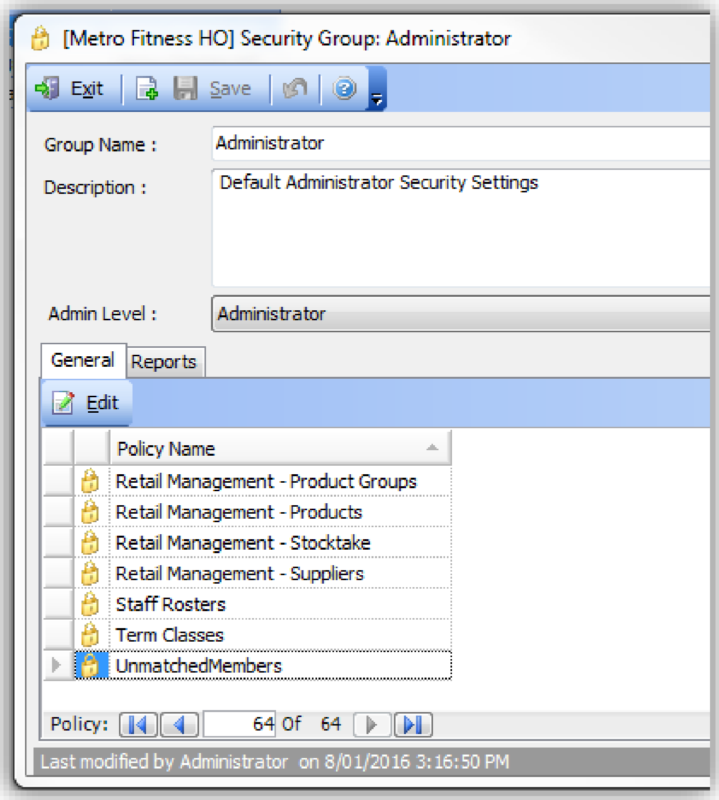
How to enable this feature:

Select **Administration | Security Groups** from the Navigation Panel as shown below.



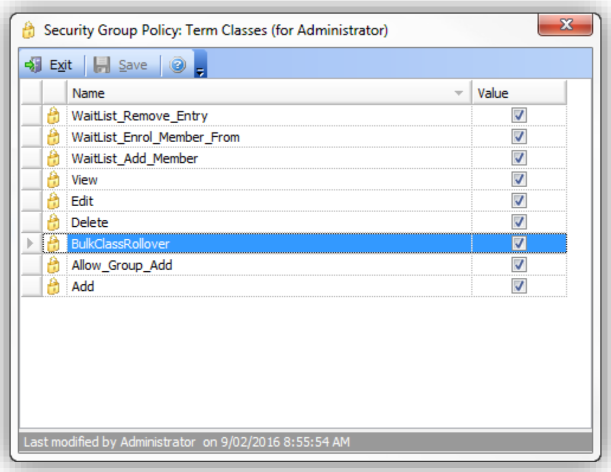
The **Security Groups** display on the screen, as shown above.

Select Administrator.
The Security Group: Administrator screen displays.



Double click Term Classes.

The Security Group Policy: Term Classes screen displays as shown below.

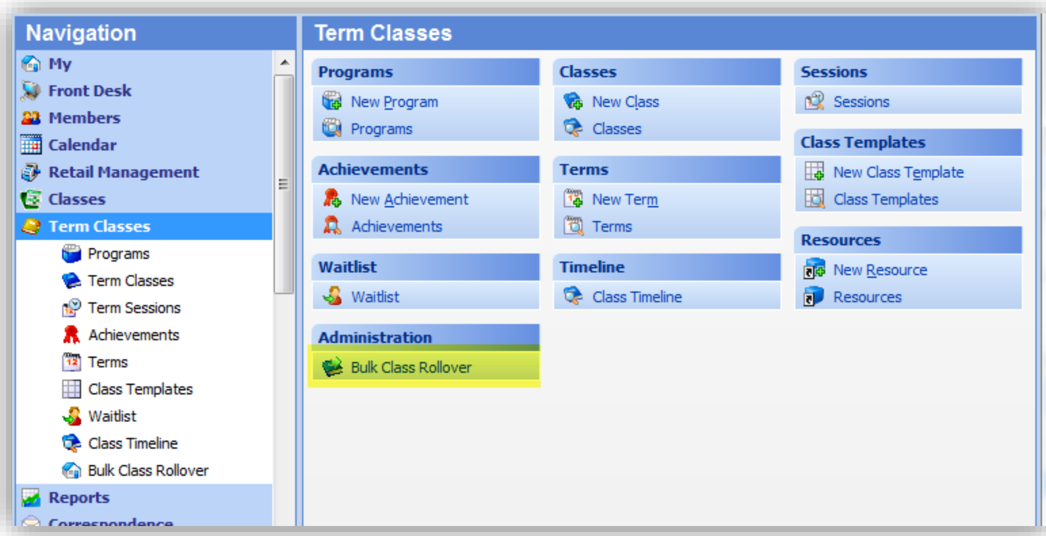


Tick the BulkClassRollover box.

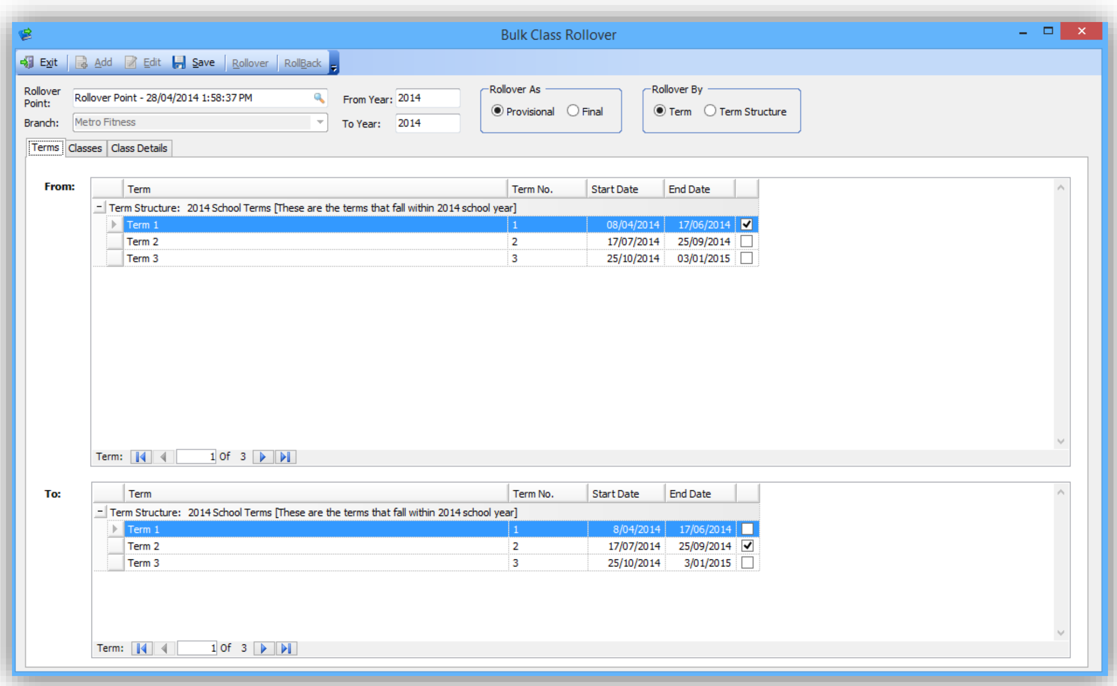
Close and **Restart** Clubware.

The Administrator Group will now be able to view **Bulk Class Rollover** on the **Term Classes** dashboard (under the **Administration** tab).

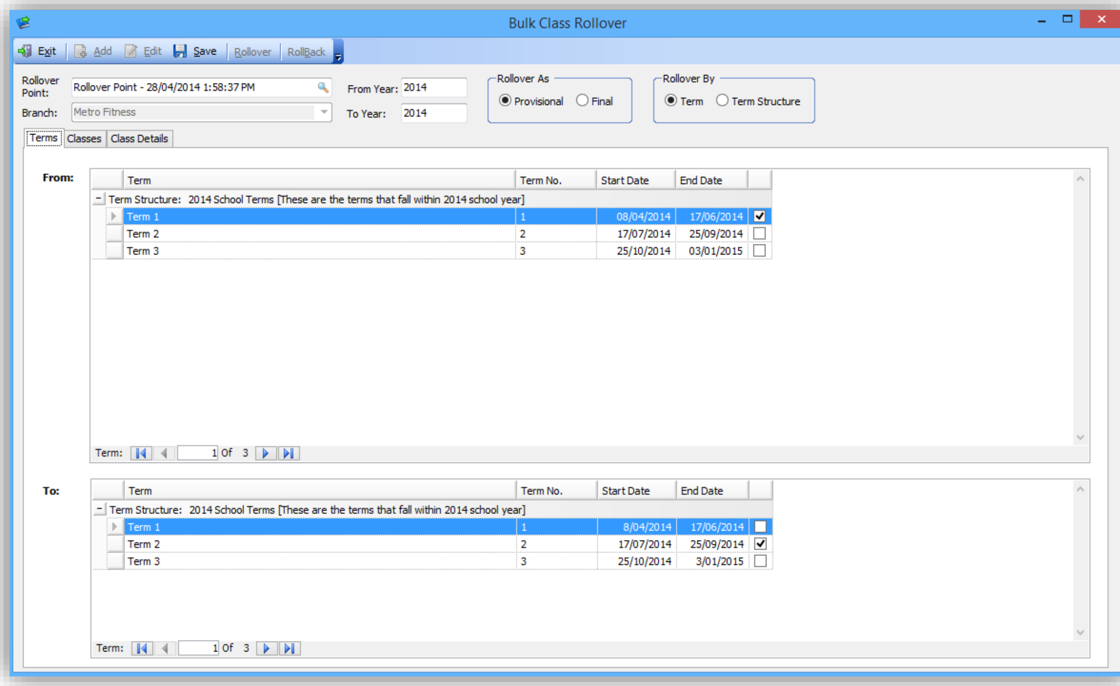
Select **Term Classes | Administration | Bulk Class Rollover** from the navigational panel as shown below.



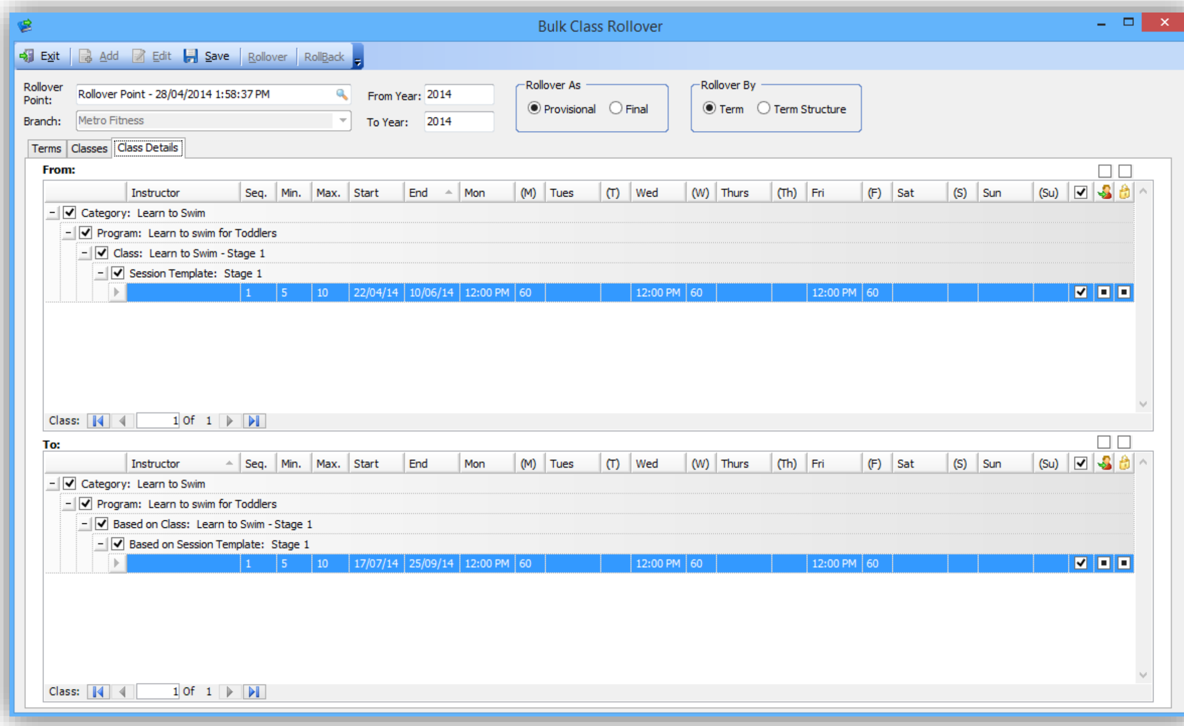
The Bulk Class Rollover form allows for the rolling over of a term's worth of classes within a year or from one year to the next by copying the term's classes and producing sessions which correspond:



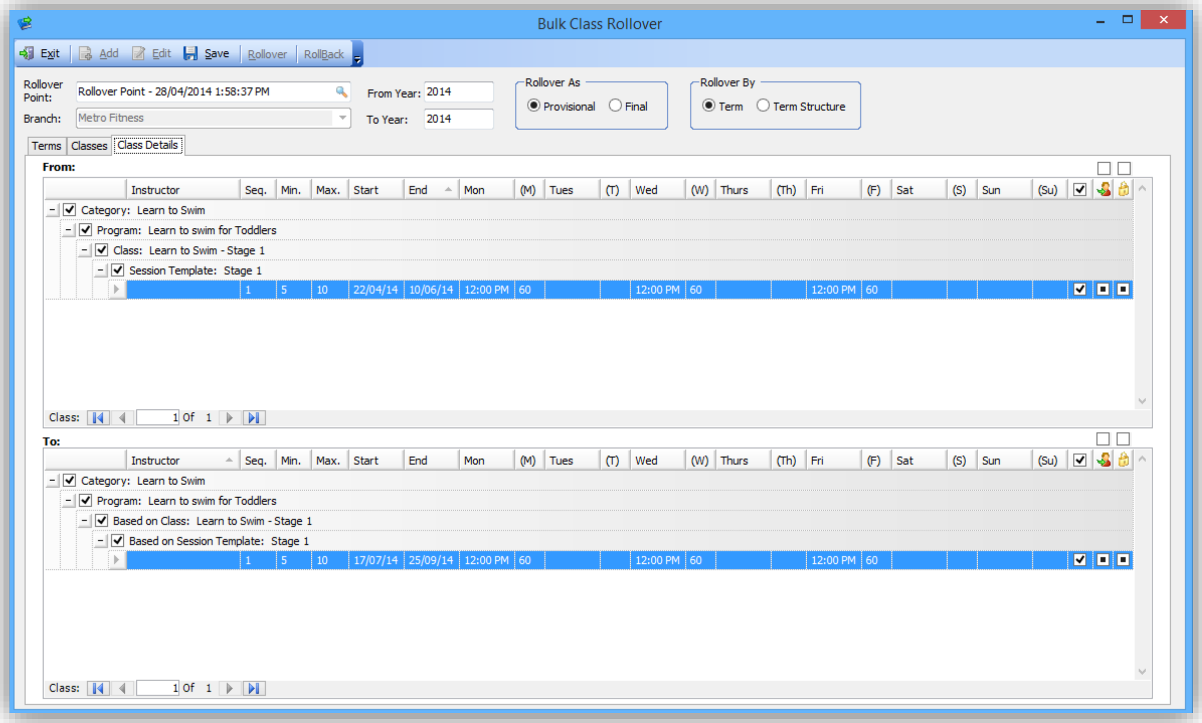
It provides the ability to create a year's worth of classes and the associated sessions by copying a Term Structure and matching it with a new term structure from the subsequent year to modify the session templates and produce appropriate sessions:



It provides the option to roll over members who are enrolled in the classes if desired by clicking the "person" icon checkbox.
If the checkbox to rollover members is selected then the Rollover has to be final i.e. it cannot be rolled back.



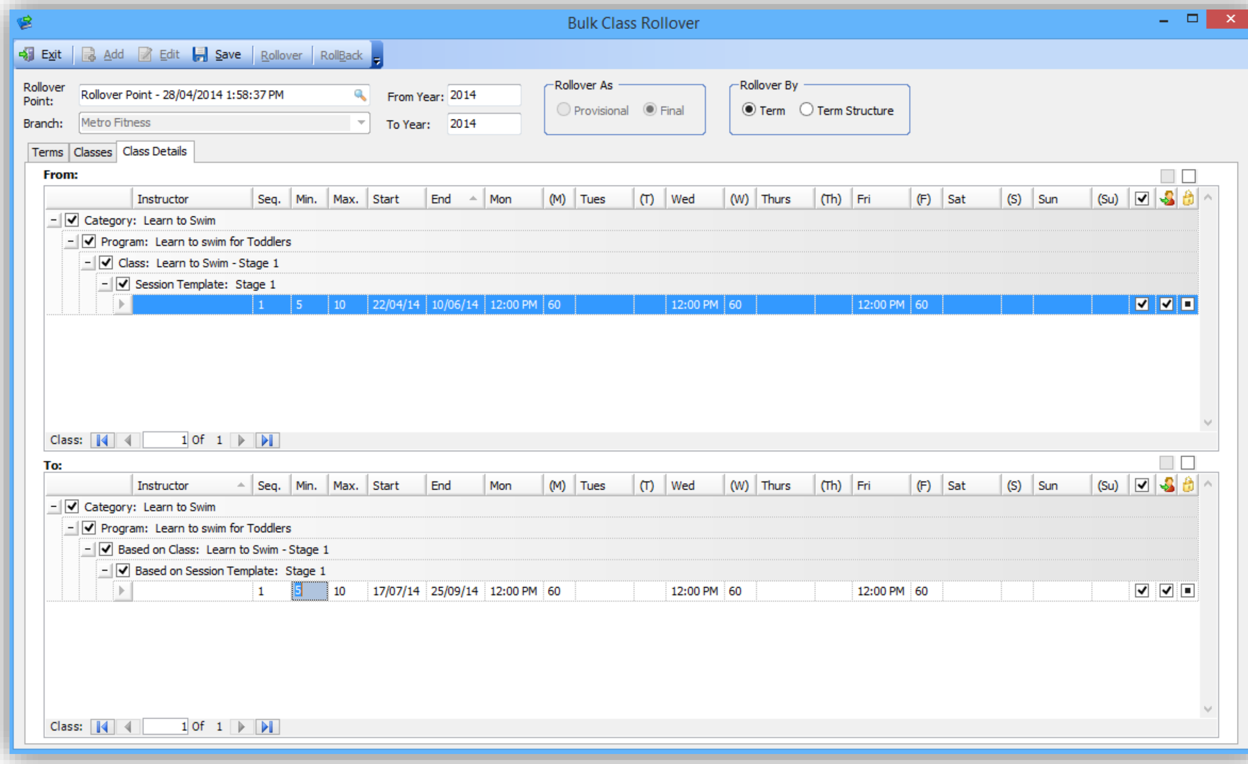
It provides the ability to generate a hold account which will span the time period from the end of the term in question to the start of the newly generated term by clicking the “yellow padlock” checkbox.



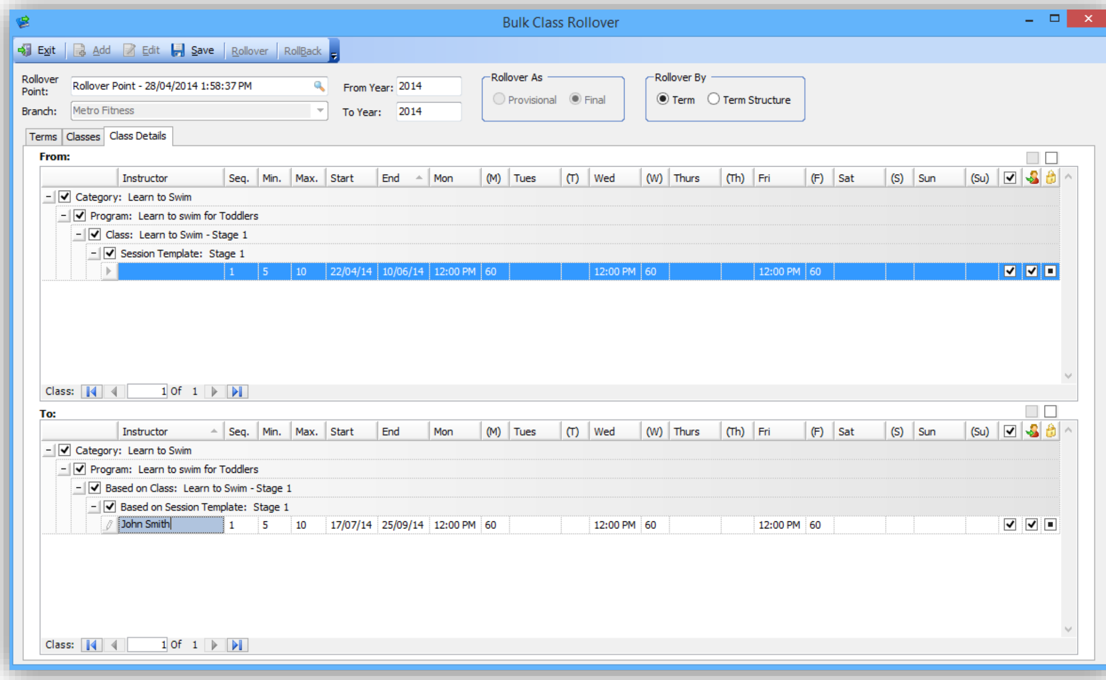
It provides the ability to rollover the classes provisionally when they can be examined in the Calendar or in the Classes/Sessions screens before they are finalized. The classes/sessions are displayed as red in the calendar if they are provisional.

It provides the ability to be selective as to the classes which are rolled over, using the appropriate checkboxes in either the Classes or Class Details tabs

It provides the ability to change the day and/or time and duration and Sequence number of the new classes as part of the rollover by editing the "**To**" screen" on the Class Details tab.



The instructors and resources of the class are rolled over.
The instructors can be changed in the "**To**" screen of the Class Details tab. The renaming needs to be accurate i.e. first name, space, last name.



Requirements:
Classes must have a term structure assigned and session templates derived from term structures.

The dates of the term structure of the period to be rolled over must encompass the current date.

You have completed the steps required to use the bulk class rollover in Clubware.

Reports

Overview

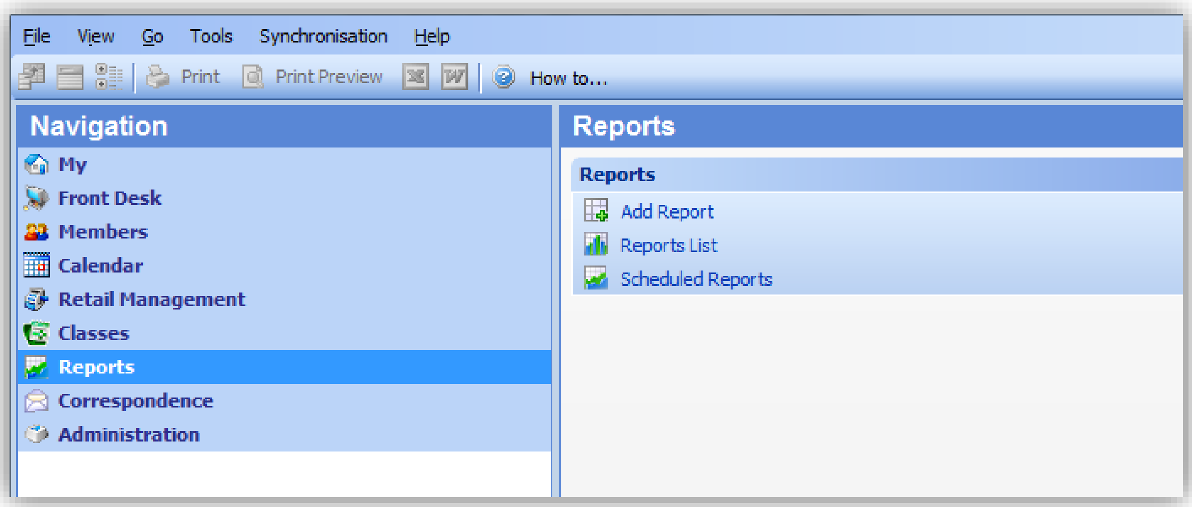
Clubware has a comprehensive suite of pre-designed reports for the most common tasks.

Design, save and re-use your own reports for any aspect of your business.

New reports can be designed from a data design (a structure that holds information you define). Filters for reports can be stored and reused.

You can schedule reports to be emailed or saved to a file on a periodic basis.

All reports can be exported to several different formats, including MS Excel, MS Word and PDF.



Add Report

The report designer allows control over the entire design process. Users can design their own reports and use standard reports as templates. Reports can be saved and reused.

Reports List

The reports list displays the available reports to choose from complete with a description.

Scheduled Reports

Clubware has the ability to have reports automatically created and scheduled to send to a file or email address. From here users can view the progress and edit the distribution timing and method.

How To

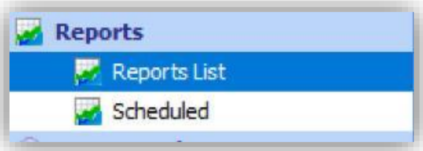
Reports

The following tutorials describe the most common actions associated with Reports.

Adding a Report

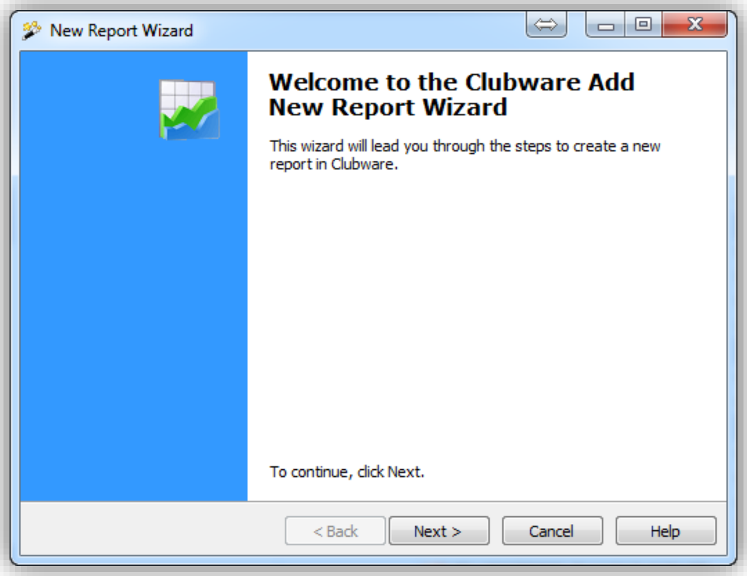
This tutorial describes the steps required to add a report within Clubware. This process is wizard driven to ensure the process is streamlined and straight forward.

Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.

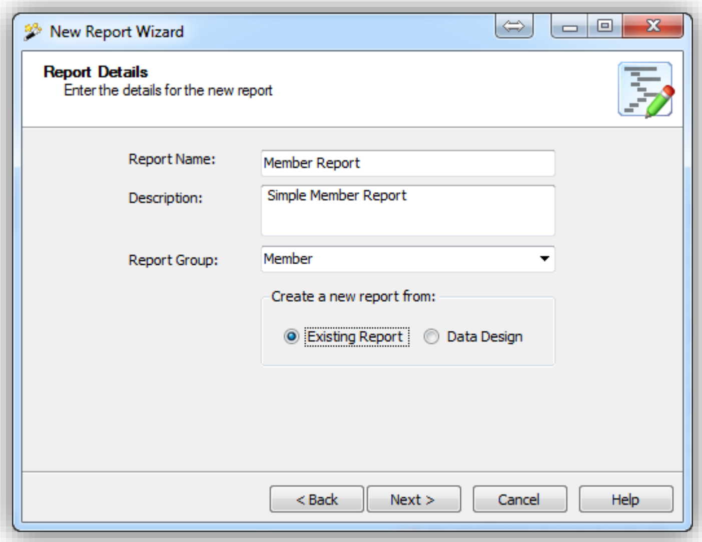


Click **Add**

The screen below displays.



Step 2. Click **Next** and enter the details as shown in the example below.



Main Points:

Report Name: Choose a name for your report.

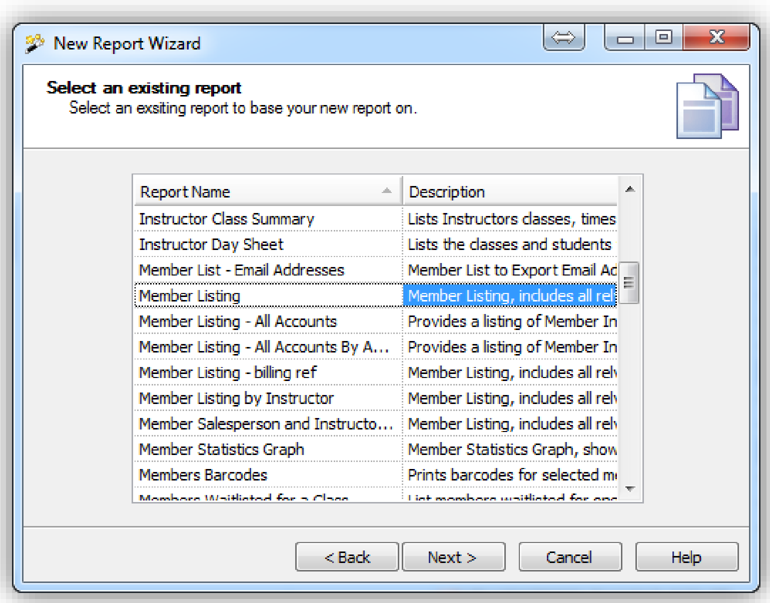
Description: Enter details on what the report is for.

Report Group: Choose the group the report will belong to. The report will be displayed in this group on the main report screen.

Create a new report from – Existing Report: You can create a new report based on an existing report layout and data design.

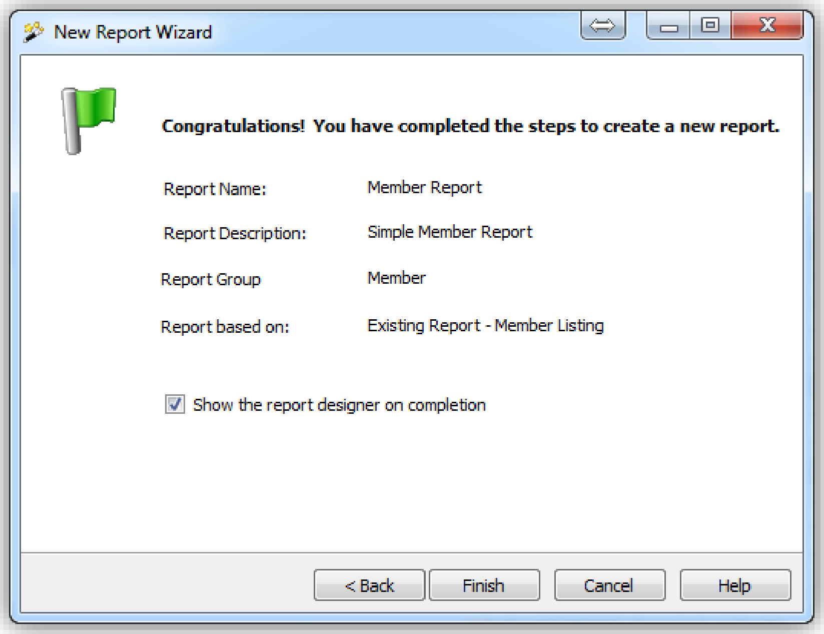
Create a new report from – Data Design: You can create a report based on an existing data design. See the tutorial Adding / Editing a Data Design for more information.

Step 3. For this tutorial, select **Existing Report** and click **Next**.
The screen below displays.



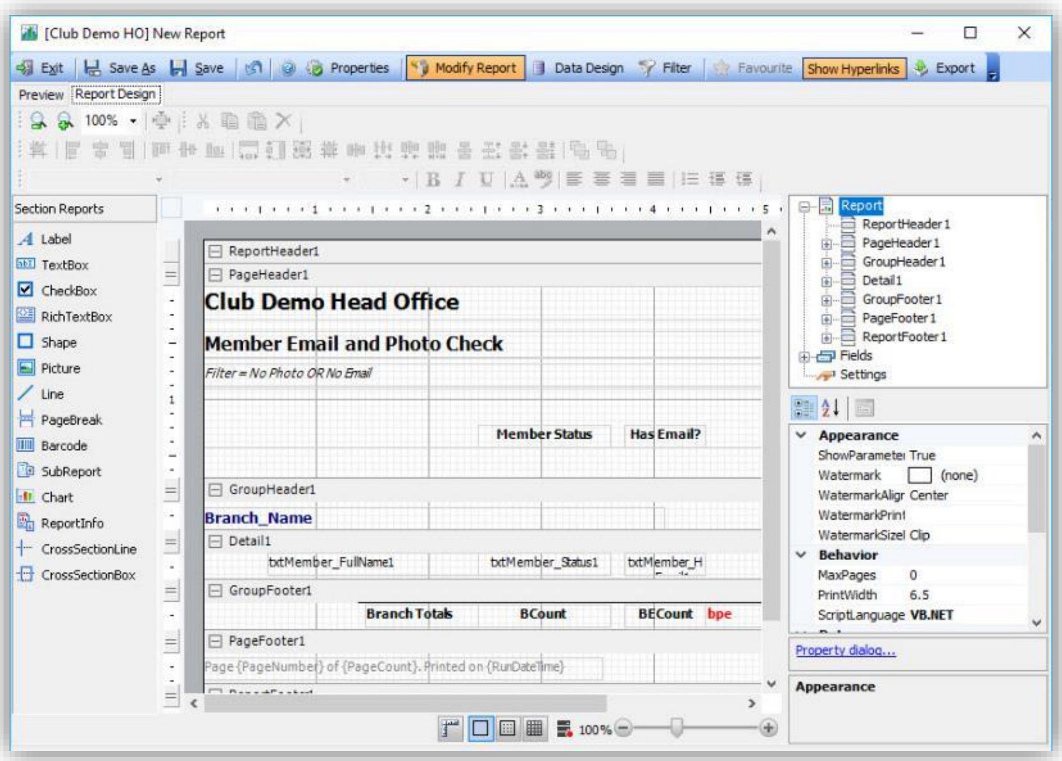
Step 4. Select the required existing report. In this example **Member Listing**.

Click **Next**. The screen below displays.



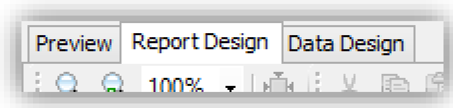
Step 5. Check your entries are correct, click **Finish.**

The report designer will display as shown below.



Step 6. Modify the report layout as required.
(See the tutorial Modifying a Report Layout for further information).

You can preview the design of the report and change the data design details.
Click the tabs under the main toolbar in the Report screen, as shown below.



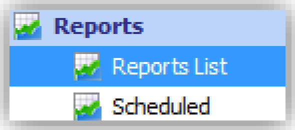
Step 7. Save and **Exit** the Report screen when you are satisfied with the design.
The new report will display in the **Reports List** screen.

You have completed the steps required to add a new report in Clubware.

Running a Report

This tutorial describes the steps required to run a report within Clubware.

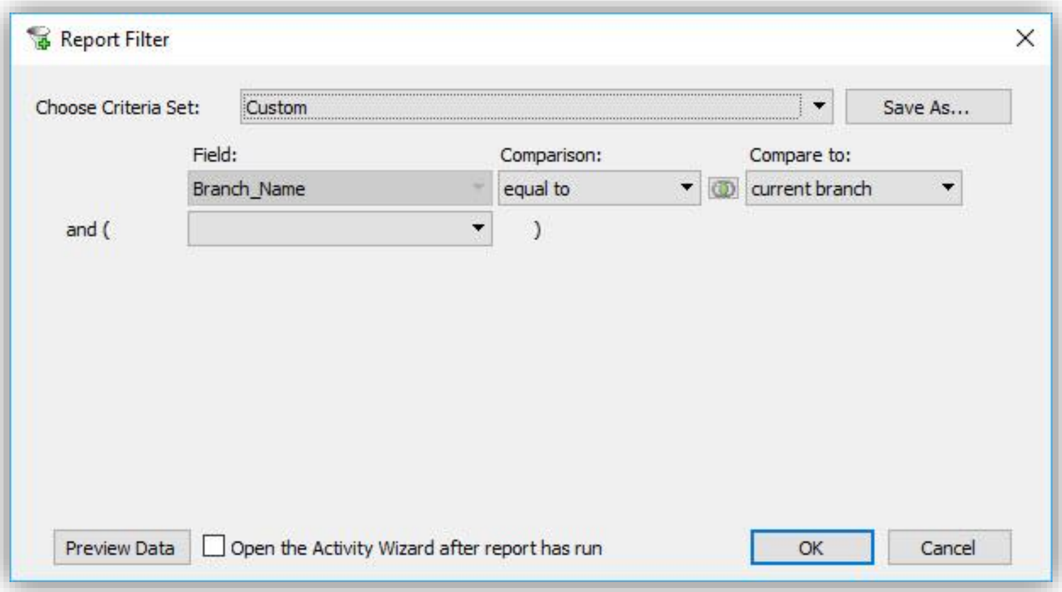
Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.



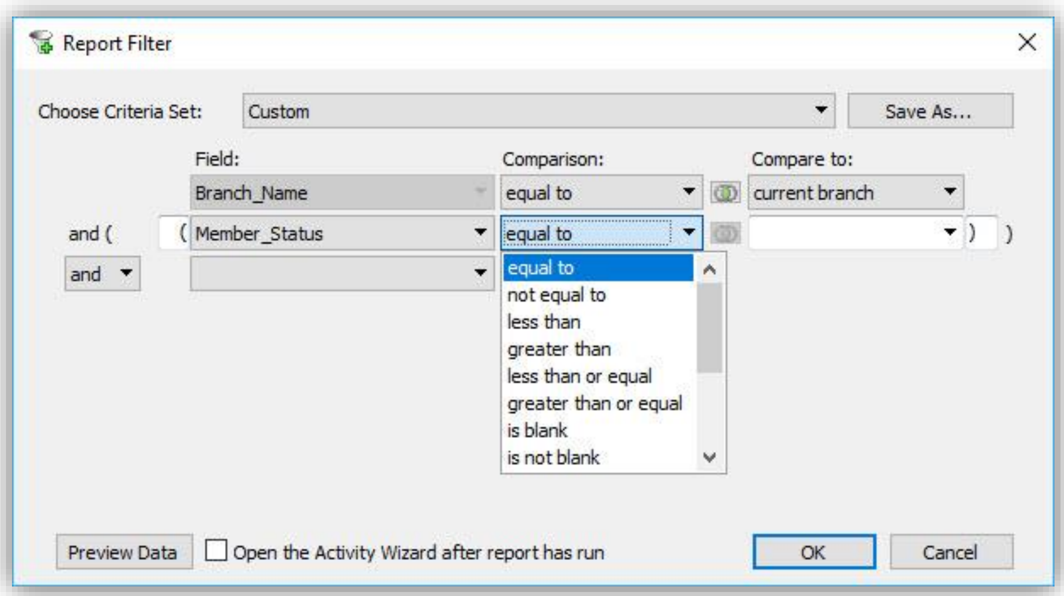
Step 2. The Reports List screen displays in the main panel.
Select the report you want to run.
Double Click the Report, or
click **Run Report** from the toolbar, as shown below.

Step 3. The screen below displays.
This will determine the filter you require to run the report chosen.
Select an option as shown below.

About Filter Criteria:



This filter refers to the status Field in the Member Table. It will return all members who have a Membership status of Active.



A description of the above Comparison options is set out below.

Equal To: Matches exactly the value you selected.

Not Equal To: Anything that does not match the value you selected.

Less than: Values prior to the selected character(s) or date.

Greater than: Values after the selected character(s) or date.

Less than or equal: Values prior to and including the selected character(s) or date.

Greater than or equal: Values after and including the selected character(s) or date.

Is Blank: The selected field is empty.

Is not blank: The selected field is populated.

Is one of: Allows you to select multiple values.

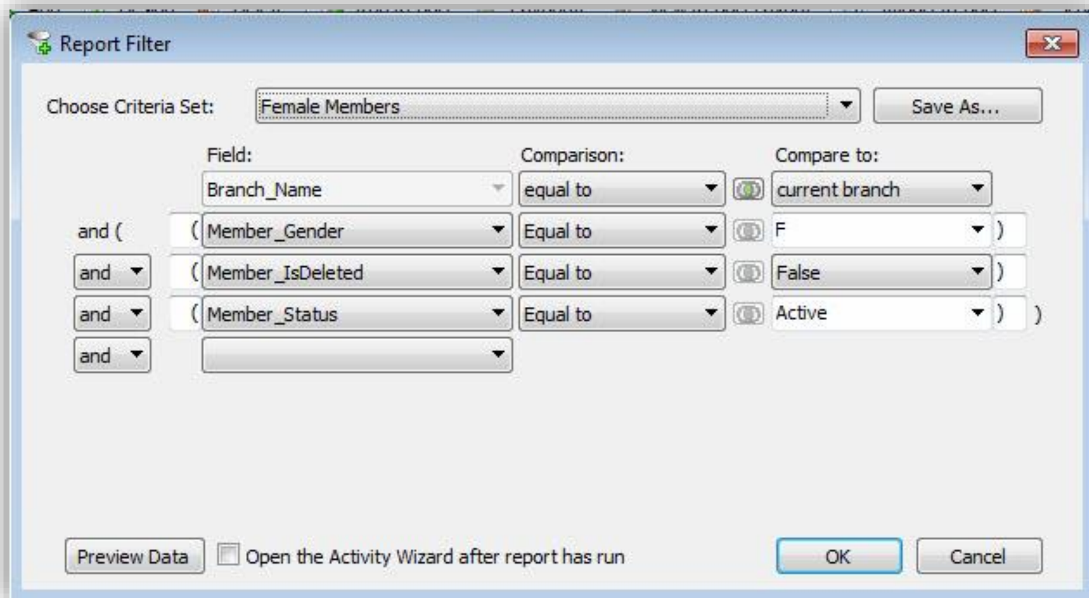
Is not one of: Allows you to exclude multiple values.

Begins with: First character(s) for the selected field.

Ends with: Last character(s) for the selected field

Contains: Contains specific characters or words within that field.

Does not contain: Excludes specific characters or words within that field.



Main Points:

Choose Criteria Set: This is a list of all the filters available for the Data Design used for the report.
Select a value or select **Custom** if you want to add a new filter for this report.

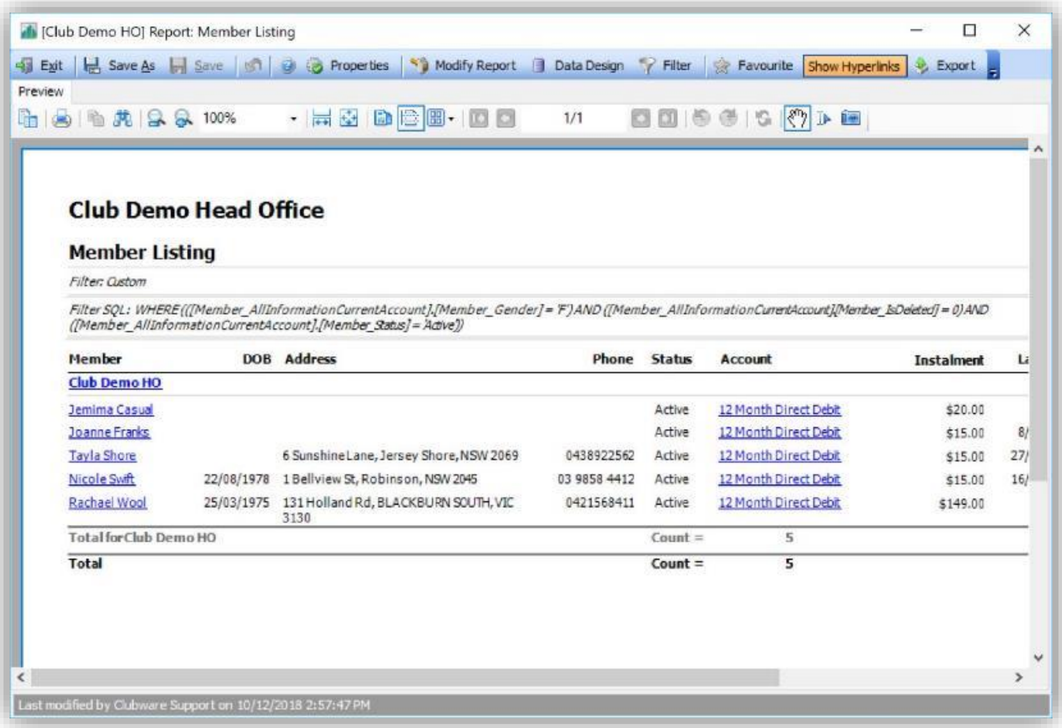
Custom: If you need to create a new filter you can use Custom as the starting point for the filter.

Save As: You can modify an existing filter, and then save the results as a new filter.

Preview Data: This will display the data in a preview window for the filter that you have selected.

Open Activity Wizard: If the report is based on a member data design, you can run the Activity Wizard to create an activity for each member in the report after the report has run. See the tutorial Running the Activity Wizard for more information.

Step 4. Select a filter, and then click **OK**. The screen below displays.

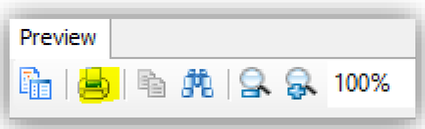


Click the **Filter Report** button in the main toolbar of the Report screen to change the filter for the report, as shown below.

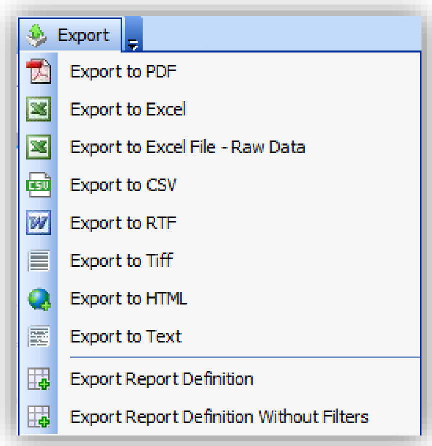
(The **Report Filter** screen displays, as discussed in Step 3 above).

Step 5. When the report displays correctly, you can either print the report or export the report to a different format.

Print: Select the **Print icon** from the Preview tab on the Report screen, as shown below.



Export: Select the format you want using the **Export** dropdown menu on the Report screen, as shown below.



The Windows **Save As** dialog box will display when the **Export to** option is chosen. Save the report to the name and location you require.

Step 6. Click **Save** and exit the Report screen.

You have completed the steps required to run a report in Clubware.

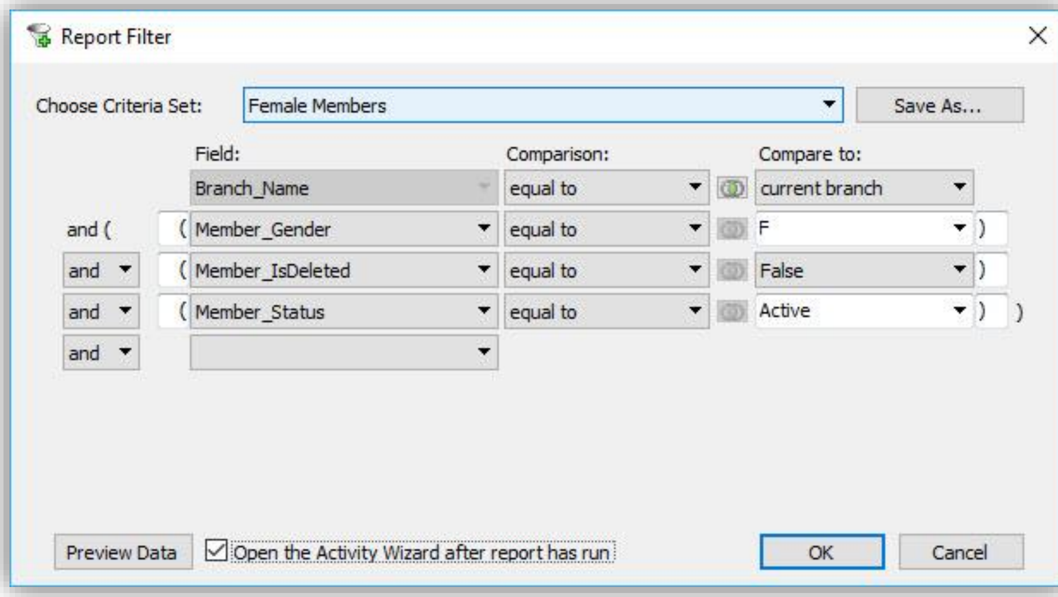
Running the Activity Wizard

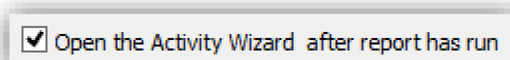
This tutorial describes the steps required to run the Activity Wizard after running a report within Clubware.

Step 1. Run the report you require.

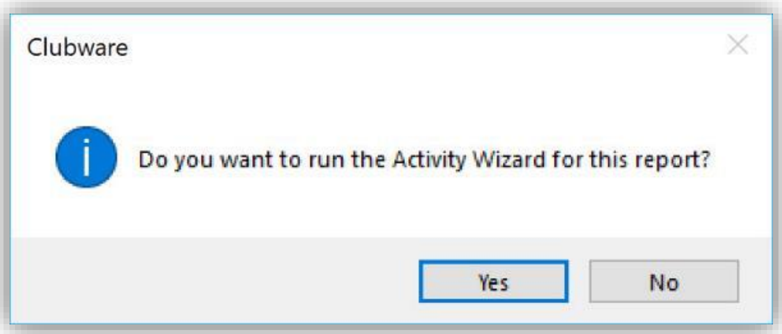
(See the previous tutorial, Running a Report if you are unsure how to complete this task).

When the Report Filter dialog box displays, click the
Open the Activity Wizard after report has run checkbox as shown below.

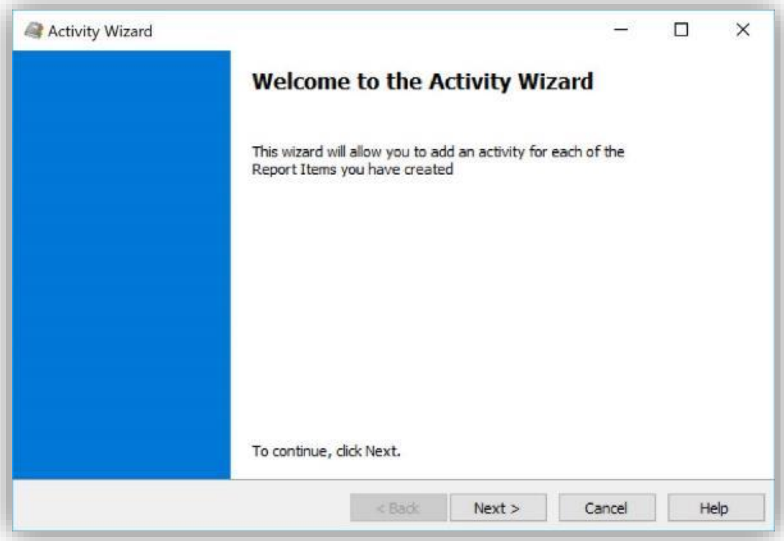




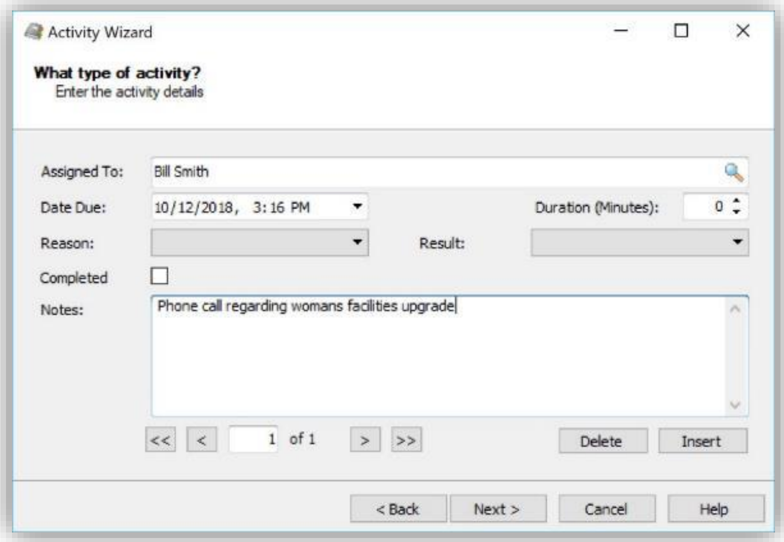
Step 2. Click **OK,** the screen below displays.



Step 3. Click **Yes,** the Activity Wizard screen displays as shown below.

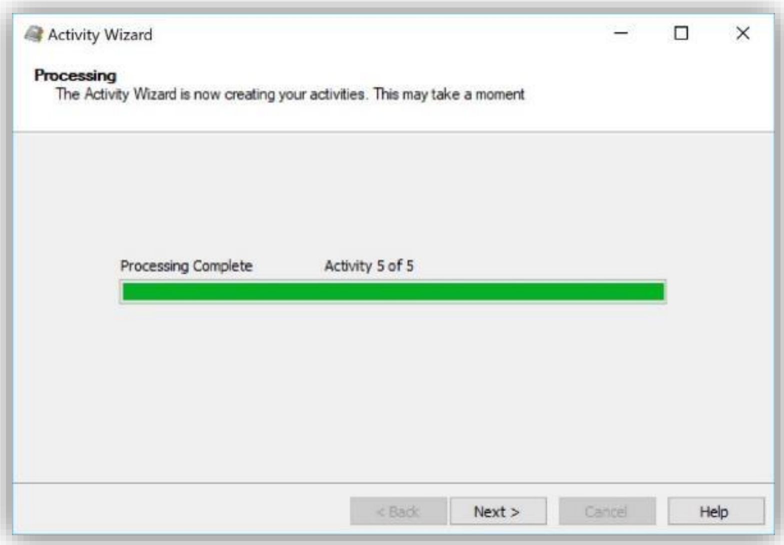


Step 4. Click **Next**. The screen below displays.

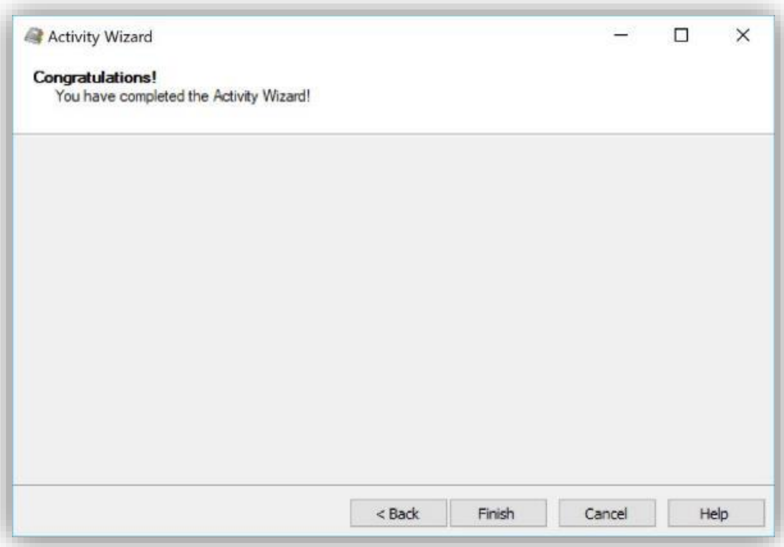


Step 5. Complete the screen as described below.

- Use the magnify glass in the **Assigned To**: field to select a Staff member to assign to the activities to.
- Enter required time in minutes in the **Duration** field**.**
- Select a reason from the drop down menu.
- Select a Result from the drop down menu.
- Tick the Completed box.
- Add any Notes in this field if required.
- Click **Next** the screen below displays.



Step 6. Click **Next** when processing is complete**.** The screen below displays.



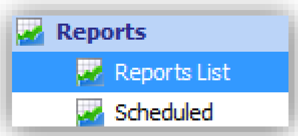
Step 7. Click **Finish**. The Activity Wizard will close.

You have completed the steps required to run the Activity Wizard in Clubware.

Modifying a Report Layout

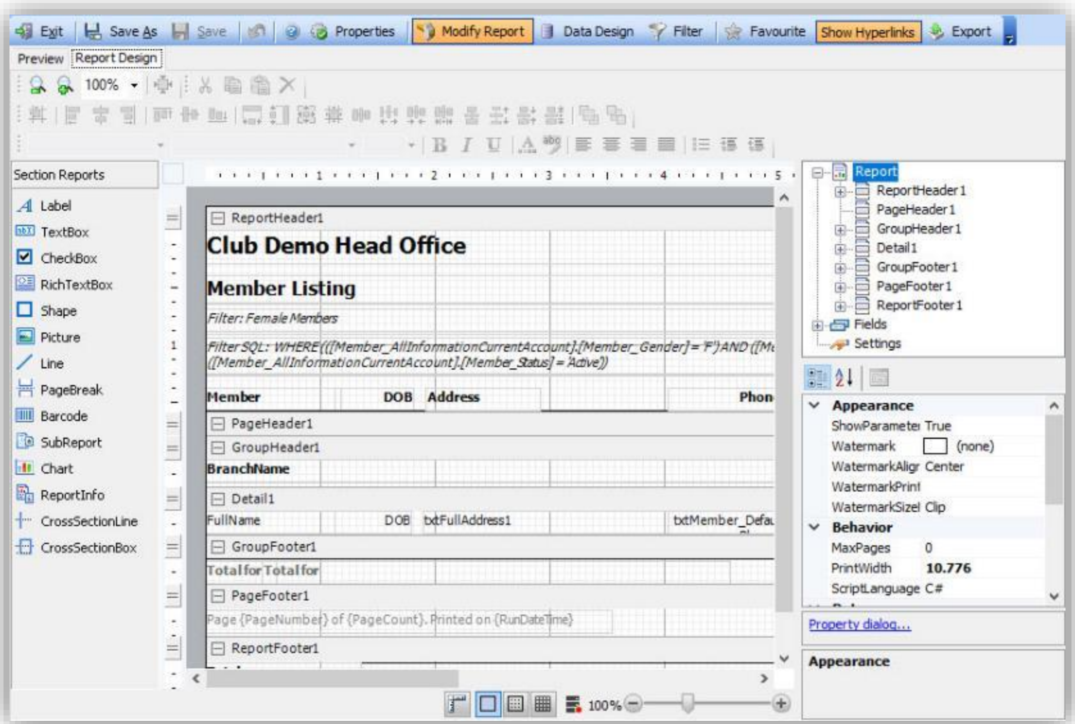
This tutorial describes the steps required to modify a report layout.

Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.



Step 2. The **Reports List** displays in the main panel.
Select the report you want to modify, and then click **Design from** the toolbar as shown below.

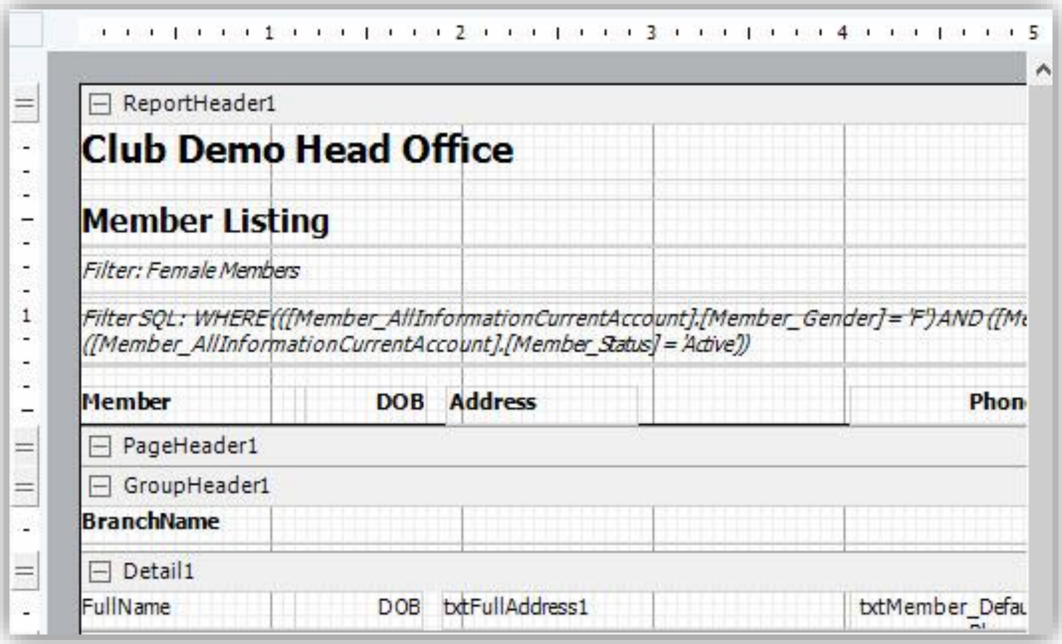
Step 3. The screen below displays.



Maximising this screen (click the centre button in the top right of the window) will make it easier to view the elements of your report and use the design tools.

The components under the **Report Design** tab are outlined below.

Design Canvas



On the Design Canvas, you can

- see all the elements included in the report, and
- Click and drag to rearrange the order of these elements.

You can also see the formatting of these elements, such as font, italics, bold, etc. The canvas is divided into bands.

The main band for report information is the **Detail1 band**, as shown above.

The fields within this band reflect the main data content of the report. These fields can display data from the database.

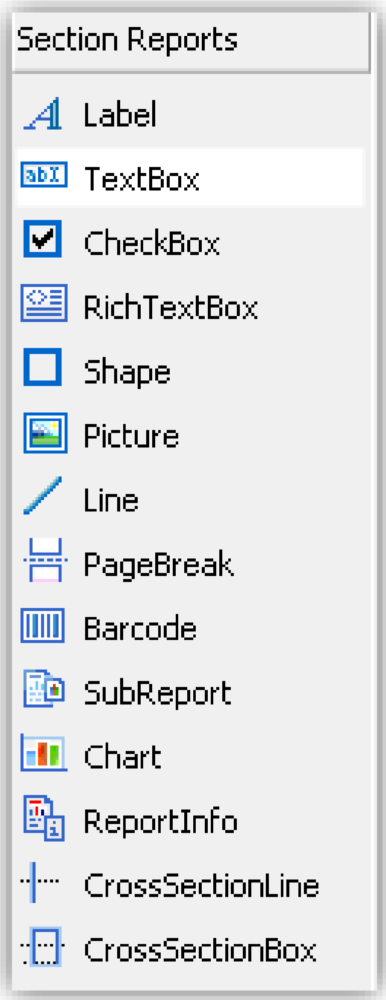
To add fields, select them from the **Report Explorer** and drag them onto the design canvas.

If you wish to group data in the Detail1 band, such as sales grouped by date, see Step 4 of this tutorial.

To view and modify the contents of a band, click the + symbol to the left of the band.

To hide the contents of a band, click the – symbol to the left of the band.

Design Components



Design components are tools you can put onto the design canvas to construct the report.

To use one of these, click on the component you require and drag it onto the design canvas.

The most commonly used components are Label, Line and Textbox. These make up almost 90% of most reports.

To add or edit the content of a design component such as a text box or picture, click on the item in the design canvas.

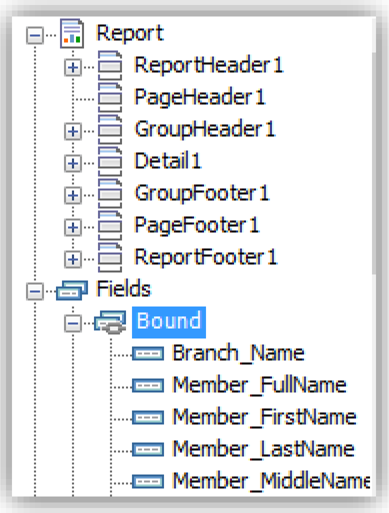
Then open the Data section of the Component Properties panel (see below) and type text into the Text field or browse for a picture using the 

button in the Image field.

Use the Component Properties panel to modify the design properties.

This is explained in the **Components Properties** section set out following the **Report Explorer** section.

Report Explorer



The **Report Explorer** allows you to select elements on the design canvas and access **fields** that are **bound** to your report. A bound field is any field included in the data design for your report.

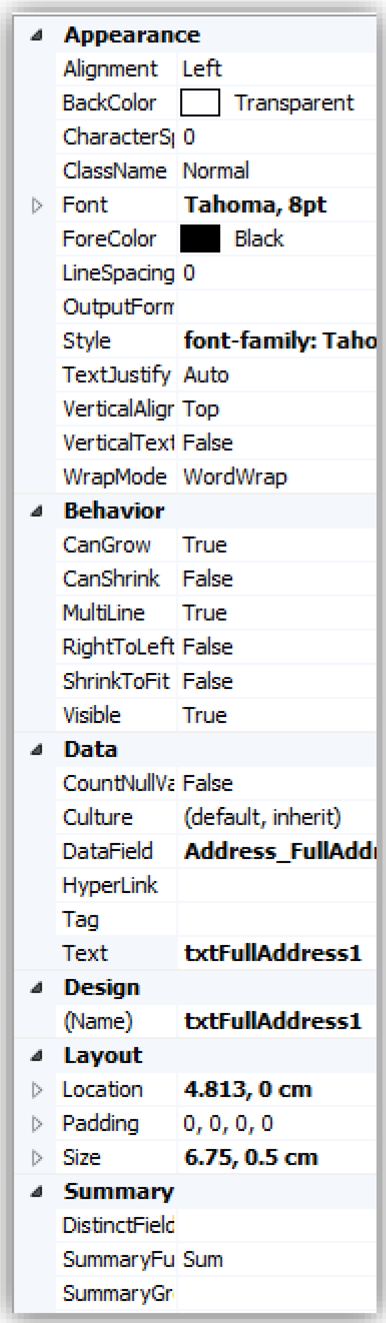
(For more on data designs, see the tutorial Adding / Editing a Data Design)

Add a field to the design canvas by dragging the field from the Fields section of the **Report Explorer** into the design canvas.

The **Reports** section of the Report Explorer gives a compact overview of the elements that are included in your report.

If you highlight an item in the **Report Explorer**, it will be selected in the design canvas. This also enables you to see its properties in the **Component Properties** panel (see below).

Component Properties



The **Component Properties** panel allows you to view and edit the properties of individual components on the design canvas.

Under the **Appearance** section, you can modify settings such as font, alignment, and colour.

Under the **Data** section, you can view or modify the connections between a design element and data fields. For example, you can select which Data Field a text box will be linked to.

Under Layout, you can set the location and**/**or size of the object.

Step 4. If you wish to group the contents of the Detail1 band when you run your report:-

Right-click in the design canvas and choose **Insert**, Group Header/Footer.
A Group Header band will be inserted.

Drag the field you want to use for grouping information from the **Report Explorer**. For example, you could group sales in an audit trail by date, drag the Sale Date field into the Group Header band.

The Group Footer can be used to show summary information (totals).

Drag the data field you wish to have totalled into the **Group Footer** band from the **Report Explorer**.

Open the Summary section In the **Component Properties** panel.

Choose a **Summary Group**, which is the field for which you want subtotals to be calculated.

For example, if you ran an audit trail report with sales grouped by date (Group Header 1), you would be able to add a subtotal of the day's sales in the Group Footer.

To do this, drag the **Amount field** in to the Group Footer band, then choose Group Header 1 (date) in the Summary Group option of the Component Properties panel.

Step 5 Click **Preview tab** to view your changes.

Step 6. When you are satisfied with the changes, save and exit the report. If you have modified a standard report, you will need to save the standard report as a new report. Please see the next tutorial, Saving a Standard Report as a New Report.

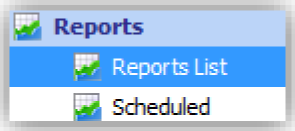
You have completed the steps required to modify a report in Clubware.

Saving a Standard Report as a New Report

If you modify a standard report, you will not be able overwrite the original version. You must save the modified version as a new report.

This tutorial describes the steps required to save a standard report as a new report within Clubware.

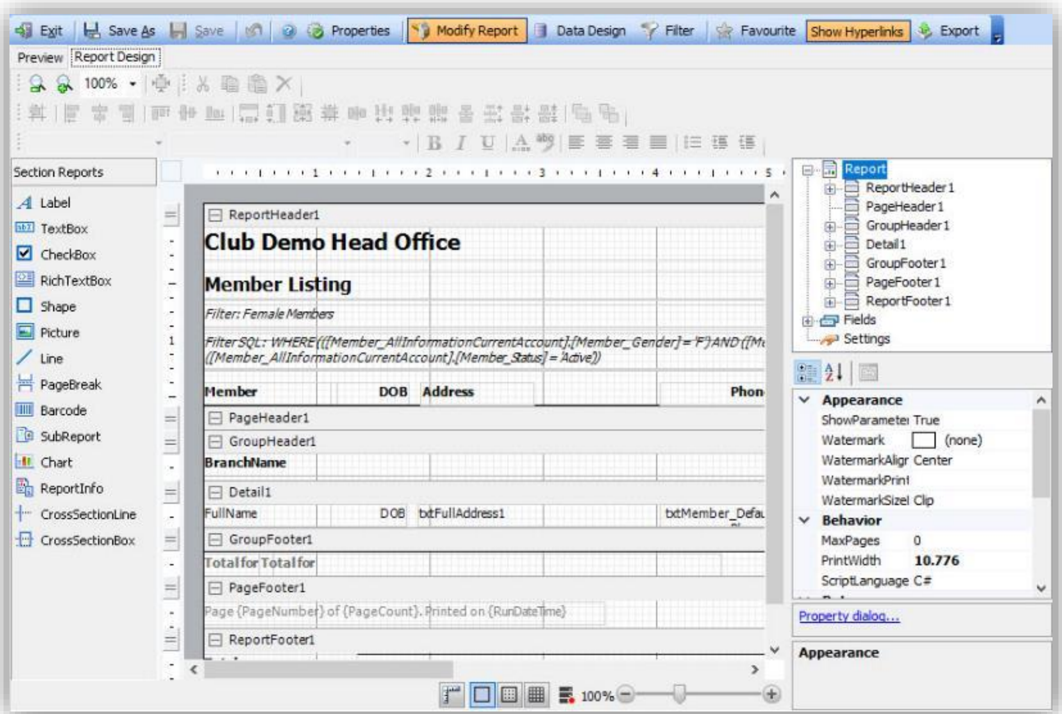
Step 1. Select **Reports | Reports List** in the navigation panel, as shown below.



The Reports List screen will display in the main panel of Clubware. Standard reports can be identified by a tick in the Standard Report column of the Reports List screen.

Step 2. Select the report you want to modify, and then click **Design** from the toolbar as shown below.

Step 3. The screen below displays.

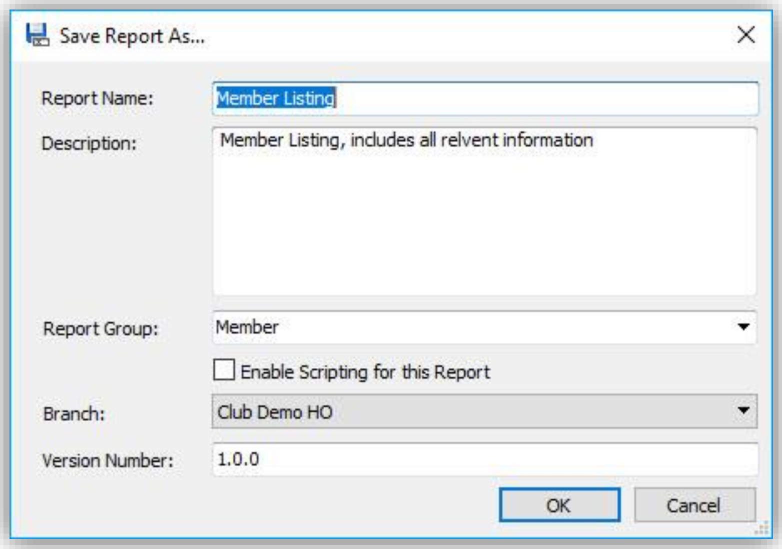


Note: The **Save** button on the main toolbar is disabled, the **Save As** button is not. This means you can edit a standard report, such as Member Listing, but it has to be saved as a new report.

(This feature prevents standard reports from being overwritten).

Step 4. Modify the report layout as required. (See the previous tutorial, Modifying a Report Layout for more information).

Step 5. Click **Save As** on the report toolbar. The screen below displays.



Main Points:

Report Name: Select a name that is different from the standard report.

Description: Add a description to identify the modified report.

Report Group: This is the group the new report will belong to. See the tutorial Adding a Report for more about Report Groups.

Enable Scripting: If this box is checked, the **Scripting** tab will become available at the bottom of the Design Canvas. Clubware supports C# Script within active reports. Script can be used to extend report functionality. A discussion on the Script Engine is outside of the scope of this manual.

Step 6. Click **OK** to save the new report and close the **Save As** screen when your entries are complete

You will be returned to the Report Design tab for your new report.

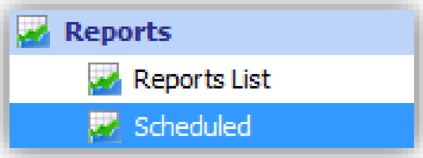
Step 7. Save and exit the Report screen.

You have completed the steps required to save a standard report as a new report in Clubware.

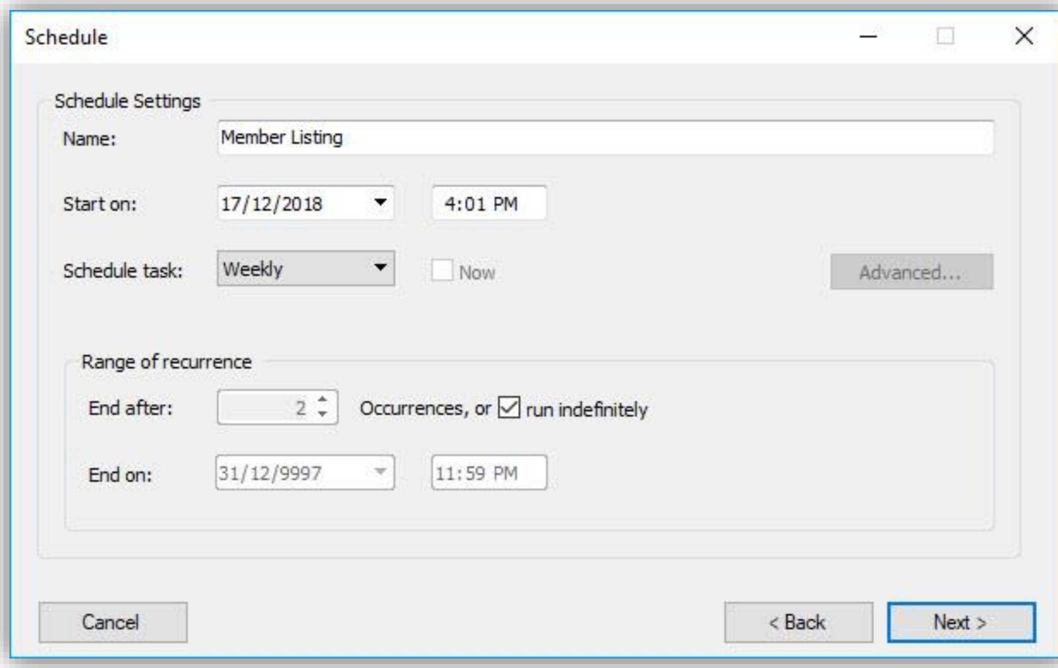
Editing an Existing Scheduled Report

This tutorial describes the steps required to edit an existing scheduled report.

Step 1. Select **Reports | Scheduled Reports** from the navigation panel, as shown below.



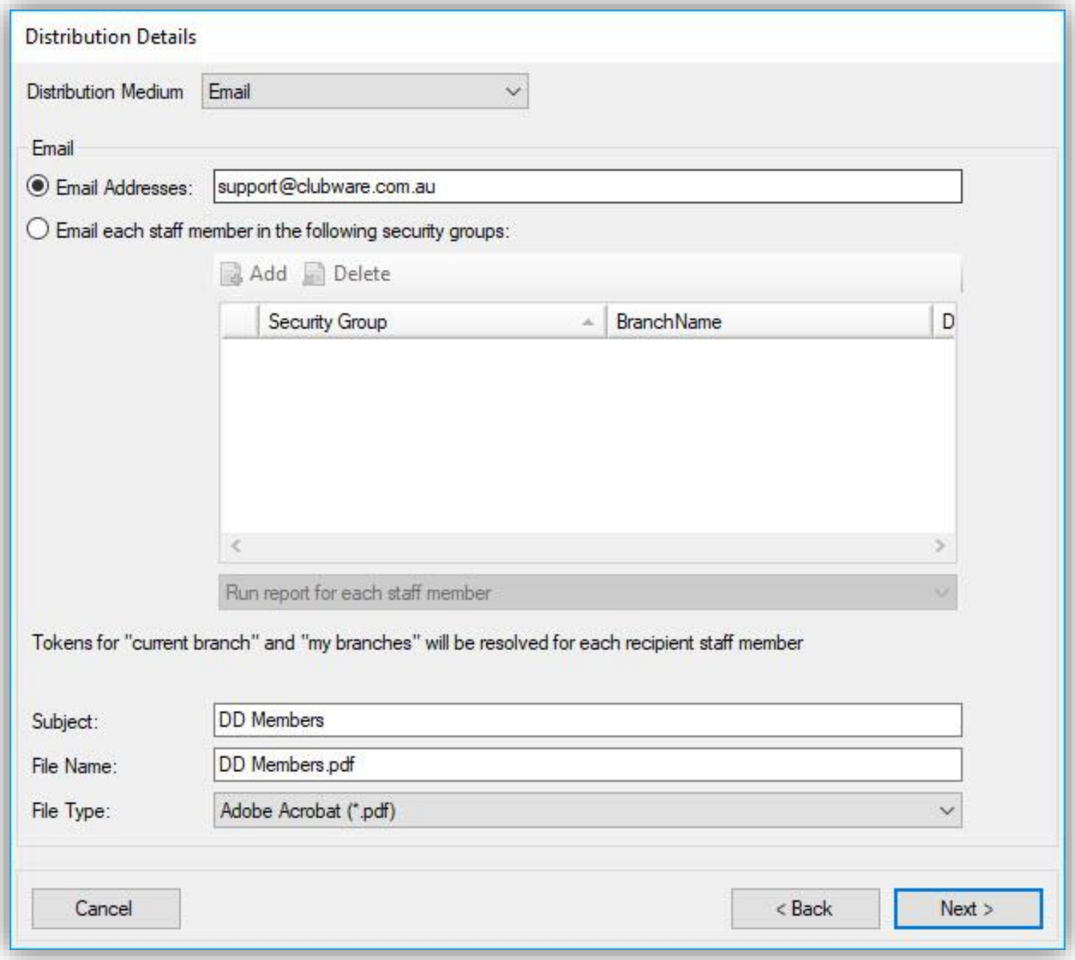
Step 2. Select your required **Scheduled Report,** The screen below displays.



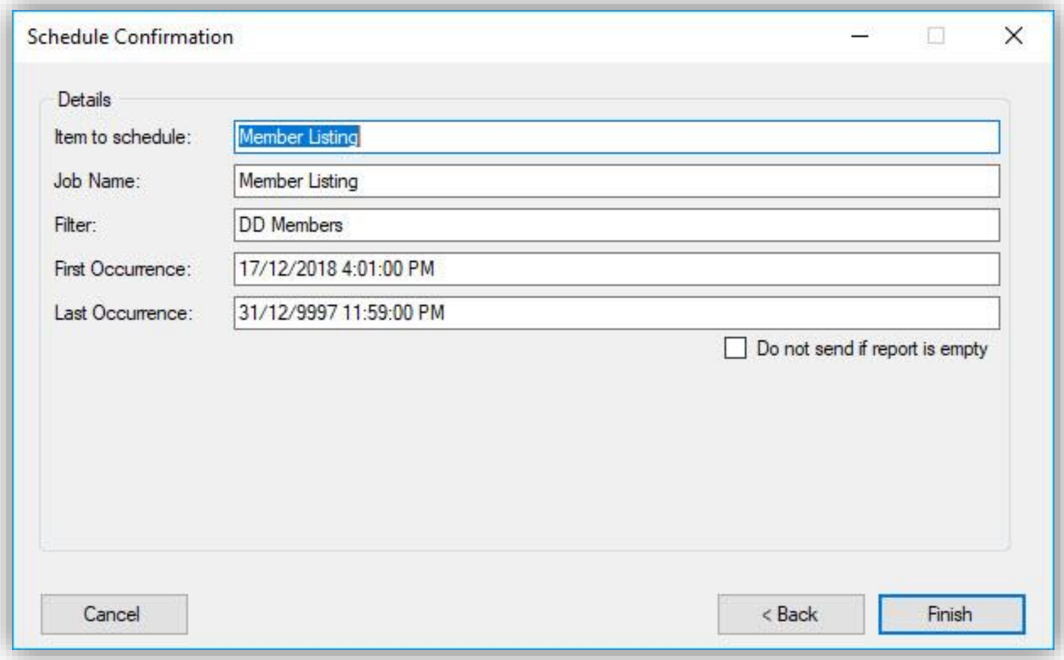
Step 3. Amend your settings as required.

Click **Next**.

The **Distribution Details** screen displays, as shown below.



Click **Next**.
The **Schedule Confirmation** screen displays.



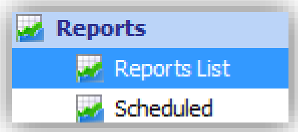
Click Finish.

You have completed the steps required to edit an existing Scheduled Report in Clubware.

Use Report Hyperlinks

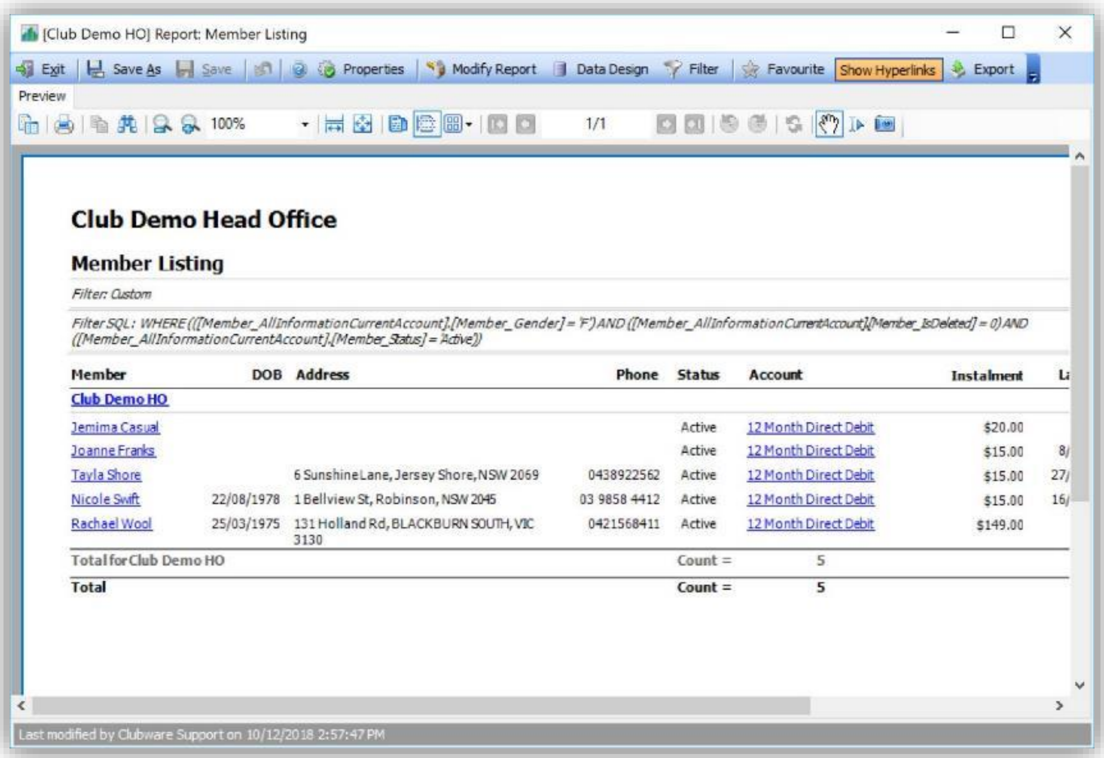
This tutorial describes the steps required to use Report Hyperlinks within Clubware.

Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.



Step 2. Run your report. For more information, see the tutorial Running a Report.

To activate the pre-set hyperlinks, select **Show Hyperlinks** from the toolbar as shown below.



From this report you should be able to select a hyperlink and open the corresponding record. In this case we can open member records and corresponding accounts.

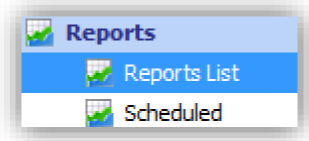
Note: If a field you require is not hyperlinked then the report may not be a standard Clubware report. Please contact Clubware Support for further assistance.

You have completed the steps required to use report hyperlinks in Clubware.

Scheduling a Report

This tutorial describes the steps required to create a **new** scheduled report within Clubware.

Step 1. Select **Reports | Reports List** from the navigation panel, as shown below.

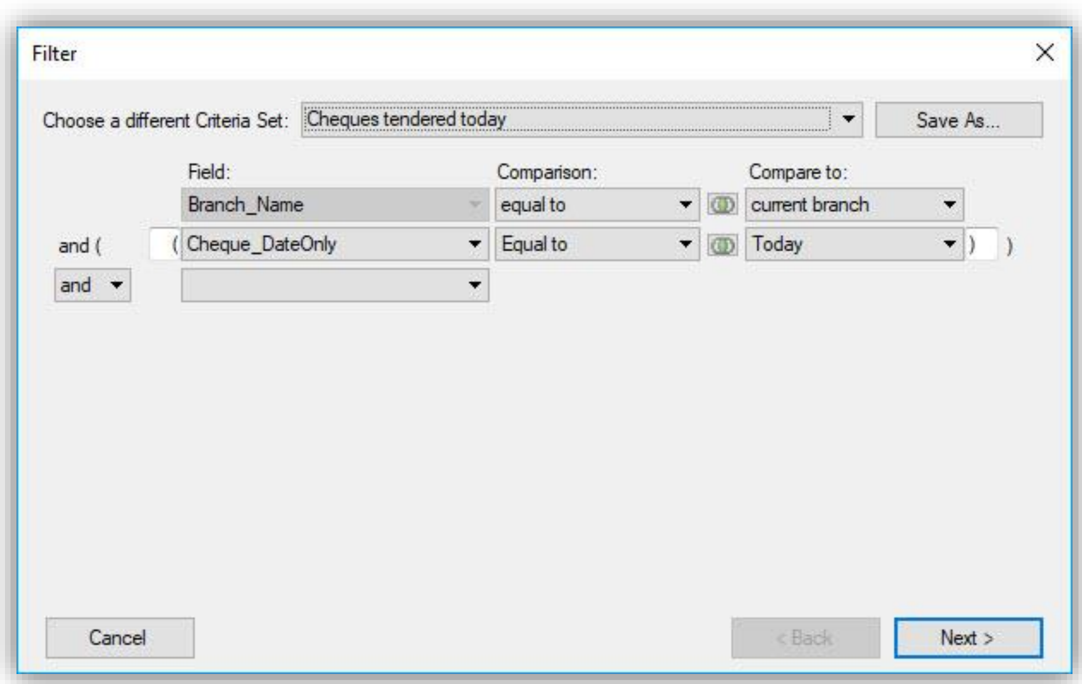


For this tutorial **Cheque Summary** was selected.
Click the **Schedule** button above the Navigation panel.

The **Filter** screen displays.

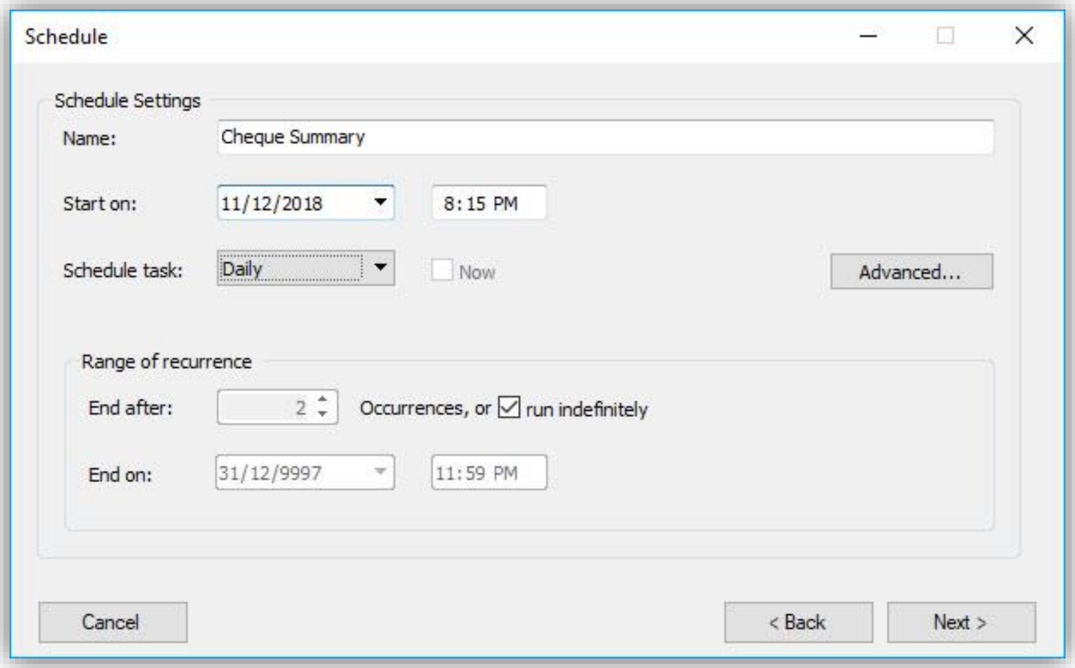
Select your requirements using the drop down menus as shown below.

Note: **Custom** is the default choice.



Step 2. Click Next.

The **Schedule** Screen displays, as shown below.



Main Points

Name: You can leave as default or change to a new name.

Start on: Date and time the Schedule will begin.

Schedule Task: The frequency with which you wish to Schedule your Report.

Now: If you select a Schedule task of **'Once'** the **Now** box will become enabled and you can tick the box to have the scheduled report created as soon as the schedule is saved.

Advanced: This button will become available on various schedule options to allow you more flexibility with the Schedule.

Range of Recurrence: Set this if you want to run the report a specific number of times. **Note**: Setting the Advanced Schedule may override the actual number of occurrences.

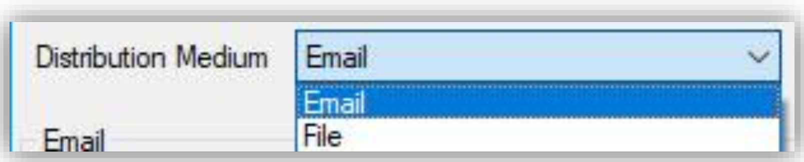
Run Indefinitely: Tick this if you want the Schedule to be on-going.

End Date: Set this if you want the Schedule to end on a certain date.

Step 3. Click Next.

The **Distribution Details** screen displays.

Select your preferred Distribution Medium option from the drop-down menu.



Option 1 If you select Email enter the details as shown below.

Step 1. Email Address: Enter one or multiple email address(es), separate with a semi colon (**;**).

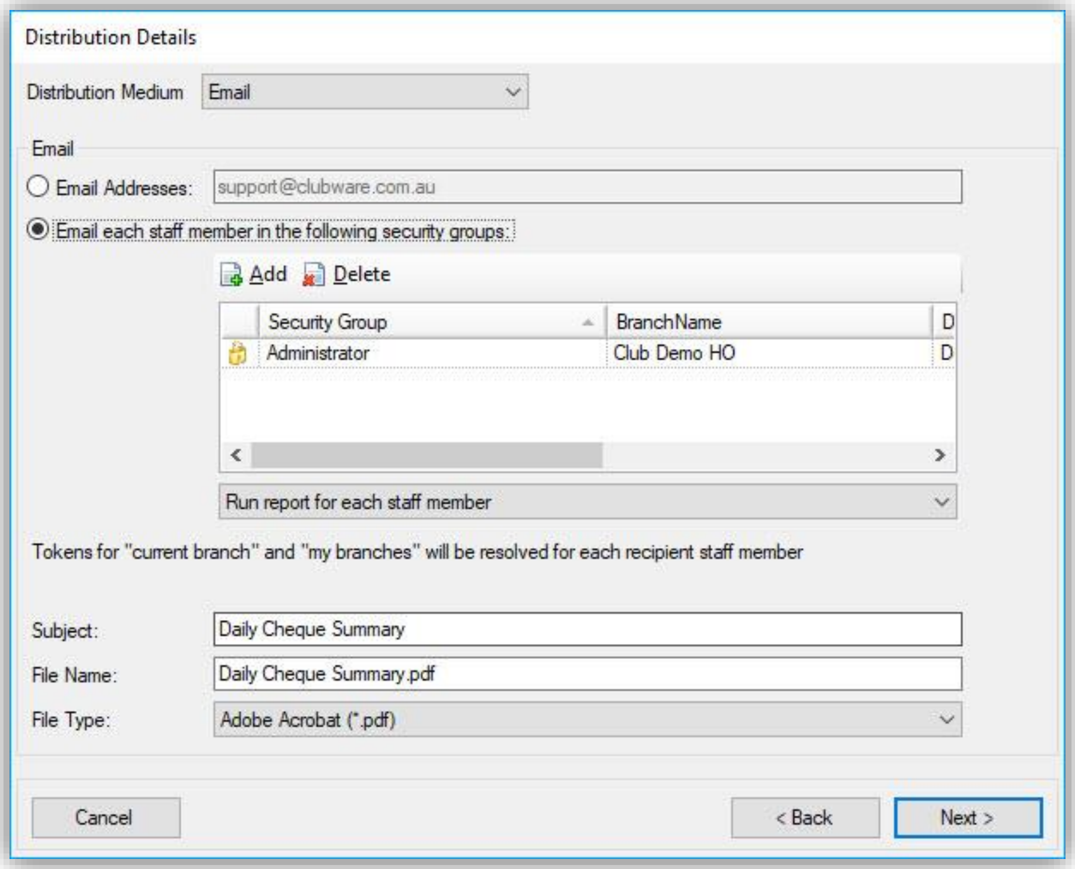
Or

Security Group: Send to all staff in a security group. Clubware will only send information to staff for the branches they are assigned if the option in the below drop down is set to ‘Run report for each staff member’.

To distribute a single report to all, select ‘Run a single Report”

Their staff profile must have an email address to use this option.

The drop down below gives an option to run the report for each staff member or produce and distribute one report.



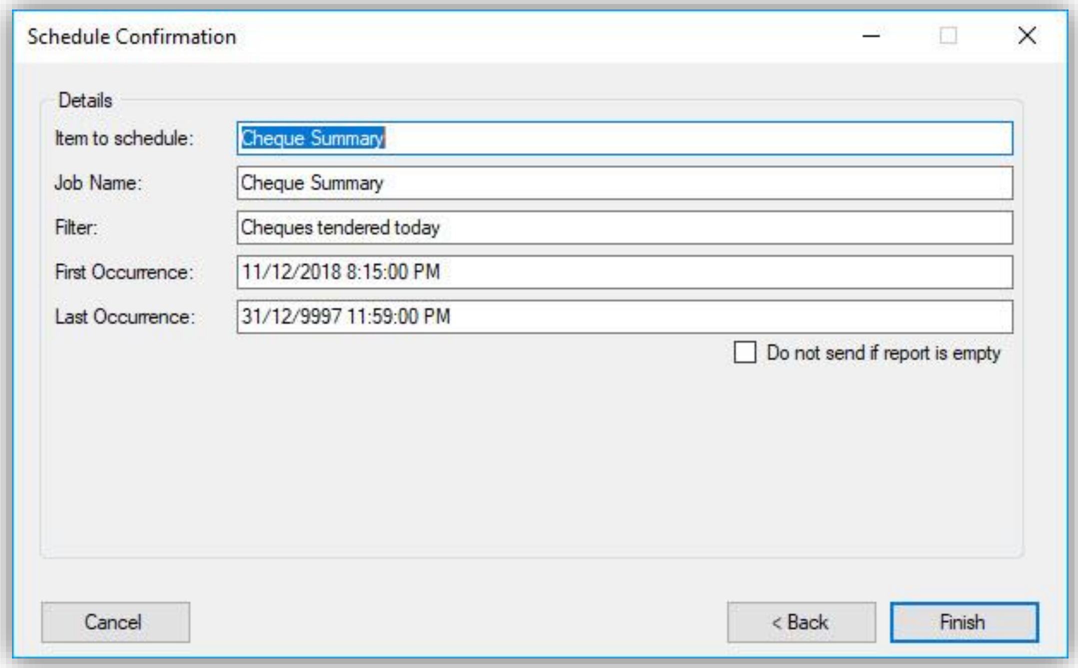
Subject: Type the Email subject.

File Name: Type the name of the file.

File Type: Select an output type.

Step 2. Click Next.

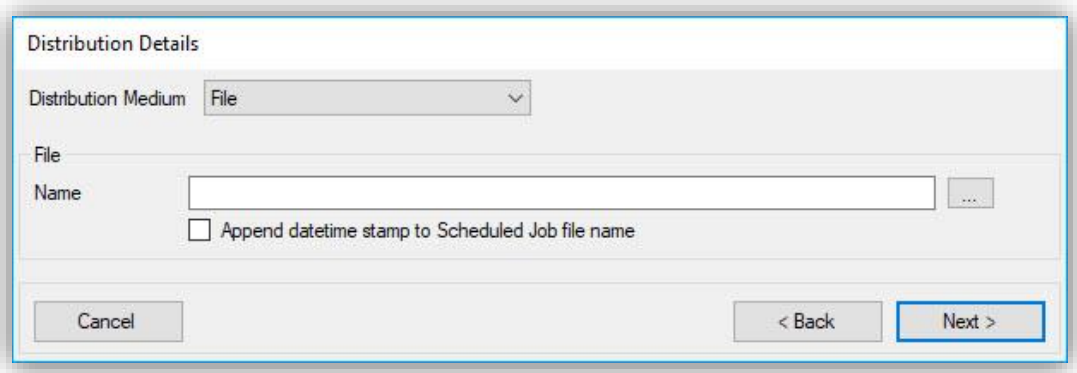
The **Schedule Confirmation** screen displays.



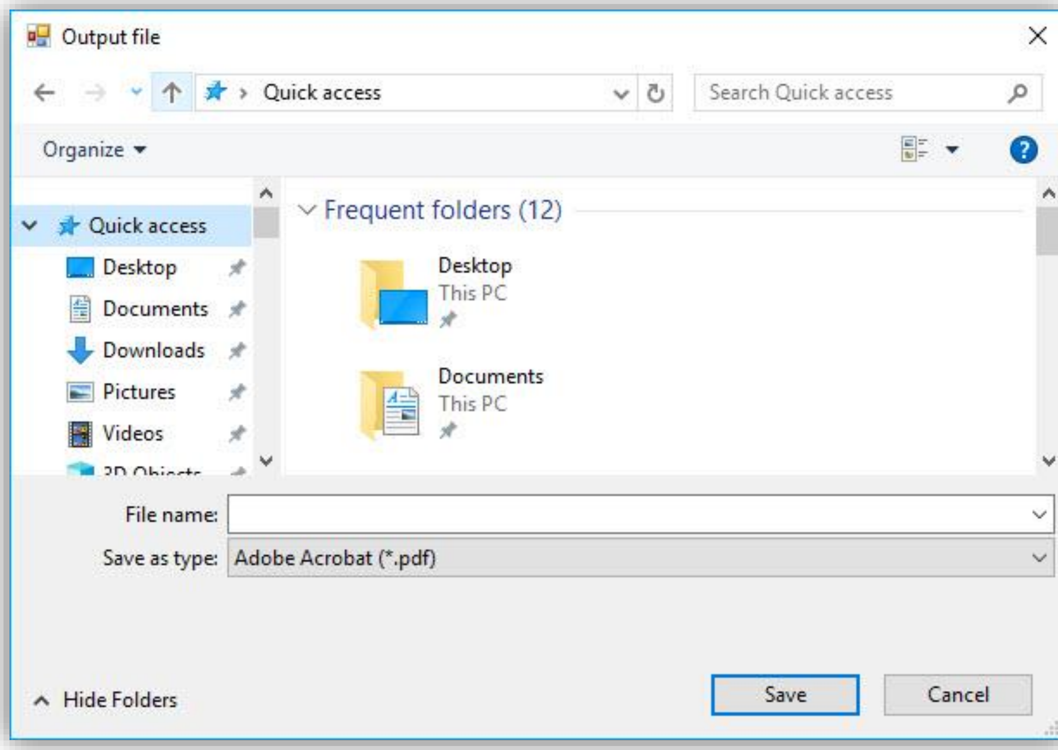
This page contains a checkbox to not send the report if there is no information contained in the report.

Click **Finish**.

Option 2. If you select **File** enter the details as shown below.

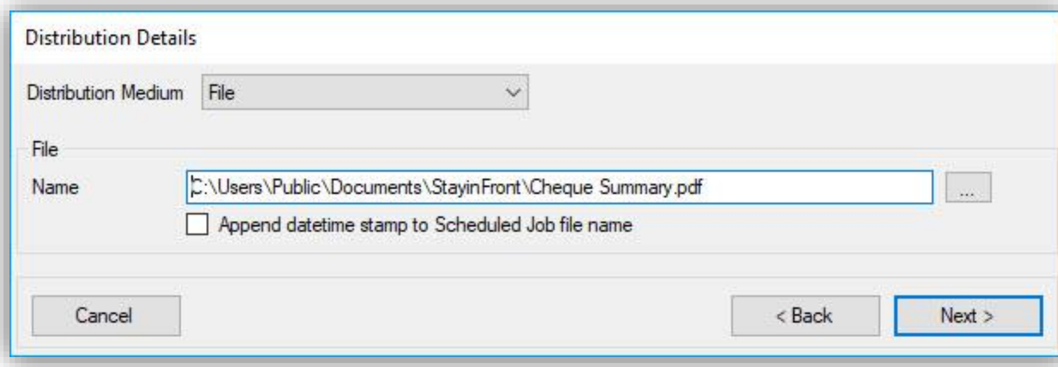


Step 1. Name: Click on the **Ellipsis button**  and browse to the location where you want to save the file.



Step 2. File Name: Type in a file name.
Select the type of file you want to save from the Drop down list.

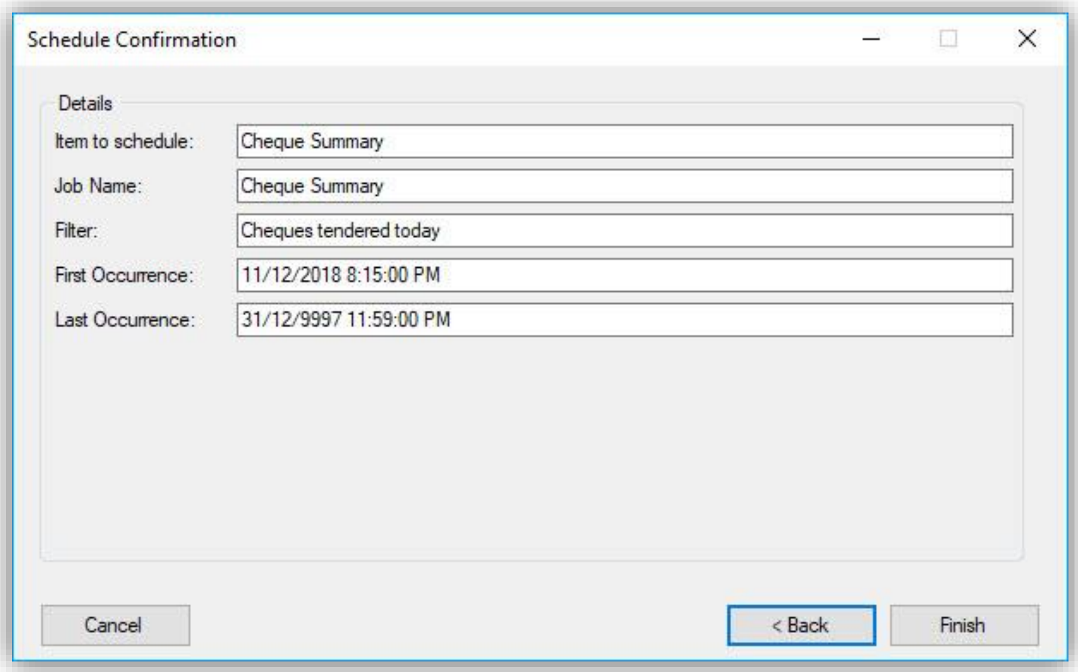
Click **Save**. The Distribution Details screen re-displays.



Step 3. Tick the “Append datetime stamp to Scheduled Job file name” if you want a unique file created each time the scheduled runs. Otherwise the file will overwrite each time the schedule runs.

Click **Next.**

The **Schedule Confirmation** screen displays.



This page contains a checkbox to not send the report if there is no information contained in the report.

Click Finish.

You have completed the steps required to schedule a report in Clubware.

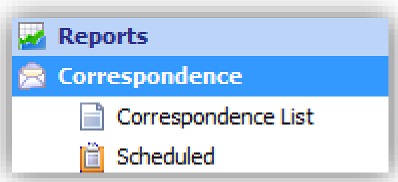
Correspondence

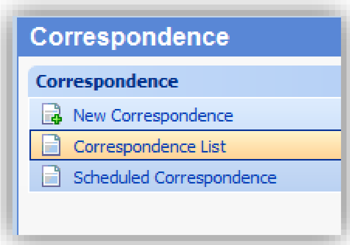
Overview

With the Clubware suite of correspondence tools, it is easy to stay in touch with your members, either individually or en masse.

The Correspondence designer allows you to write and format letters, and the Correspondence merge wizard easily adds personal details for the group of customers you select, without using any other software.

Clubware can create and publish correspondence to multiple formats including PDF as well as print and email. A fully featured designer allows rich content to be included in your correspondence with members.





New Correspondence

All correspondence used in Clubware (letters, email etc.) can be designed from within Clubware. The correspondence designer allows users to create and modify correspondence in one central location.

The designer has similar functionality to MS Word™. It allows the addition of images, tables, your club logo and details. The Correspondence Assistant enables you to include member database fields in your documents.

Correspondence Merge Wizard

The correspondence wizard allows users to merge and publish correspondence. The wizard steps a user through the process of selecting correspondence to merge, filtering the data required for the merge and selecting a publishing medium.

Scheduled Correspondence

Scheduling is the ability to process merged correspondence/documents to be run at specific times.

How To

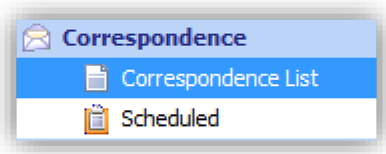
Correspondence

The following tutorials describe the most common actions associated with Correspondence.

Adding New Correspondence

This tutorial describes the steps required to add a new correspondence document within Clubware.

Step 1. Select **Correspondence | Correspondence List** from the navigation panel, as shown below,

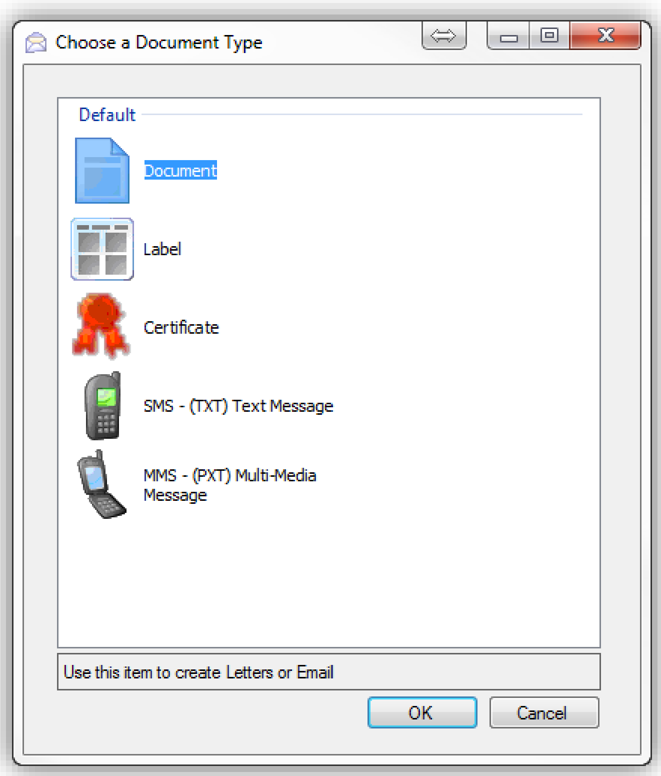


Step 2. The Correspondence List screen displays in the main panel of Clubware.
Select **Add** from the toolbar.

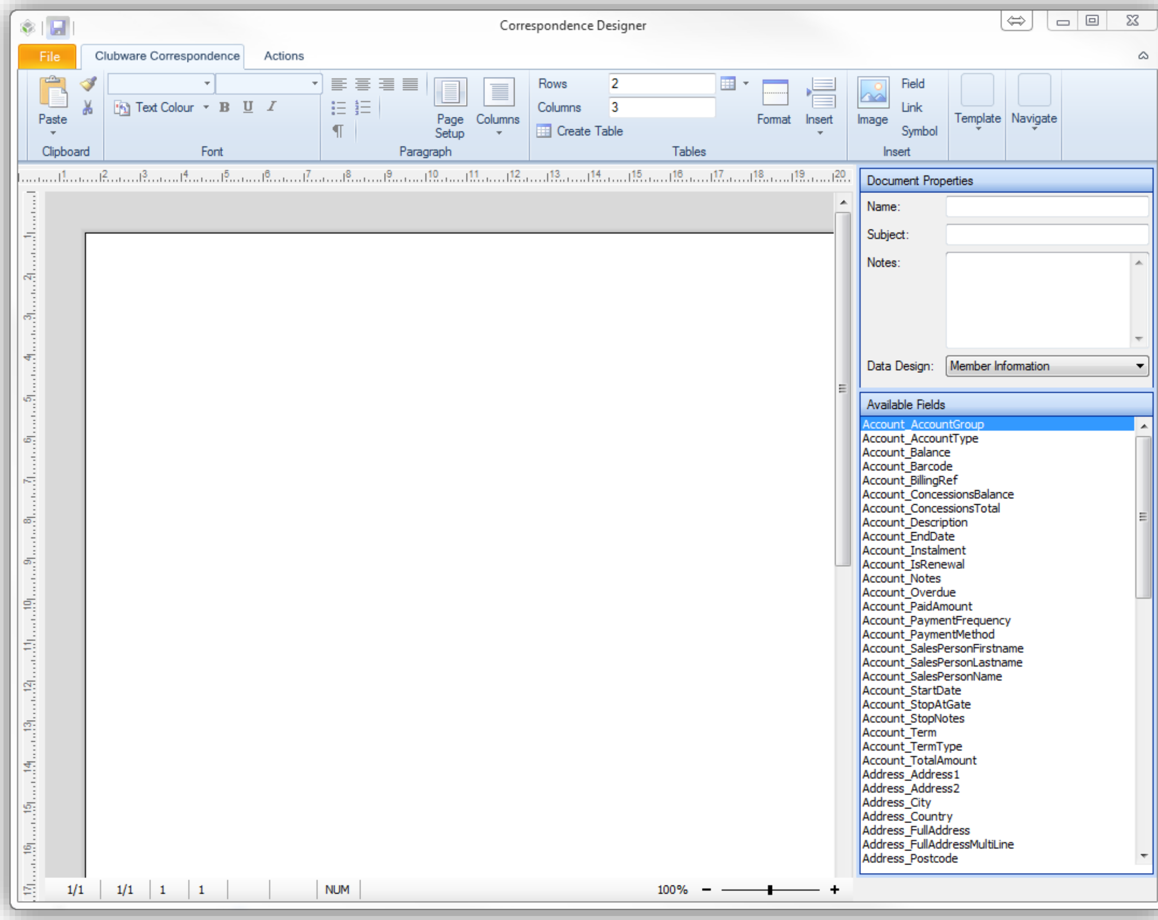
Or

Select **Correspondence | New Correspondence**.

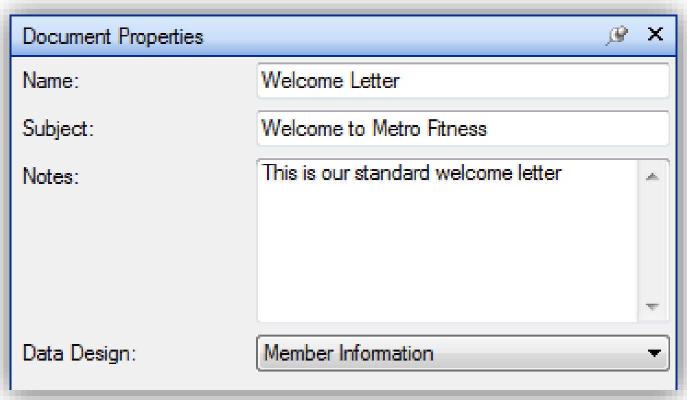
The Choose a Document Type screen displays.



The **Correspondence Designer** screen displays as shown below.



Step 3 Complete the **Document Properties** on the right hand side of the screen.



Main Points:

Name: This is the name of the correspondence.

Subject: This subject can be used as the correspondence subject for emails.

Notes: Internal Notes for staff relating to the correspondence can be written here.

Data Design: This is the data source which determines where your correspondence will draw data from. The default is **Member Information**. You can add additional data sources as required.

Note: **Member Information** and **Member Information – All Accounts** are the most commonly used data sources.

Use **Member Information – All Accounts** when you want to send one email/letter/sms per account based on the filter criteria selected.
Therefore, one member would receive two emails/letters/sms if two accounts fit the criteria.

For example, If you send an email to accounts expiring next month using this data source (Account_Enddate = next month), each member will receive an email for every account that is expiring next month.

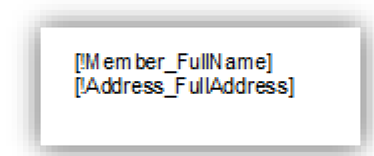
Use **Member Information** when you want to send one email/letter per member based on the filter criteria selected.

Step 4. You can now enter the required fields into your document using the following methods.

Using the **Available Fields** section:

Place the cursor in the required position on the Correspondence Designer page.

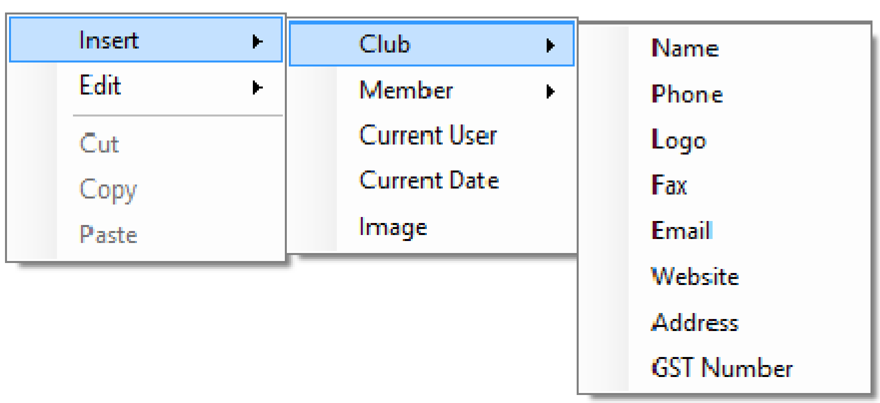
Double Click on the Field choice. Your selection will appear on the screen as shown below.



Using the **Default** fields:

Place the cursor where you want the field placed.

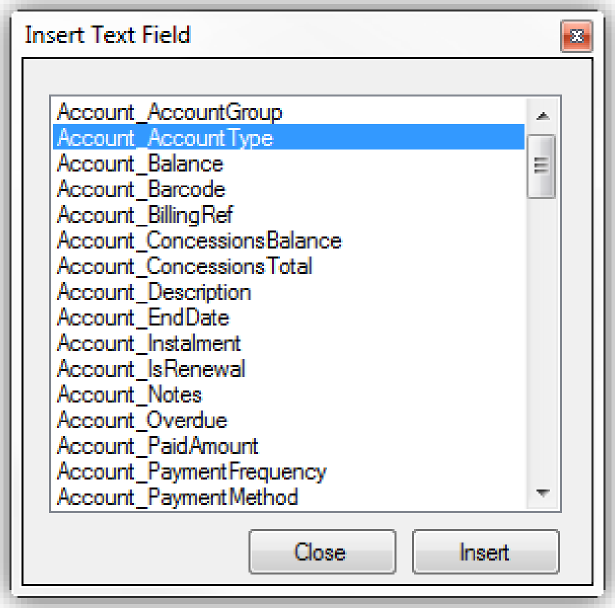
Right click anywhere on the **Correspondence Designer** page.
The fields below display.



Click your required field. The field will then display on the **Correspondence Designer** page.

Step 5. You can also enter fields from the Ribbon at the top of the screen.

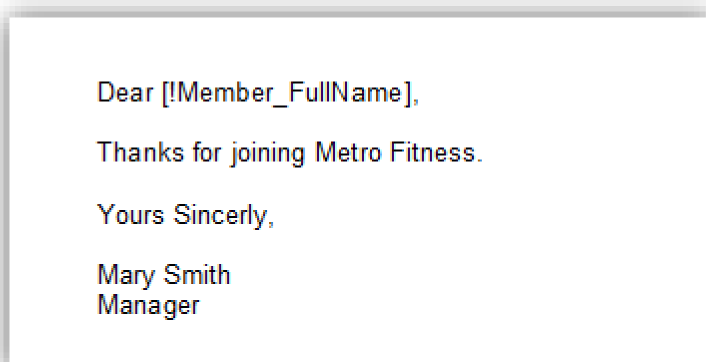
- Place the cursor where you want the field placed.
- Select **Field** in the Insert section.
  The **Insert Text Field** screen displays.



- Double click on the required field.
  Your choice will insert where required.

Or,

- Select the required field and click Insert.
  Your choice will insert where required.



Dear [!Member_FullName],

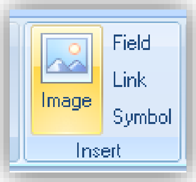
Thanks for joining Metro Fitness.

Yours Sincerly,

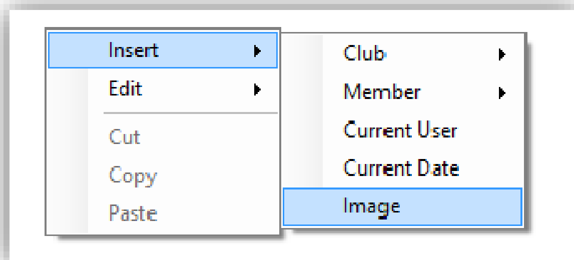
Mary Smith
Manager

Repeat the process to add as many fields as required.

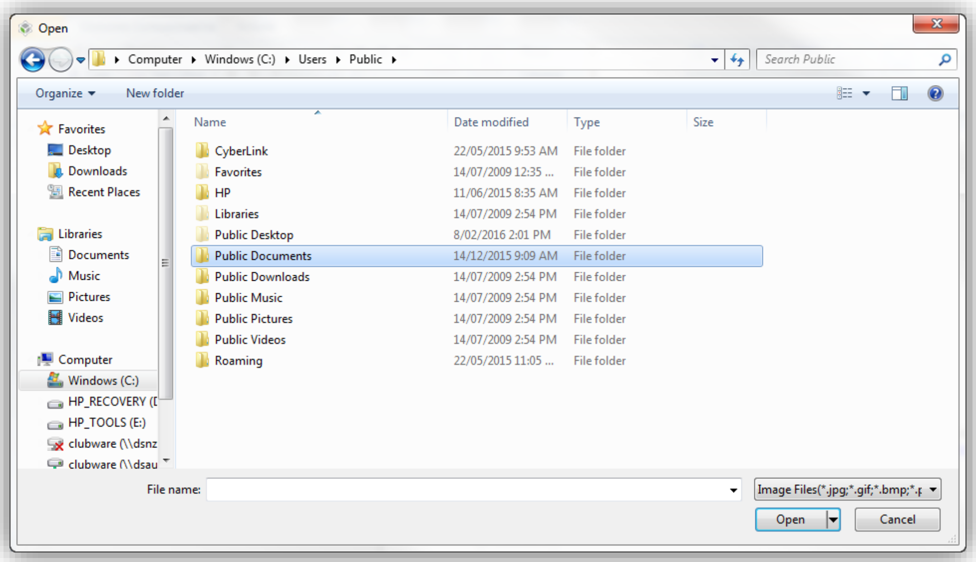
Step 6. Add an Image



Click the Image button in the **Toolbar Insert** section, **or** right click in the document and select Insert-> Image



The screen below displays.



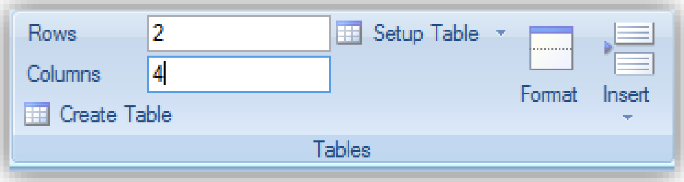
Locate your image, and insert it in the **File name** field, then Click **Open.**

Your image will display on your document.

There is a recommended size limit of 300 kb. You will receive a prompt advising you to reduce the size if it is larger than 300 kb.

Step 7. Adding a Table

To create a table, over-type the number of columns and rows required in the **Rows** and **Columns** fields on the **Tables** Tool bar section.

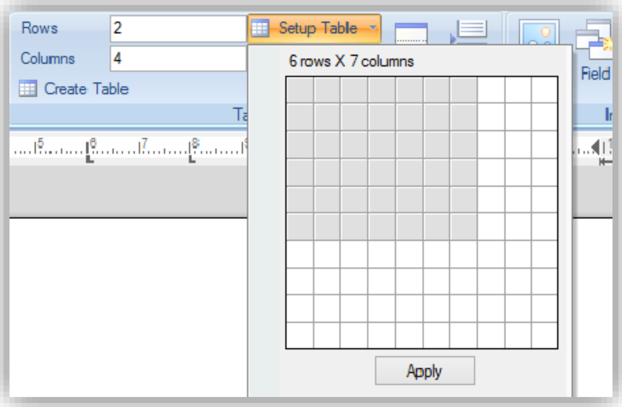


Click Create Table.

The table will display in your document.

You can also use the **Setup Table** option to create a table.

Click the Setup Table option as shown below.
Select the required number of rows and columns.

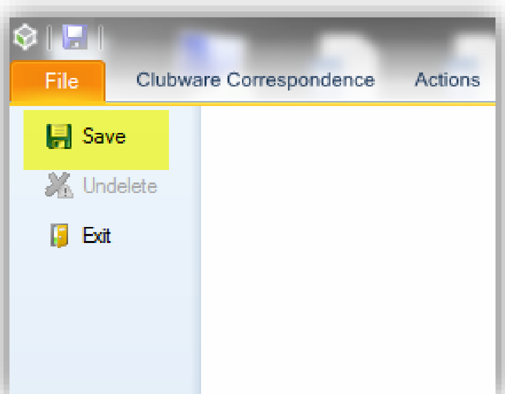


Click **Apply**. The table will display in your document.

Step 8. Click **Save** when you have completed designing the document.

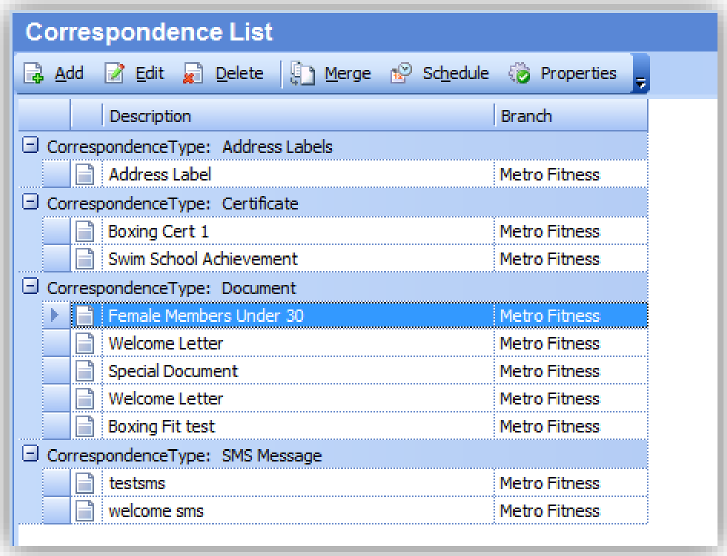
Note: The **Save** button is next to the Clubware icon in the top left of the Designer Screen.

Or, click File and the **Save** button is there as well.



This is also how you can undelete correspondence and **Exit**. (To turn on your deleted records, select **Administration | Branches | Select Current Branch | Settings | General | Show deleted records**)

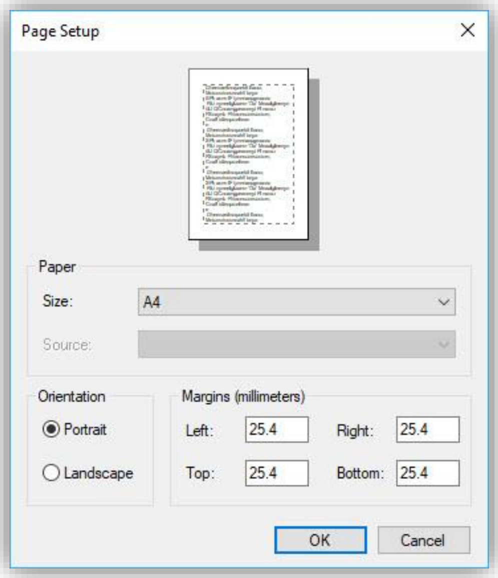
The new document now displays on the **Correspondence List,** as shown below.



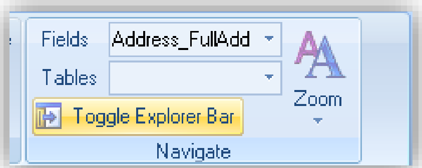
You have completed the steps required to add new correspondence in Clubware.

Helpful features

You can use **Page Setup** to change the page orientation.

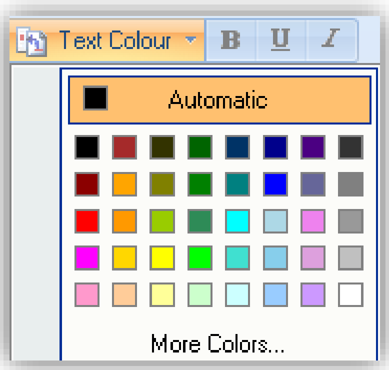


Click the **Toggle Explorer Bar** or Press **'X**' to hide the Tools section on the right side of the screen.



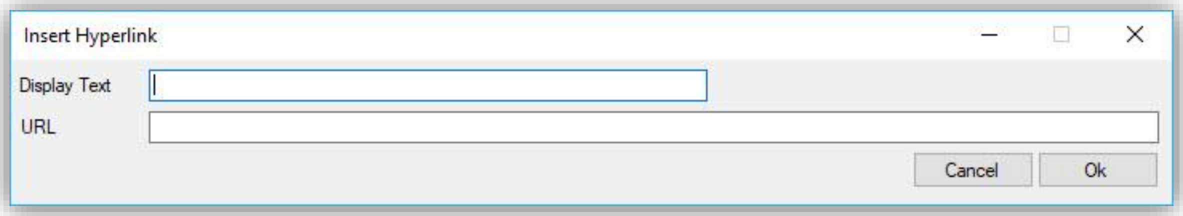
Click **Toggle Explorer Bar** again to re-display Tools.

Click the '**Text Colour**' button to change the text colour and select from the colour palette. You can click 'more colours' for further colour options.



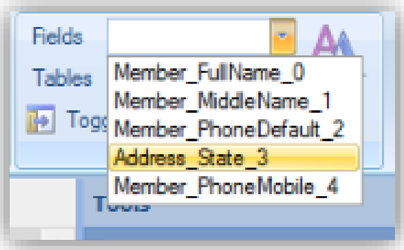
Click the “**Link’** button to add a Hyperlink, as shown below.

The **Insert Hyperlink** screen displays.

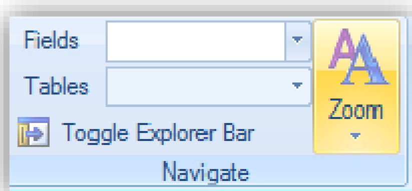


Enter the required details and press **OK**.

Use the **Navigate** Toolbar to quickly locate **fields** or **tables** by using the drop down menus. The **Fields** menu is shown below.



Also within the Navigate Toolbar are the **Zoom** feature and
Toggle Explorer Bar.

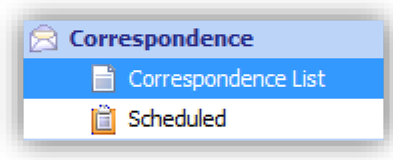


Click the **Zoom** button to change the view size.

Use the Template function in Clubware

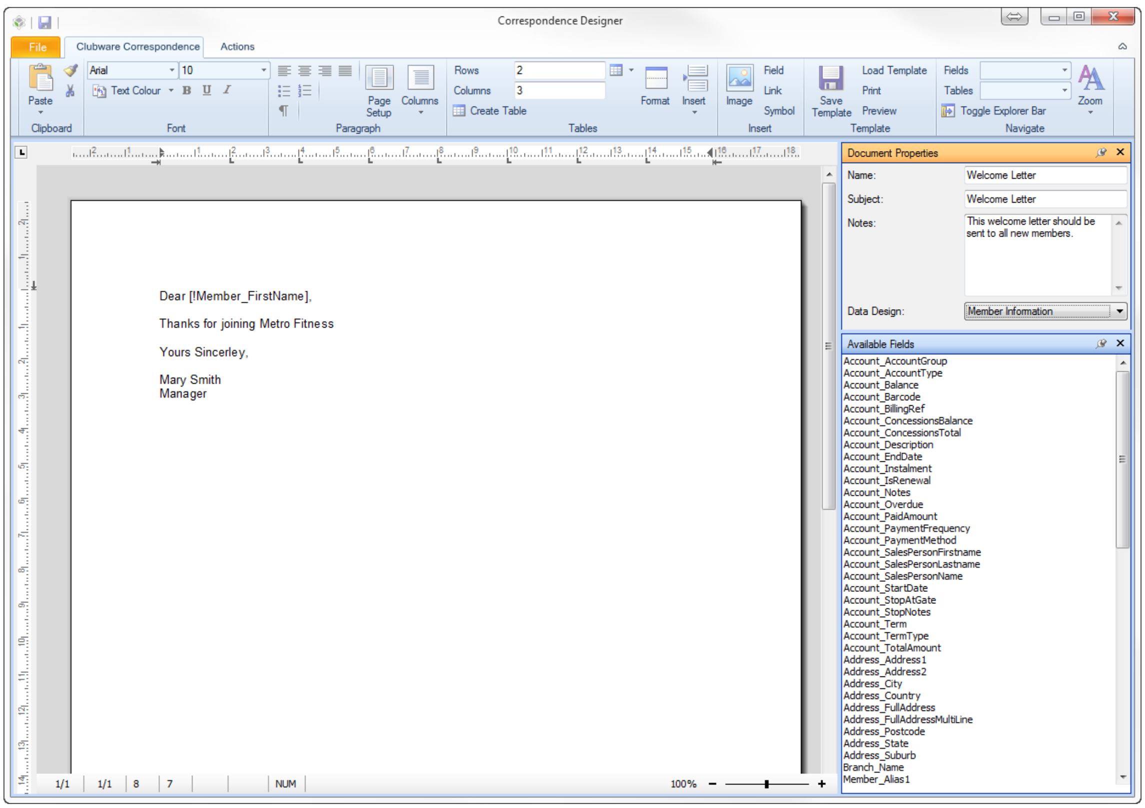
This tutorial describes the steps required to create and apply templates within Clubware.

Step 1. Select **Correspondence | Correspondence List** from the navigation panel as shown below.

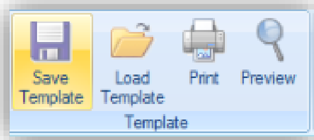


Step 2. The **Correspondence List** displays in the main panel of Clubware

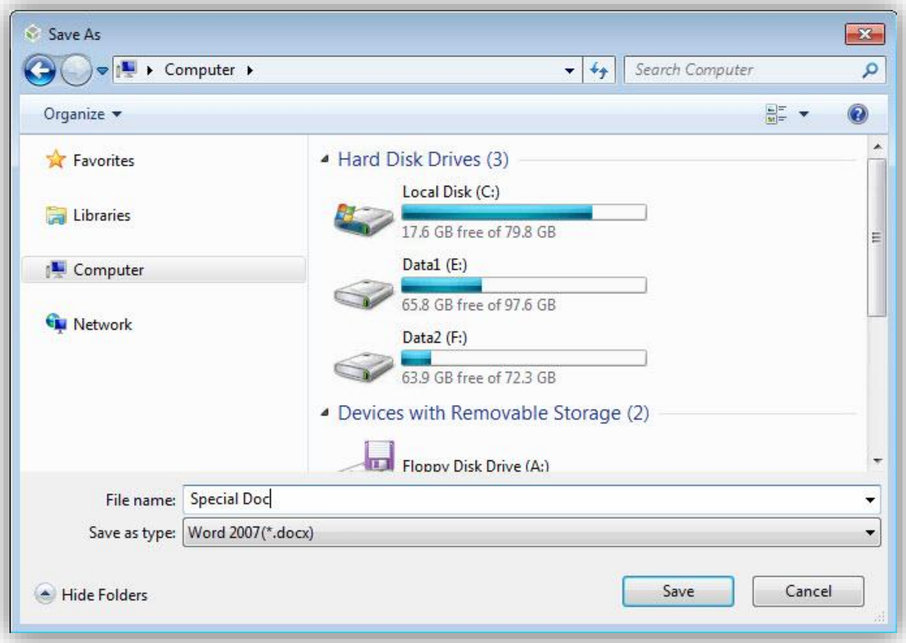
Select your required document from the list.
Click **Edit**.
The selected document displays as shown below.



Step 3. Click the Save Template button.

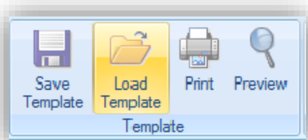


The Save As screen displays.



Type a new name in the **File name** field and click **Save**.

You then need to add a **New Correspondence** document. Click the '**Load Template'** button and browse to the file to load the template. Then you can edit further if required.

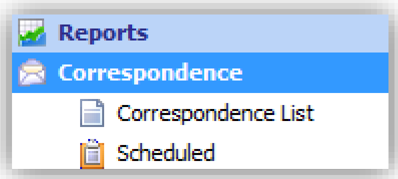


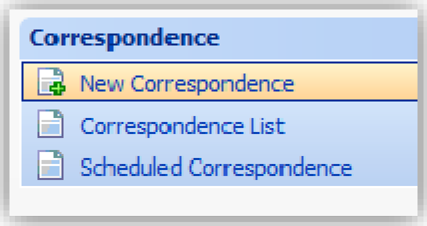
You have completed the steps required to add correspondence from a template in Clubware.

Creating Labels

This tutorial describes the steps required to create labels.

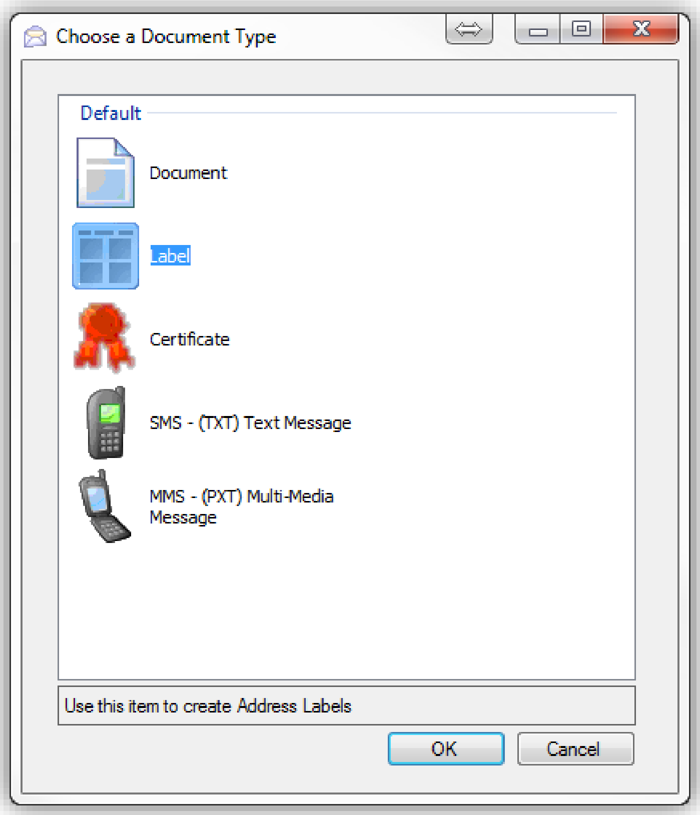
Step 1. Select **Correspondence | New Correspondence** from the navigation panel, as shown below.



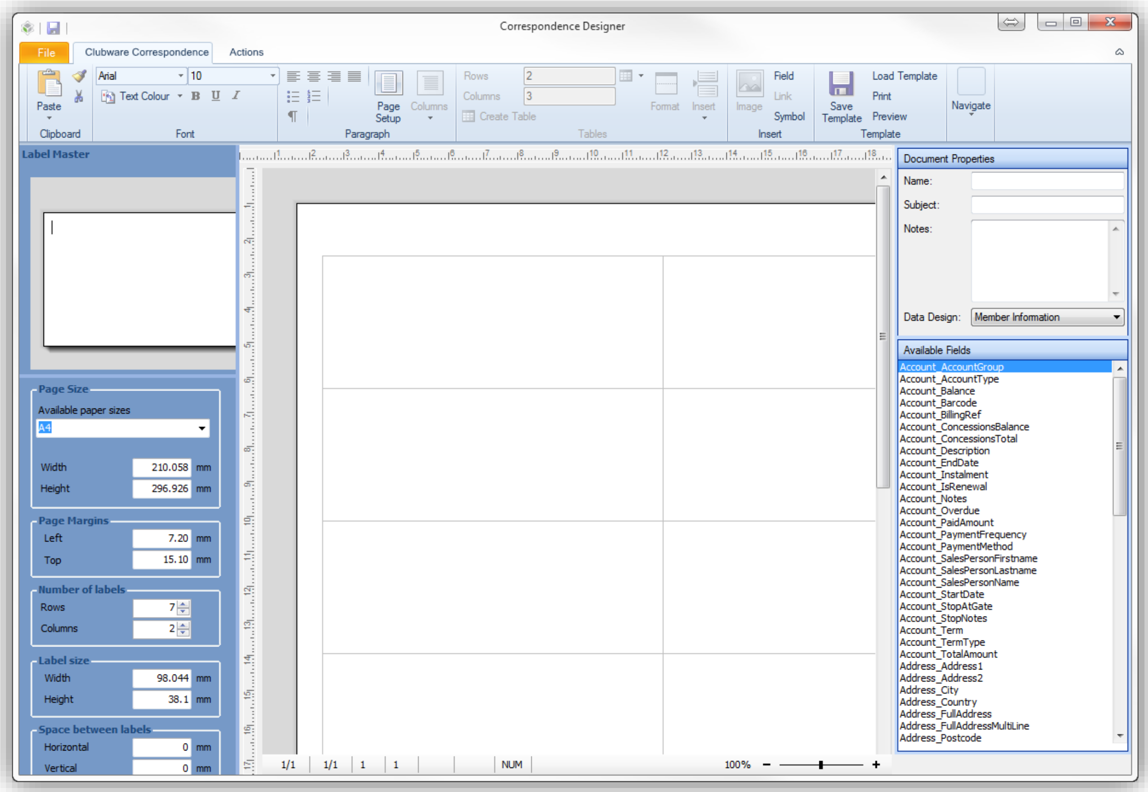


Step 2. The Choose a Document Type screen displays.

Select **Label**.
Enter a document name as shown below, click **OK**.



The **Correspondence Designer** screen displays as shown below.



Step 3. Complete the required **Document Properties**.
Note: **Member Information** is the default.

Place the cursor in the **Label Master** space in the top left corner, as shown above.
Double click on each of the required fields to add to the label master.

Note: The **Label Master** space is your working space.
Fields and information inserted here will reflect in the labels designer window on the right of the **Label Master** space.

Step 4. Select your paper requirements from the sections below the Label Master.

Note: Click the **Update** button if you change the paper size measurements. (Shown above at the bottom right of the Label Master Panel).

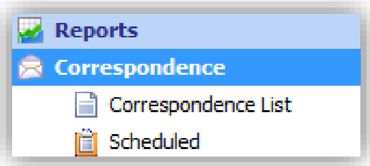
Note: If you reset the paper size before you add any fields, you won't lose any of your entries.

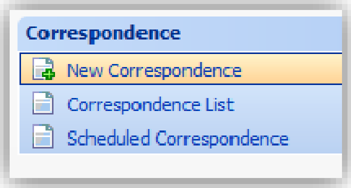
You have completed the steps required to create address labels in Clubware.

Creating Certificates

This tutorial describes the steps required to create certificates.

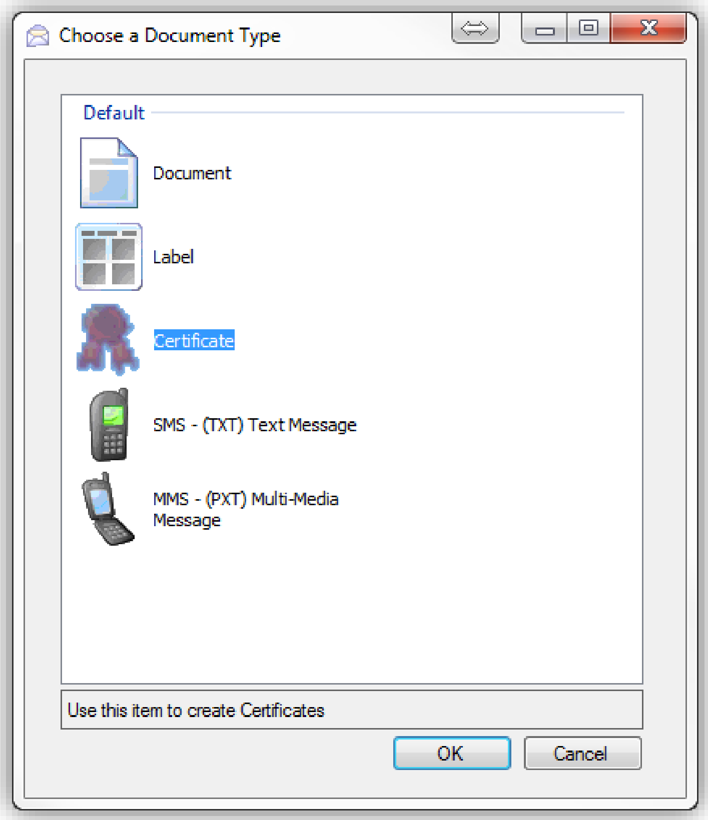
Step 1. Select **Correspondence | New Correspondence** from the navigation panel, as shown below.



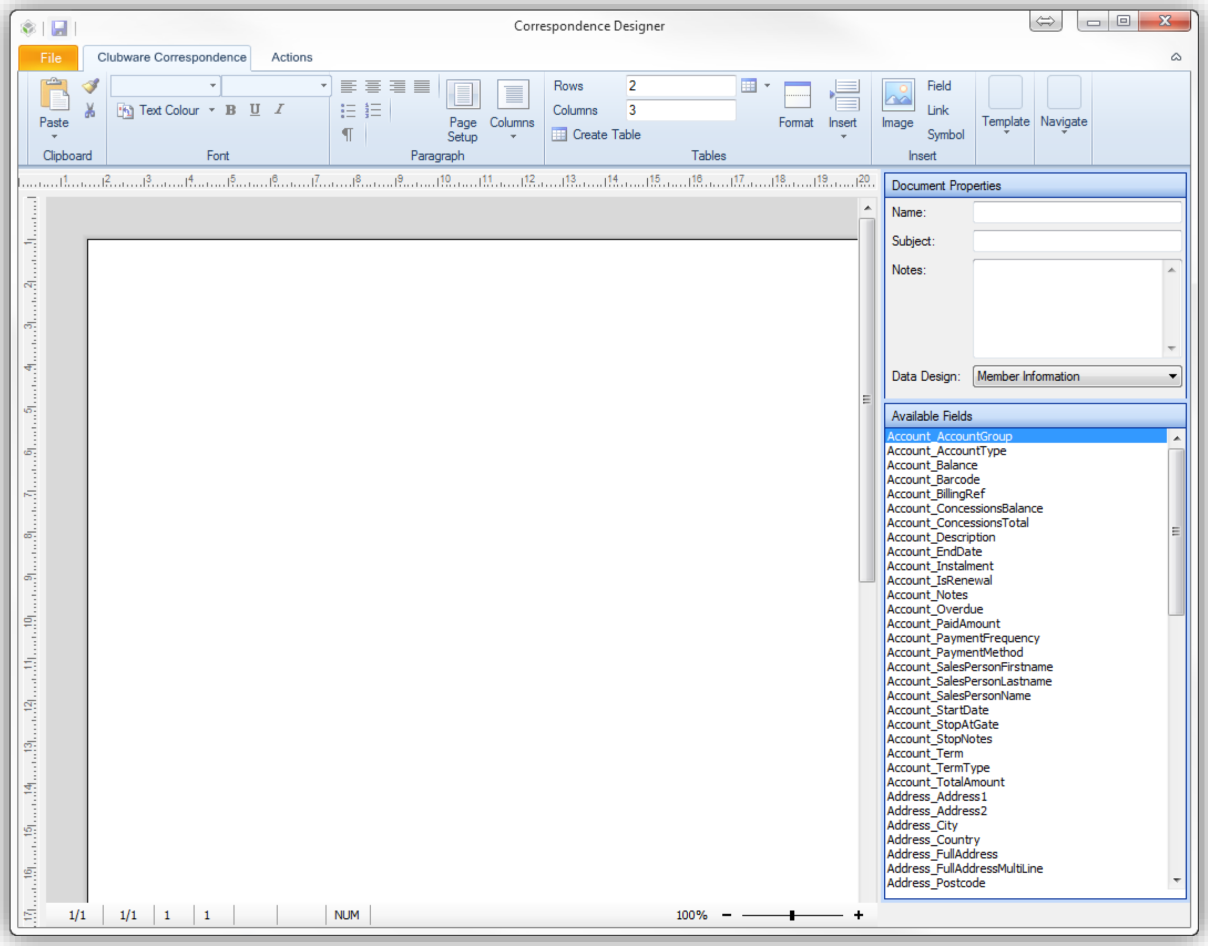


Step 2. The Choose a Document Type screen displays.

Select **Certificate**, click **OK**.



The **Correspondence Designer** screen displays.



Type in your required details.

Double click on each of the required fields to add to the Certificate document.

Click **Save**.

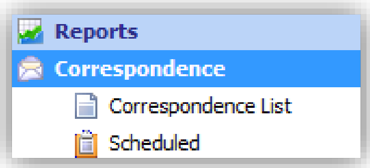
You have completed the steps required to create certificates in Clubware.

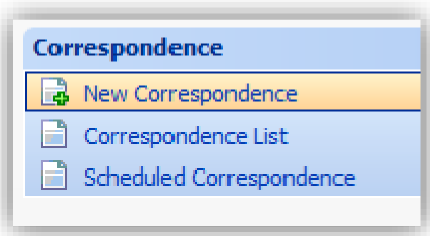
Creating SMS Messages

This tutorial describes the steps required to create SMS Messages.

You must have an account with a Clubware approved SMS provider and the account settings entered in **Administration | Branches | Select Current Branch | Settings | SMS Settings**.

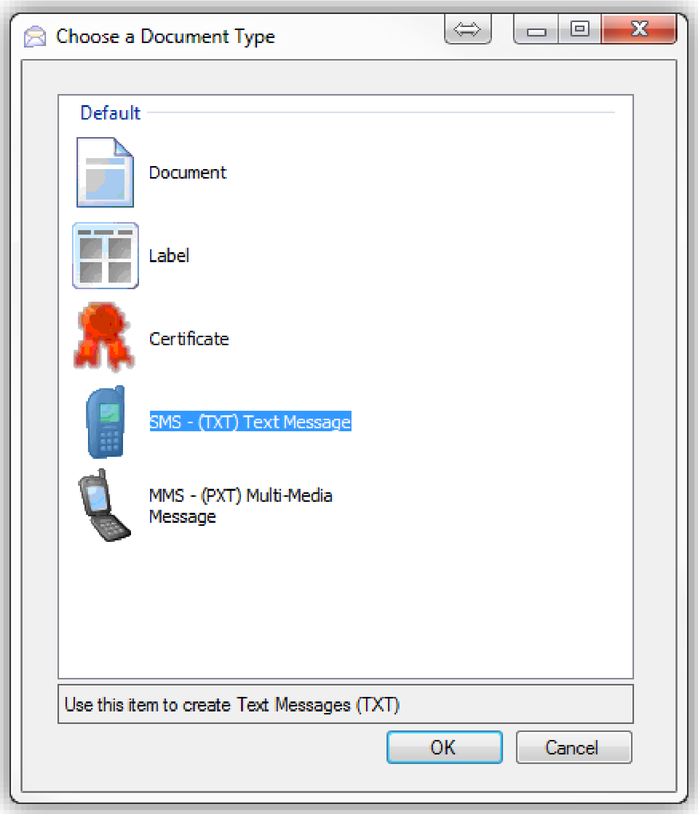
Step 1. Select **Correspondence | New Correspondence** from the navigation panel, as shown below.



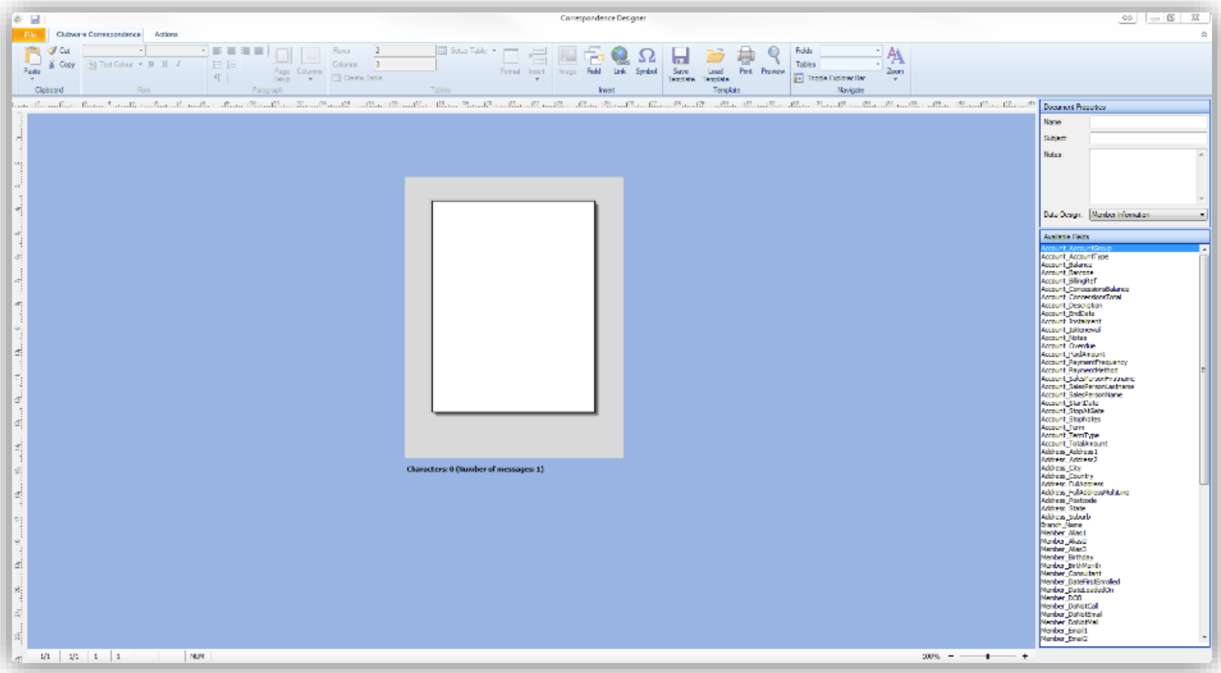


Step 2. The Choose a Document Type screen displays.

Select **SMS – (TXT) Text Message**, click **OK**.



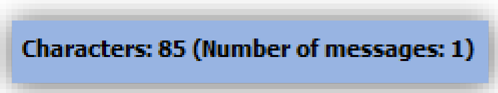
The **Correspondence Designer** screen displays.



Enter your message in the page.

Double click on each of the required fields to add to the SMS Message.

Note 1. The character count will increase as you add content. You will also be advised of the number of messages that will be sent.



Note 2. If you insert Database Fields, the character count only increases by the length of the inserted characters, therefore the actual message length may vary when it is merged.

Click **Save**.

You have completed the steps required to create an SMS message in Clubware.

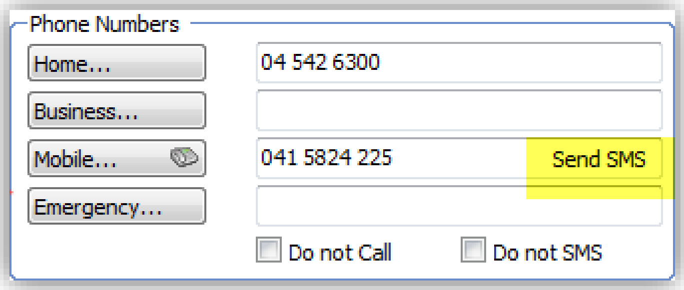
Sending one off Ad hoc SMS Messages

This tutorial describes the steps required to send a one off ad hoc SMS message to a member.

You must have an account with a Clubware approved SMS provider and the account settings entered in **Administration | Branches | Select Current Branch | Settings | SMS Settings**.

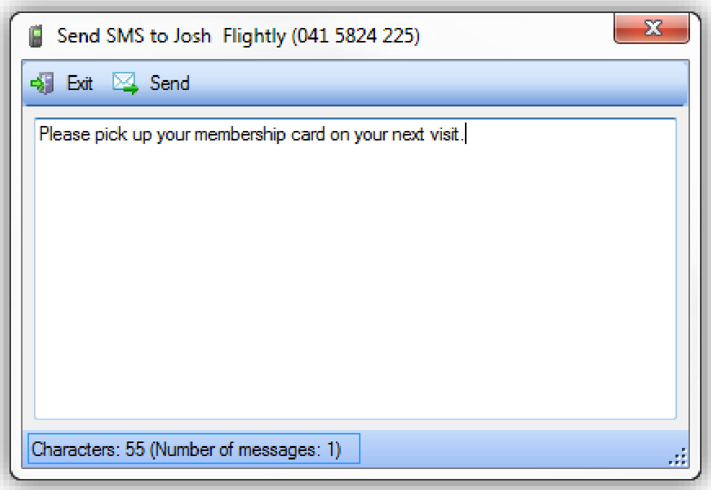
Note: The logged on user must have access to send correspondence within Clubware and the member must have a mobile number loaded.

Step 1. Locate and open the screen for the member you want to send an ad hoc SMS message to. (See the tutorial Finding a Member .
Click the **Send SMS** button on the member screen, as shown below. It is next to the Mobile phone number



Step 2. Add an ad hoc SMS message

Click into the window and type a message.
Click **Send TXT**



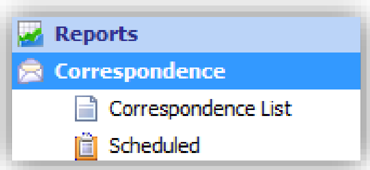
You have completed the steps required to send an ad hoc SMS message in Clubware.

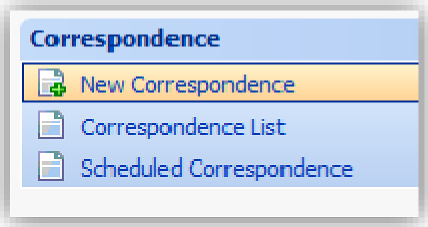
Creating MMS Messages

This tutorial describes the steps required to create MMS Messages.

You must have an account with a Clubware approved SMS provider and the account settings entered in **Administration | Branches | Select Current Branch | Settings | SMS.**

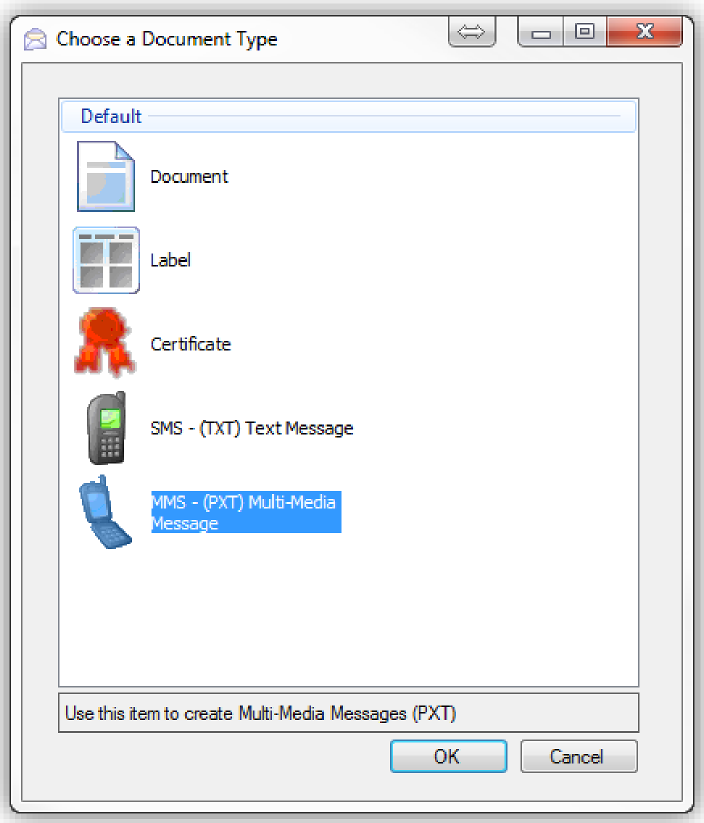
Step 1. Select **Correspondence| New Correspondence** from the navigation panel, as shown below.



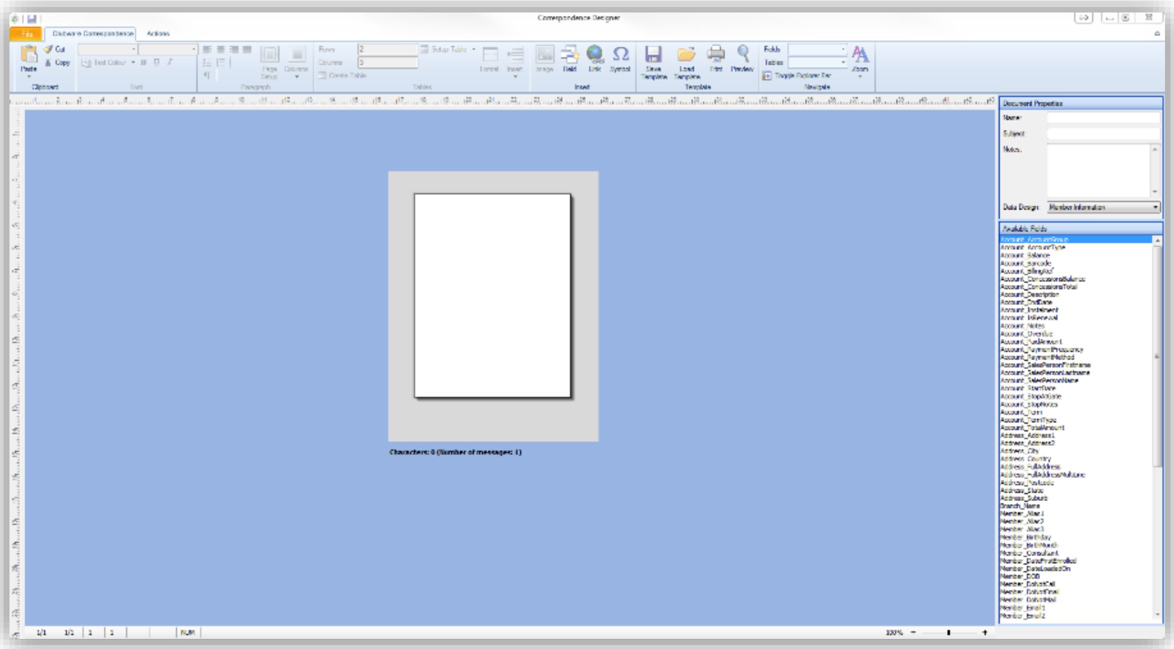


Step 2. The Choose a Document Type screen displays.

Select **MMS - (PXT) Multi-Media Message**. Click **OK**.

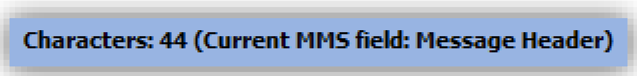


The **Correspondence Designer** screen displays.



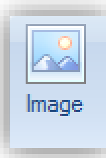
Enter your message in the page.
Double click on each of the required fields to add to the MMS Message.

Note 1. The character count will increase as you add content. You will also be advised of the number of messages that will be sent.



Note 2. If you insert Database Fields, the character count only increases by the length of the inserted characters, therefore the actual message length may vary when it is merged.

Click on the **Image** button and add multimedia files, e.g. movies, music, pictures, video clips to your message.



Click Save.

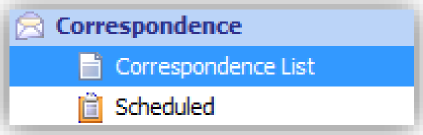
You have completed the steps required to create an MMS message in Clubware.

Merging Correspondence

This tutorial describes the steps required to merge correspondence. See the tutorial Adding New Correspondence to create correspondence.

Step 1. Select **Correspondence | Correspondence List** in the navigation panel, as shown below.

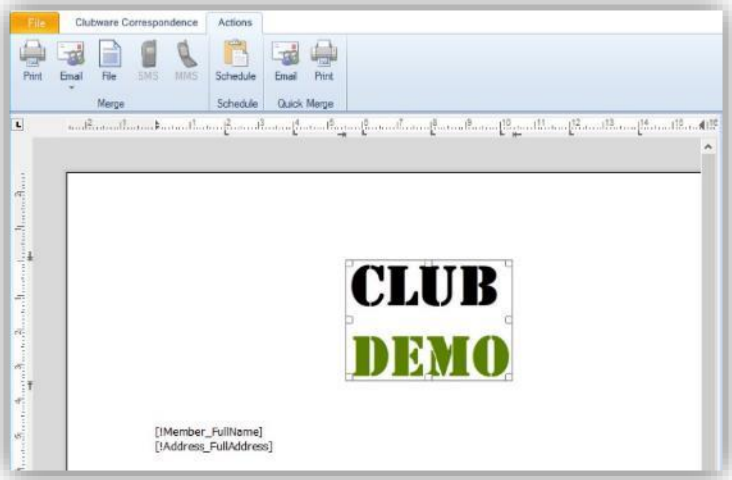
The **Correspondence List** displays in the main panel.



Step 2.

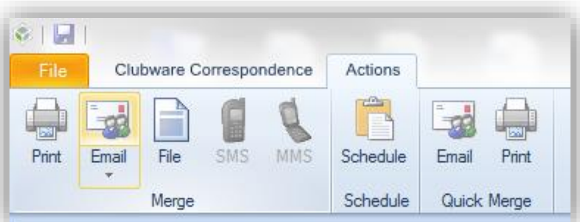
Select the document you wish to merge,
Click **Merge from** the toolbar. (For this tutorial select **Welcome Letter**).

The selected **correspondence document** displays.



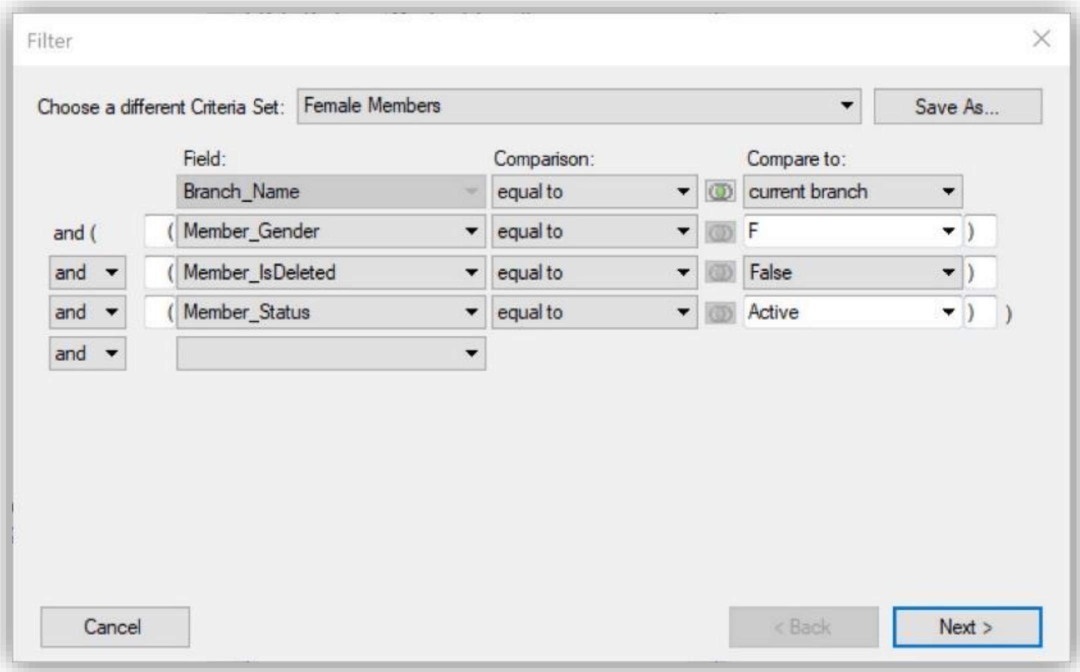
Note: The **Actions** panel in the ribbon above displays **SMS** and **MMS** greyed out because a correspondence document was selected. If SMS or MMS correspondence had been selected these would display as active.

Step 3. Select your required Distribution medium. (For this tutorial select **Email** from the **Action** tab.



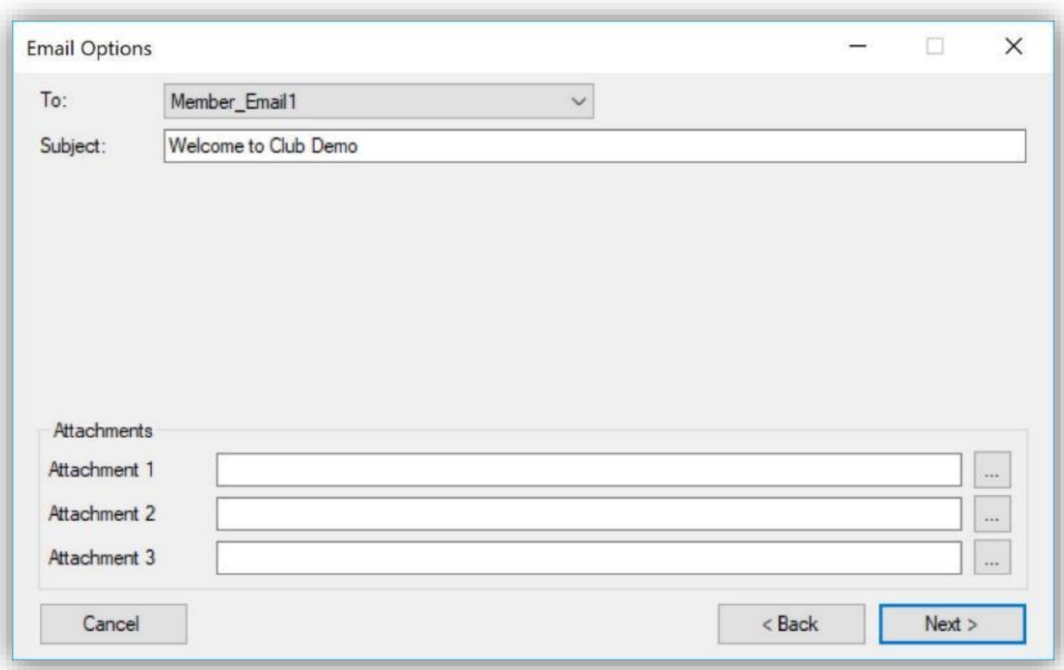
Note: The quick merge distribution methods have fewer windows to navigate than the standard email and print merges.

The **Filter** screen displays.

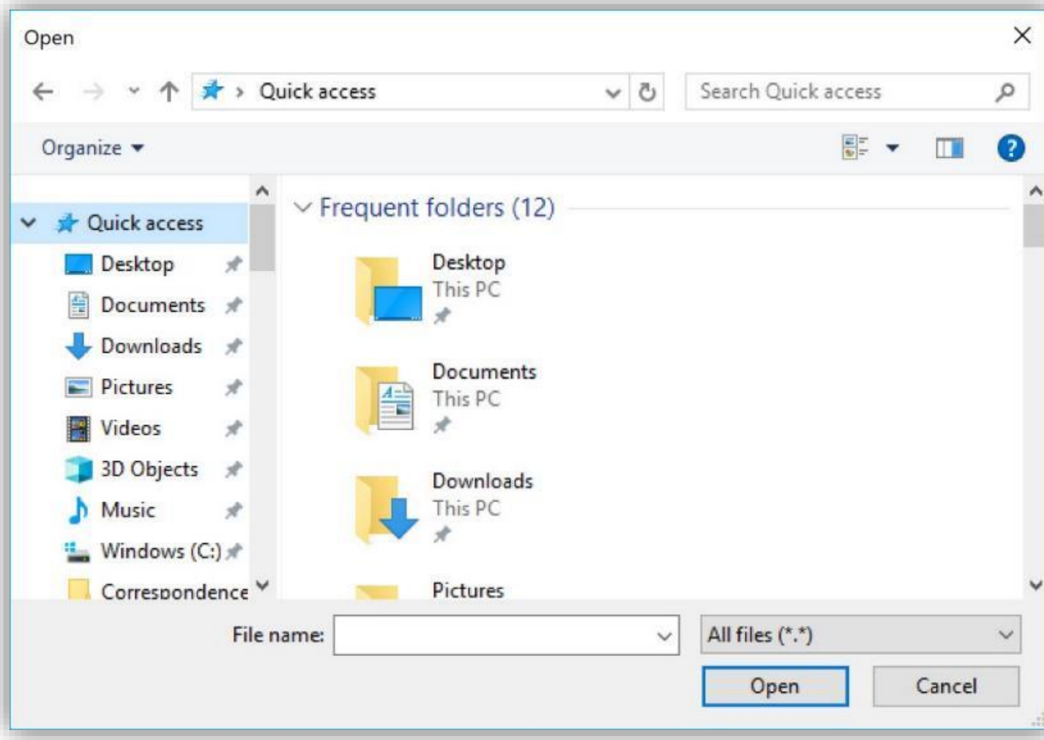


Step 4. Enter your filter criteria, using the drop-down menus, as shown in the example above. Click **Next.**

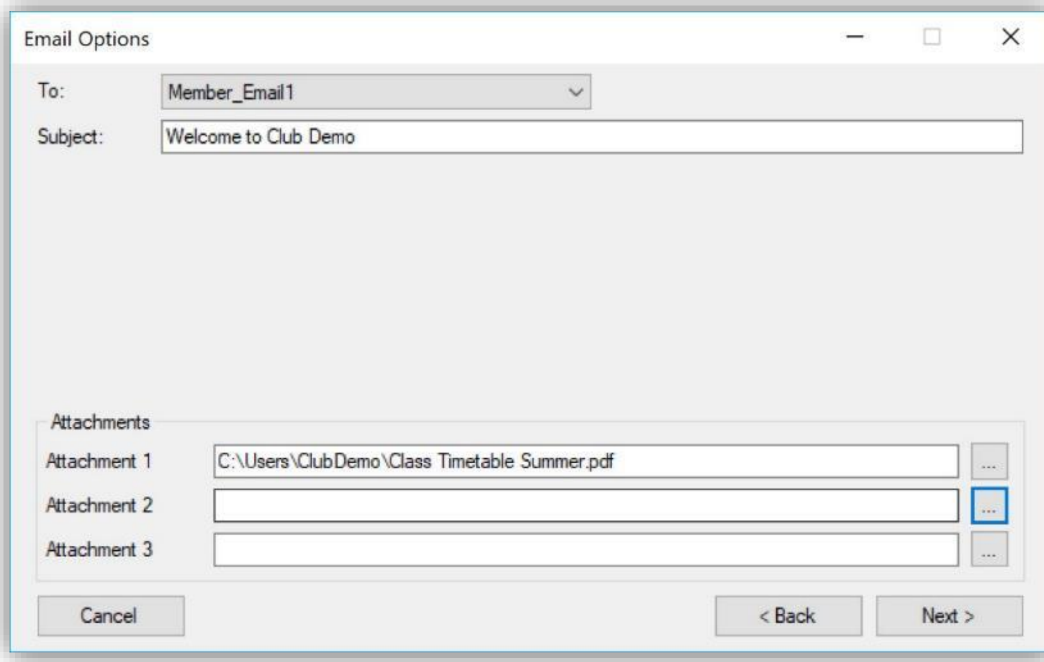
The **Advanced Email Merge** Options screen displays.



Step 5. Click the **Ellipsis** button  next to Attachment 1. This will open the following standard Windows dialog screen.

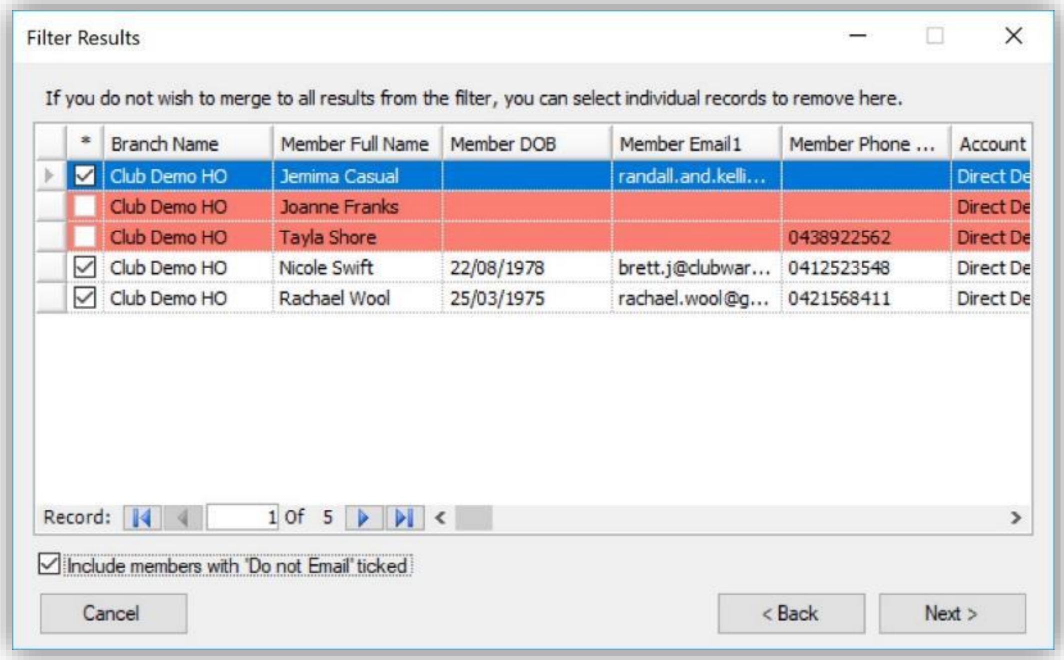


Browse to the file you would like to attach and click **Open.**

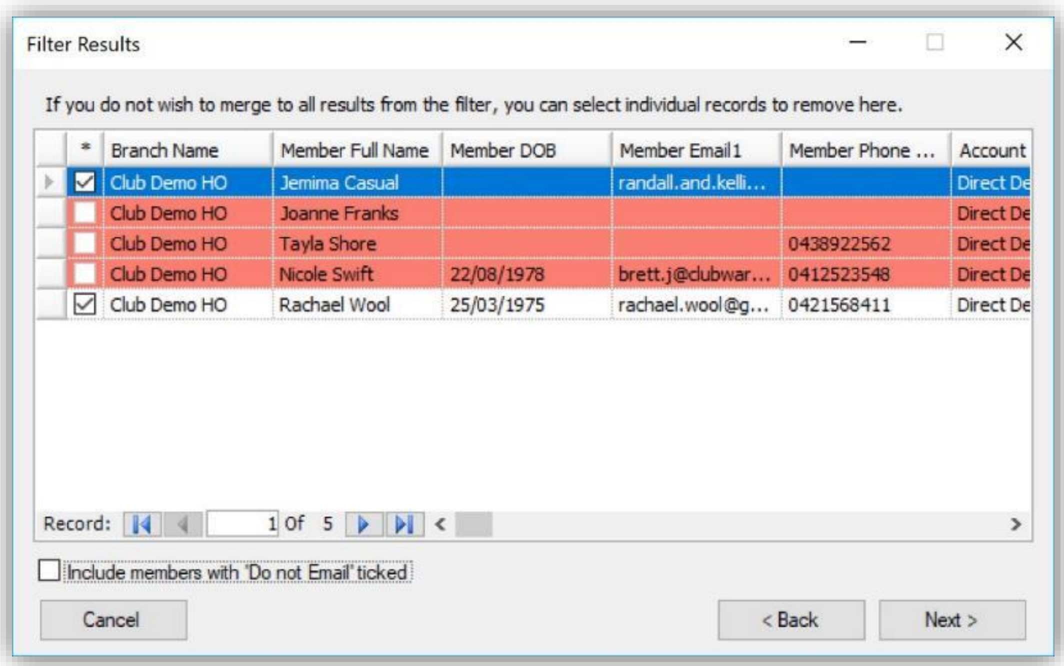


Step 6. Click Next.

The **Filter Results** screen displays. You are also able to include members with 'Do Not xxxx' ticked on the member record if the correspondence is important.

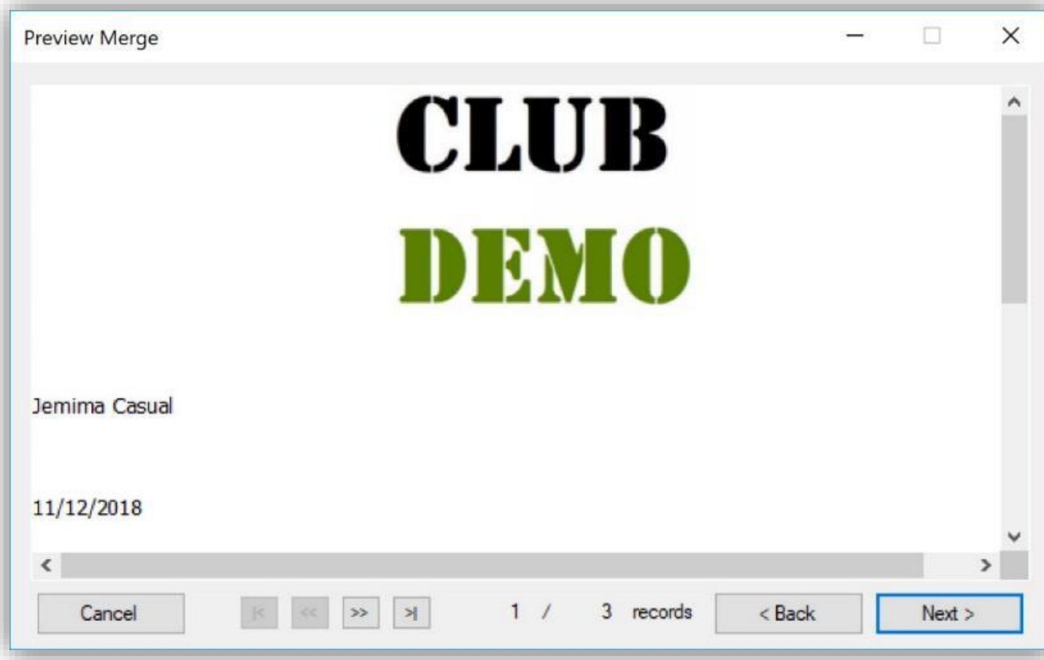


The members highlighted in red have the Do Not Email ticked or do not have a valid email address in Clubware



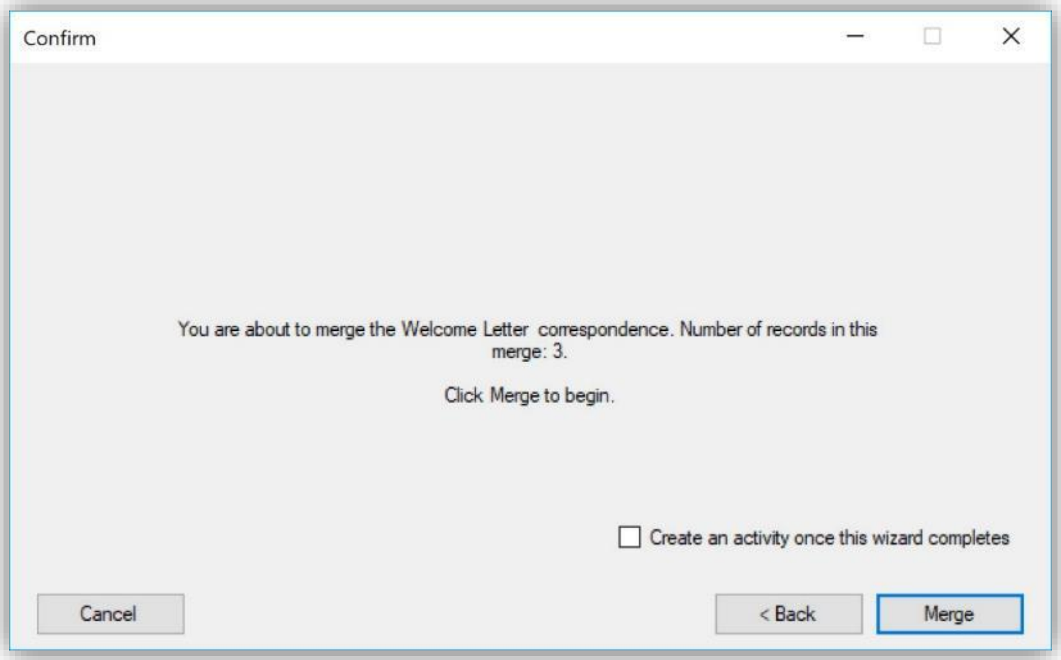
Step 7. Click **Next** if the results are correct.

The **Preview Merge** screen displays.



Step 8. Click Next.

The **Confirm** screen displays.



Step 9. Click **Merge** to commence the merge process.

If you wish to save an activity, tick the '**Create an activity once this wizard completes**' box prior to clicking '**Merge.**

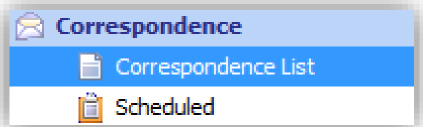
Refer to the **tutorial** Running the Activity Wizard for further information.

You have completed the steps required to merge and email correspondence in Clubware.

Scheduling Correspondence

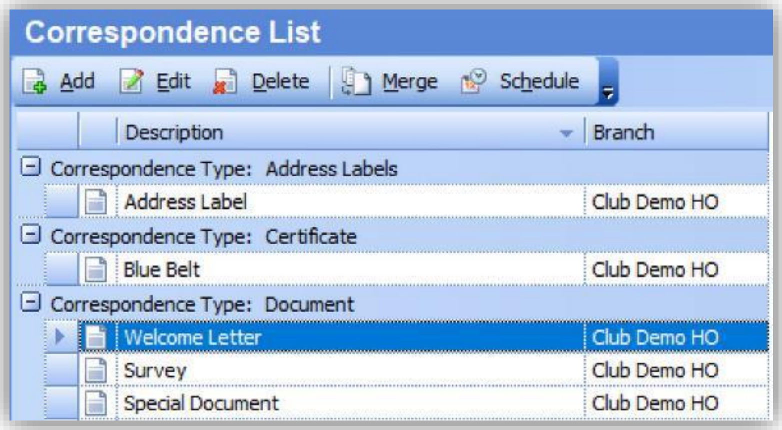
This tutorial describes the steps required to Schedule correspondence to be run at specific times.

Step 1. Select **Correspondence | Correspondence List** in the navigation panel, as shown below.

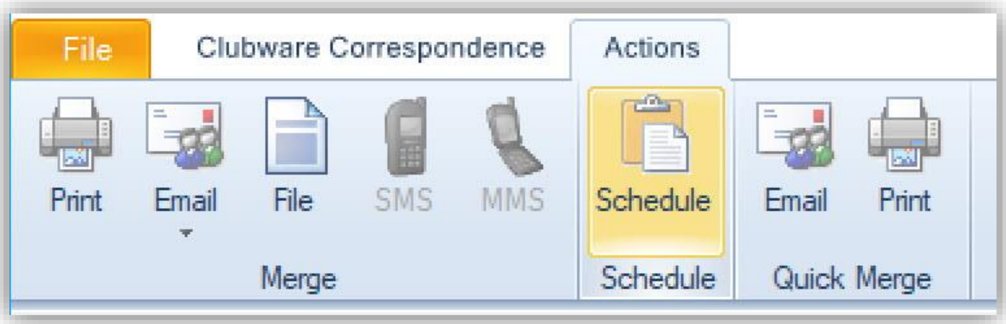


The **Correspondence List** displays in the main panel.

Step 2. Select the required correspondence type. For this tutorial **Welcome Letter -** from the Correspondence list, was selected.

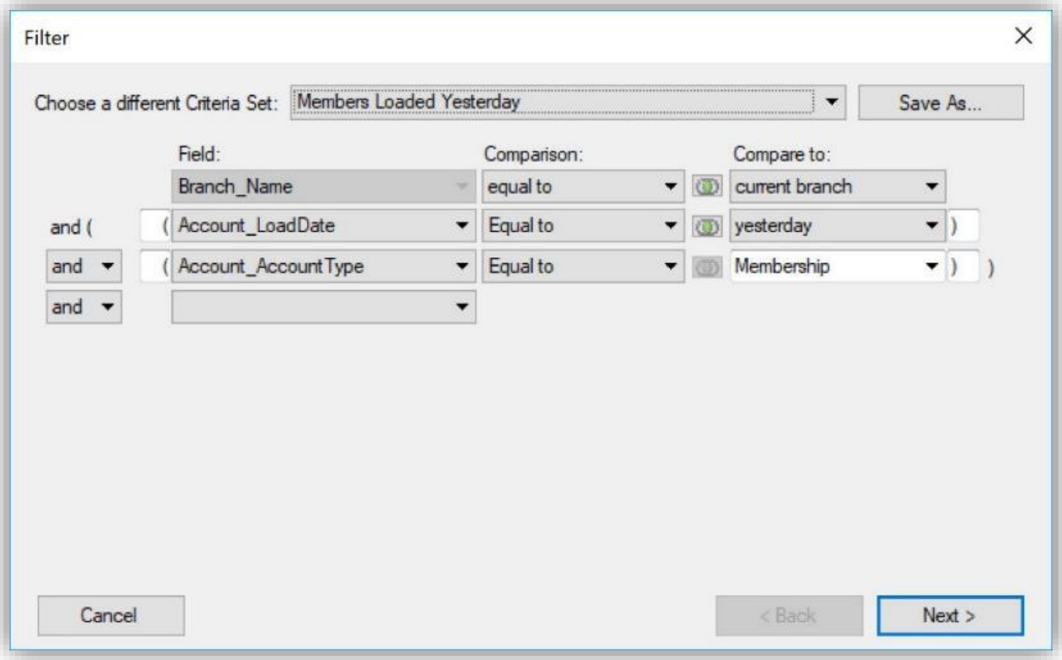


The selected correspondence displays.



Step 3. Click **Schedule** from the Actions Ribbon, highlighted above.

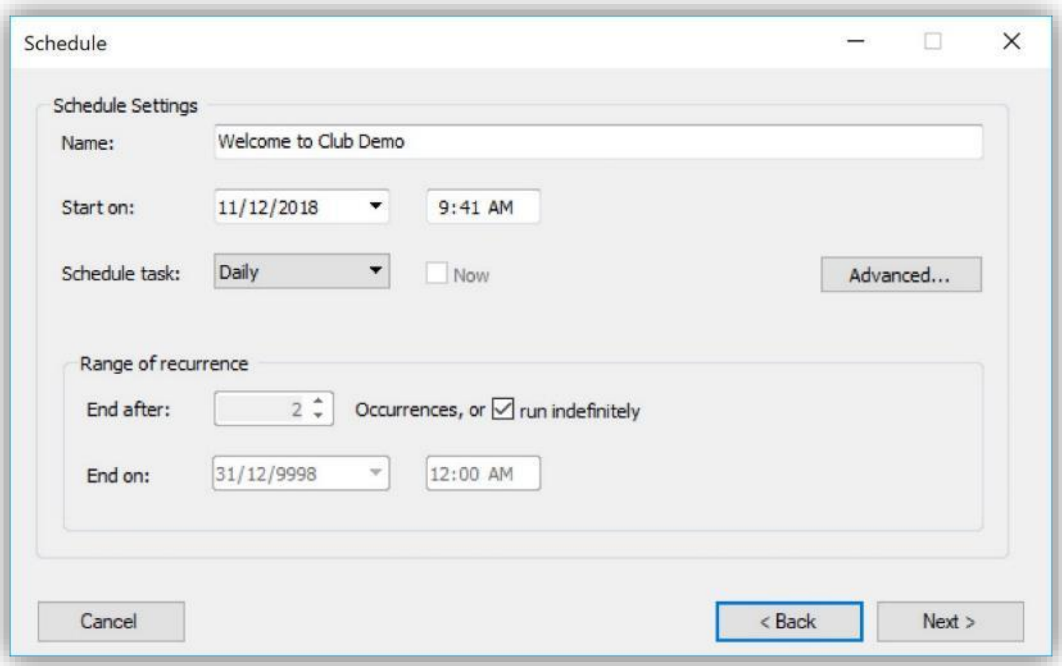
The **Filter** screen displays.



Step 4. Enter the Filter criteria for who is to receive the correspondence on a regular basis.

Click **Next**.

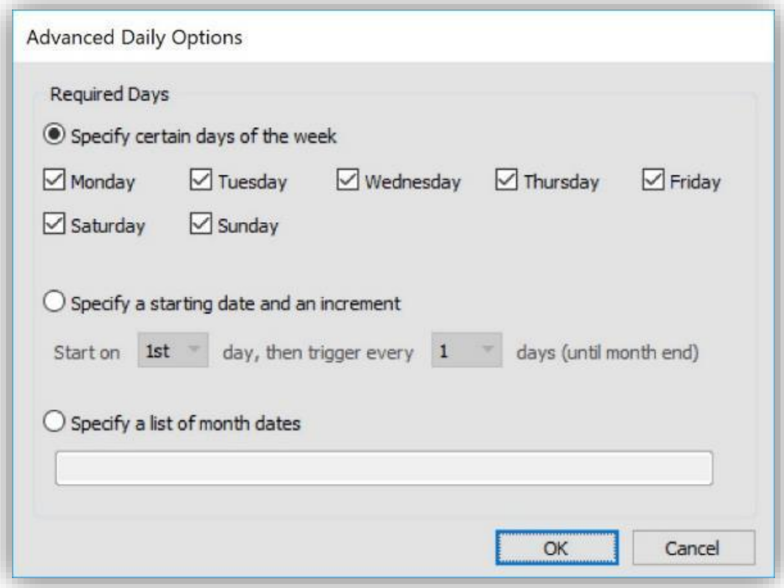
The **Schedule** screen displays.



Step 5. Enter your criteria using the drop-down menus.

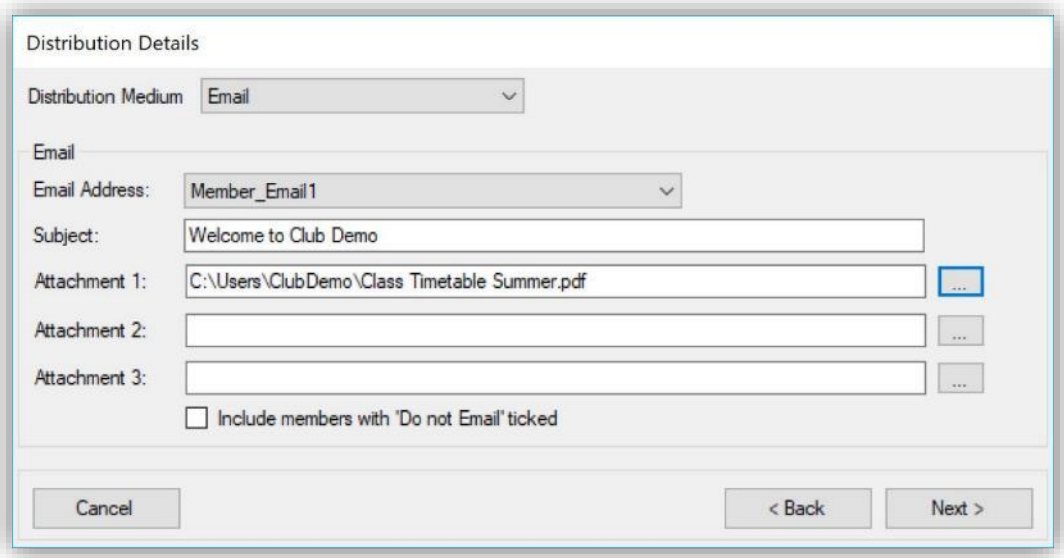
Uncheck **run indefinitely** if you want to enter an **End after** or an **End on** date.

You can also use the **Advanced** button to customise your schedule further.



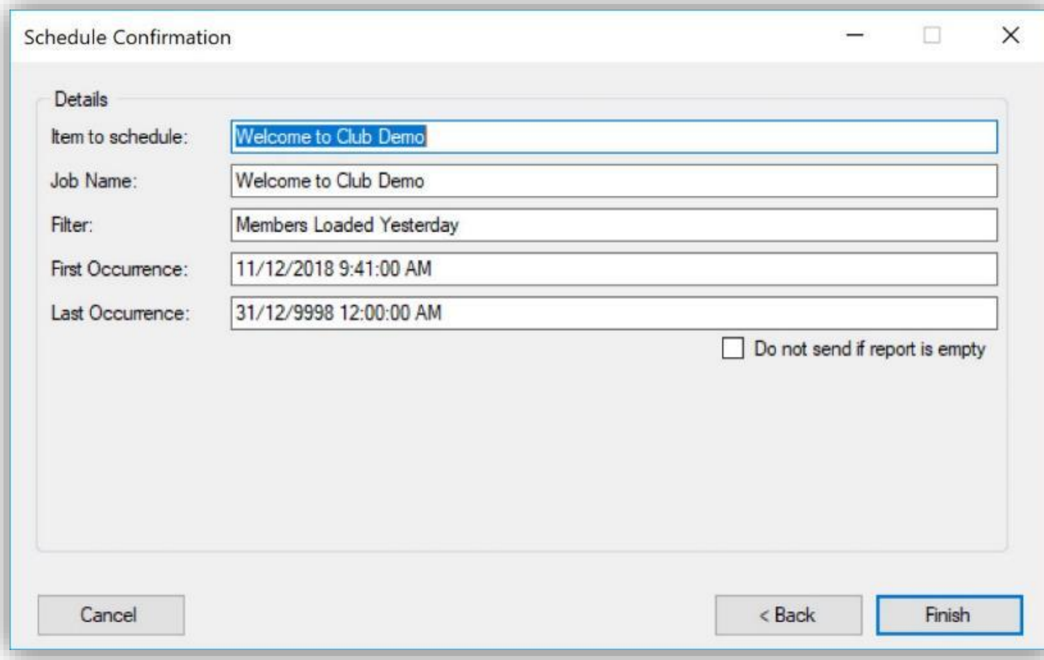
Click **Next**.

The **Distribution Details** screen displays.

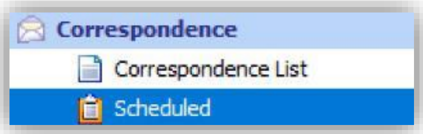


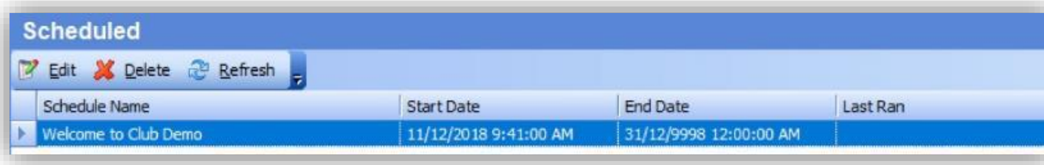
Click **Next**.

The **Schedule Confirmation** screen displays.



Click **Finish**.
Your Scheduled correspondence will be saved and appear in the Scheduled Correspondence List.





You have completed the steps required to schedule correspondence in Clubware.

Administration

Overview

The Administration area of the system is used for managing system settings, templates, standard information and completing administration tasks.

Access Control

If you have integrated with Paxton/Inner Range Integriti access control systems, the access control module in Clubware allow you to configure the requirements of each access control system. This version of Clubware also integrates with Gantner. Please contact Clubware Support for further information

Account Fees

This area allows you to add new custom account fees and also to set whether you are prompted to send the payment to the billing company or not.

Account Templates

Account Templates are templates that can be used when adding a new account for a member. They are designed to reduce the amount of data entry required when adding a new account.

A template can be set up once and reused many times. Templates are totally customisable and can be designed for any type of account and any type of membership your facility has.

Specific template defaults can be set for an account, such as associated entry cards, visit restrictions etc.

Account Templates can also be configured for suspensions in the self-service portal.

Activity Templates

You can add one or more activities to a member based on an Activity Template, these can also be grouped so you can quickly and easily add common activities against your members.

Announcements

Global or branch specific announcements can be created in Clubware to allow staff to be aware of upcoming events or changes.

Branches

Clubware is a multi-branch club management tool. From this screen, individual branches can be set up, edited and managed.

Branch Groups

Branch groups can be created in Clubware to allow specific branches to be linked together for both physical access and/or logon permission for Clubware users.

Branch Closures

Use branch closures to close a current branch and point the members to a new branch.

Bulk Payments

If your site processes bulk payments, such as credit card payments or automatic payments, these can be administered from this section.

Clubware has the ability to process different types of payments for different periods depending on user defined criteria. This makes processing bulk payment information (i.e. from a bank statement) simple and fast.

Corporates

If your facility sells memberships to specific corporate businesses, the ability lies within Clubware to create these details and rules, then apply to the applicable Account Templates.

Data Design

Data design is the cornerstone for retrieving data for both reports and correspondence within Clubware.

The data design system allows you to choose which database fields you want to use with your reports or correspondence. Every report or correspondence item must have a data design associated with it.

Data design maintenance is also completed from this section of the system.

Data Export

Data Export allows information to be exported from Clubware for use in third party systems. Please contact Clubware Support for more information regarding Data Export.

Data Import

Data Import allows information to be imported into Clubware from third party systems. Please contact Clubware Support for more information regarding Data Import.

Entry Cards

Clubware's entry card tools allow you to associate entry cards with account templates. Entry cards can be printed for individual member accounts, including classes and concession cards.

Clubware supports an unlimited number of entry cards, which can be set up and edited from this section.

Exercise Templates

Exercise Templates are a library of exercises that can be used when setting up fitness programs for members. You can add and edit exercises from this section and these will be available when adding exercises to fitness programs in the Members section.

Templates can be set up for both cardio and weight-based exercises, and you can add images and other relevant information for an exercise.

Fitness Program Templates

Clubware has the ability to create templated exercise programs for a member to use.

FTP Credentials

These credentials link an FTP server to Clubware. Please contact Clubware Support for more information regarding FTP Credentials.

Lookup Category

Lookups are grouped together by a lookup category. You can create custom lookup categories for use with User Defined Fields.

Lookups

Lookups are items that appear in dropdown lists within Clubware screens. Lookups can be added and edited from this section of the system. You can also sort the order of lookups within dropdown lists.

Machines

Each computer (or Machine) using Clubware can be configured to perform different tasks and control certain peripheral devices.

Promotions

Membership and account sales have the ability to be linked to a particular promotion.

In this section, Clubware enables you to set up and edit an unlimited number of promotions that can be assigned to members when accounts are sold. This allows for tracking of the effectiveness of your promotional activities.

Resources

Resources can be added and edited from this section of Clubware. Resources at your site can be allocated to different bookings and classes. A resource can be anything you want to track within your site, from training or class aids to physical space such as a pool or room.

Resources can be viewed and booked through the Calendar panel within Clubware.

Sales Targets

Sales Targets can be created or imported into Clubware. Please contact Clubware Support for more information

Salesforce

Clubware can be integrated with Salesforce Marketing Cloud to create a seamless correspondence merge. Please contact Clubware Support for more information.

Security Groups

Security for your Clubware system can be set up from this section. A security group is a group of individual security settings. When a group is set up, it can then be assigned to a staff member.

If a staff member is promoted, you can change the security group that person belongs to.

Service Jobs

Clubware jobs that are queued to run can be reviewed in this area for their status and to review the job details.

Staff Members

This section of Clubware allows you to add and edit staff member information. Security access privileges, passwords and other relevant information for each staff member can be edited from this section.

A staff member can also be set up as a resource and linked to bookings and classes.

User Defined Fields

User Defined Fields allow you to capture and track additional information where standard Clubware views may not have the ability to.

Watches

Watches enable you to target a member who meets certain criteria and can allow you to block, warn or set a 'Stop At Gate' note on their membership account. An example of a watch would be if you had a troublesome member who signs up using the same email address.

Web API Clients

This section contains Web WPI information for 3rd party programs to access the Clubware database. Please contact Clubware Support for further information.

Zones

By using zones, you can create multiple entry points for your facility within Clubware.

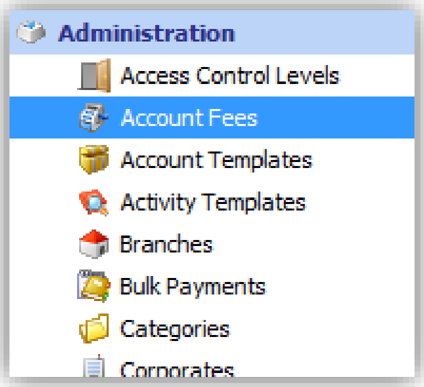
How To

Account Fees

The following tutorials describe the most common actions associated with Account Fees.

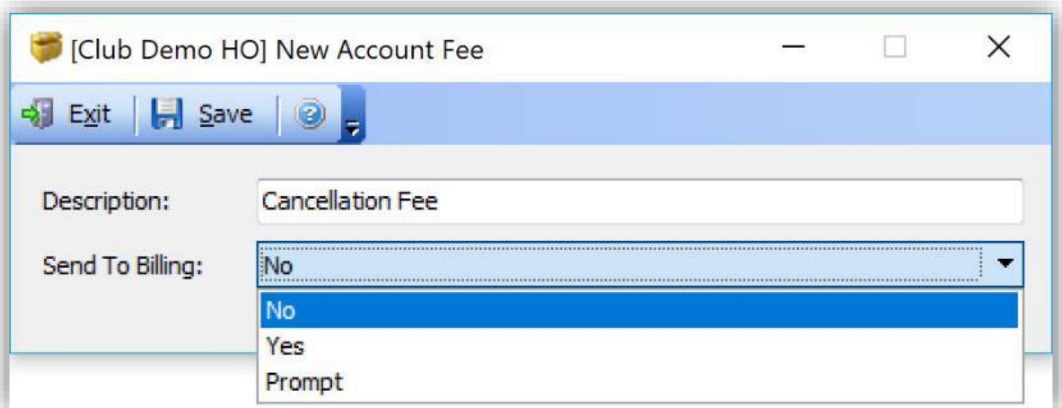
Adding a New Account Fee

Step 1. Select **Administration | Account Fees** from the navigation panel, as shown below.



Step 2. Click **Add** from the Account Fees toolbar

Step 3. The New Account Fee screen will display. Complete the details as in the example below.



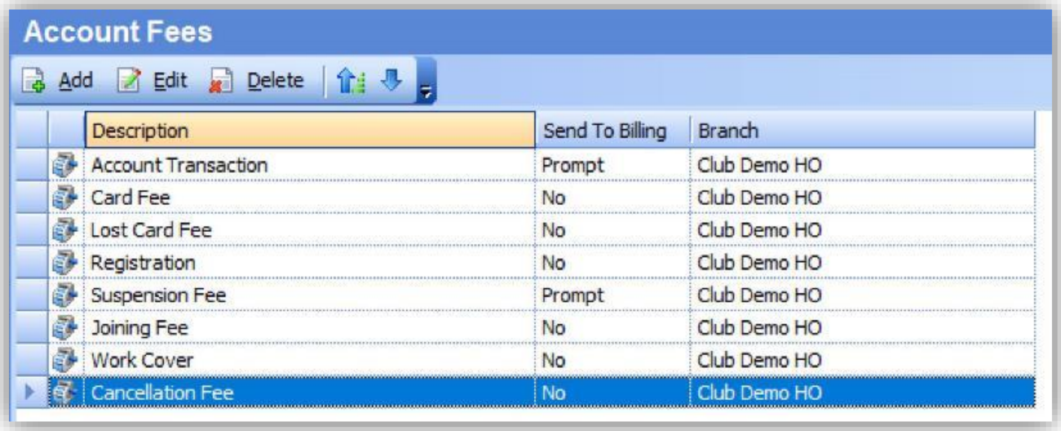
Send To Billing options:

- No, payments will not be synched to your billing company.
- Yes, payments will be synched to your billing company

- Prompt, you will be asked if you want to send the payment to your billing company.

Step 4. Click **Save** and **Exit**.

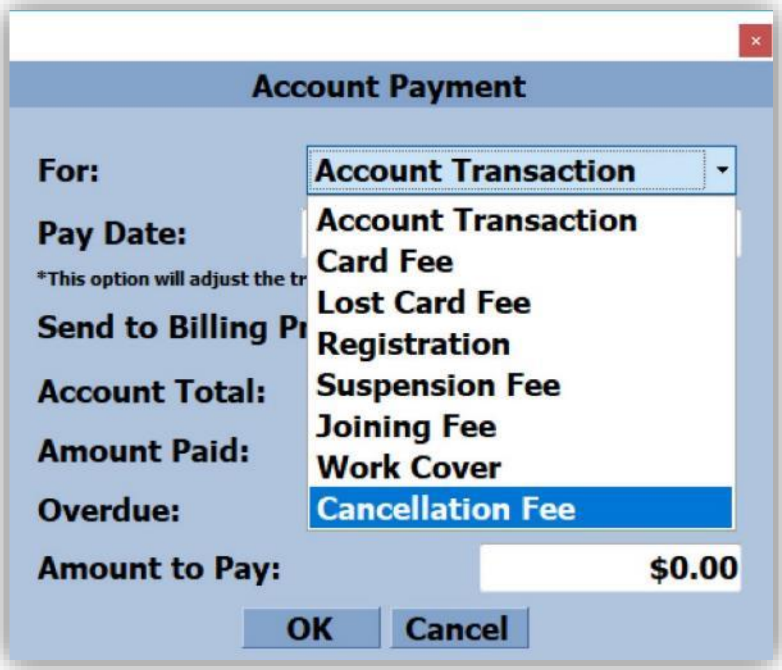
The new account fee will appear in the Account Fees list, as shown below.


Account Fees

Add | Edit | Delete

Description	Send To Billing	Branch
Account Transaction	Prompt	Club Demo HO
Card Fee	No	Club Demo HO
Lost Card Fee	No	Club Demo HO
Registration	No	Club Demo HO
Suspension Fee	Prompt	Club Demo HO
Joining Fee	No	Club Demo HO
Work Cover	No	Club Demo HO
Cancellation Fee	No	Club Demo HO

Now when you take a payment for a member via the member you will see the new fee in the drop down list. An example is shown below.



You have completed the steps required to add a new account fee in Clubware.

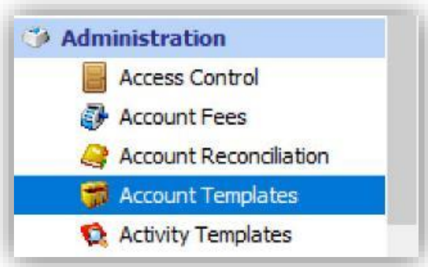
Account Templates

The following tutorials describe the most common actions associated with Account Templates.

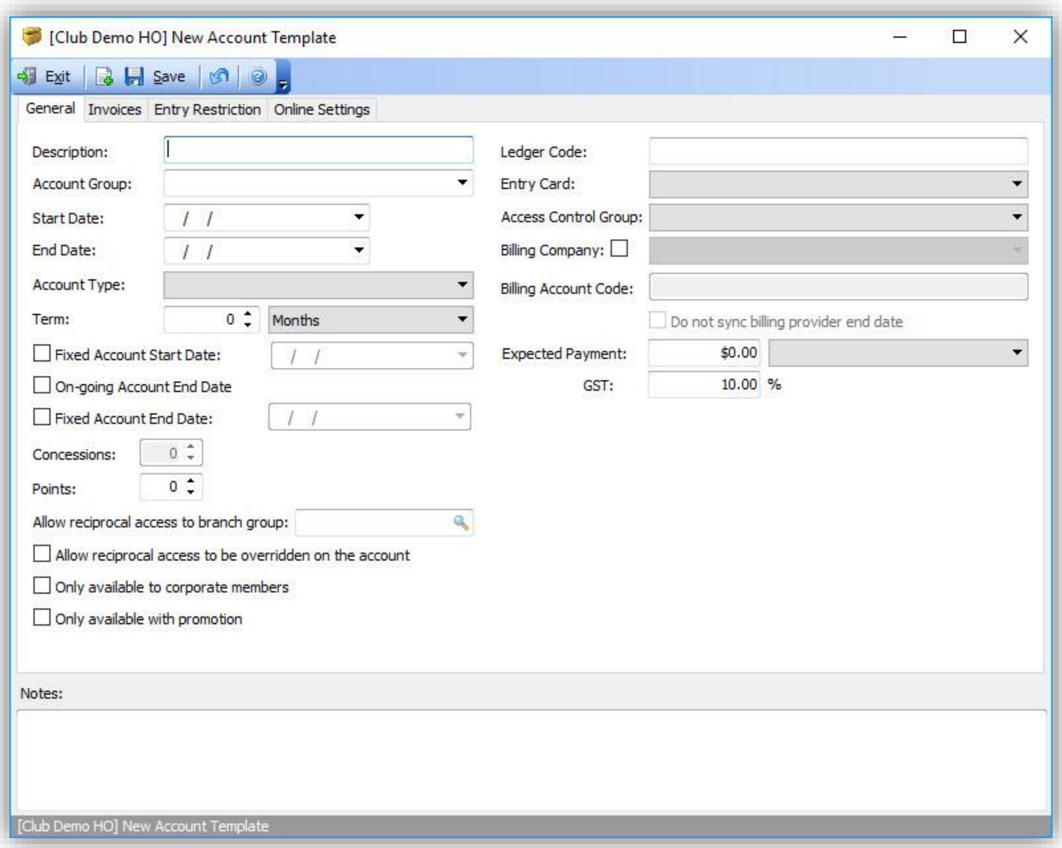
Adding an Account Template

This tutorial describes the steps required to add an Account Template within Clubware.

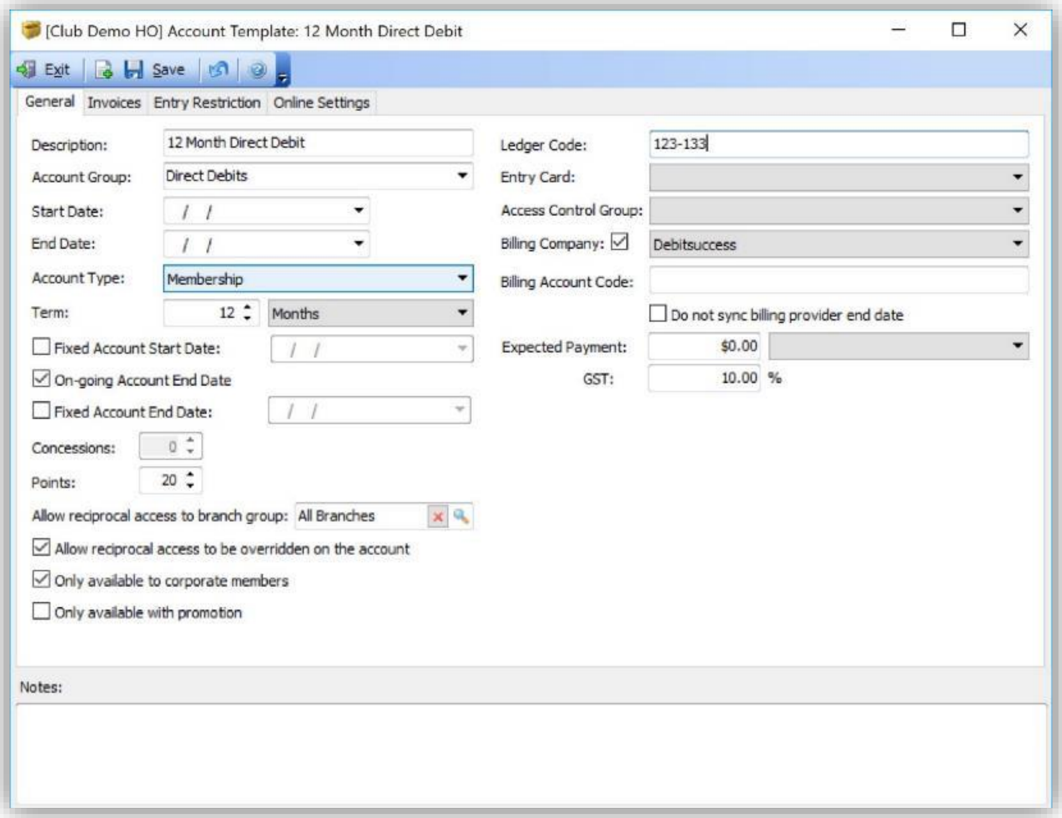
Step 1. Select **Administration | Account Templates** from the section of the navigation panel, as shown below.



Step 2. The **Account Templates screen** displays in the main panel.
Click **Add** from the toolbar.
A blank **New Account Template** screen displays.



Enter information as shown below.



Main Points:

Description: Enter a description that is meaningful and will easily identify the type of account template you are setting up.

Account Group: This feature helps organise your account templates into categories, such as Student, Senior, or Corporate.

If you wish to create a new group, type in the field and press **'Tab'.**

You can display templates by group in the Account Templates screen.

Start Date/End Date: For Promotional purposes, this feature allows controls over memberships that are short term offers. Once the end date is reached, the membership is no longer visible for sale

Account Type: Choose Membership, Concession Card or Class.

Membership: Use this for most set-term membership types, including both cash and payment-plan memberships.

Concession Card: Concession Cards are based on visits.

Use this membership type for sunbeds, spin classes etc.

If you wish to set a time limit during which all the visits on a concession card membership must be used, this must be specified in the Term field.

This note will display to prompt Clubware users to choose an appropriate end date when setting up an account using this template for an individual member.

Class: Use this account type to distinguish accounts for attending a specific class. This keeps general membership at your facility separate from enrolment in a class.

Term: Set this as the default length of membership for the account template. This can be set in days, weeks or months, for Membership, Concession or Class accounts.

Note: Term is a mandatory field and must be populated prior to saving an account template.

Fixed Account Start Date: Use this feature if the account is part of a specific program such as a 12 week challenge, which has a specific start date

Ongoing: If this membership is to be set up as either “until further notice” or “flexi”, set this option. This will allow the membership to continue after the minimum period specified, and no end date will appear in the account upon creating.

Fixed Account End Date: Use this feature if the account is part of a specific program such as a 12 week challenge, which has a specific end date

Concessions: The number of visits allowed for a concession card.

Points: The number of points the account template is worth.

Allow reciprocal access to branch group: Set member access to specific branch groups or all branches.

Allow reciprocal access to be overridden on the account: Allows a member’s reciprocal access to be adjusted on an individual basis.

Only available to corporate members: When the account template is added to a member, Clubware will prompt for the corporate member details as out lined in Corporates.

Only available with promotion:

Ledger Code: If you want to export information to an accounting package, enter the ledger code used in the Accounting package.

Entry Card: Select a preferred entry card for this account, this is recommended even if you use your own card. You do have the ability to design your own membership cards and assign them as a default for the membership types you set up.

Billing Company: If this membership will have payments processed by a billing company, check this box and select the billing provider.

Billing Account Code: Billing providers can expose codes used on their sign ups that are referenced by Clubware to map to the appropriate account template. If an account template has the matching billing provider account code then the member and account will be automatically created in Clubware (assuming no other issues are found).

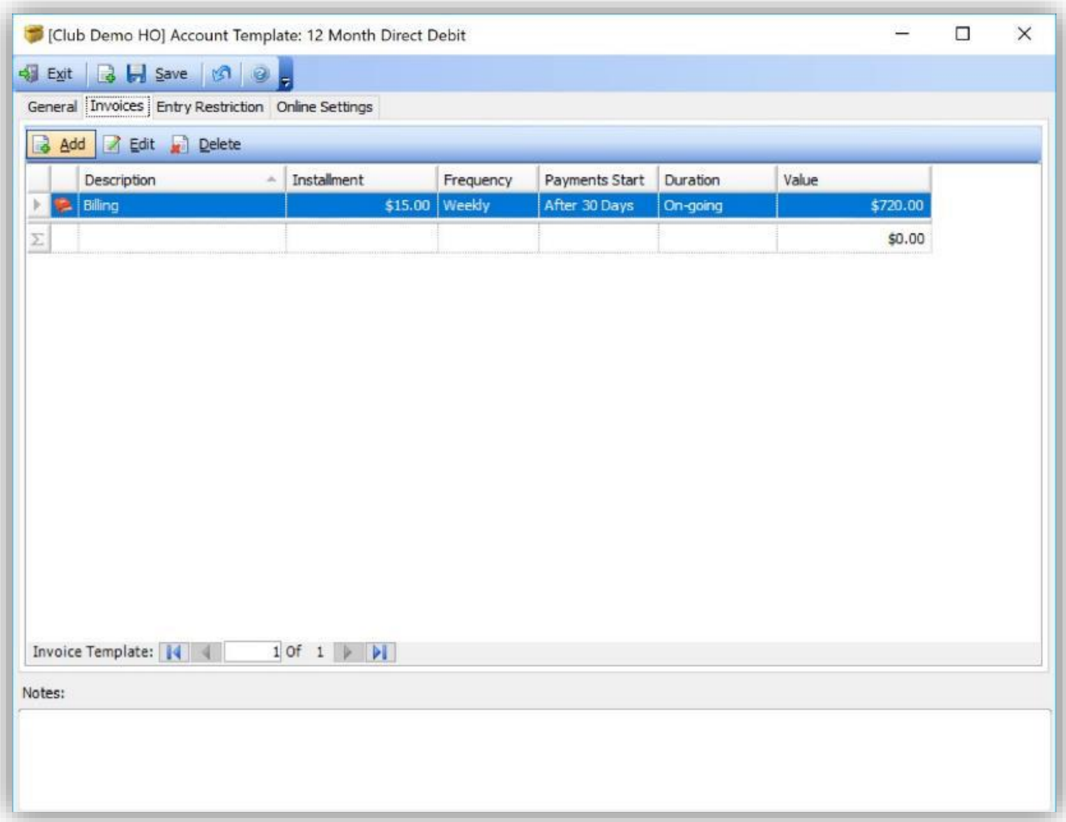
Expected Payment Amount and Frequency: You can set this to assist with reconciling the amount you should be receiving on a recurring billing account with amount that is being deducted by the billing provider.

GST: This defaults to the rate specified in the setup of your system. If necessary, reset it to the rate applicable to your location.

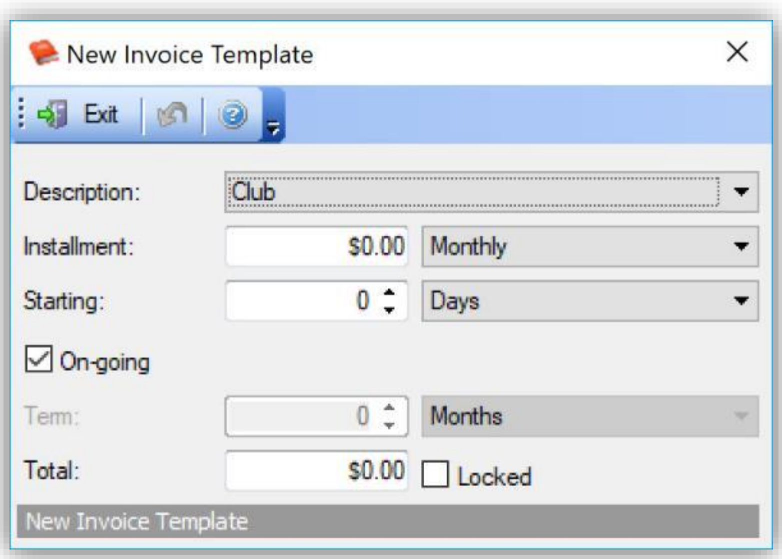
Notes: Insert special requirements, these will display when a new account is added.

Check the details are correct.
Click **Save.**

Step 3. Invoice Setup. Invoices need to be added for the Account Template. Select the **Invoices** tab. Click **Add** in the Invoice Setup section of the Account Template screen.



The screen below displays.



Clubware invoicing is designed for your facility to collect an initial payment before the membership commences, and all other payments during the term of the membership, in accordance with best practice procedure.

Main Points:

Description: Choose **Club** from the drop down menu if your facility will issue and enforce this invoice, or **Billing** if this invoice is to be issued and enforced by a billing company.

Create one invoice template for the initial club payment (if applicable), and a separate invoice template for the subsequent payments to be collected by the billing company. There is no limit to invoice templates per account template.

Instalment: Select the amount and frequency for invoicing. To invoice for one payment only, choose **One Off**.

Starting: This is the start date for invoicing, calculated as the number of days between creating a new account and billing for the first invoice.

For the initial payment, set to **'0'**.

If your facility will collect all payments at regular intervals without using a billing company, set **Starting** to'**0'**.

If you are setting up subsequent payments to be collected by a billing company, set **Starting** to allow time for financial arrangements to be made, usually set to 7 or 14 days.

Ongoing: Select this option if invoicing should continue until further notice with no finish date, as for "flexi" memberships.

Term: This will automatically calculate based on the term of the membership.

Total: This figure calculates automatically from the information entered above it. You can overwrite the total amount if required.

Add as many invoices as required for your account template.

Step 4. When your entries are complete, **Save** and **Exit** the form. **Save** and **Exit** the Account Template

You have completed the steps required to add a new account template in Clubware.

Adding Entry Restrictions to an Account Template

This tutorial describes the steps required to add entry restrictions to an account template.

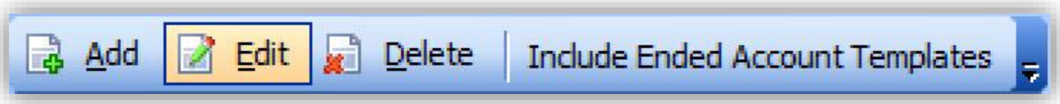
When you have added an account template (See the tutorial Adding an Account Template), the template can have visit restrictions applied to it. You can use restrictions to control when people are allowed to visit your site, as for off-peak memberships.

Restrictions can be set up for any time or zone at your site (a zone is an area within your site).

Step 1. Select **Administration | Account Templates** from the navigation panel. The Account Templates screen displays in the main panel.

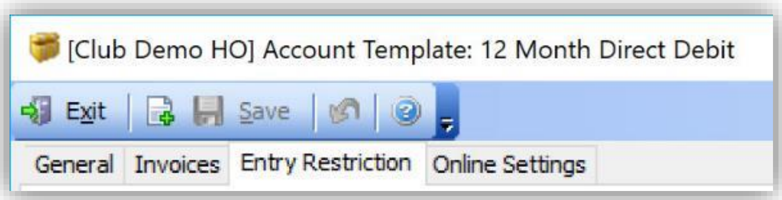
Highlight the account to which you wish to add a restriction.

Click **Edit** as shown below.

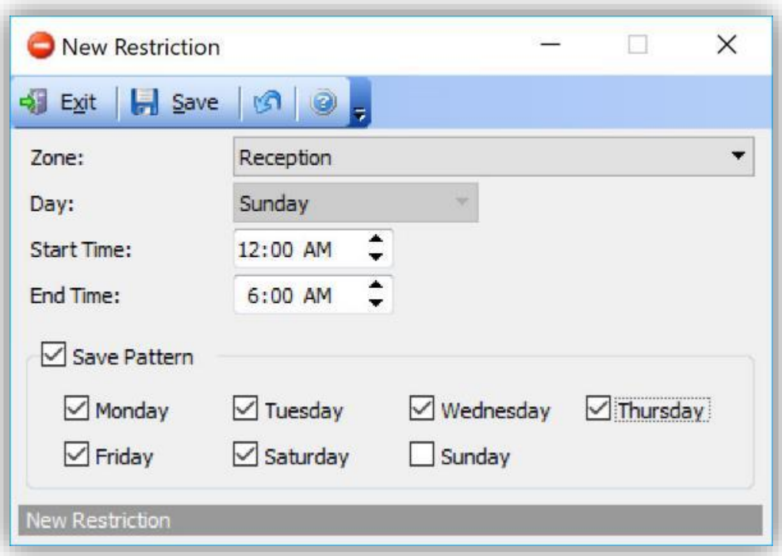


Step 2. The Account Template Screen displays.

Select **Entry Restriction**, as shown below.



Step 3. Click **Add**.
A blank **New Restriction** screen displays.
Enter information similar to the example below.



Main Points:

Zone: This is the area the restriction applies to.

Day: To create a restriction for one day only, use this to set the day, otherwise use **Save Pattern** below.

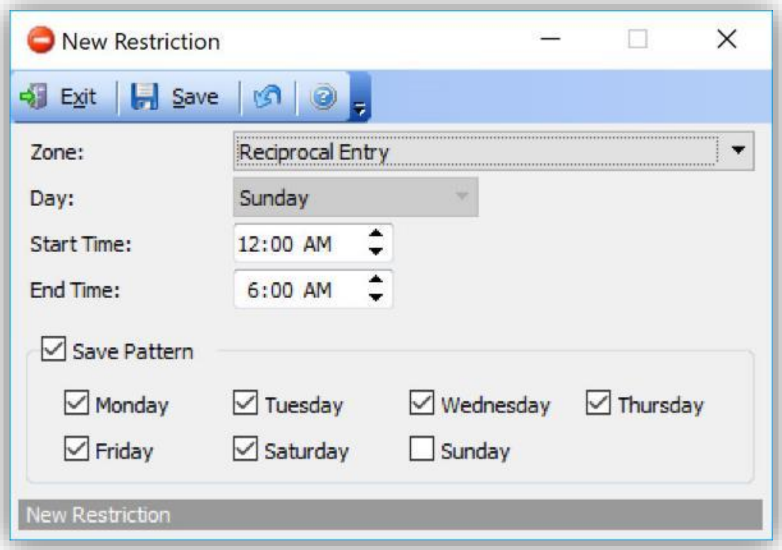
Start Time: The time the restriction starts.

End Time: The time the restriction ends.

Save Pattern: Use this option to apply a restriction to multiple days. Check the days you require.

Step 4. Save and Exit the form.

Note: If you are in a multi-branch environment you can restrict members from other centres entering your facility using the **Reciprocal Entry** restriction.



You have completed the steps required to add a restriction for an account template in Clubware.

Configuring Online Settings

This tutorial describes the steps required to configure online settings for use in the Clubware Mobile app.

Once you have added an account template (See the tutorial Adding an Account Template), online details and self-suspension conditions can be applied to it, providing members the opportunity to manage their own suspensions online. Clubware users will still have the ability to add suspensions as outlined in the tutorial Adding a Suspension for a Member's Account.

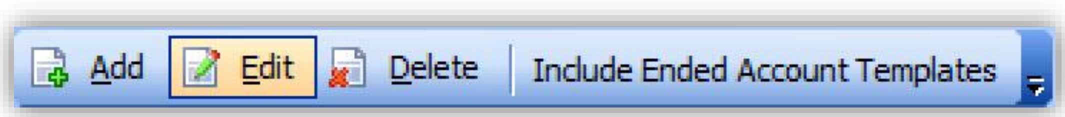
Self-suspension conditions can be applied to non-billing templates; however, any suspension fees charged will need to be collected as an invoice will be created on the member requiring payment.

Note: Billing suspensions will still apply as outlined by billing providers. Pease check with Clubware Support or your billing provider if suspensions are applied pro rata or in line with the billing cycle.

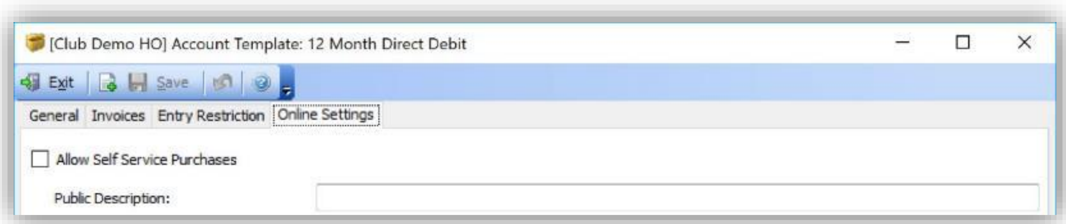
Step 1. Select **Administration | Account Templates** from the navigation panel. The Account Templates screen displays in the main panel.

Highlight the account to which you wish to add the self-suspension conditions.

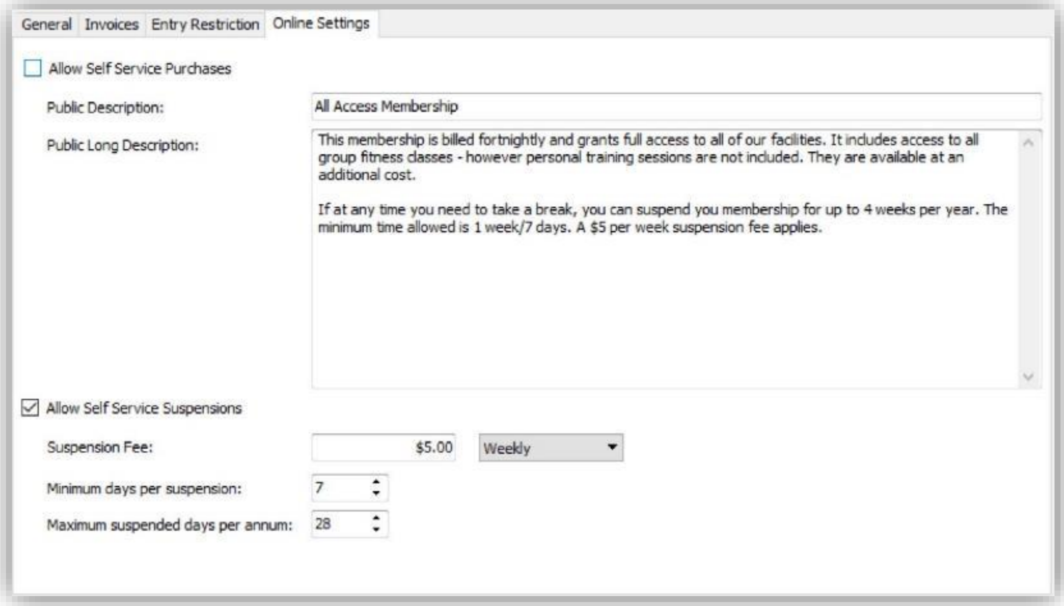
Click **Edit** as shown below.



Step 2. The Account Template Screen displays. Select **Online Settings** as shown below.



Step 3 Enter information similar to the example below



Main Points:

Allow Self Service Purchases: Allows Concession Card Account Templates to be purchased online. The Account Template must have an invoice with a One Off frequency.

Public Description: Member facing account description. This may be different to the actual account template name in Clubware.

Public Long Description: This can contain all the information pertaining to the membership and the suspension rules.

Allow Self Suspensions: Allows members to apply suspensions through the member portal.

Suspension Fee: The cost of a suspension. These can be configured based on standard billing cycle.

Minimum days per suspension: Minimum number of days a suspension can be applied for.

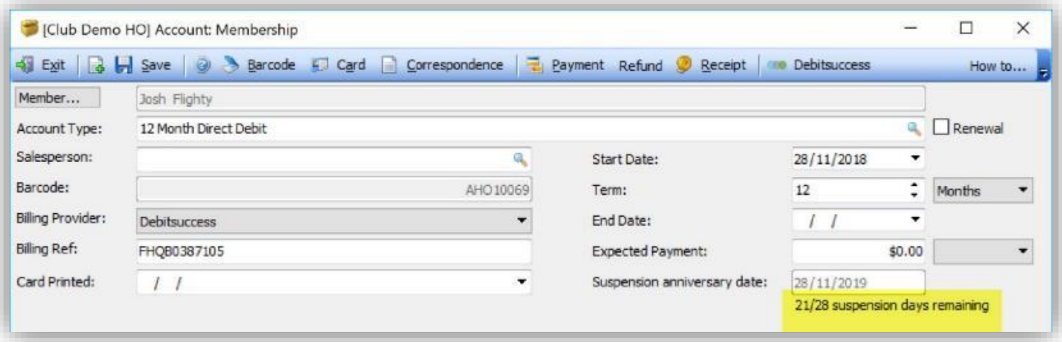
Maximum suspended days per annum: How many days per 365 day period a member can be suspended for. This information will display on the members account.

Notes: Use this option to add additional internal notes for all staff

Step 4. Save and Exit the form.

Note: When you apply these settings, all members with this account will display a new field showing the number of days used in the suspension period and the date the number of days available will renew. This field updates for all methods of applying a suspension.

It will however only refresh the number of days to the maximum per annum, ignoring any still available from the previous year period.



You have now completed the steps required to configure Online Settings for the Clubware mobile app.

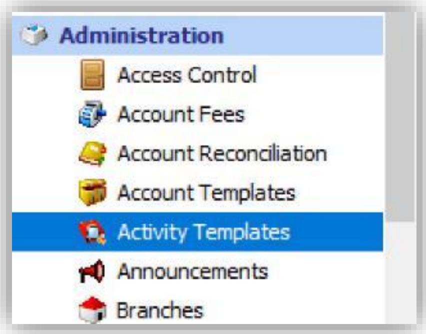
Activity Templates

Adding an Activity Template

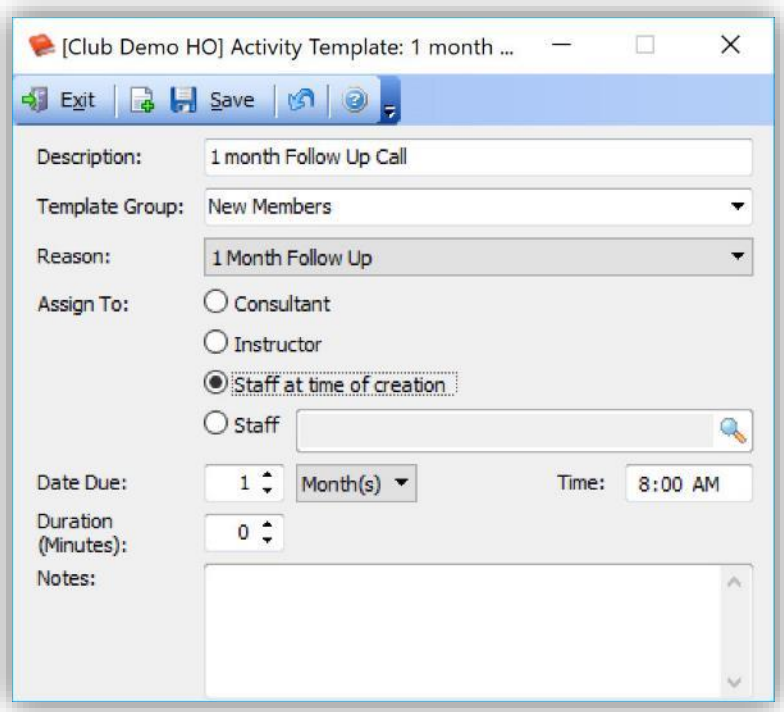
This tutorial describes the steps required to add an activity template in Clubware.

Step 1. Select **Administration | Activity Templates** from the navigation panel, as shown below.

The Activity Template screen displays in the main panel.



Step 2. Select Add from the toolbar as shown above
A new Activity Template screen displays
Enter information similar to the example below



Main Points:

Description: The name that will appear on the Administration **|** Activity Template screen, this will generally be related to the activity reason.

Template Group (Optional): If you want to add multiple activity templates to a member at the same time add a template group name, once it has been added and saved against an activity template it will be available in the drop down.

Reason: This is the reason for the activity.

Assign To: This determines which staff member the activity will be assigned to at the time the activity is created against the member. If the specified staff member has been deleted from Clubware then the activity will be assigned to the logged in staff member at time of creation.

You have completed the steps required to add a new activity template in Clubware.

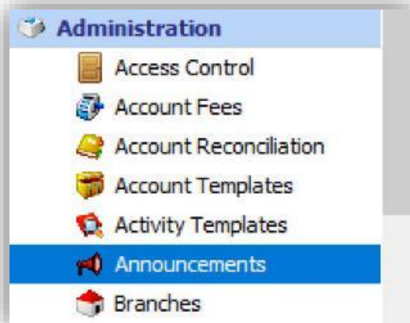
Announcements

Adding an announcement

This tutorial describes the steps required to add an announcement in Clubware.

Step 1. Select **Administration | Announcements** from the navigation panel, as shown below.

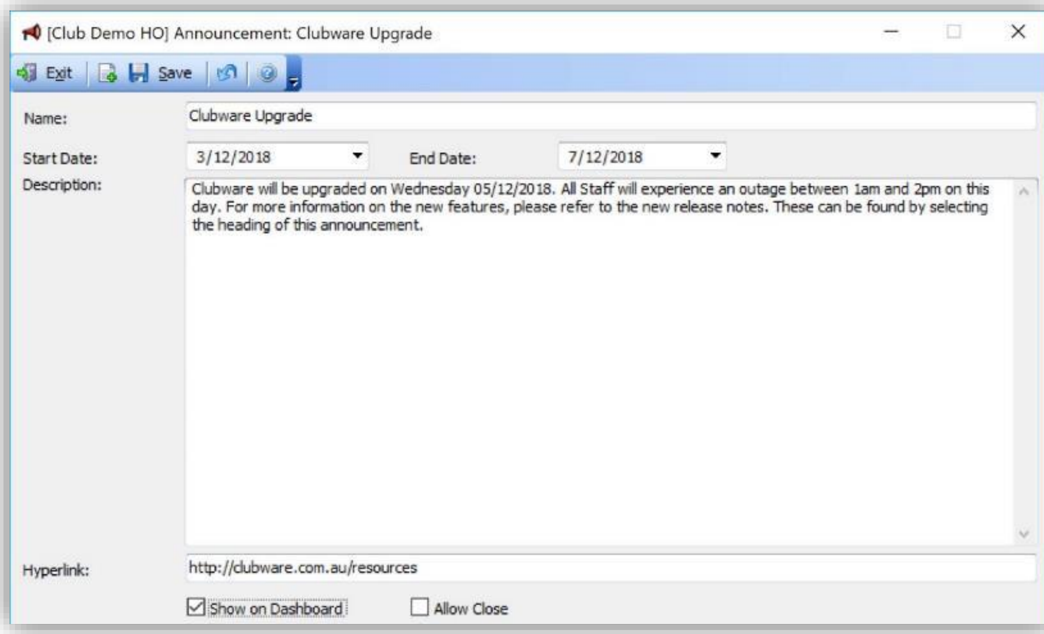
The **Announcement** screen displays in the main panel.



Step 2. Select **Add** from the toolbar, as shown above

A **New Announcement** displays.

Enter information as shown.



Main Points:

You do not need to complete all fields.

Name: Enter the title of the announcement here

Start Date: Start date for the announcement to be visible in the My area.

End Date: End date for the announcement to be visible in the My area.

Description: Details of the announcement

Hyperlink: Website or shared folder paths can be added

Show on Dashboard: The announcement will display in My Area

Allow Close: Allows staff to close the announcement once they have read the details.

Step 3. Click **Save**.

You have completed the steps to add an announcement in Clubware

Branches

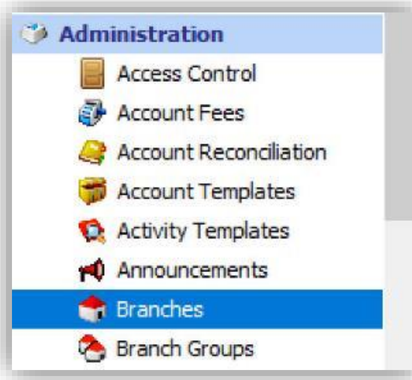
Adding Branches

This tutorial describes the steps required to add a branch in Clubware.

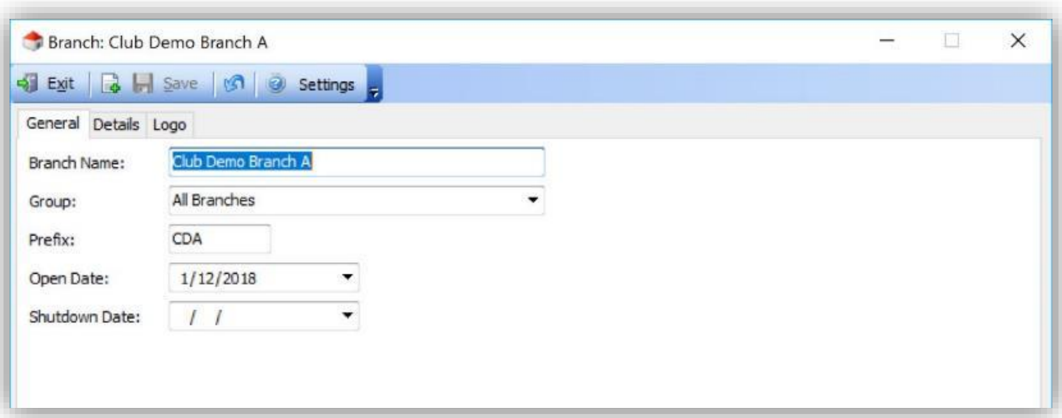
Please contact Clubware Support if an additional branch is required or an existing branch name needs to change as the Clubware licensing is based on the branch name and you may be unable to log in to Clubware if changes are made.

Step 1. Select **Administration | Branches** from the navigation panel, as shown below.

The **Branches** screen displays in the main panel.



Step 2. Select **Add** from the toolbar, as shown above.
A **New Branch** screen displays.
Enter information as shown below.



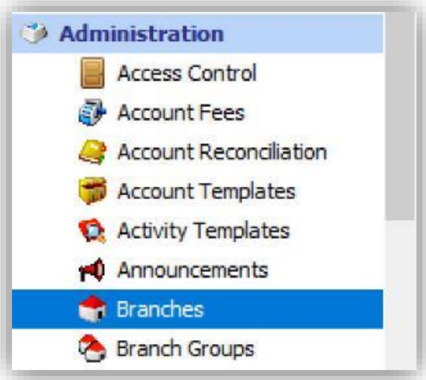
Step 3. Save and Exit the New Branch screen.

You have completed the steps required to add a new branch in Clubware.

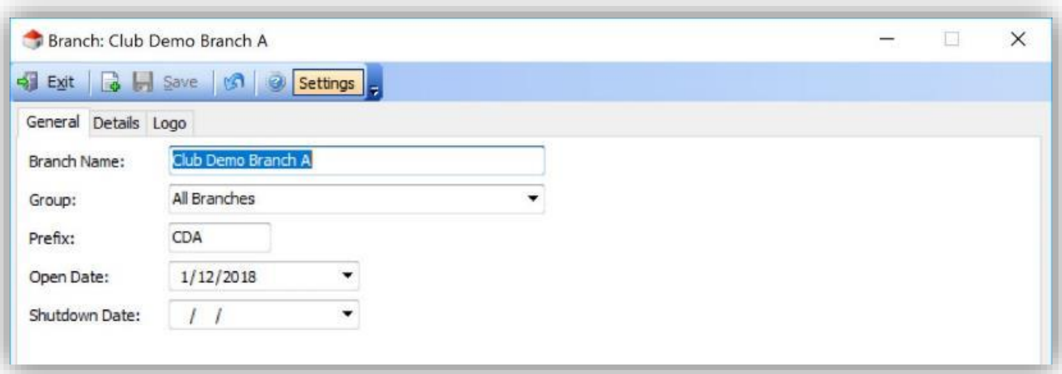
Configuring Branch Settings

This tutorial describes the steps required to configure branch settings in Clubware.

Step 1. Select **Administration | Branches** from the navigation panel, as shown below**.** The **Branches** screen displays in the main panel.



Select the Branch you wish to configure and the **Edit**. The select **Settings** from the Branch toolbar.



Main Points:

Branch Name: Enter the full Branch name here.

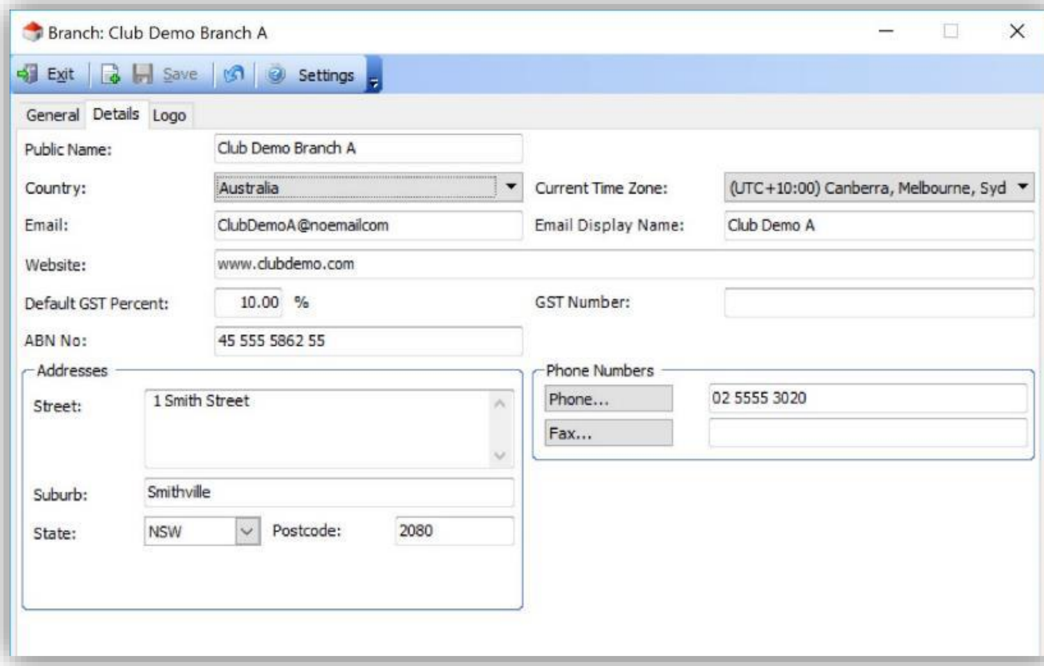
Group: Indicates which branch groups the branch belongs to.

Prefix: A club prefix will be added to assist with creation of barcodes.

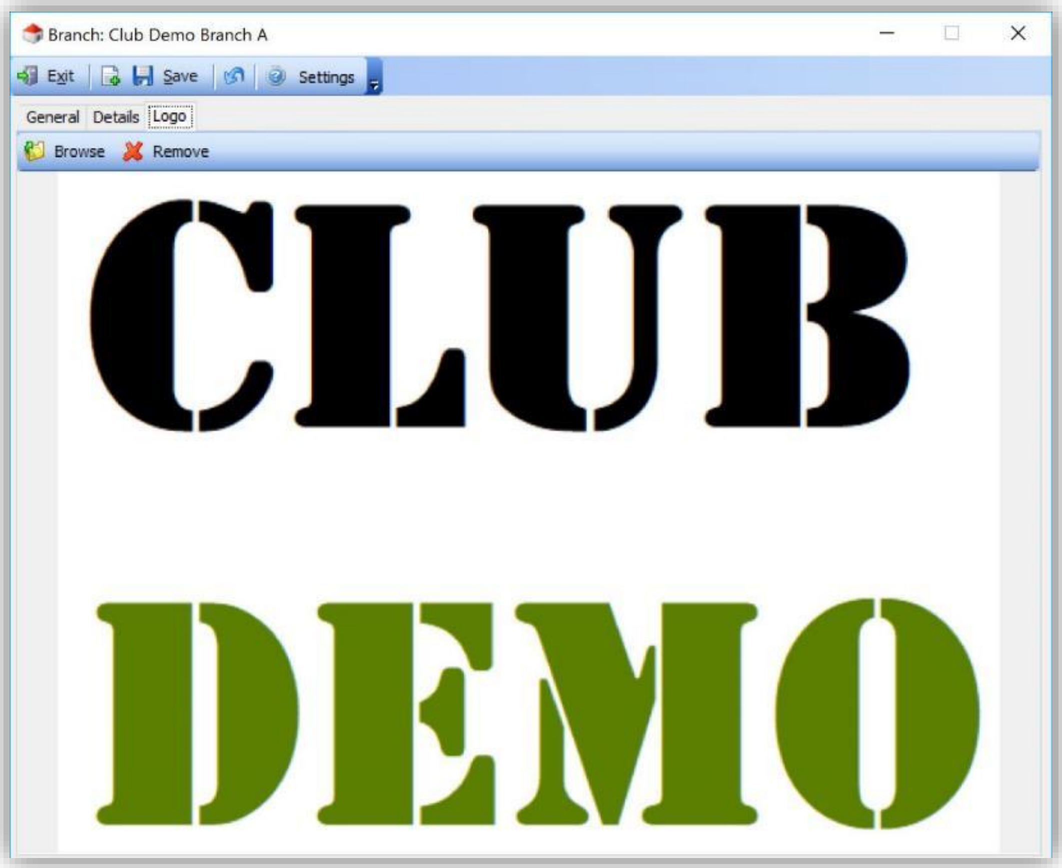
Open Date: This information denotes when the facility closed.

Shutdown Date: This information denotes when the facility closed.

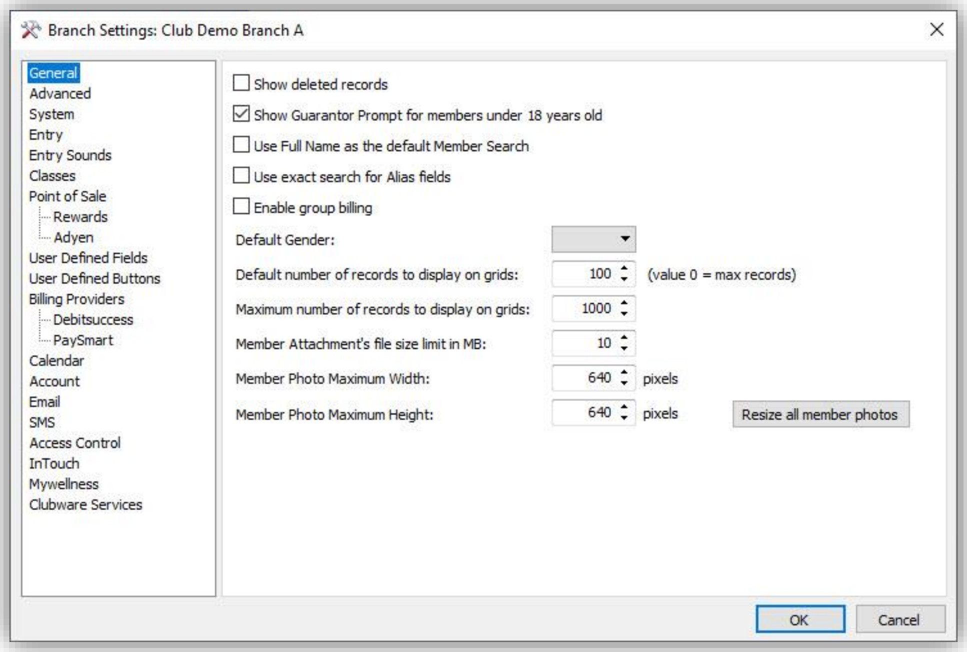
Step 2. Select the **Details** tab and enter the facility details, as shown below.


Branch: Club Demo Branch A
Exit
Save
Settings
General
Details
Logo
Public Name:
Club Demo Branch A
Country:
Australia
Current Time Zone:
(UTC+10:00) Canberra, Melbourne, Syd
Email:
ClubDemoA@noemailcom
Email Display Name:
Club Demo A
Website:
www.clubdemo.com
Default GST Percent:
10.00
%
GST Number:
ABN No:
45 555 5862 55
Addresses
Street:
1 Smith Street
Suburb:
Smithville
State:
NSW
Postcode:
2080
Phone Numbers
Phone...
02 5555 3020
Fax...

Step 3. Select the Logo tab and add the facility logo by browsing the applicable files. If the image is incorrect, select remove and browse to find the correct image.



Step 4. Select **Settings** from the toolbar. The Settings screen displays as shown below. The **General** details section is the default view.



Main Points:

General: (Default View) This includes settings for how member information will appear within Clubware. There are also some administrative options available.

Advanced: This includes settings for how information from other branches will appear within Clubware. There are also some administrative options available. Can be restricted by Security policies.

System: This is where the backup path is set. **Maintenance can be manually run from this tab.** Can be restricted by Security policies.

Entry: This information defines how the arrivals are configured to operate within Clubware.

Entry Sounds: Sounds for alerts can be set from this section.

Classes: This is where you can change options regarding the classes booking tickets

Point Of Sale: In this section, you can determine how the Point of Sale operates within Clubware. Clubware Rewards and EFTPOS integration can also be configured in this area.

User Defined Fields: These are the fields that display within the members **Details** tab. The names of the fields can be customised as per user requirements. Can be restricted by Security policies.

User Defined Buttons: Within Clubware, you can create customised buttons to external applications.

Billing Providers: This information is used when synchronising with a billing company. Can be restricted by Security policies.

Calendar: Select your sites opening hours, and default calendar time scale units.

You can then create and maintain staff rosters, display rosters for staff in Calendar views, and check for staff availability when adding a booking.

Account: Adjust settings for both accounts and account templates.

Email: Set up the connections and requirements for sending email with Clubware.

SMS: This feature enables you to utilise the SMS\MMS facility using a Clubware approved SMS Provider. Contact your Clubware Account Manager to set up this option.

Access Control: This feature allows you to integrate with approved access control hardware and software.

InTouch: This feature allows you to integrate with InTouch Follow up software.

Mywellness: This feature allows you to integrate with Technogym Mywellness.

Clubware Services: Holds the credentials for Clubware Licencing and Online Bookings.

Salesforce: This feature allows you to integrate with Salesforce CRM interface.

Step3. Once you have made the appropriate changes, select OK. You will be prompted to restart Clubware for these changes to take effect. Restart Clubware.

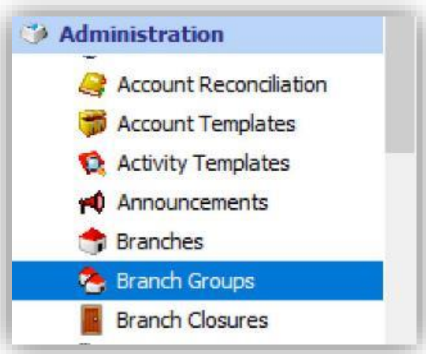
You have completed the steps to Configure Branch Settings in Clubware.

Branch Groups

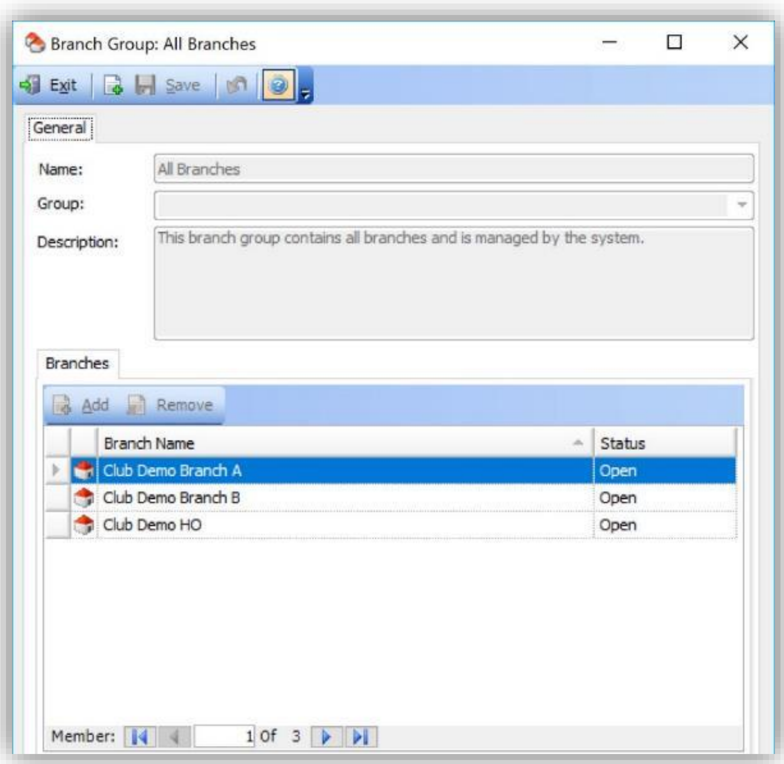
Adding Branch Group

This tutorial describes the steps required to add a branch group.

Step 1. Select **Administration | Branch Groups** from the navigation panel, as shown below. The **Branch Groups** screen displays in the main panel.



Step 2. Select **Add** from the toolbar.



Main Points:

Name: The name of the branch Group (e.g. Western Clubs)

Group: An optional grouping/classification of the branch group.

Description: General notes about this branch group

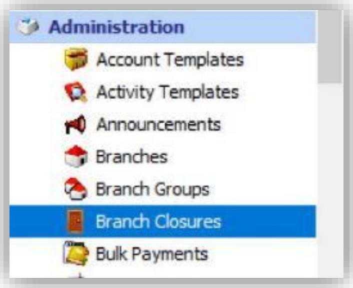
Branches: Add the individual branches associated with this group

You have completed the steps to create branch groups in Clubware.

Branch Closure

Adding Branch Closure

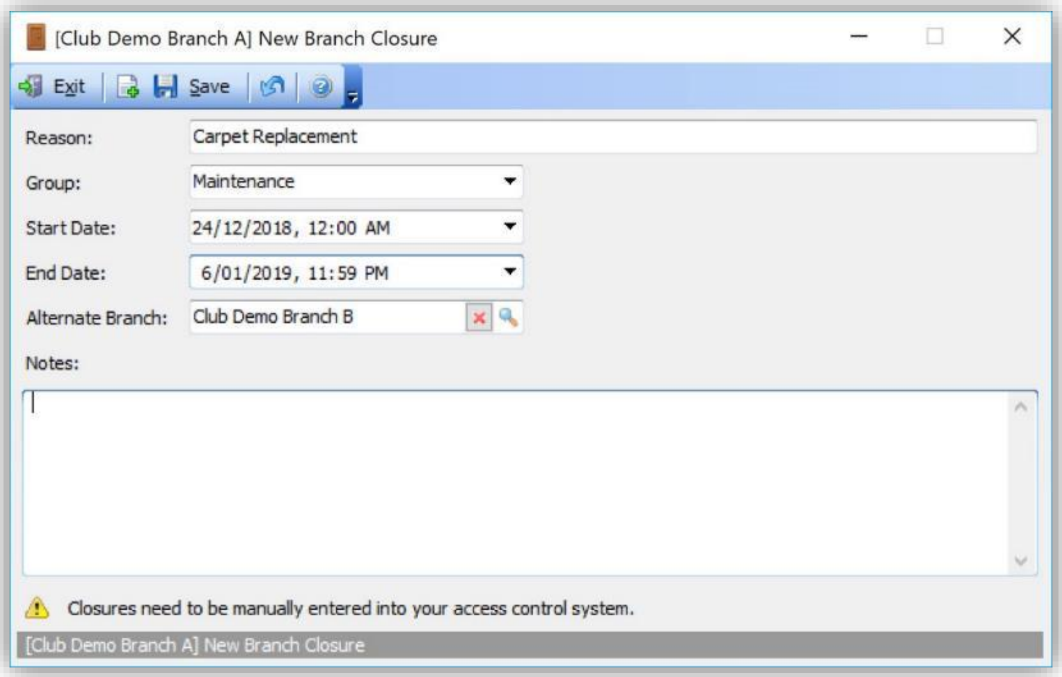
This tutorial describes the steps required to add a branch closure. This is for temporary closures. For permanent closures, see the tutorial Adding Branches.



Step 1. Select **Administration | Branch Closure** from the navigation panel, as shown below.

The **Branch Closures** screen displays in the main panel.

Step 2. Select **Add** from the toolbar. The new Branch Closure box opens, as shown below.



Main Points:

Reason: The reason why the branch is closing down (e.g. General Maintenance)

Group: An optional grouping/classification of the closure.

Start Date: The date and time that the closure will commence.

End Date: The date and time the closure will finish

Alternate Branch: The branch that any member who has access to this current branch can visit in lieu of this branch closing down. Note: When using an integrated access control system, please be sure to set up the closure of the doors/barriers manually for the current branch

Notes: Any notes about the closure that Clubware users can refer to.

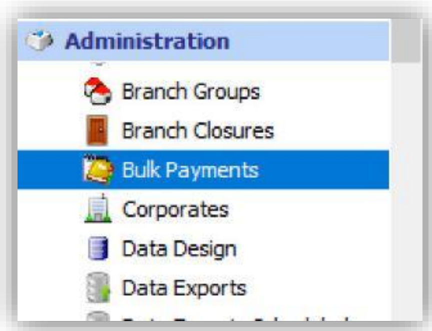
You have completed the steps to add a branch closure in Clubware

Bulk Payments

The following tutorials describe the most common actions associated with Bulk Payments.

Processing Bulk Payments

Bulk payments can be used for adding payments to members in bulk. This process is used for clients who wish to manage their own billing.



+

For example:
Opening individual members' accounts and adding a payment would be very time consuming.

Bulk Payments allows you to add payments to multiple members in one easy process.

There are two ways to process bulk payments.

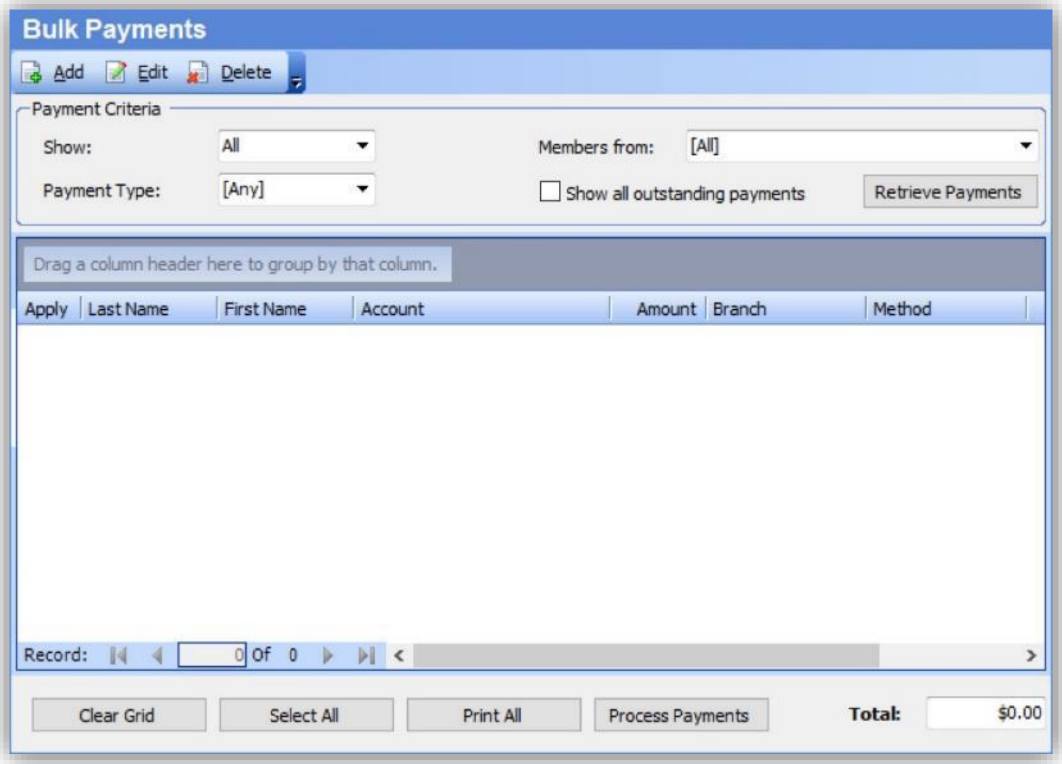
> **Retrieve Payments:** This will retrieve a list of members who are due, or overdue for a payment.
>
> **Manually add payments**. This allows you to add payments for individual members.

Both methods are described below.

Retrieve Payments

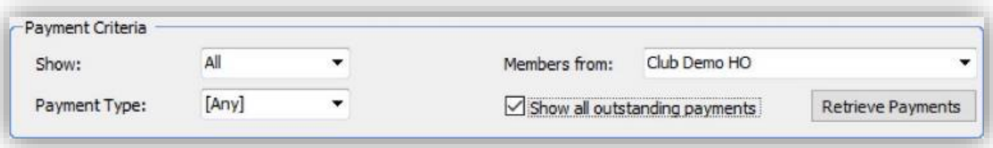
Step 1. Under the Financials tab on the members account, the payment type should be set to **Automatic Payment**, or **Direct Debit**.

Step 2. Select **Administration | Bulk Payments** from the navigation panel.
The screen below displays.



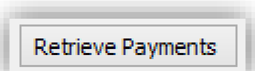
Step 3. Select -

- Membership status from the **Show** list.
- A facility from the **Members from** list.
- The **Payment Type** from the drop down menu.
- For this example, select **Direct Debit** as shown below.
  (Active memberships from Metro Fitness are shown in the example below).

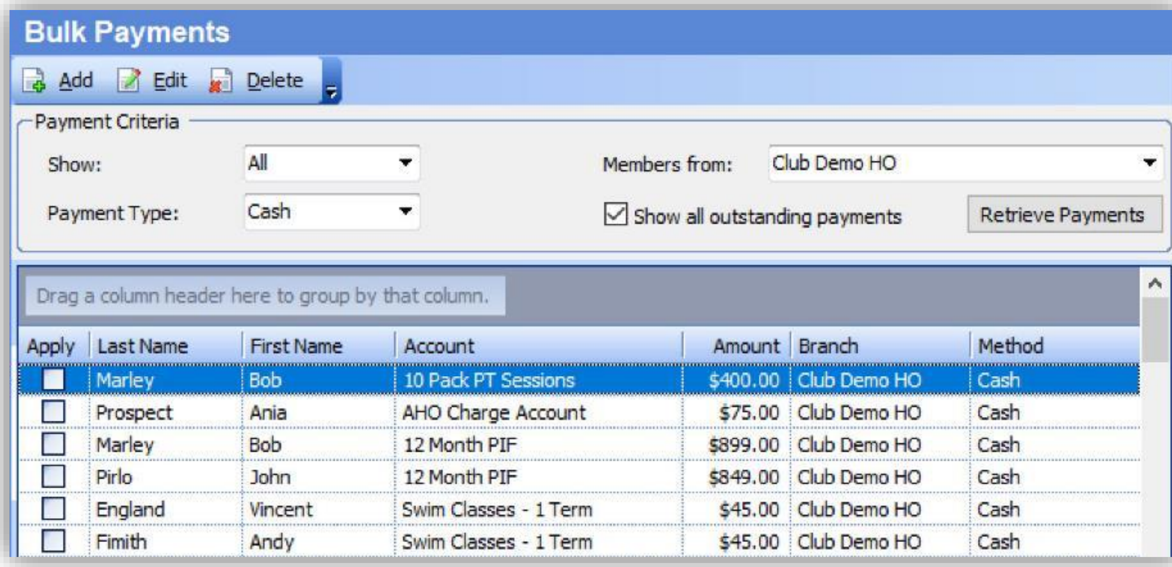


Click **Show all outstanding payments** to show all overdues on the screen.

Click **Retrieve Payments** as shown below.



Step 4. Members in your system due to make a payment of the type you selected, will display on the screen as shown below.

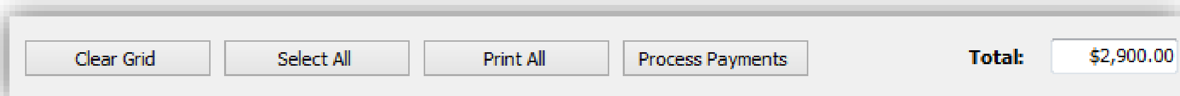


Step 5. To apply the payments on the screen, either -

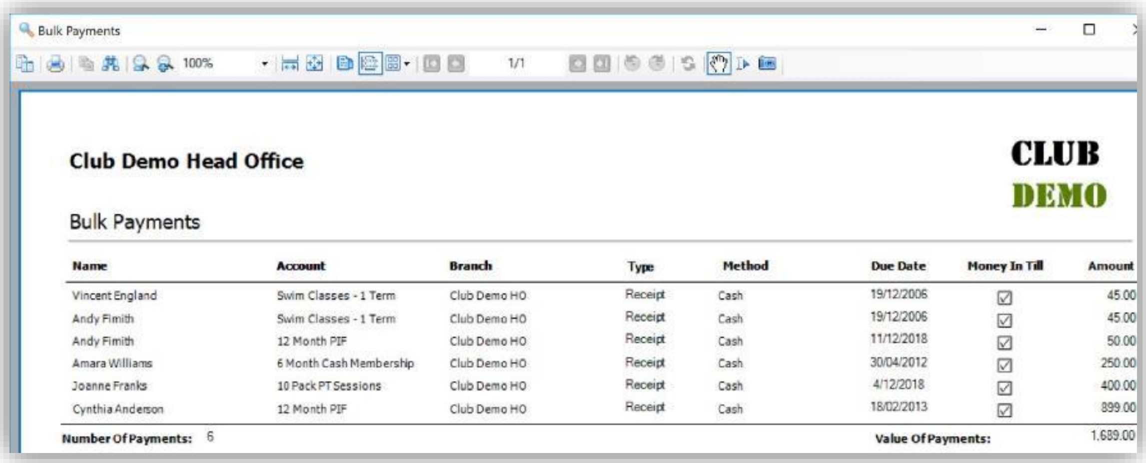
Click the **Select All** button on the bottom of the screen, or
Check the **Apply** checkbox for the individual members you want to apply payments for.

Step 6. Select the members to process a payment for.

Click **Process Payments** as shown below.
This will post all payments on the screen to the selected members.



The screen below displays.



Club Demo Head Office

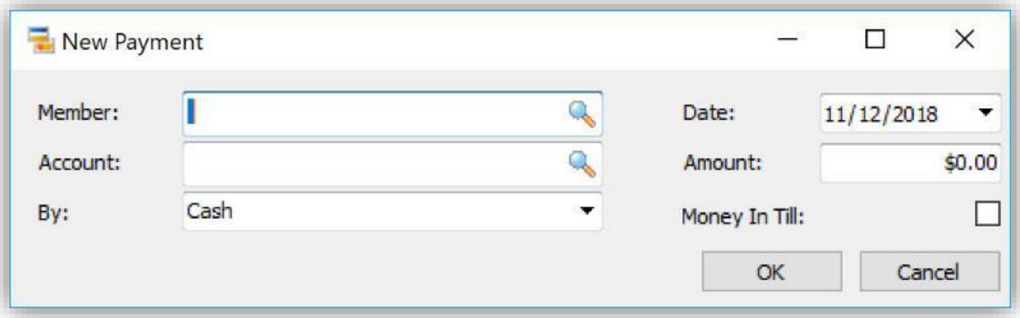
Bulk Payments

Name	Account	Branch	Type	Method	Due Date	Money In Till	Amount
Vincent England	Swim Classes - 1 Term	Club Demo HO	Receipt	Cash	19/12/2006	☑	45.00
Andy Fimith	Swim Classes - 1 Term	Club Demo HO	Receipt	Cash	19/12/2006	☑	45.00
Andy Fimith	12 Month PIF	Club Demo HO	Receipt	Cash	11/12/2018	☑	50.00
Amara Williams	6 Month Cash Membership	Club Demo HO	Receipt	Cash	30/04/2012	☑	250.00
Joanne Franks	10 Pack PT Sessions	Club Demo HO	Receipt	Cash	4/12/2018	☑	400.00
Cynthia Anderson	12 Month PIF	Club Demo HO	Receipt	Cash	18/02/2013	☑	899.00

Number Of Payments: 6 Value Of Payments: 1,689.00

Adding Manual Payments

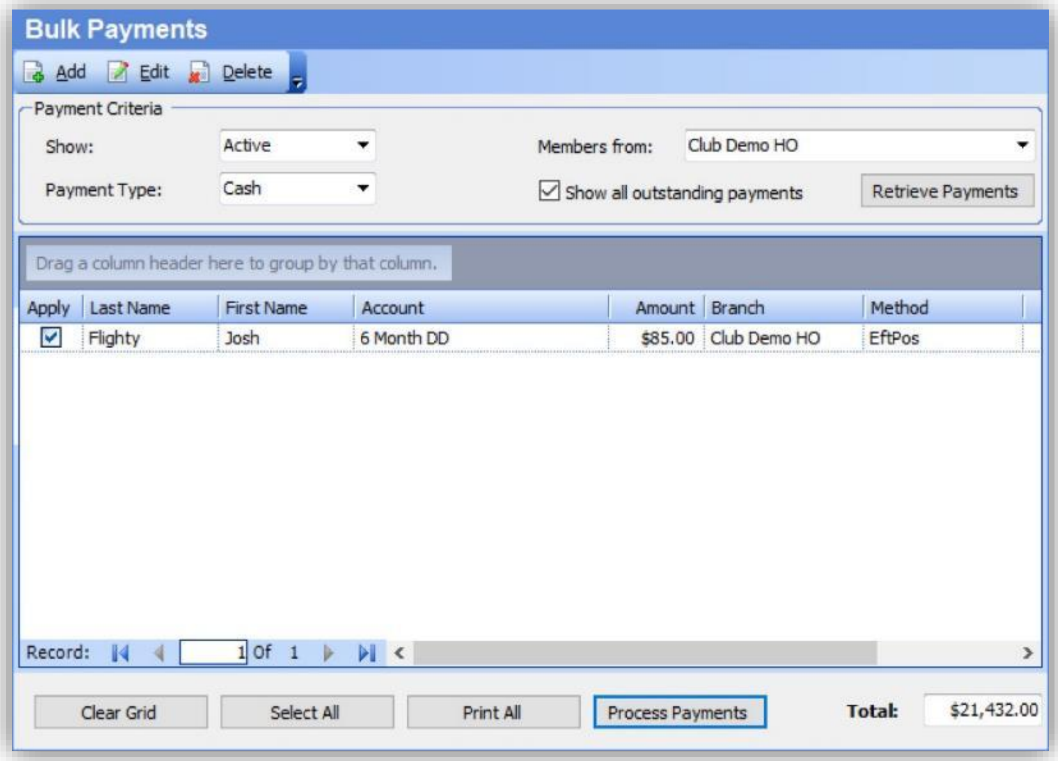
Step 1. Click Add in the Bulk Payments Screen.
The New Payment screen displays.



Step 2. Select **Member** required, using the drop-down menu.
Select **Account**, using the drop down menu.
Insert **Amount**. An example is shown below.

Click **OK.**

Your selection will display in the Bulk Payments screen as shown below.
You can add several members manually.



Step 3. Click **Process Payments** .
The listed members accounts will update in bulk.

If you check the **Money in Till** box the transaction will be added to your **Payment Z Off** report and the funds will be included in the end of day balancing.

You have completed the steps required to process bulk payments in Clubware.

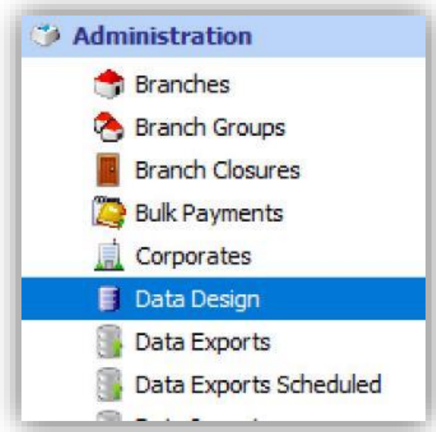
Data Design

Data Design allows you to create and save views of your data for use with reports and correspondence.

The following tutorials describe the most common actions associated with Data Design.

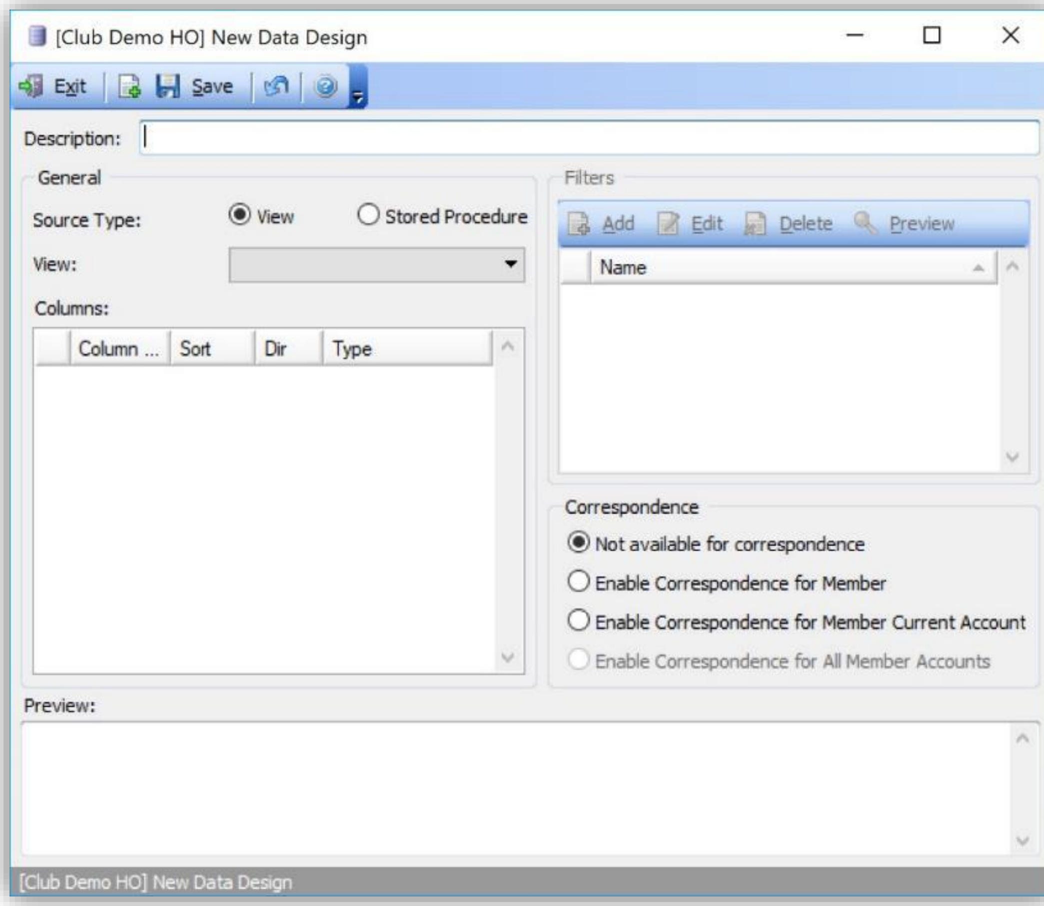
Adding / Editing a Data Design

Step 1. Select **Administration | Data Design** from the navigation panel, as shown below.



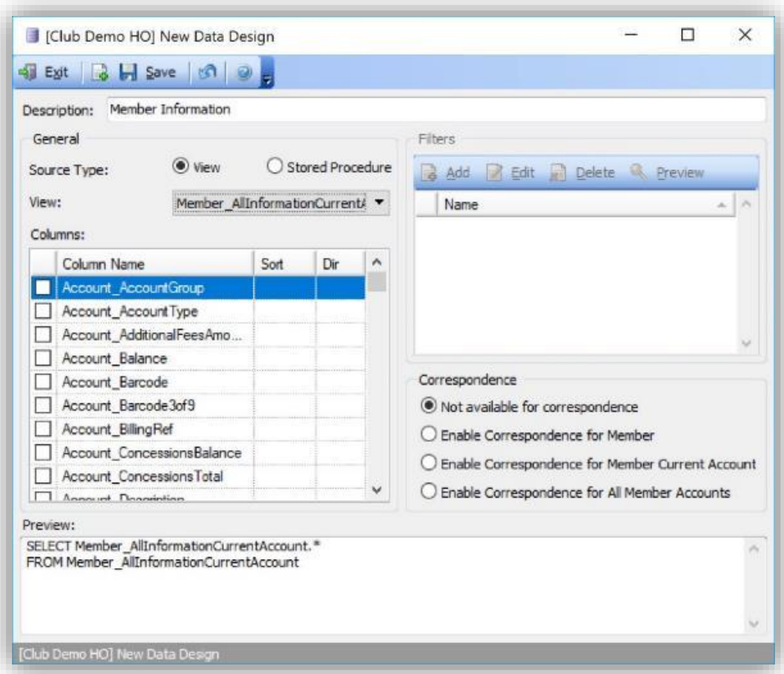
Step 2. The Data Design screen displays in the main panel.
Click **Add from** the toolbar.

A **New Data Design** screen displays. The Source Type should be set to view.



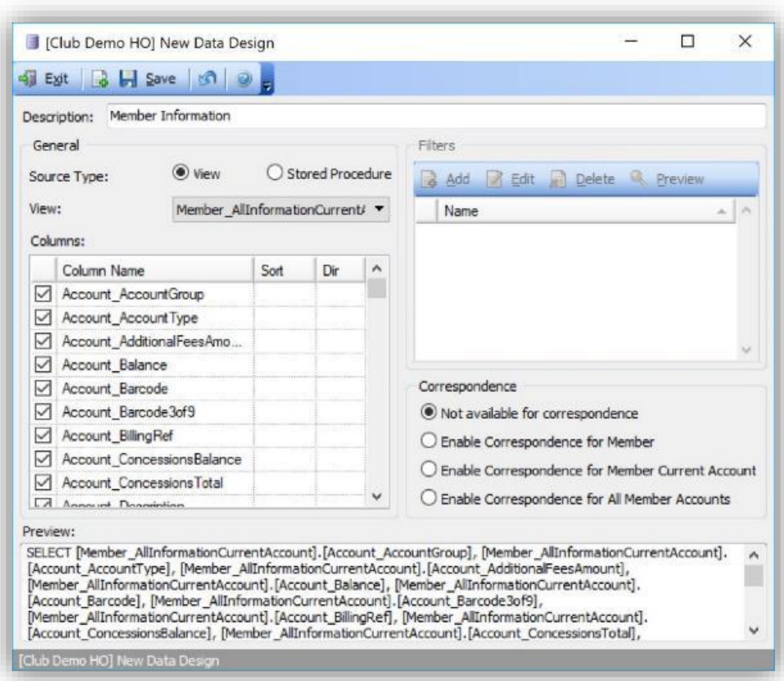
Step 3. Enter the name of the new Data Design in the **Description** field.
This enables you to identify your Data Design when required.

Step 4. Select an available **View** as a starting point.
Views are lists of data that can be used as starting points for Data Designs.
For information about creating a new view, see the tutorial Adding a View to a Data Design.
For this example, select **Member_AllInformationCurrentAccount**.
The **View Columns** for the selected view display in the list, as shown below.



Note: You can also create new views.
See the tutorial Adding a View to a Data Design for more information.

Step 5. Select the Columns required to display in your report or correspondence.

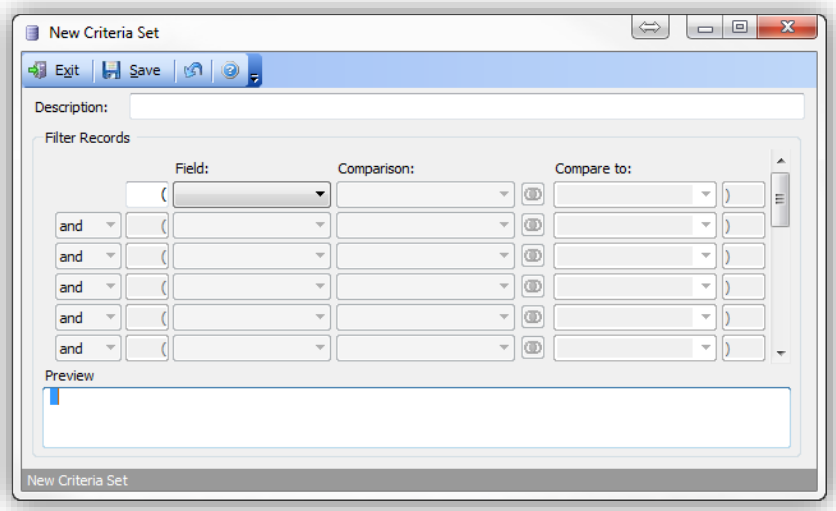


In the above example, FirstName, FullName, FullNameAndTitle, Gender have been selected.

Step 6. When **Base View** and **View Columns**, have been selected,
add **Filter Criteria** to your data design.
This allows the selected data to be filtered.

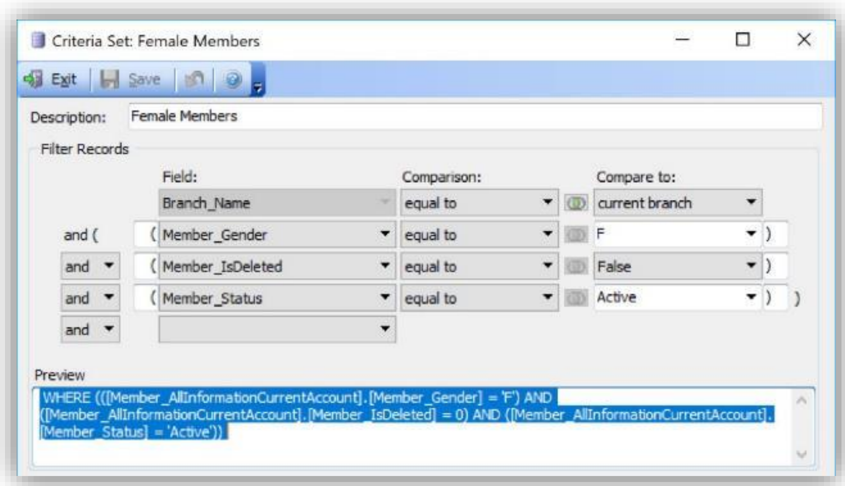
In this example we only want to see members whose Last Name starts with ‘F’. (See illustration in Step 8).
Click **Save** at the top of the Data Design screen to save your work and enable the Filter Criteria toolbar.

Step 7. Click **Add** in the Filter Criteria toolbar.
The screen below displays.



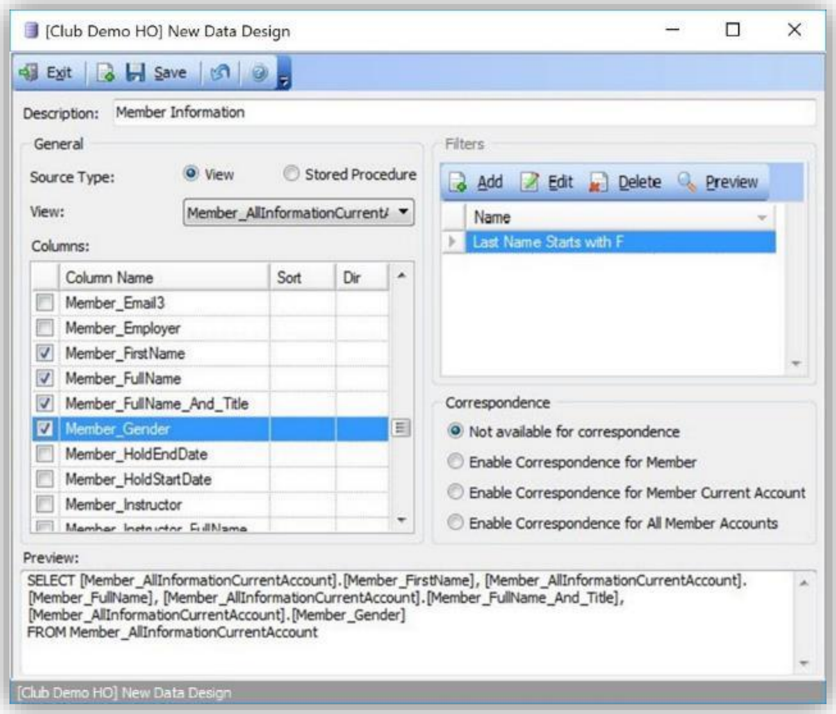
Step 8. A **Filter Criteria** set can contain many filters in one set.

For this example we are locating only members whose last name begins with ‘F’. Enter the Description, Field, Comparison and Compare to, as shown below.



Step 9. Save and **Exit** the Criteria Set screen.

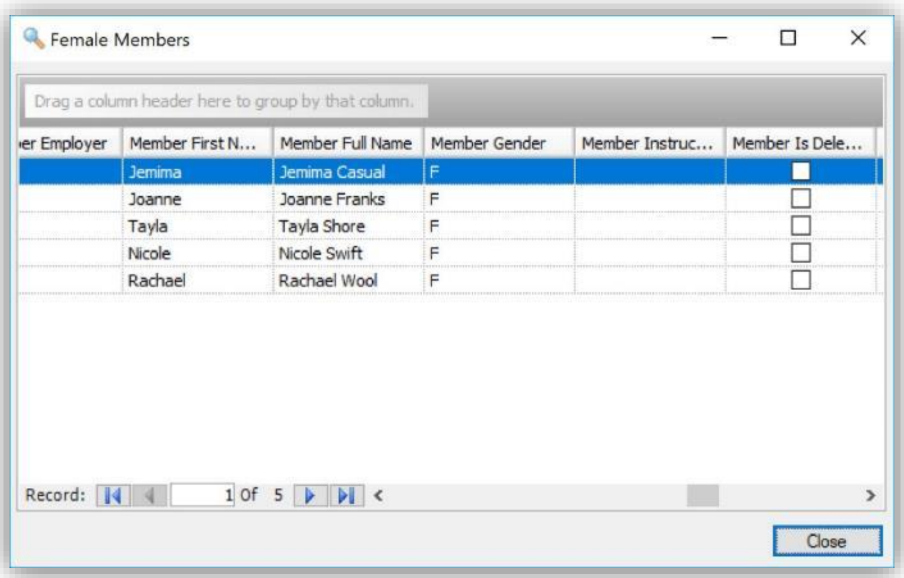
The Data Design screen displays as shown below.



Step 10. You can add more Filter Criteria by repeating the steps above.

Click **Preview** on the Filter Criteria toolbar to preview your selection.

The screen below displays with filtered data as defined in this example.



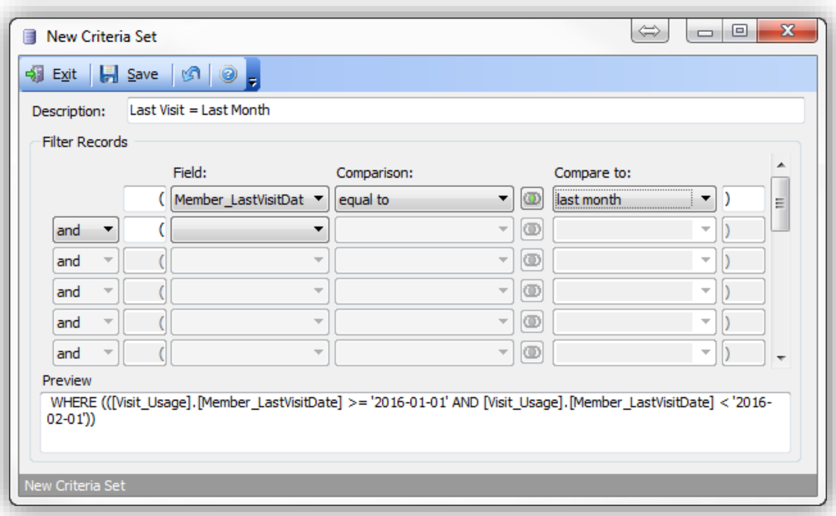
Step 11. Save and **Exit** the Data Design screen if your entries are correct.

You have completed the steps required to add a data design in Clubware.

Using a Token in the Filter Criteria

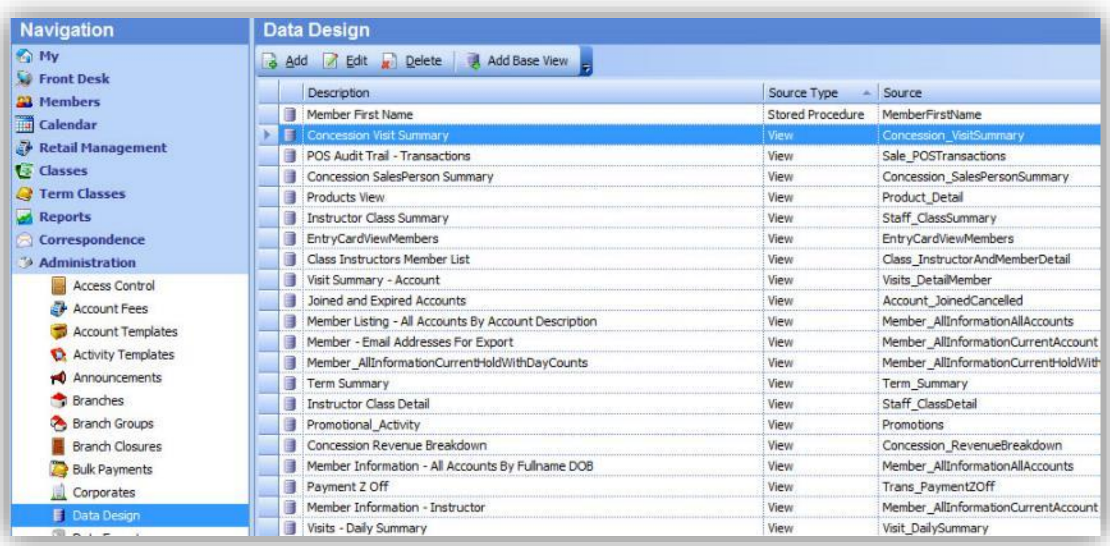
A **Token** can be used to set up filter criteria based on a changing value, such as Today, Last Week or Next Month.

For example, when you want to filter by a date range, such as the previous month, but don't want to manually enter the relevant dates every time you use the filter criteria. The screen below shows a token being used.



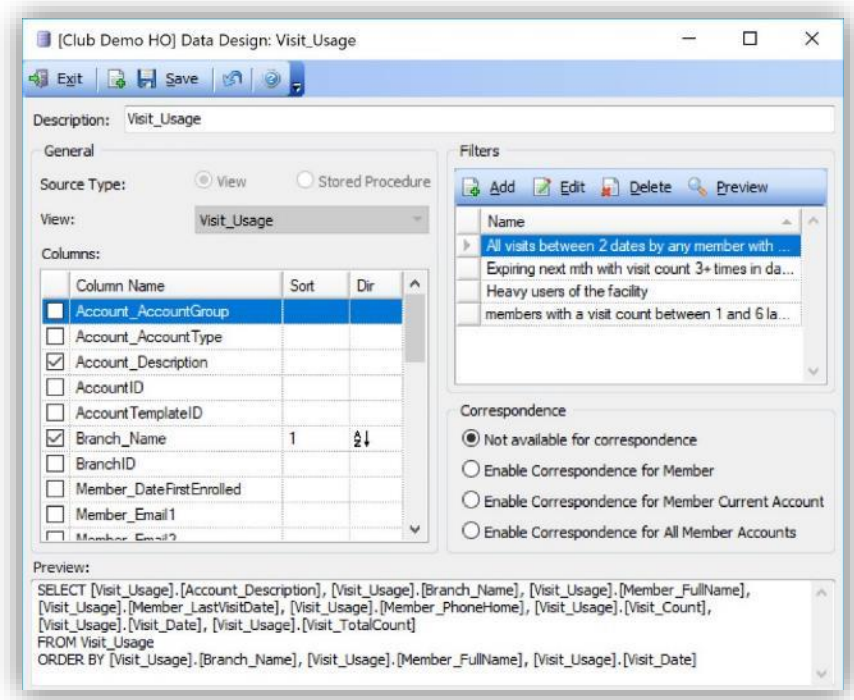
Follow the steps below to set a token for a filter.

Step 1. Select **Administration | Data Design** in the navigation panel.
The **Data Design** screen displays in the main panel.

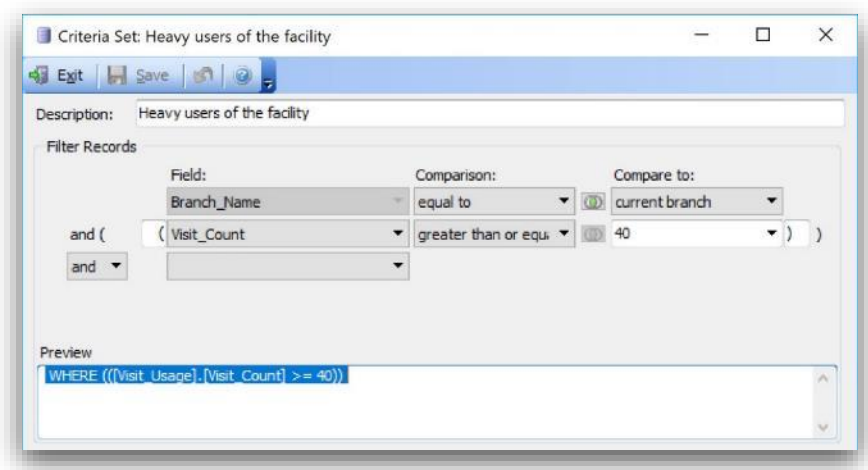


Step 2. Double click to open an existing data design or add a data design (See the tutorial [Adding / Editing a Data Design](#)).

The screen below displays.



Step 3. Select an existing filter and click **Edit** on the Filter Criteria toolbar, as shown above. The **Criteria Set** screen displays.



Step 4. Click the Eye icon beside the “Compare to” field to enable a **Token.**
This toggles the value between **Value** and **Token.**
Select your required token.

Note: If the Eye icon is disabled, your choice of Field is not valid for using a token. For example, if your Field is LastName, it would not make sense to apply a token of Today or Last Week.

Note: The **Preview** field at the bottom of the screen displays the values the token is using at present. These values will always be updated to be correct at the time the filter is run.

Step 5. Save and **Exit** the Criteria Set and Data Design screens.

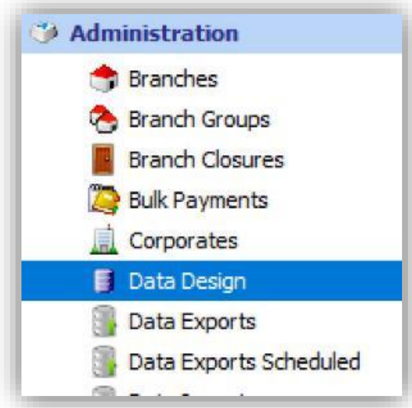
You have completed the steps required to use a token in filter criteria in Clubware.

Adding a View to a Data Design

Data designs are predominantly based on a view.
A view is a database view stored within the database and made up of ANSI standard SQL (Structured Query Language) code.
For example "`Select * From Member`".
From this view, a data design can be created, and filters attached to the data design.

This tutorial describes the steps required to add a new view for a data design within Clubware.

Step 1. Select **Administration | Data Design** in the navigation panel, as shown below.

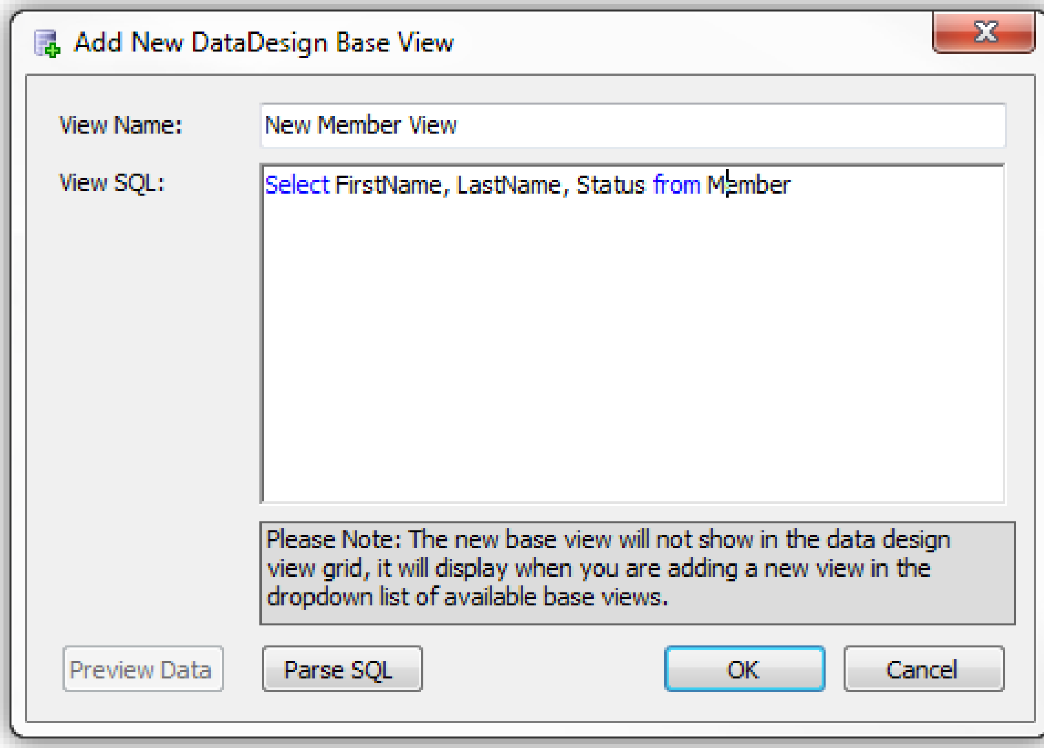


Step 2. The Data Design screen will display in the main panel.

Select your required Data Design.

Select **Add Base View** from the toolbar, as shown below.

Step 3. The **Add New DataDesign Base View** screen displays. Enter details as shown below.



Main Points:

View Name: Give the new base view a name using only alpha numeric characters.

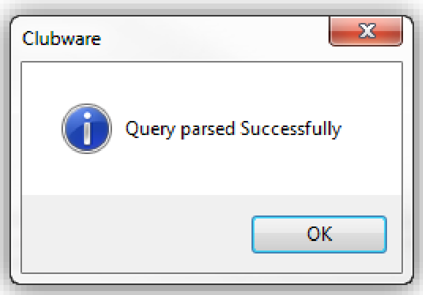
View SQL: Enter the ANSI Standard SQL required to generate the view.

Parse SQL: This parses the SQL against the data source to determine if the SQL has correct syntax (rules for producing SQL structure).
If the SQL is parsed correctly, the **Preview Data** button becomes enabled.

Preview Data: This allows the user to view a sample of the data the SQL will produce.

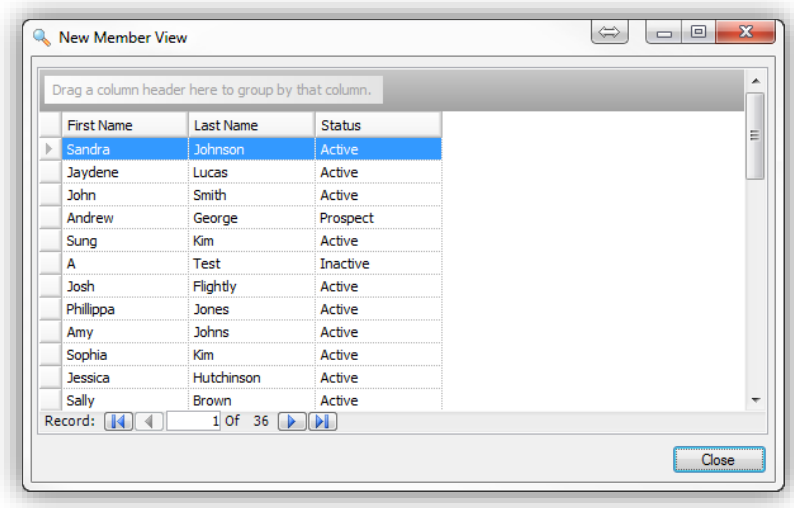
Step 4. When you have entered valid SQL code for creating a view, click the **Parse SQL** button.

This will parse the SQL and determine that the correct syntax has been entered. A dialog box will display indicating the result of the parse, as shown below.



Click **OK.**

Step 5. When the SQL is parsed, click the **Preview Data** button to display the data the SQL will return, as shown below.



Step 6. Click **OK** in the Data Design Base View screen to complete the procedure.

Create a new Data Design to utilise the view.
See the previous tutorial Adding / Editing a Data Design for more information.

You have completed the steps required to add a new view for data designs in Clubware.

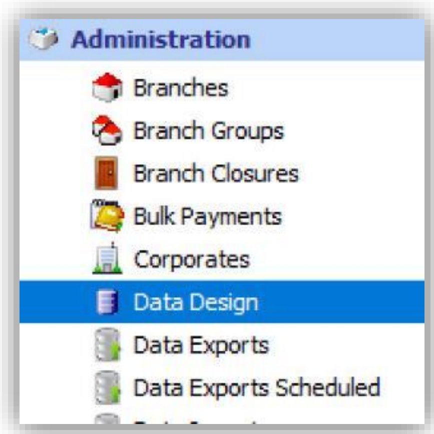
Adding a Stored Procedure to a Data Design

In some instances, there may be a requirement to create a highly specific data design based around set fields.

A stored procedure is a command stored within the database and made up of ANSI standard SQL (Structured Query Language) code. You will need Clubware Support to assist in creating this stored procedure in your database.

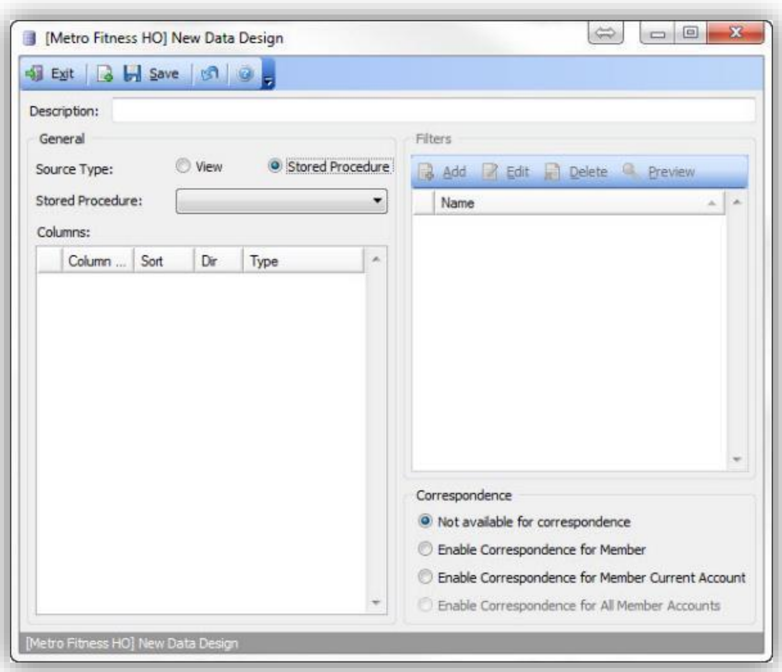
This tutorial describes the steps required to create data designs based on a stored procedure. We have created a very simple stored procedure in SQL for this example.

Step 1. Select Administration | Data Design from the navigation panel, as shown below.



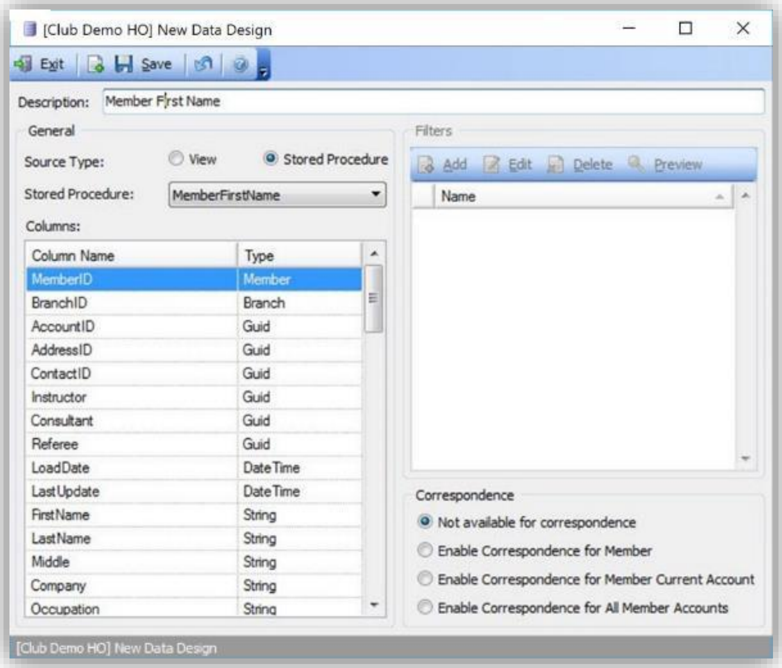
Step 2. The Data Design screen displays in the main panel.
Click **Add from** the toolbar.

A **New Data Design** screen displays. The **Source Type** should be set to **Stored Procedure**.



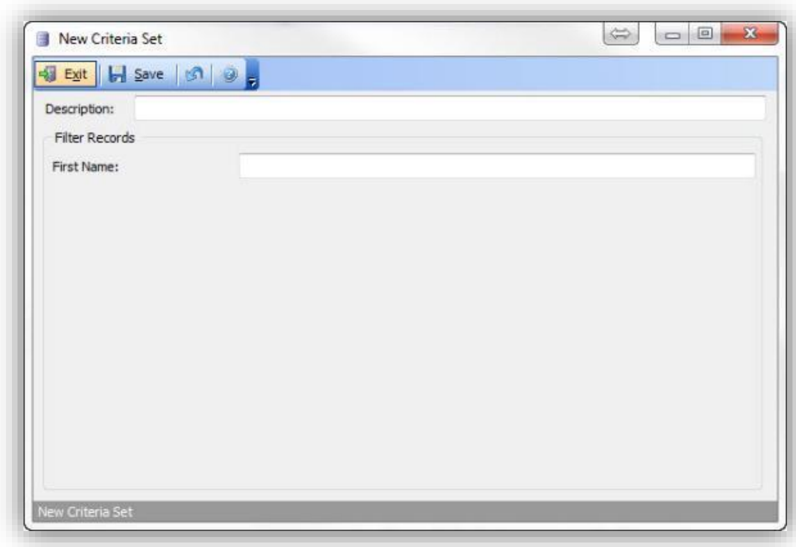
Step 3. Enter the name of the new Data Design in the **Description** field.
This enables you to identify your Data Design when required.

Step 4. Select an available **Stored Procedure** as a starting point.
For information about creating a new stored procedure, please contact Clubware Support.
For this example, select **MemberFirstName**.
The **Stored Procedure Columns** for the selected view display in the list, as shown below.



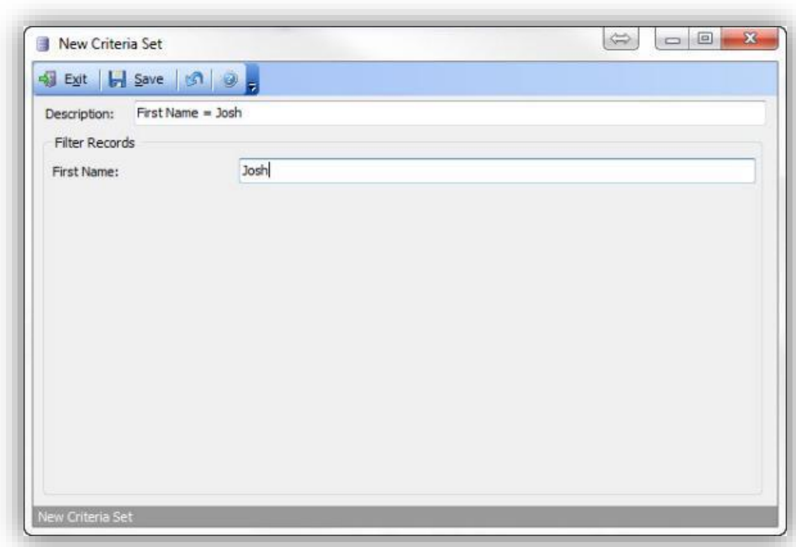
Step 6. When **Stored Procedure View** has been selected, add **Filter Criteria** to your data design.
This allows the selected data to be filtered.
In this example we only want to see members whose First Name is ‘Josh’. (See illustration in Step 7).
Click **Save** at the top of the Data Design screen to save your work and enable the Filter Criteria toolbar.

Step 7. Click **Add** in the Filter Criteria toolbar.
The screen below displays.



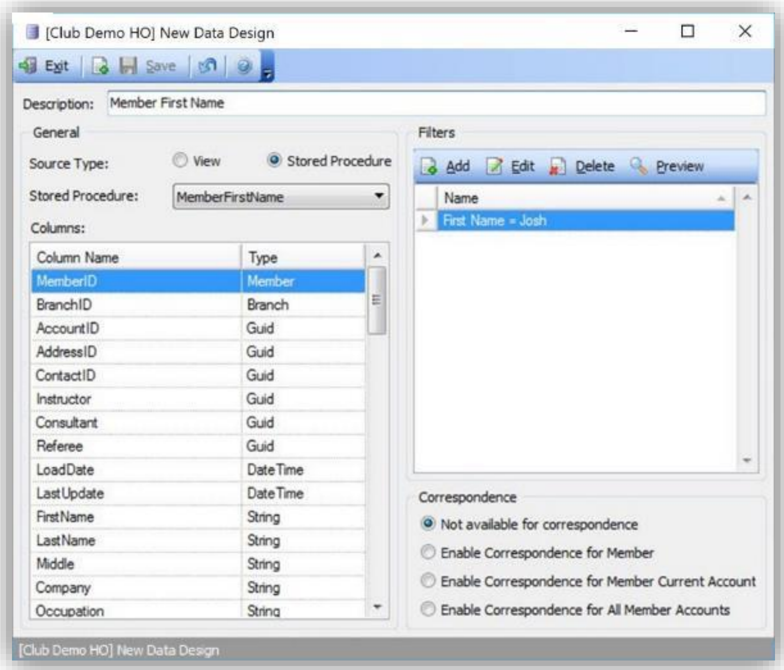
Step 8. A **Filter Criteria** set can contain many filters in one set.

For this example, we are locating only members whose first name is 'Josh'. Enter the Description and required information, as shown below.



Step 9. Save and **Exit** the Criteria Set screen.

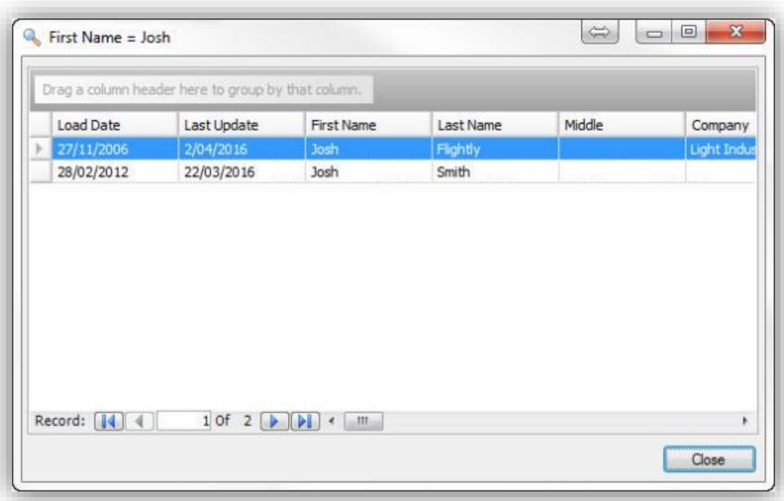
The Data Design screen displays as shown below.



Step 10. You can add more Filter Criteria by repeating the steps above.

Click **Preview** on the Filter Criteria toolbar to preview your selection.

The screen below displays with filtered data as defined in this example.



Step 11. Save and **Exit** the Data Design screen if your entries are correct.

You have completed the steps required to add a data design using stored procedures in Clubware.

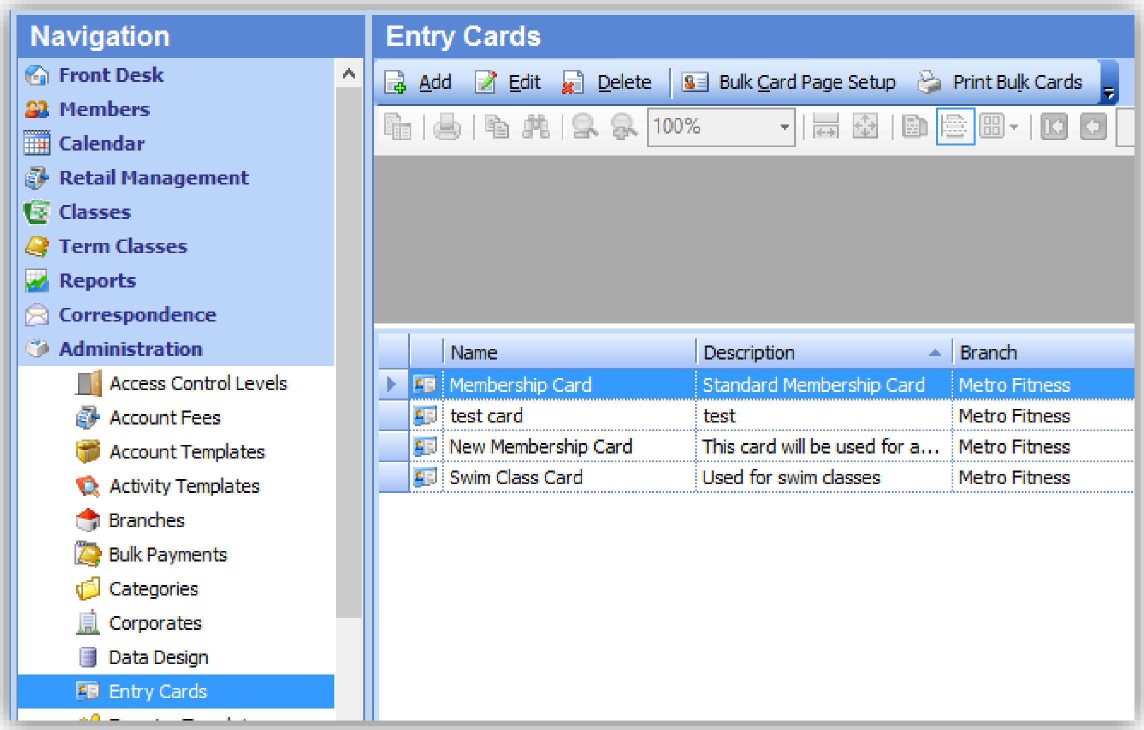
Entry Cards

The following tutorials describe the most common actions associated with Entry Cards.

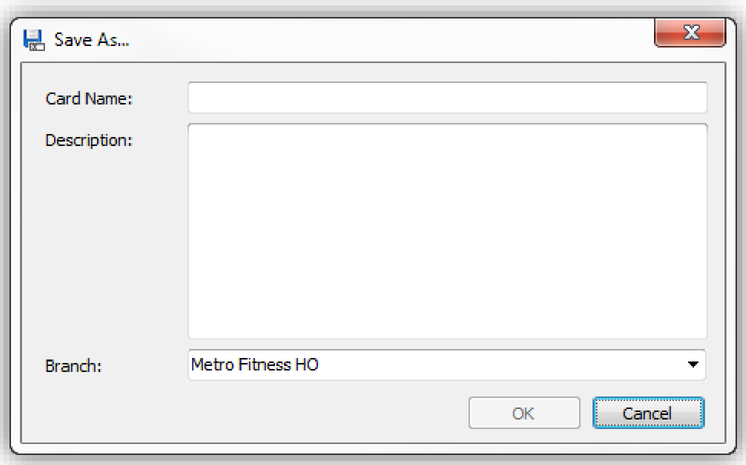
Designing a New Entry Card

This tutorial describes the steps required to add a new Entry Card within Clubware.

Step 1. Select **Administration | Entry Cards** from the navigation panel, as shown below.



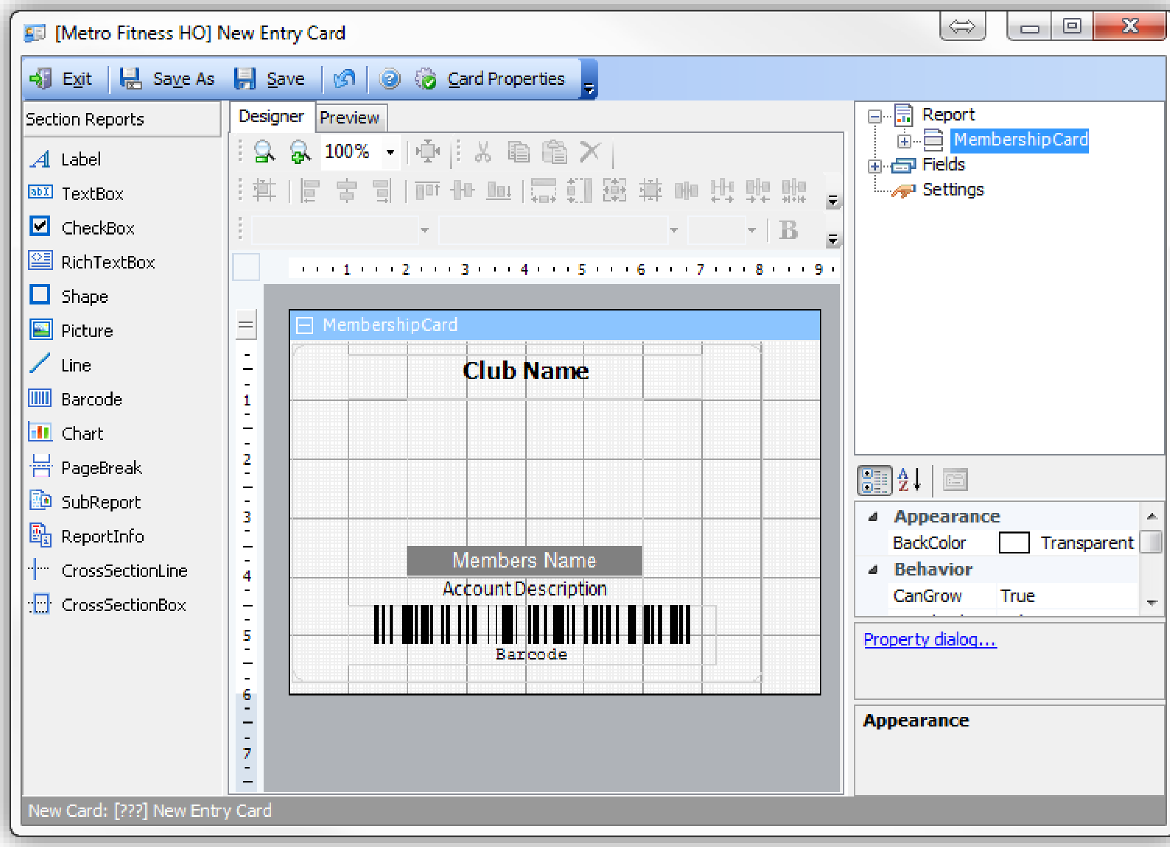
Step 2. The **Entry Cards** screen will display in the main panel.
Select **Add** from the toolbar. The screen below displays.



Step 3. Enter a **Card Name** and **Description** for your new Entry Card.

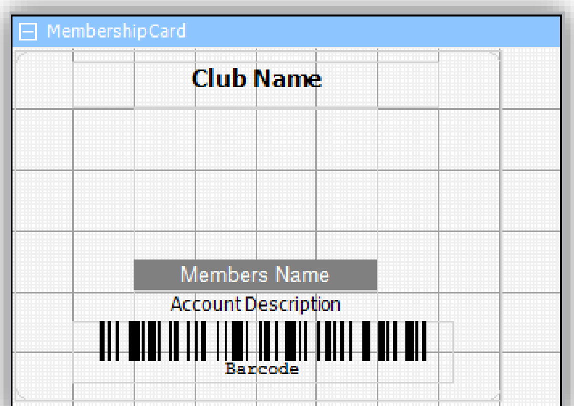
Click **OK.**

The **New Entry Card** screen displays.



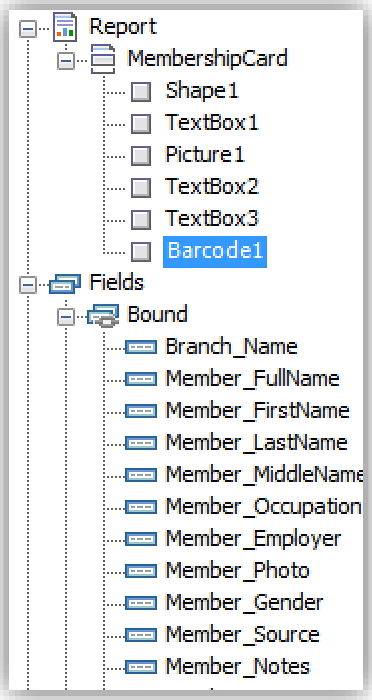
A default layout is created for you. The Entry Card designer is very similar to the report designer. The designer includes the following features:

Drag and Drop Designer: You can drag any fields around the design canvas, the central panel of the New Entry Card screen, as shown below.



Use the **Fields** part of the tree menu in the top right of the screen, shown below, to drag data fields onto the design canvas.

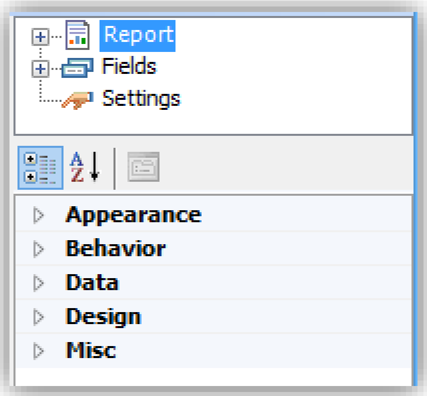
The **Report** section of this tree menu shows the elements already included in your design.



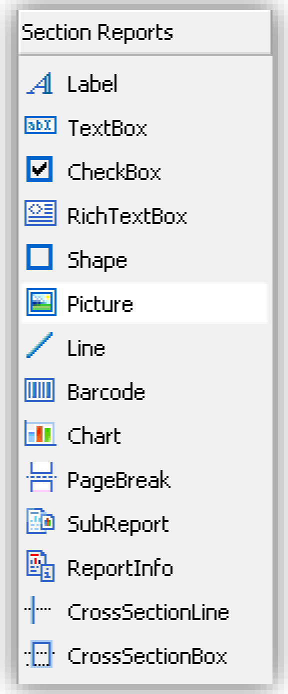
Each item on the design canvas is called a field. All aspects of a field can be modified, including size, colour, font type and position.

To modify a field, click on it in the design canvas or select it from the top right tree menu.

Then, modify it using the options in the tree menu in the lower right of the screen, under the headings Appearance, Behaviour, Data, Design, Layout and Summary.

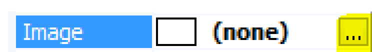


Picture: Use the Picture option in the left-hand Design Components menu to add an image to the design canvas of your card.



Click and drag from the **Picture** button into the design canvas.

Select the **Data** section of the lower right tree menu.

Browse for a picture you've saved by using the 

button next to **Image** in the Data section of the menu, or point to a picture in the database by clicking **Data Field** and choosing from the dropdown menu.

Barcode Control: You can add a barcode to an entry card, so visits can be recorded using a barcode scanner and entry card.
See the next tutorial Adding a Barcode to an Entry Card for more information.

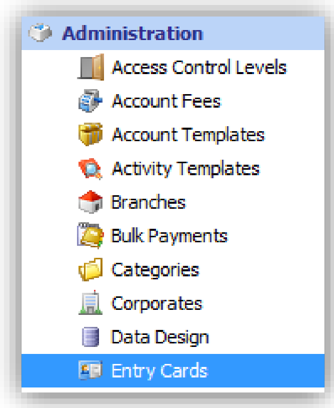
Step 4. Click **Save** and exit the **New Card Entry** screen.

You have completed the steps required to add a new entry card in Clubware.

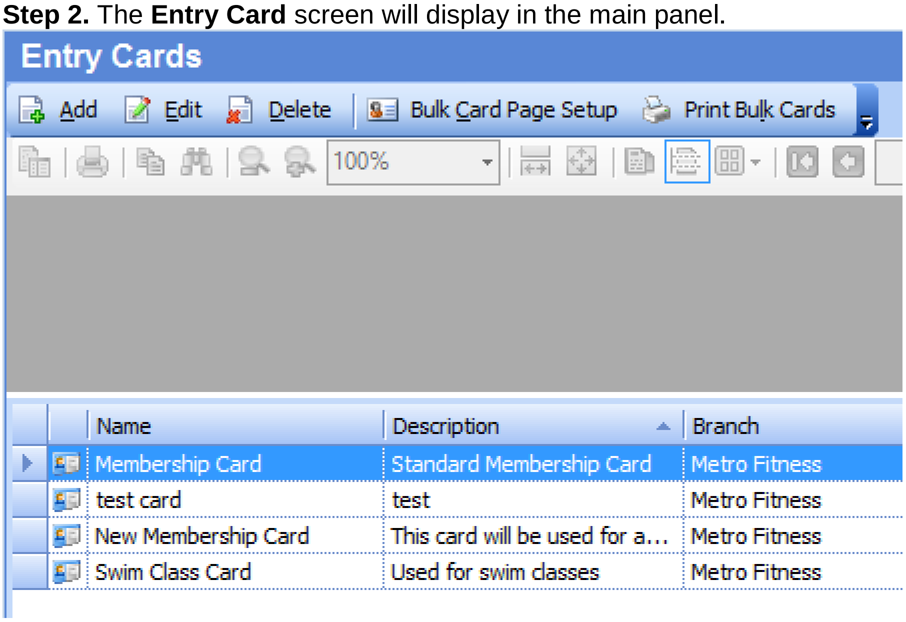
Adding a Barcode to an Entry Card

This tutorial describes the steps required to add a barcode to an entry card in Clubware.

Step 1. Select **Administration | Entry Cards** in the navigation panel, as shown below.

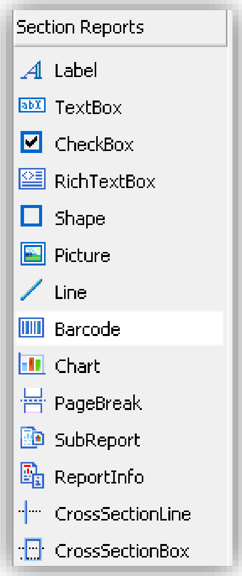


Step 2. The **Entry Card** screen will display in the main panel.

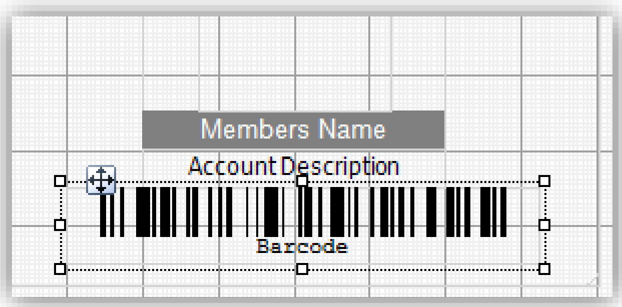


Select the card you want to add a barcode to.
Click **Edit** from the toolbar.

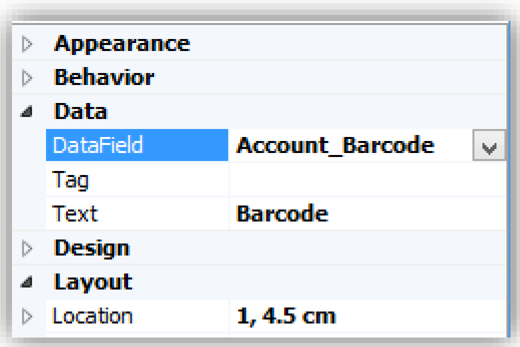
Step 3. Click **Barcode** in the Design Components toolbar on the left side of the screen, and drag onto the design canvas as shown below.



The barcode will appear on the design canvas where you drop the control.

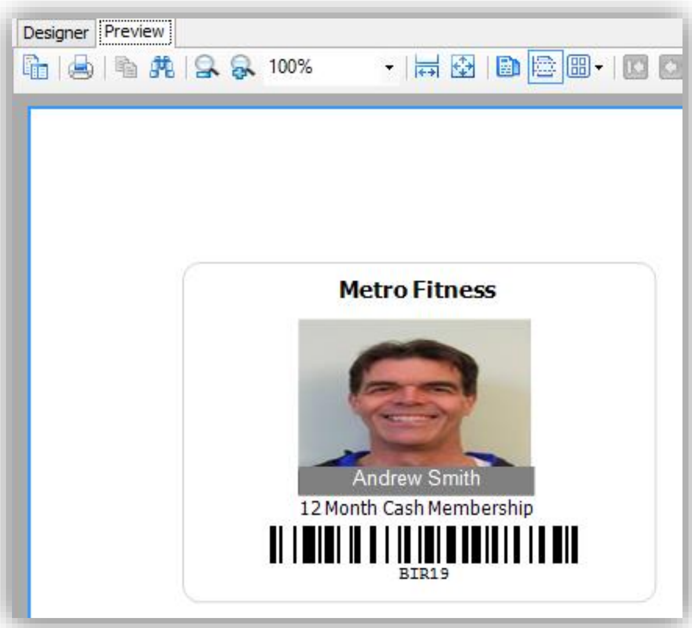


Step 4. Open the **Data** section of the tree menu on the lower right side of the screen. Select **DataField | Barcode** from the dropdown menu and select Account_Barcode, as shown below.



Step 5. Click the **Preview** tab on the top of the design.

Your card displays as shown below.



You can move any item on the card on the designer surface by selecting an item and dragging it.

Step 6. Save and exit the Entry Card screen when you are satisfied with your card.

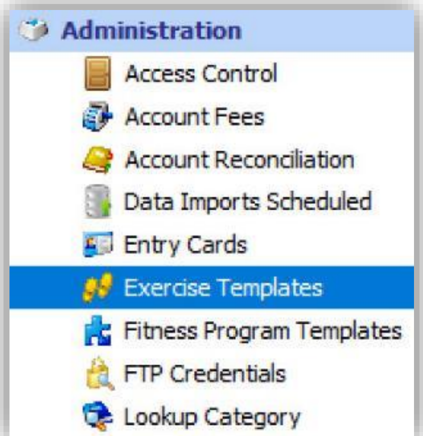
You have completed the steps required to add a barcode to an entry card in Clubware.

Exercise Templates

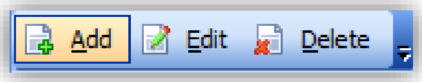
Adding a New Exercise Template

This tutorial describes the steps required to add a new Exercise Template within Clubware.

Step 1. Select **Administration | Exercise Templates** in the navigation panel, as shown below.

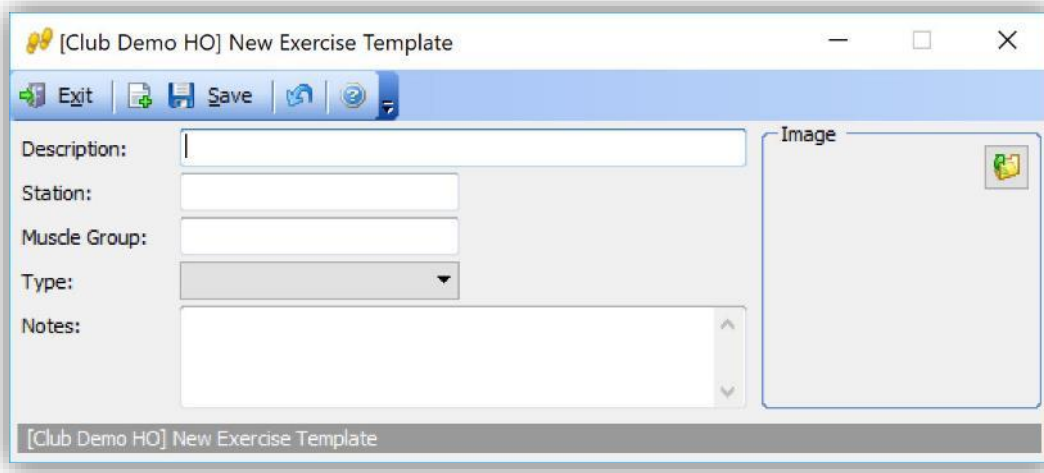


Step 2. The **Exercise Templates** screen displays in the main panel.
Select **Add** from the toolbar.



A New Exercise Template screen displays.

Step 3. Enter appropriate information as shown below.



Main Points:

Description: Enter a description for the exercise.

Station: Enter a number or note to indicate where the exercise station is within your site.

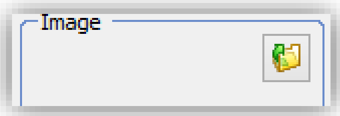
Muscle Group: Describe which muscles are being exercised.

Type: Select either Cardio or Weights.

Notes: Add any notes that may help the member performing this exercise.

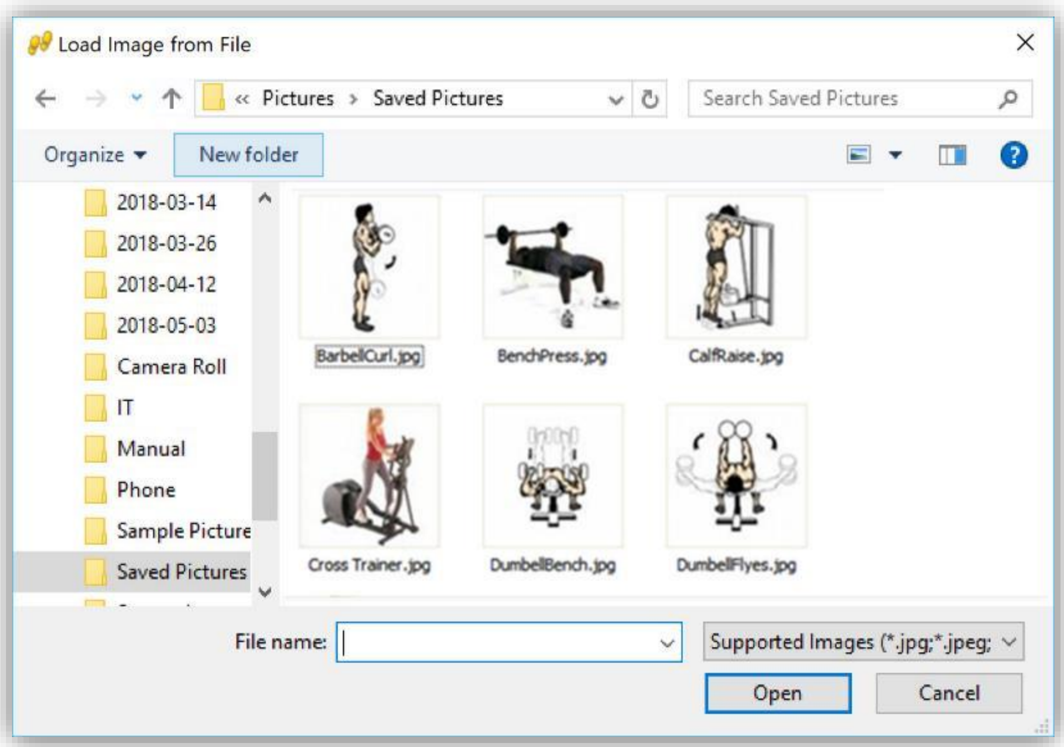
Note: You can add suitable images as shown below. These images are not a Clubware feature at present. You will need to acquire your images and store them on your computer.

Step 4. Click the folder icon in the image section shown below to add an image to the exercise template. This icon is situated on the right side of the New Exercise Template shown above.

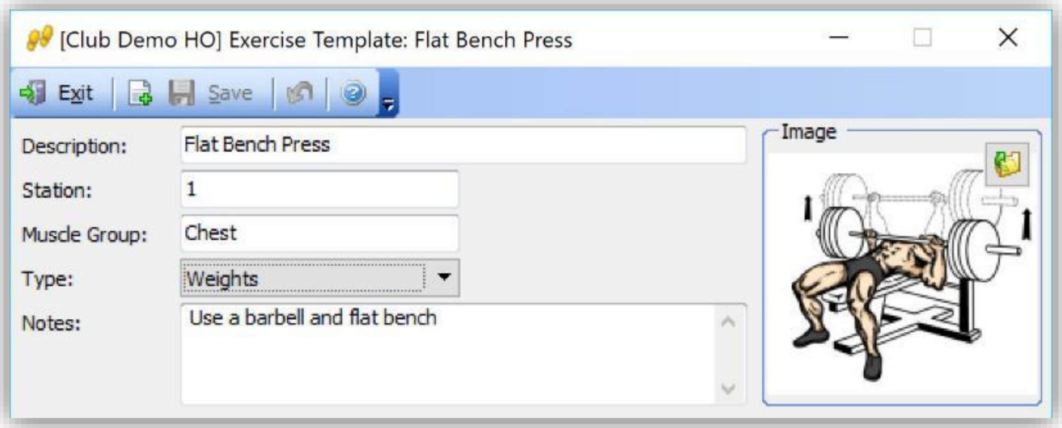


The standard Windows **Load Image** dialog box displays.

Step 5. Navigate to the image you wish to associate with this exercise.
Click **Open** as shown below.



The selected image will display on the new Exercise Template screen**.**



Step 6. Click **Save and Exit** the Exercise Template Screen.

You have completed the steps required to add an exercise template in Clubware.

Fitness Program Templates

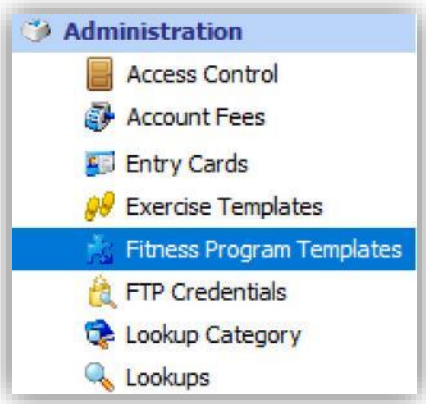
The following tutorials describe the most common actions associated Fitness Program Templates.

Adding a Fitness Program Template

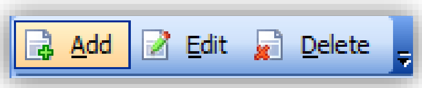
This tutorial describes how to create a Fitness Program Template.

Once you have created you Exercise Templates you have the ability to build Fitness Program Templates. (See tutorial: Adding a New Exercise Template)

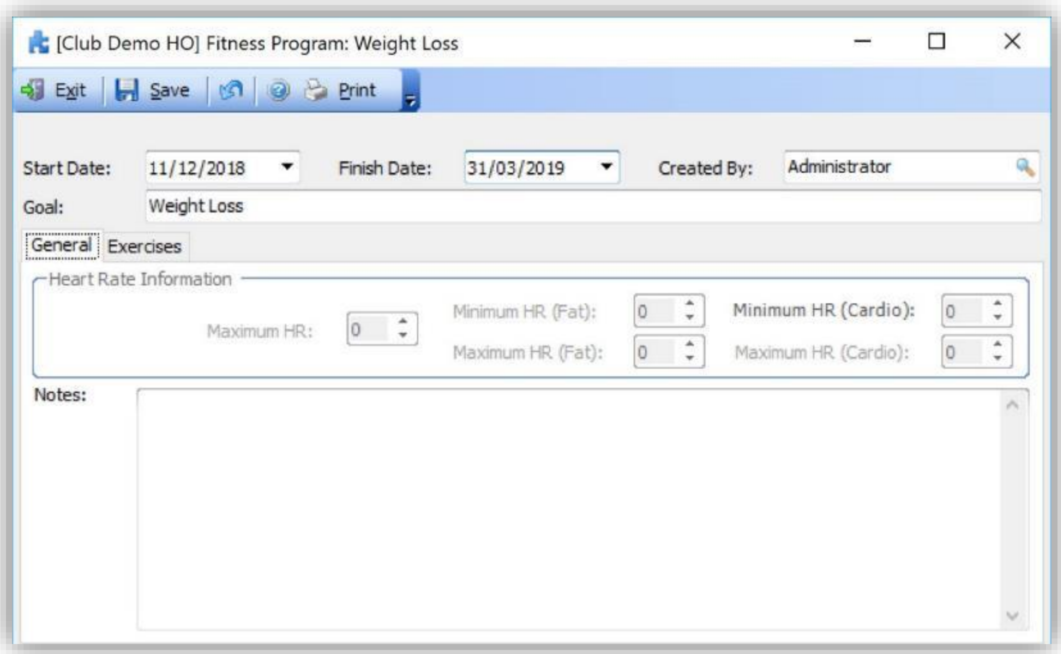
Step 1. Select **Administration | Fitness Program Templates** in the navigation panel as shown below.



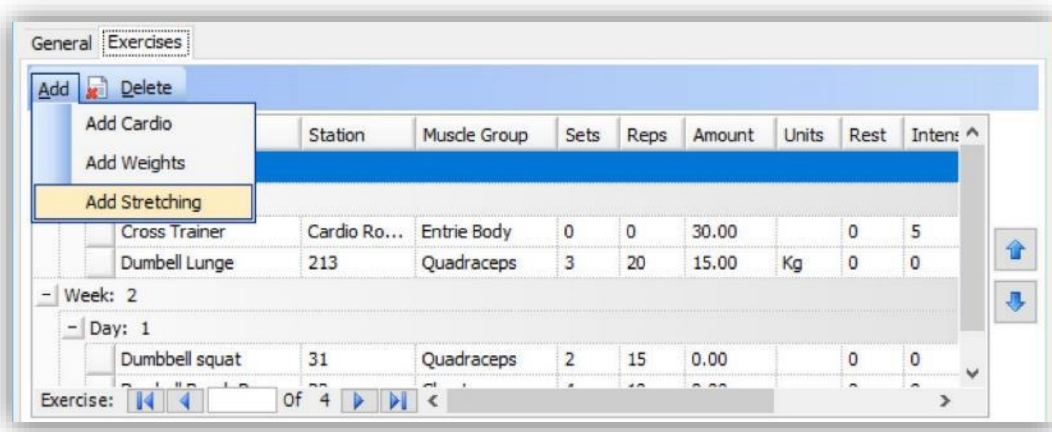
Step 2. The **Fitness Program Templates** screen displays in the main panel.
Select **Add** from the toolbar.



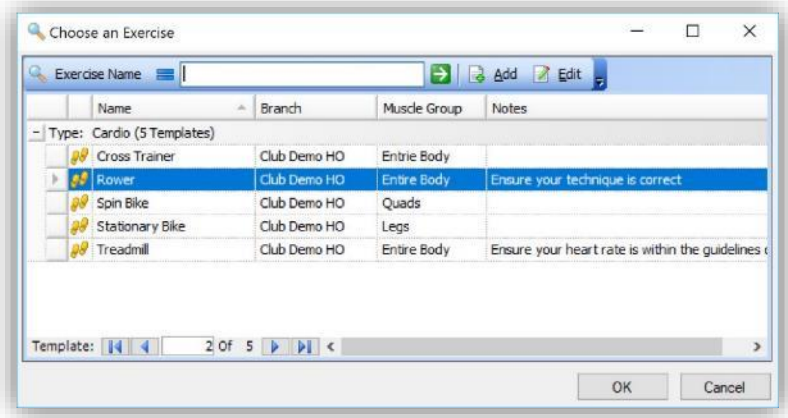
Step 3. A **New Fitness Program** screen displays.
Enter details similar to the example below.



Step 4: Select the **Exercises** Tab. Select **Add** to attach an Exercise Template from one of the below groups.

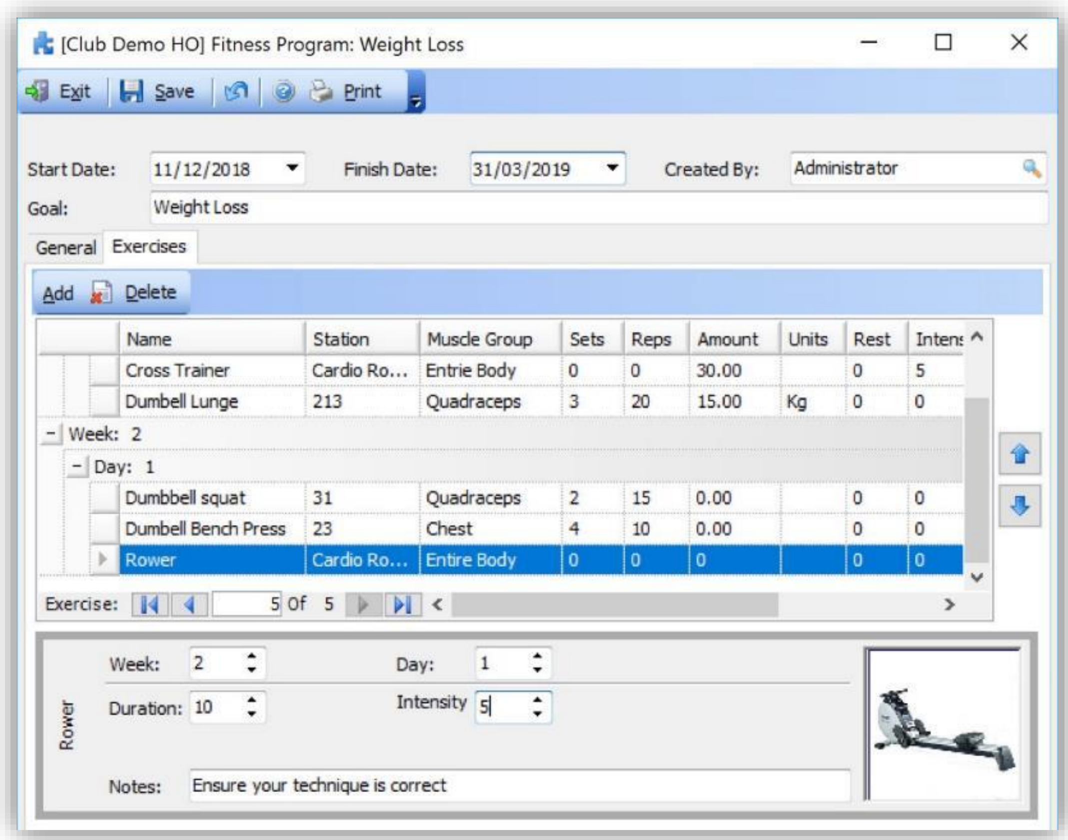


Step 5: Select the applicable exercise and select OK as shown below.



Step 6: Add the week number and day number to the program as shown below.

Note: If you add the Sets, Reps, Weights, Intensity and Rest on the Fitness Program template, it will not populate on the member, allowing you to personalise the fitness program on an individual basis.



Step 7. Click **Save and Exit** the Fitness Program Screen.

You have completed the steps required to add a fitness program in Clubware.

Lookups

The following tutorials describe the most common actions associated with Lookups.

Adding a Lookup Item

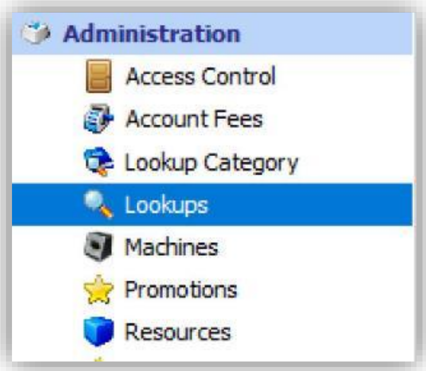
This tutorial describes the steps required to add a new **Lookup** item within Clubware.

Lookups are the options that appear in many dropdown menus within various parts of Clubware.

For example, when receiving a payment you can choose options including Cash, Credit Card, and Eftpos from a dropdown menu.

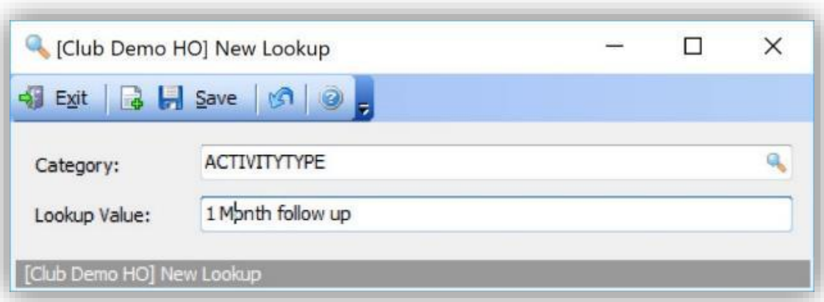
With lookups, you could add an option to be paid by points from a loyalty scheme card.

Step 1. Select **Administration | Lookups** in the navigation panel, as shown below.



Step 2. The **Lookups** screen displays in the main panel.
Select **Add** from the toolbar.

Step 3. A **New Lookup** screen displays.
Enter details similar to the example below.

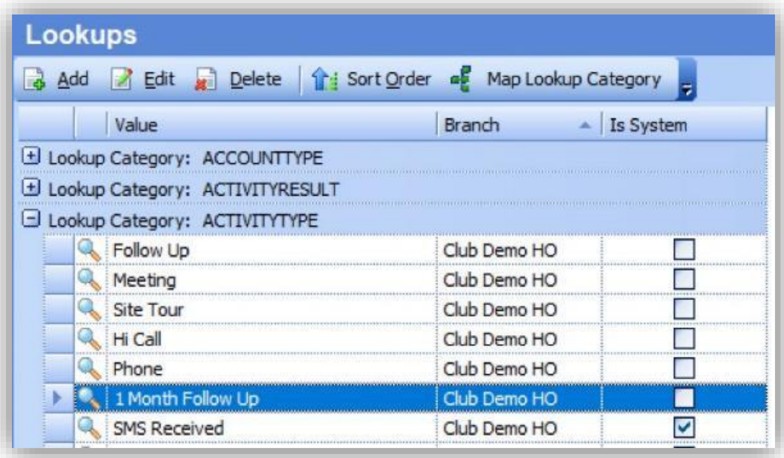


Select a **Category** to indicate the types of dropdown menus in which your new lookup should be included.

For example, to add a new activity reason, 1 Month Follow Up, select the Category ACTIVITYTYPE.

Step 4. Save and exit the **New Lookup** screen.

Note: Your new Lookup will appear in the **Lookups** screen.

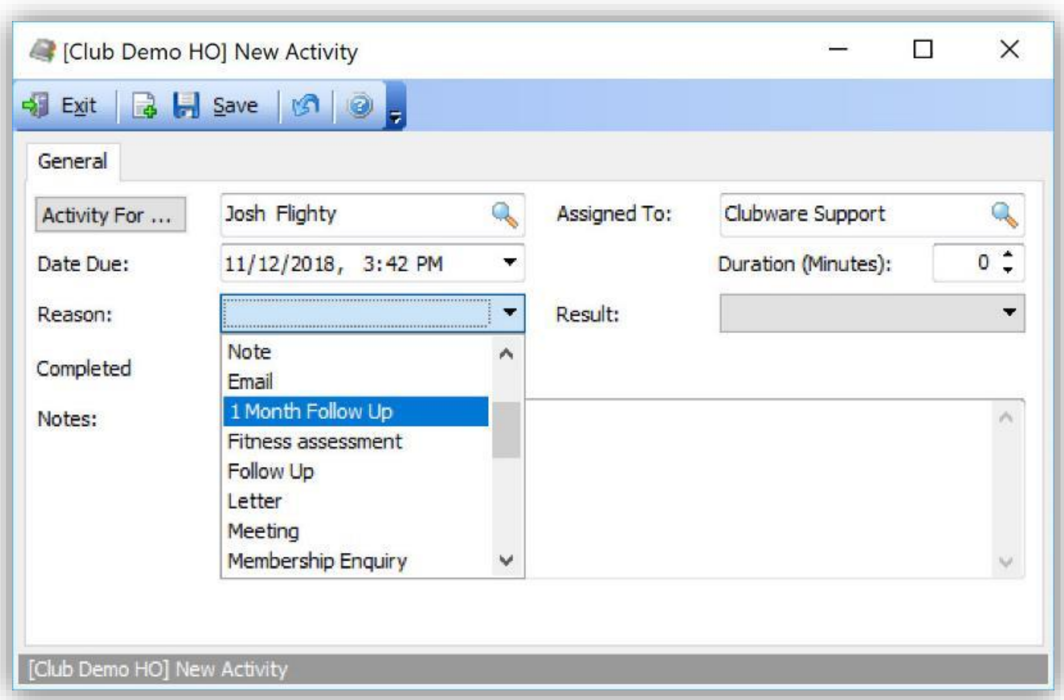


For this example:

To verify and/or use your new Lookup, select **Front Desk | Activities** in the Navigation Panel.

The Activities Panel displays.

Click **Add**. A **New Activity** screen displays.
The new Lookup now displays in the **Reason** drop down menu, as shown below.



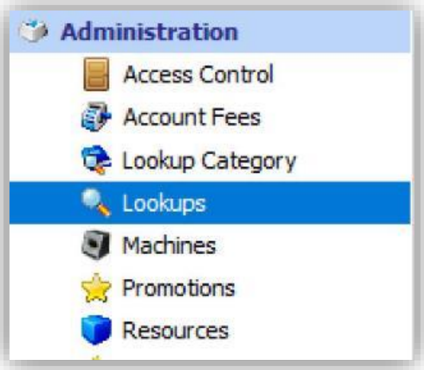
You have completed the steps required to add a lookup in Clubware.

Changing the Sort Order of a Lookup List

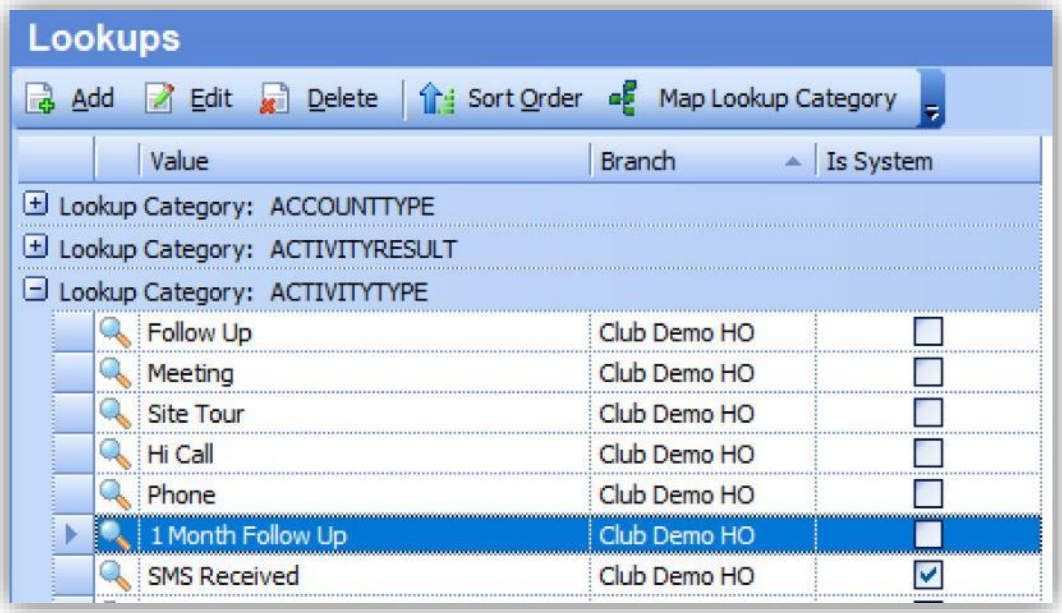
This tutorial describes the steps required to change the sort order of a lookup list within Clubware.

This allows you to control the order in which items in some dropdown menus appear. You can place the most used items at the top of the menu.

Step 1. Select **Administration | Lookups** in the navigation panel, as shown below.

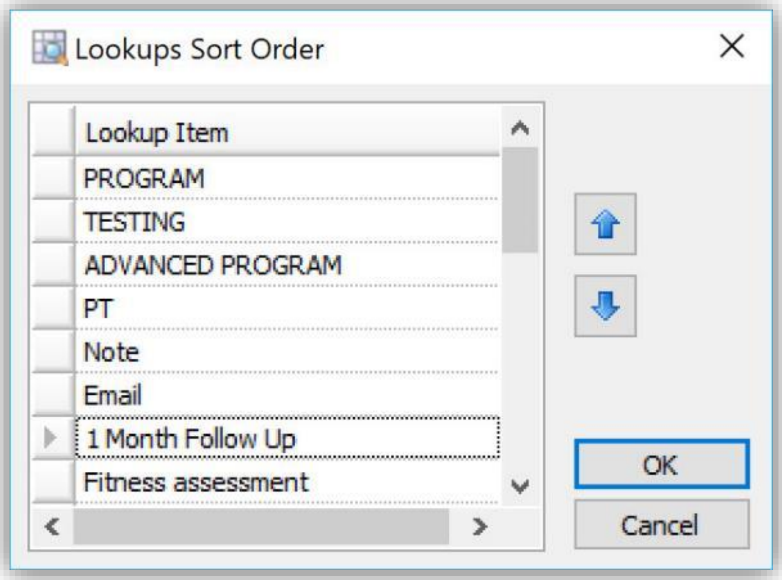


The **Lookups** screen displays in the main panel as shown below.



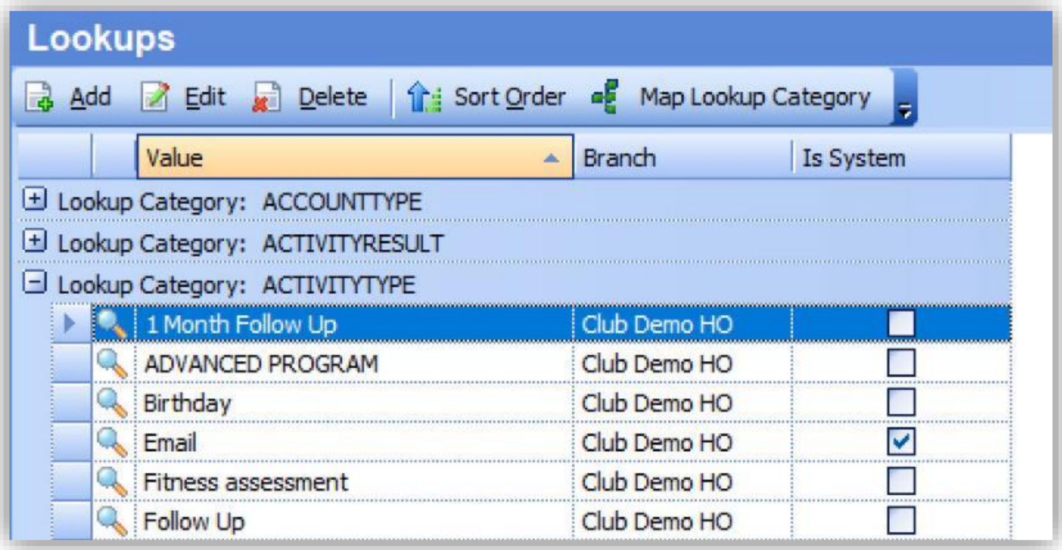
Step 2. Select the item from the category you wish to sort,
Click **Sort Order** as shown below.

Step 3. The **Sort Order** screen displays.
Select the item you want to change
Click either the **up** or **down** to change the order, as shown below.



Step 4. Click **OK** when the items display in the correct order.
Close the **Sort Order** screen.

Step 5. When you **refresh** the screen, the re-ordered item will display in the modified order as shown below.



When using lookups, the options will not show alphabetically within the dropdown list, but in the order specified using these steps.

You have completed the steps required to change the sort order of a lookup list in Clubware.

Linking Activity types to Activity results

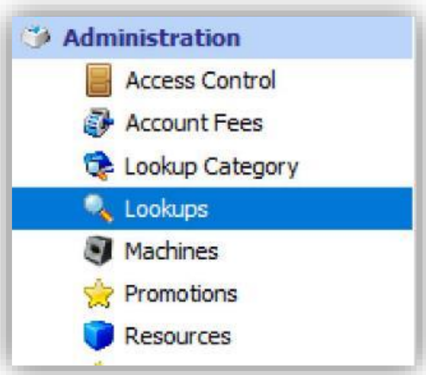
When you assign an Activity Type you can customise the Activity Results which will appear for this Activity Type.

You can link a set of results to a reason so that only those results appear in the Drop Down box.

This enables to you to view only those selected results instead of scrolling through the complete listed, as shown in the example below.

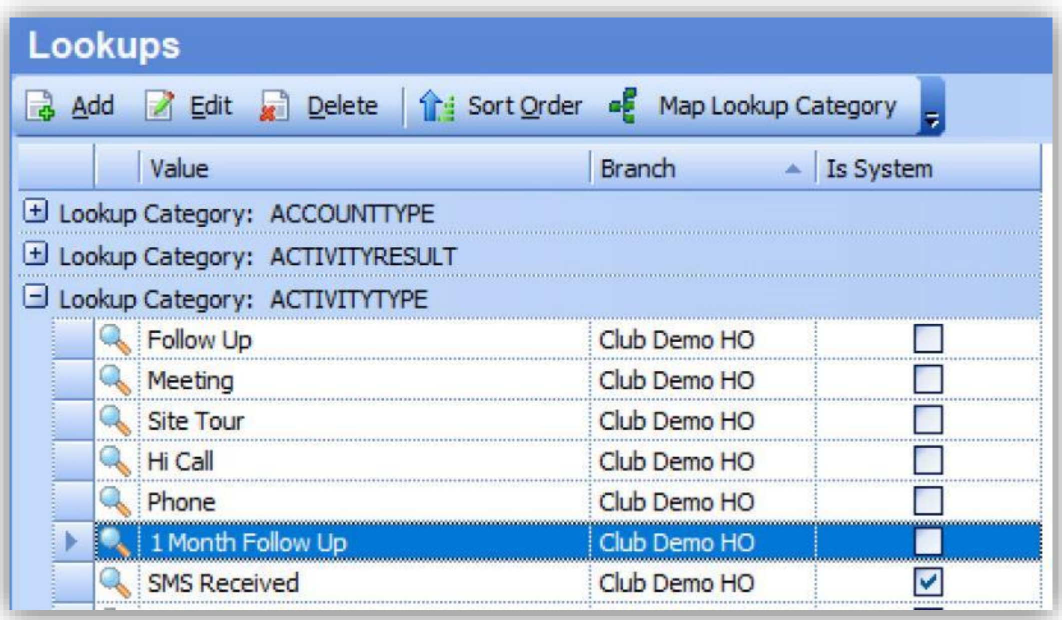
This tutorial describes the steps required to link Activity Types to Activity Results.

Step 1. Select **Administration | Lookups** in the navigation panel, as shown below.



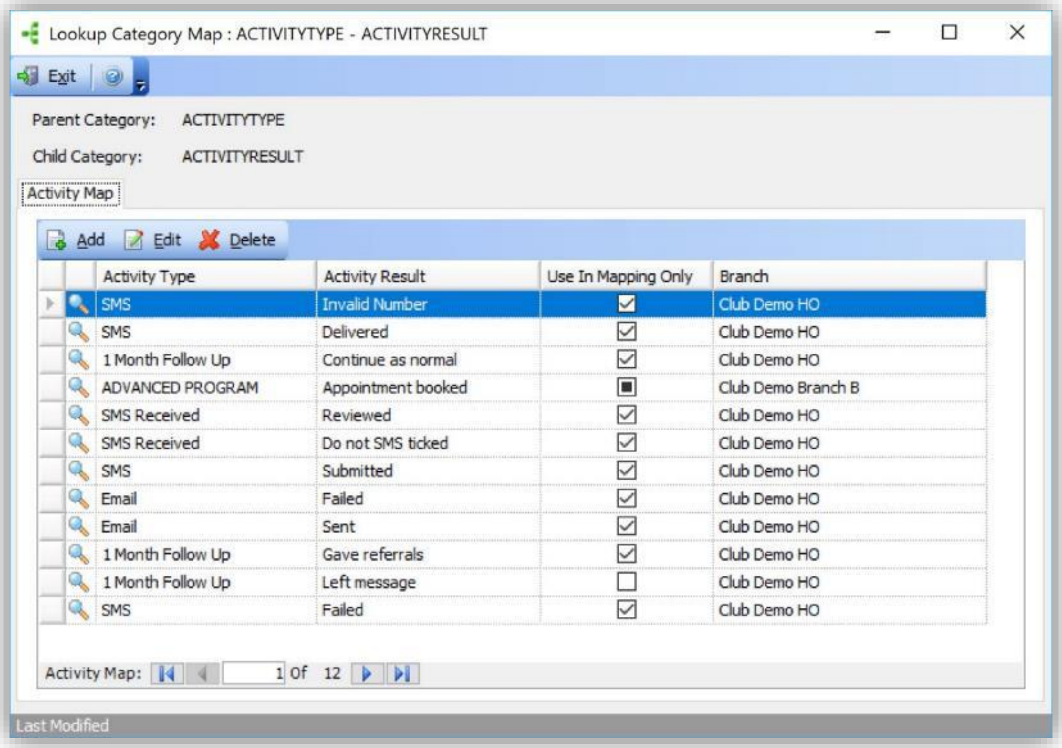
The **Lookups** screen displays.

Note: Press the green arrow on the top toolbar  if the screen displays blank.

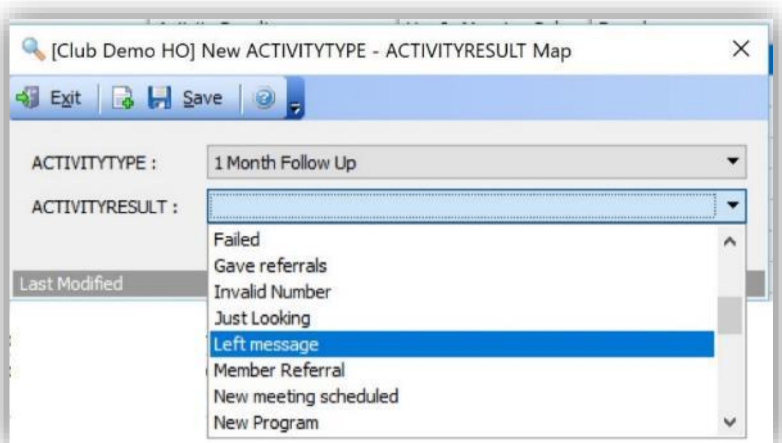


Step 2. Click the ‘**Map Lookup Category’** button.

The **Lookup Category Map** screen displays.



Step 3. Click Add.
The New ACTIVITYTYPE –ACTIVITYRESULT Map displays.

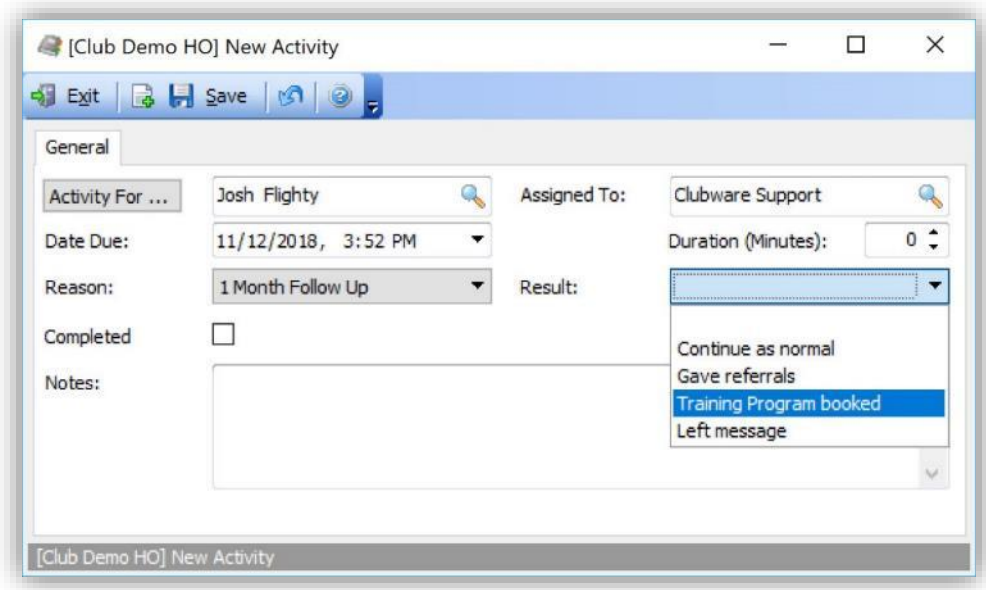


Step 4. Select your required ACTIVITYTYPE from the drop down menu.

Step 5. Select your required ACTIVITYRESULT from the drop down menu.

Step 6. Click **Save** and **Exit**.
Repeat the process to add as many results as necessary.

Now when you assign an activity on the member's screen you will only see the results you have assigned to that activity. An example is shown below.



In the above example:

Select an existing member.

Click the **Activities** tab**.**

Click **Add**. The **New Activity** Screen displays.

Select **Reason**: from the Drop down menu. (Fitness Assessment).

Select **Result**: from the Drop down menu. Only those items assigned will be displayed. (As shown in **Step 2** above)

You have completed the steps required to link activity types to activity results in Clubware.

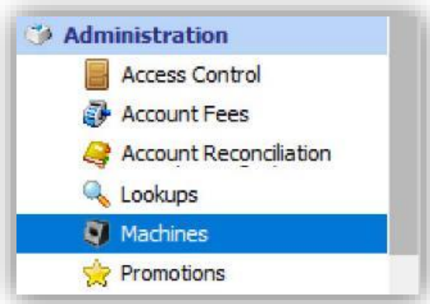
Machines

The following tutorials describe the most common actions associated with Machines.

Adding a Machine

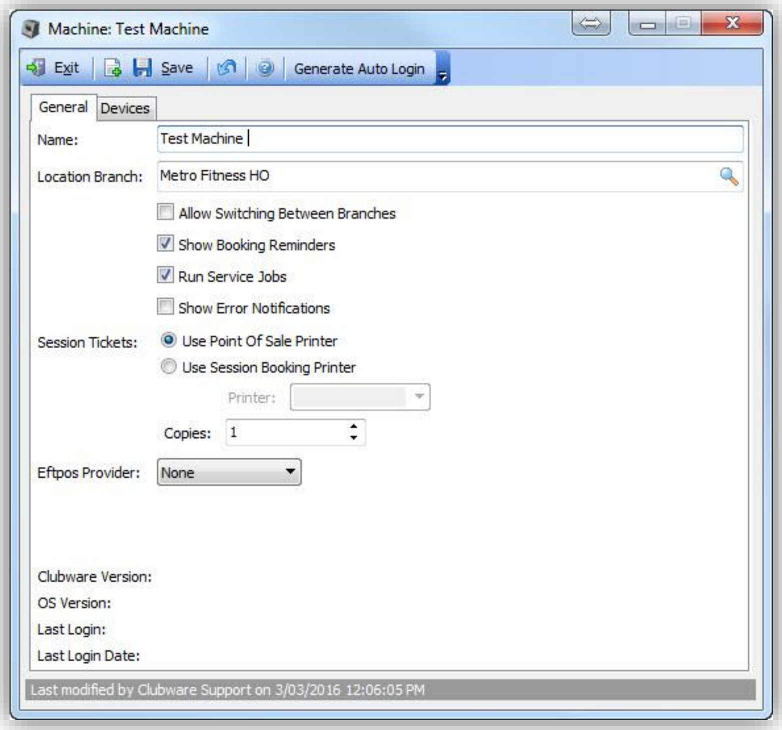
This tutorial describes the steps required to add a machine in Clubware. A machine can also be automatically added by logging in after Clubware has been installed.

Step 1. Select **Administration | Machines** in the navigation panel as shown below.



Step 2. The **Machines** screen displays in the main panel.
Select **Add** from the toolbar.

Step 3. A New Machine screen will appear.
Complete the details as in the example below.



Main Points:

General Tab

Name: Enter the exact name of the computer e.g. GYM1-PC.

Branch Location: Which branch the machine is located.

Allow Switching Between Branches: Allows the machine to switch between branches as long as the staff member also has the correct permissions. See the tutorial Adding a Staff Member for more information.

Show Booking Reminders: Displays booking reminders for calendar sessions.

Run Service Jobs: Check this box to allow listed machine to run service jobs.

Show Error Notifications: Allows error notifications to be displayed on the machine.

Session Tickets: Allocate a specific printer for Class session tickets. If a printer is not added, the default printer is used.

EFTPOS Provider: Allows supported EFTPOS providers to integrate with Clubware POS

Devices Tab

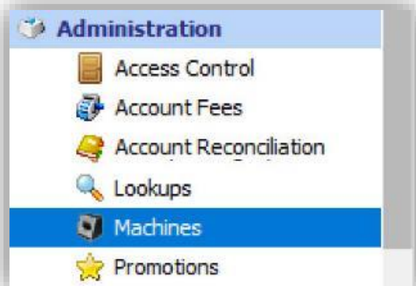
Add, **Edit** or **Delete** Devices for this machine. (See the tutorial Adding a Device for more information.)

You have completed the steps required to add a device in Clubware.

Adding a Device

This tutorial describes the steps required to add a device in Clubware

Step 1. Select **Administration | Machines** in the navigation panel as shown below.

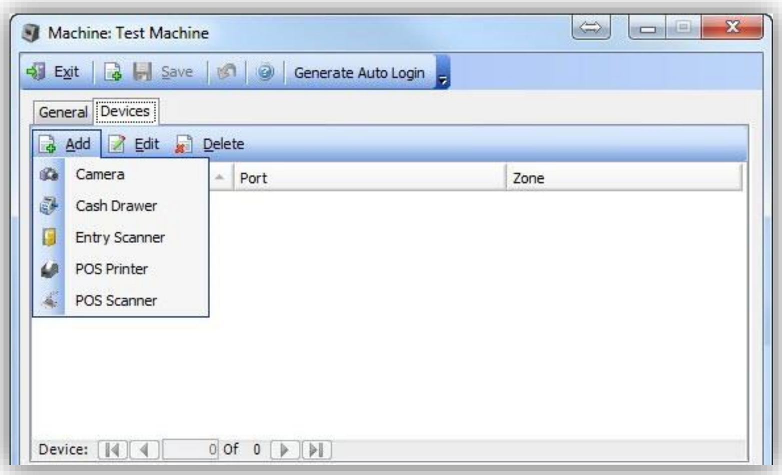


Step 2. The **Machines** screen displays in the main panel.
Select **Add** from the toolbar.

Step 3. A New Machine screen will appear. Fill in the appropriate details.
(See the tutorial Adding a Machine for more information.)

Step 4. Select the Devices tab.

Select Add from the toolbar and then select the device type to be configured.



To configure a Camera, see the tutorial Configuring a Camera.

To configure a Cash Drawer, see the tutorial Configuring a Cash Drawer.

To configure an Entry Scanner, see the tutorial Configuring an Entry Scanner.

To configure a POS Printer, see the tutorial Configuring a POS Printer.

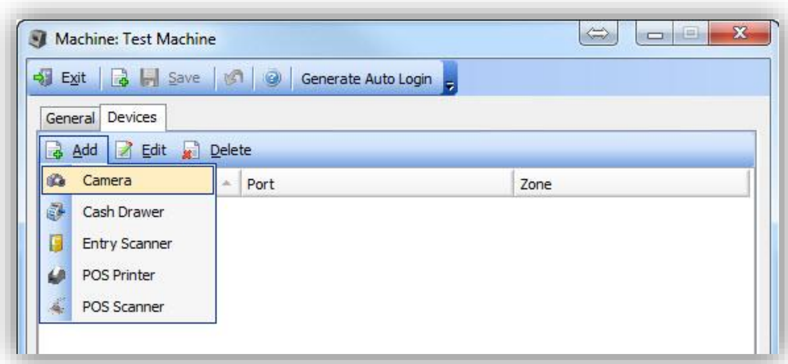
To configure a POS Scanner, see the tutorial Configuring a POS Scanner.

Configuring a Camera

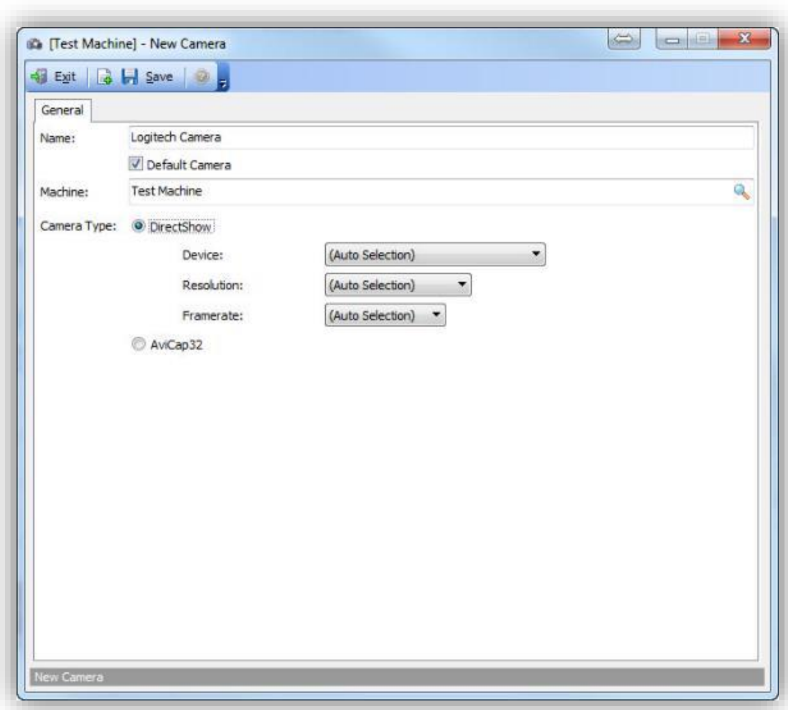
This tutorial describes the steps required to configure a camera in Clubware

Step 1. Follow the steps in the tutorial Adding a Device.

Step 2. Select **Camera** from the drop down menu.



A New Camera screen appears.



Main Points:

Name: The name that will appear on the Administration | Machine | Device screen.

Default Camera: Select this check box if you wish for this camera to be the default camera.

Machine: Select the machine the device is connected to. (See the tutorial Adding a Machine for more information.)

Camera Type: Check either Direct show or AviCap32. Clubware will default to DirectShow.

Step 3. Select Save and Exit. Restart Clubware.

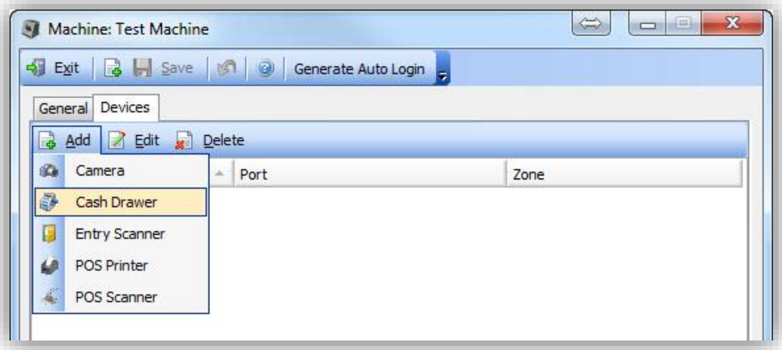
You have completed the steps required to configure a camera in Clubware.

Configuring a Cash Drawer

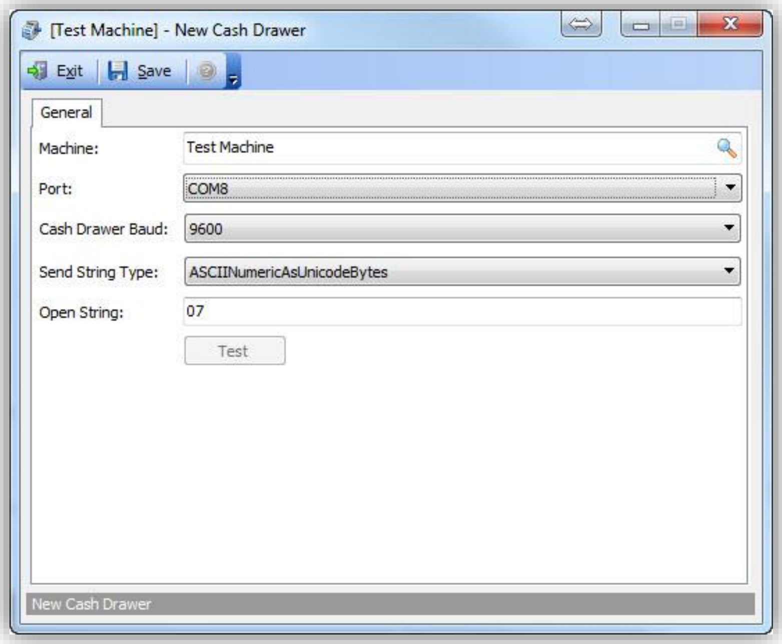
This tutorial describes the steps required to configure a cash drawer in Clubware

Step 1. Follow the steps in the tutorial Adding a Device.

Step 2. Select **Cash Drawer** from the drop down menu.



A New Cash Drawer screen appears**.**



Main Points:

Machine: Select the machine the device is connected to. (See the tutorial Adding a Machine for more information.)

Port: Select the port the cash drawer is connected to.

Cash Drawer Baud: The speed the machine and cash drawer communicate. 9600 is default.

Send String Type: ASCII is the default string type, however plaintext can also be selected.

Open String: Defaults to 07

Step 3. Select Save and Exit. Restart Clubware.

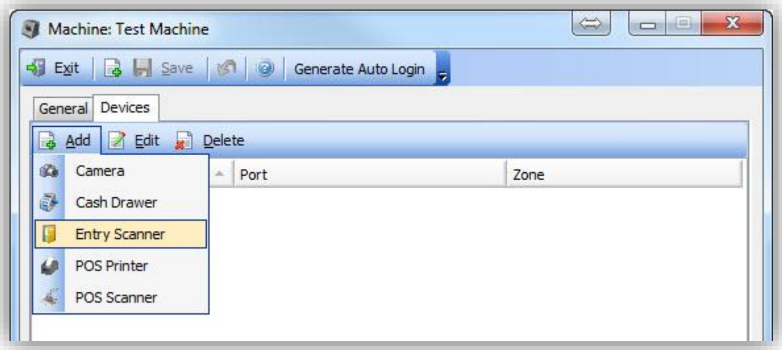
You have completed the steps required to configure a cash drawer in Clubware.

Configuring an Entry Scanner

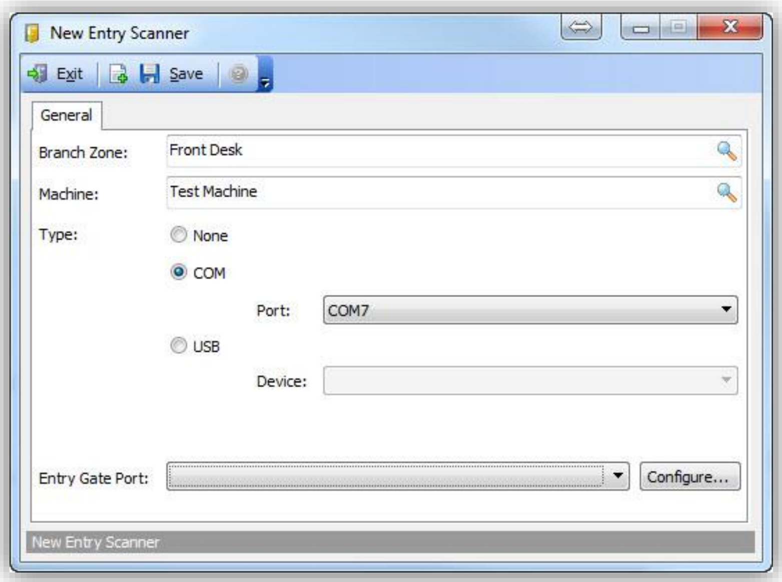
This tutorial describes the steps required to configure an entry scanner in Clubware

Step 1. Follow the steps in the tutorial Adding a Device.

Step 2. Select **Entry Scanner** from the drop-down menu.



A New Entry Scanner screen appears.



Main Points:

Branch Zone: Select zone from created list. (See the tutorial Adding a Zone for more information.)

Machine: Select the machine the entry scanner is connected to.

Type: Select the connection to the machine, either none, COM port or USB.

Entry Gate Port: Configure your gates by adding the post and then adding configuration details under the configure tab.

Step 3. Select Save and Exit. Restart Clubware.

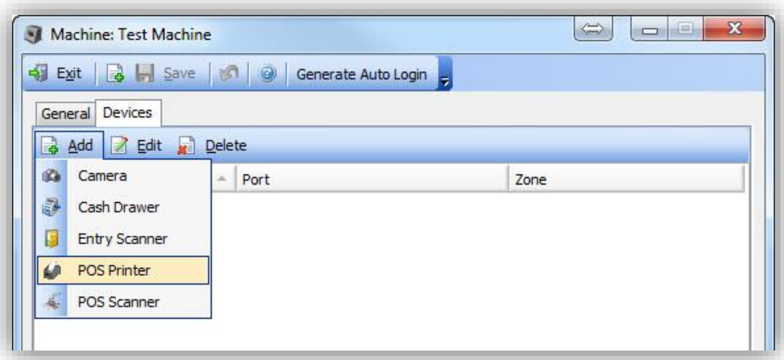
You have completed the steps required to configure an entry scanner in Clubware.

Configuring a POS Printer

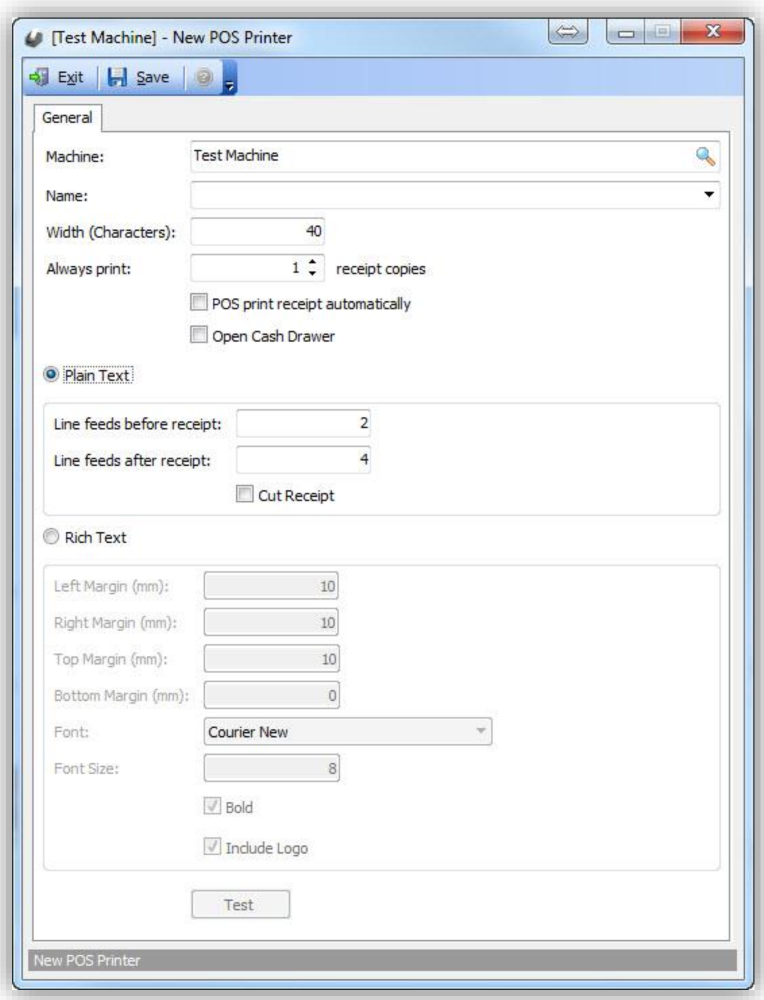
This tutorial describes the steps required to configure a POS Printer in Clubware

Step 1. Follow the steps in the tutorial Adding a Device.

Step 2. Select **POS Printer** from the drop down menu.



A New POS Printer screen appears.



Main Points:

Machine: Select the machine the device is connected to. (See the tutorial Adding a Machine for more information.)

Name: The name that will appear on the Administration **|** Machine **|** Device screen.

Width: Number of characters that should be printed across the receipt.

Always Print: Number of copies to be produced when a receipt is printed.

POS print receipt automatically: Ensures a receipt is printed each time a sale is recorded in Clubware.

Open Cash Drawer: If the printer is connected to a cash drawer, checking this box will ensure Clubware opens the cash drawer when a sale is recorded.

Plain Text: Print style for the receipt and printer.

Rich Text: Print style for the receipt and printer.

Test: Test your settings after you have saved, but before closing the configuration box.

Step 3. Select Save and Exit. Restart Clubware.

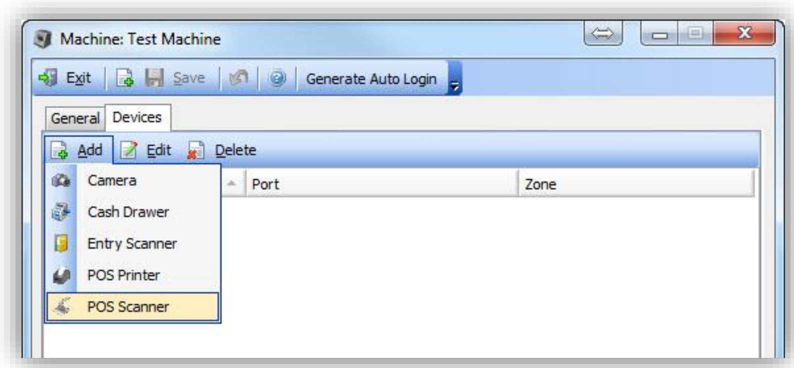
You have completed the steps required to configure a POS Printer in Clubware.

Configuring a POS Scanner

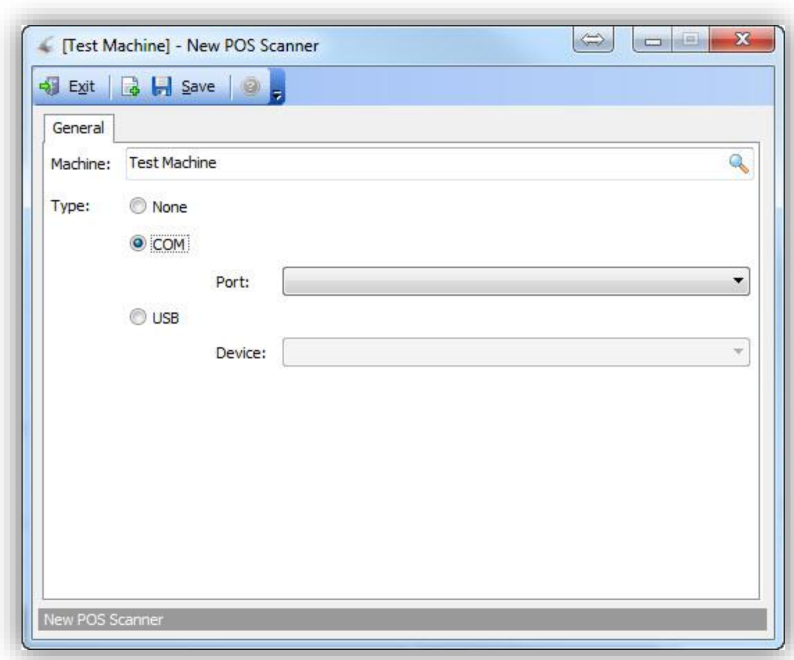
This tutorial describes the steps required to configure a POS Scanner in Clubware

Step 1. Follow the steps in the tutorial Adding a Device.

Step 2. Select **POS Scanner** from the drop down menu.



A New POS Scanner screen appears.



Main Points:

> **Machine:** Select the machine the device is connected to. (See the tutorial Adding a Machine for more information.)
>
> **Type:** Select the connection to the machine, either none, COM port or USB.

Step 3. Select Save and Exit. Restart Clubware.

You have completed the steps required to configure a POS Scanner in Clubware.

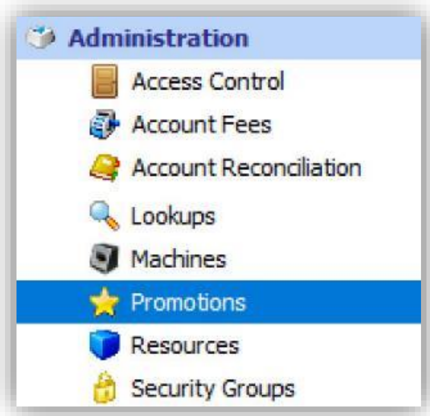
Promotions

The following tutorials describe the most common actions associated with Promotions.

Adding a Promotion

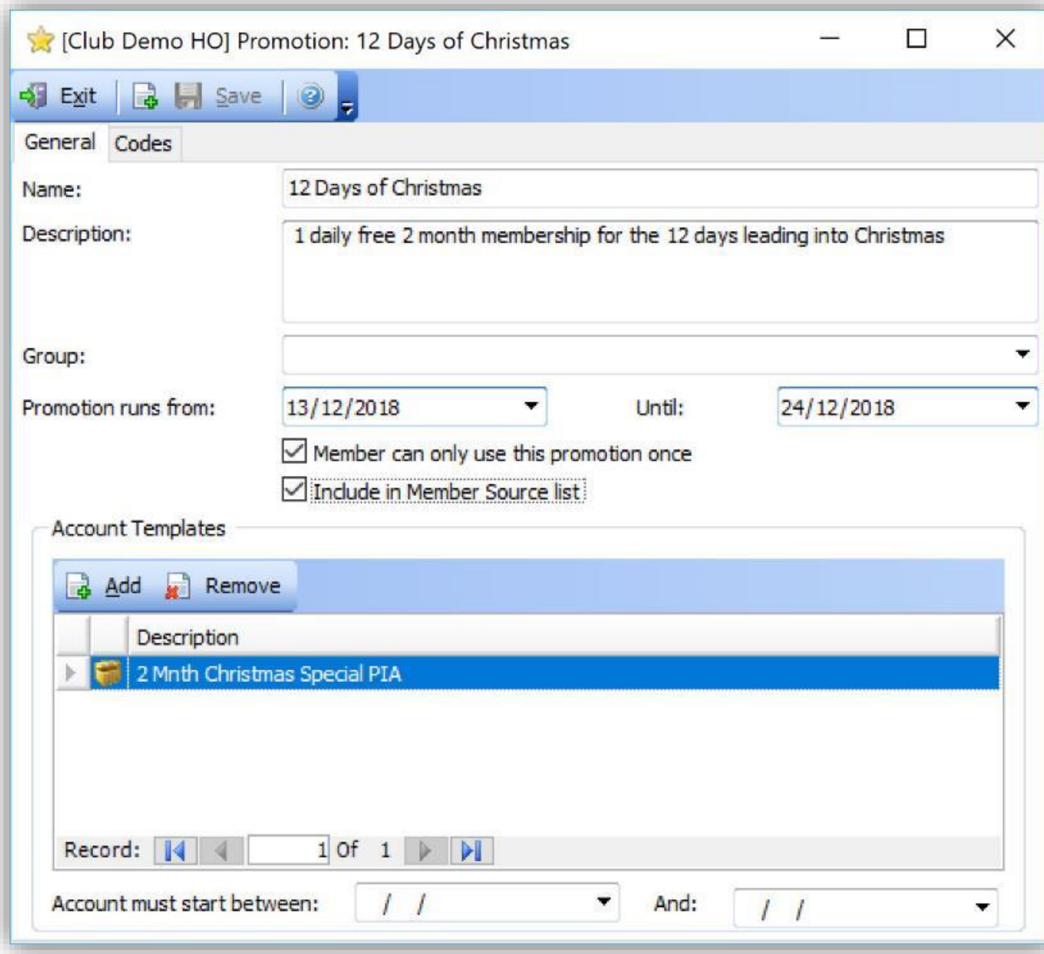
This tutorial describes the steps required to add a new promotion within Clubware.

Step 1. Select **Administration | Promotions** in the navigation panel, as shown below.



Step 2. The **Promotions** screen displays in the main panel.
Select **Add** from the toolbar.

Step 3. A New Promotion screen will appear.
Complete the details as in the example below.



Main Points:

Name: Give this promotion a short descriptive name.

Description: The description can contain the parameters of the promotion e.g. who it applies to.

Group: Allows for sorting on the Promotions screen.

Promotion runs from and until: Dates the promotion can run from and to. These are optional fields.

Member can only use this promotion once: Allows the member to sign up for the promotion once only.

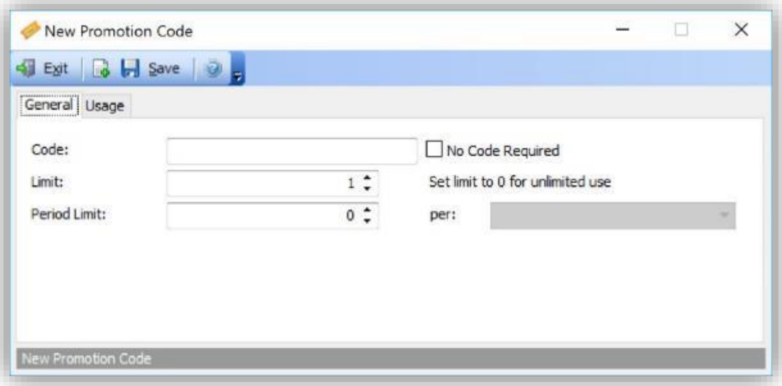
Include on Member Source List: If a member learns about your facility because of a promotion, that information can be assigned to the **Source** field on the **Details Tab** of the member's screen, as shown below. This can be used to track promotion success and response rates.

Account Templates: Lists any account templates exclusively related to the promotion. (See the tutorial Adding an Account Template for more information.)

Step 4. Save the New Promotion screen. From here you can apply 2 methods to create promotions.

Method 1. – Individual Codes

Step 1. Select the **Codes** tab. Select **Add**. By using this option, you are creating associated with this promotion



Main Points:

Code: Give this promotion a specific code. E.g. G3TF1T@GYM

No Code Required: Select this tick box if the promotional code is not required.

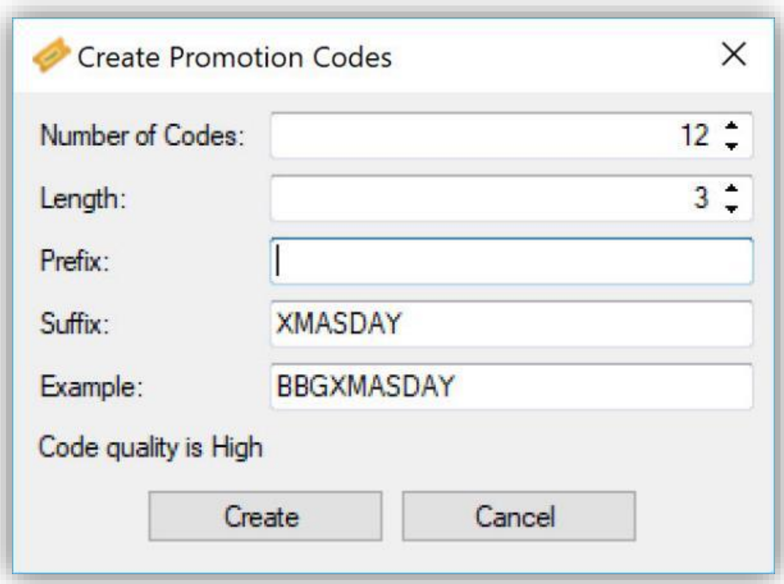
Limit: States how many times a promotion can be redeemed.

Period Limit: States how many of the codes can be redeemed within a set time period.

Step 2. Select **Save** and **Exit.** This code is now available for use in the Web API.

Method 2. Bulk Codes

Step 1. Select the **Codes** tab and then **Generate Codes**. By using this option, you can create one off codes for specific uses.



Main Points:

Number of codes: How many codes are required for the promotion.

Length: Allows you to create a specific length code.

Prefix: You can add a prefix to the code for personalisation to appear at the start of the promotional code.

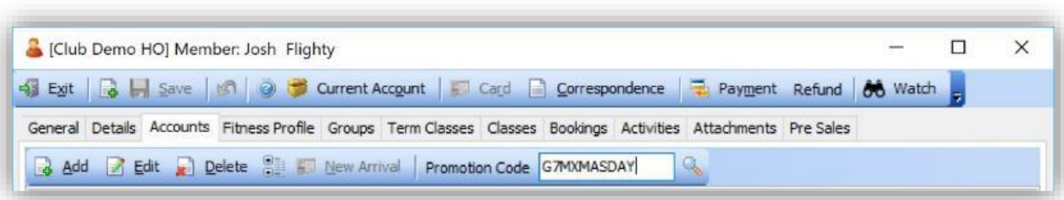
Suffix: You can add a suffix to the code for personalisation to appear at the end of the promotional code.

Example: Displays the output of the promotional code.

Step 2. Select **Save** and **Exit.** These codes are now available for use on a member.

Step 3. Add a promotion code to a member and select the search icon. The specific account template associated with the promotion will be available for selection.

Select OK.

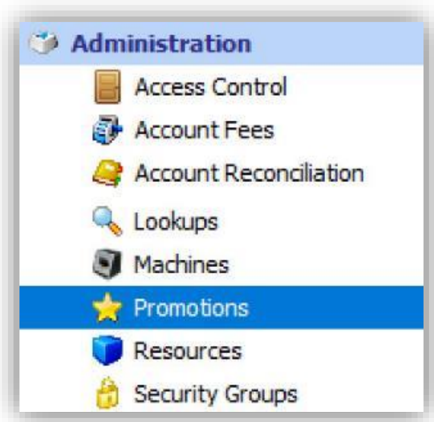


You have completed the steps required to add a new promotion in Clubware.

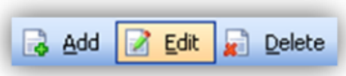
Configuring Promotion Approvals

This tutorial describes the steps required to configure promotions for approval. By using this option, club managers can control the promotions created by staff and offered to prospective members.

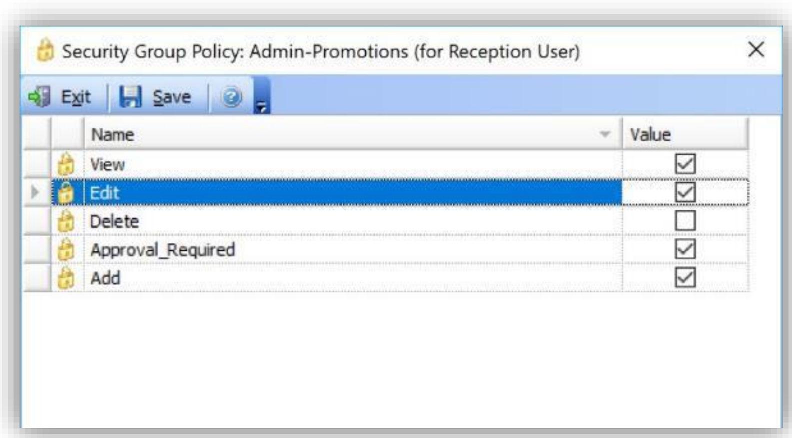
Step 1. Select **Administration | Security Groups** in the navigation panel, as shown below.



Step 2. The Security Group screen displays in the main panel of Clubware.
Highlight the security group you want to add the approval permission to and select Edit from the toolbar, as shown below.



Step 3. On the **General** tab, open the **Admin-Promotion** security group policy and tick the check box called ‘Approval_Required’



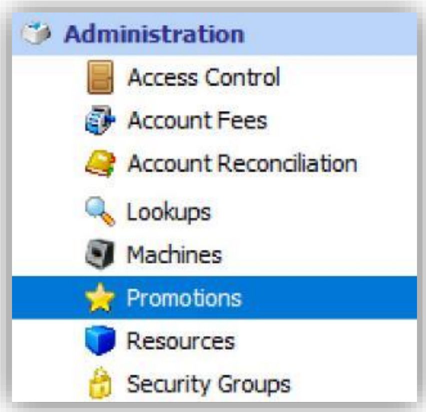
Step 4. Save and Exit.

You have completed the steps required to configure promotion approvals in Clubware.

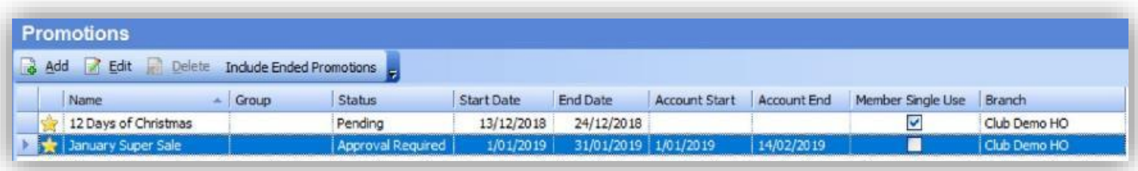
Approving Promotions

This tutorial describes the steps required to approve promotions for created by staff with security restrictions. For more information, see the Tutorial Configuring Promotion Approvals.

Step 1. Select **Administration | Promotions** in the navigation panel, as shown below.

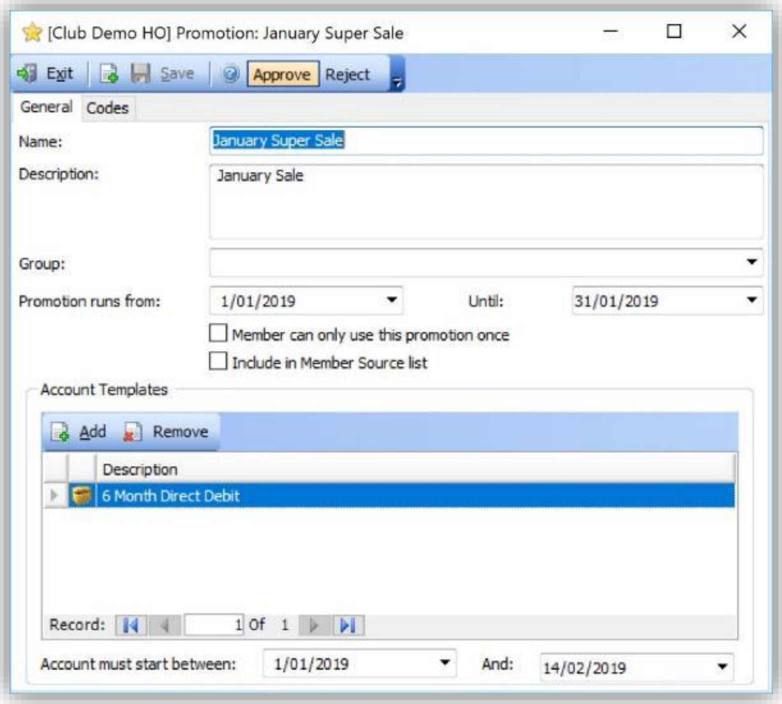


Step 2. The **Promotions** screen displays in the main panel of Clubware.

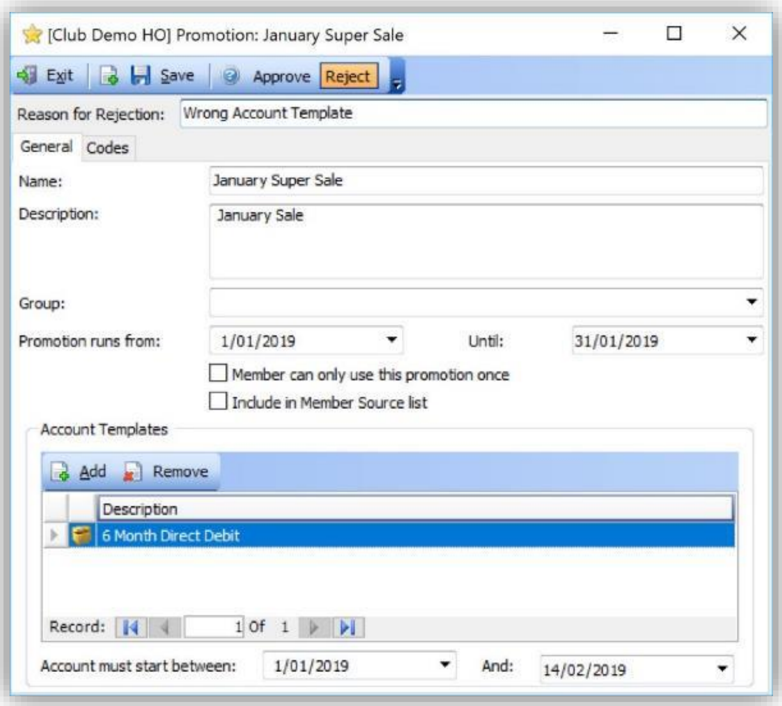


In the above example, there is one promotion requiring approval in the status column. Select the promotion and then edit to open the promotion.

Step 3. On the promotion toolbar, there are two options: to **Approve** the promotion or to **Reject** the promotion.

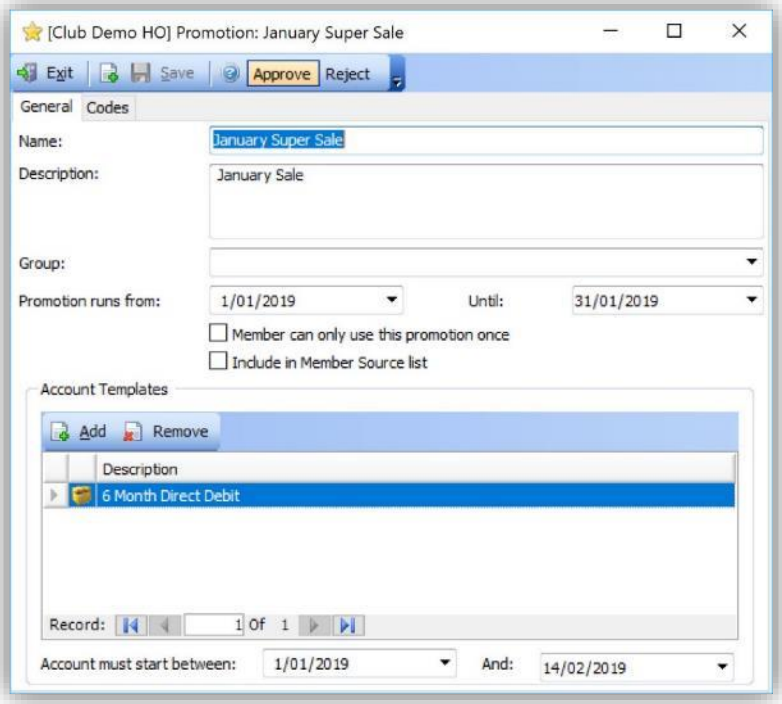


Selecting the **Reject** option allows for feedback to be provided as to the reasons why the promotion was not approved.



Step 4: The rejected promotion can then be updated by the staff member. Once saved, the promotion will again require approval

Step 5: Once the promotion is correctly updated, the manager can approve the promotion.



You have completed the steps required to approve or reject promotions in Clubware.

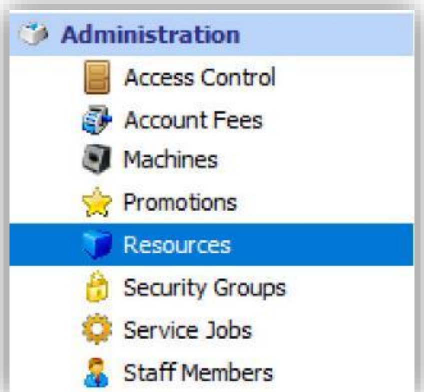
Resources

The following tutorials describe the most common actions associated with Resources.

Adding a Resource

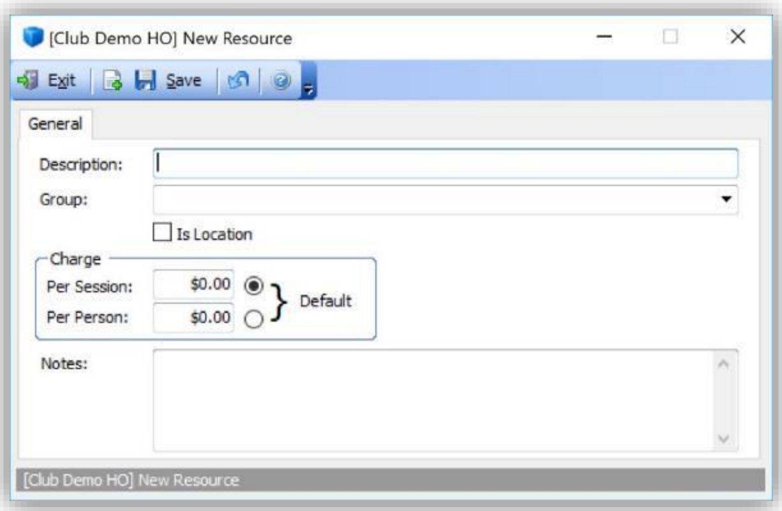
This tutorial describes the steps required to add a new resource within Clubware.

Step 1. Select **Administration | Resources** in the navigation panel, as shown below.



Step 2. The **Resources** screen displays in the main panel of Clubware.
Select **Add** from the toolbar, as shown below.

Step 3. A **New Resource** screen displays.



Step 4. Enter the details required for this resource.

Description: Enter a name for the new resource.

Group: create a specific group for the use of the resource. E.g. Swimming, yoga etc.

Is Location: Use this checkbox to allow the resource to be booked as a location

Charge: Enter the default charge for this resource. This sets the default charge value when adding a booking using the resource. (This field is optional).

Step 5.Save and **Exit** the New Resource screen.

All resources will be available on the Calendar, Classes and Term Classes within Clubware.

You have completed the steps required to add a new resource in Clubware.

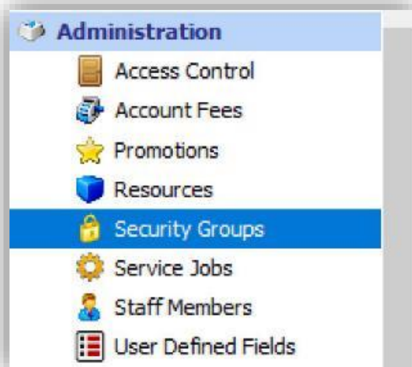
Security Groups

The following tutorials describe the most common actions associated with Security Groups.

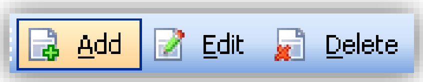
Adding a Security Group

This tutorial describes the steps required to add a new security group.

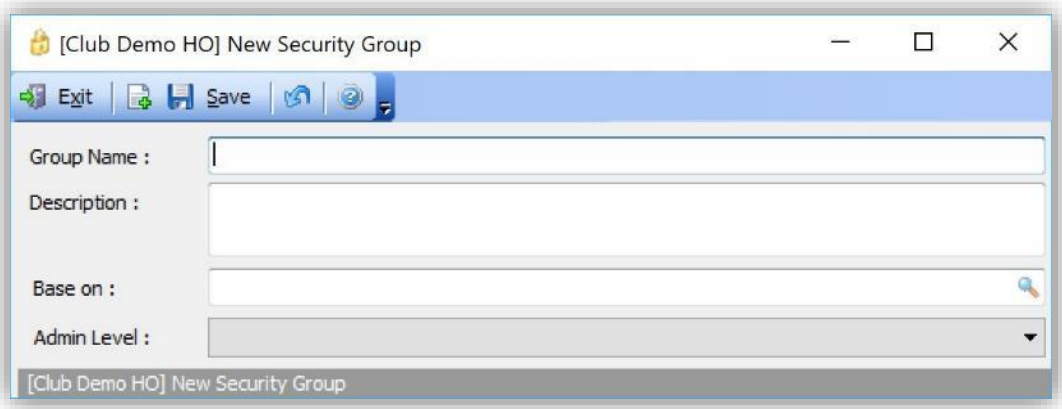
Step 1. Select **Administration | Security Groups** in the navigation panel, as shown below.



Step 2. The **Security Group** screen displays in the main panel.
Select **Add** from the toolbar.



A **New Security Group** screen displays.



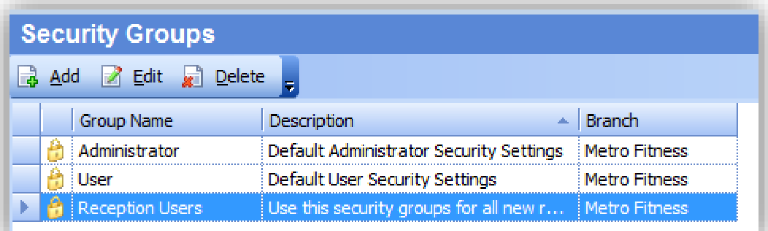
Step 3. Enter a name for the new group, and a short description.
In the **Base on** dropdown menu, select a group that best matches the settings you want to use.

Select an **Admin Level** similar to the level you will be creating for your new group.

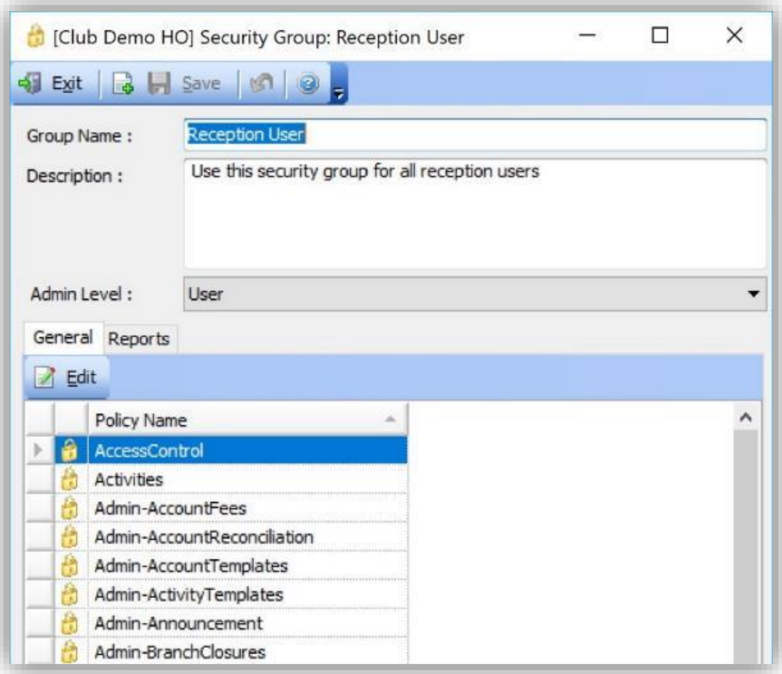
Note: You will be able to modify these settings when the new group has been saved.

The screen displays as shown below.

Step 4. Save and **Exit** the **New Security Group** screen.
The new group displays in the **Security Groups** screen as shown below.

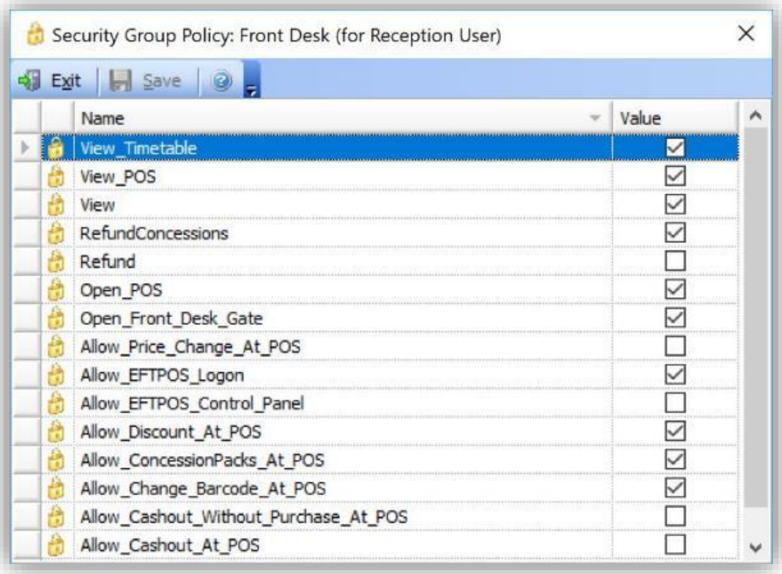


Step 5. Double click on the new group and the screen below displays.



Each Security Group has a number of policies associated with it.
Each policy refers to a separate area of functionality within the system.

Step 6. To edit a policy, select the required policy and click **Edit** on the policies toolbar. A screen similar to the one below displays.



Step 7. Check or uncheck options in the Value column depending on your requirements.

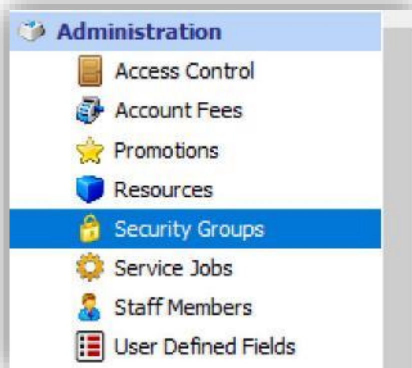
Step 8. Save and **Exit** the Security Group Policy screen.

You have completed the steps required to add a new security group in Clubware.

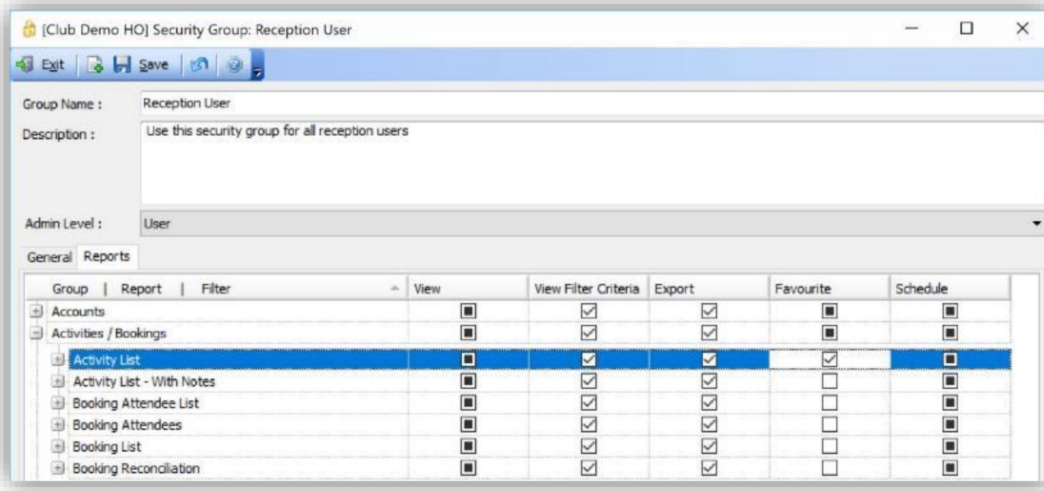
Editing Report Permissions

This tutorial describes the steps required to create report permissions within Clubware.

Step 1. Select **Administration | Security Groups** in the navigation panel, as shown below.



Step 2. The **Security Group** screen displays in the main panel. Select **Edit** to open the security group you wish to change report permissions for. Once this opens, select the **Reports** tab to show the reports available, as shown below.



Main Points:

Group | Report | Filter: According the tabulation of the report name, shows if it is a report group, report or report filter.

View: Allows the security group to see the Group | Report | Filter.

View Filter Criteria: Allows the security group to see the filter criteria when running the report from the reports screen

Export: The ability for the security group to export reports is controlled from here.

Favourite: Allows the group, report or specific filter to display for use on the **Favourite Reports** tab. (See the tutorial Configuring Favourite Reports list for more information.)

Schedule: Controls the scheduling permissions for the security group.

Step 3. Check the box to allow permission and uncheck to remove access. Select **Save** and **Exit** when completed.

You have completed the steps required Edit Report Permissions in Clubware.

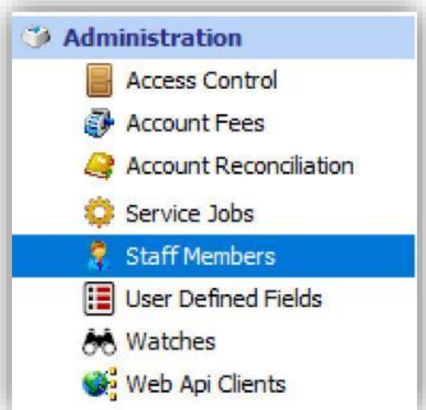
Staff Members

The following tutorials describe the most common actions associated with Staff Members.

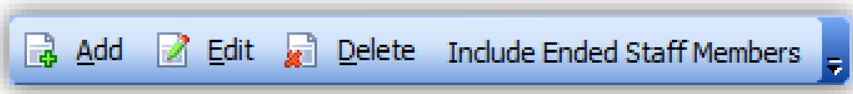
Adding a Staff Member

This tutorial describes the steps required to add a new staff member within Clubware.

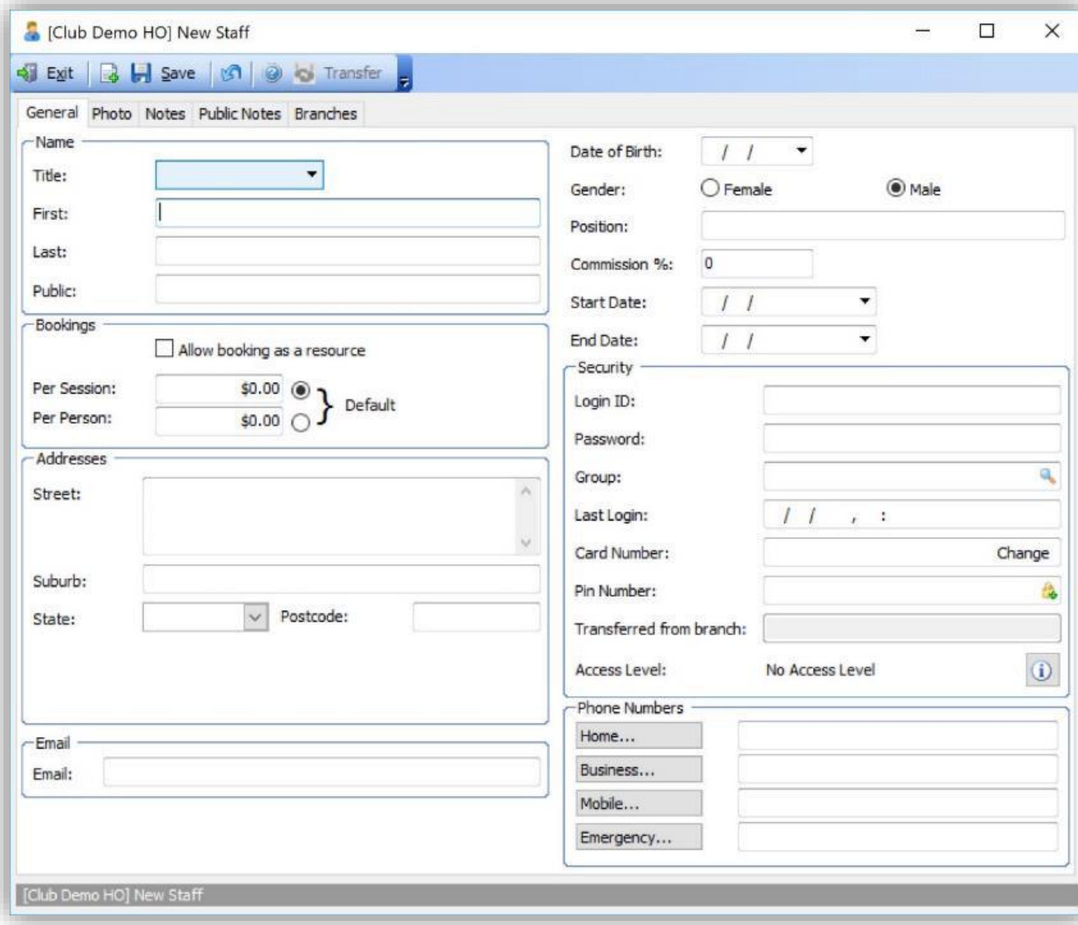
Step 1. Select **Administration | Staff Members** from the navigation panel, as shown below.



Step 2. The **Staff Members** screen will display in the main panel.
Select **Add** from the toolbar.



Step 3. The screen below displays.



Step 4. Complete the fields as required including First Name, Last Name, Login ID, Password, and Group as a minimum for a staff member you want to provide login access to Clubware.

General Tab:

First Name: The staff members' first name.

Last Name: The staff members' last name

Position: The staff members job title for informational purposes only.

Login ID: This is what the user will select from the dropdown menu when logging into Clubware from the login screen.

Password: Enter a password for the user.

Group: Select a security group the staff member will belong to. This will affect access to different areas of the system.

Card Number/Pin Number: If your facility is 24 hr and this staff member requires access.

Bookings: This is the default cost to members of adding the staff member to a booking. You can override this value when making a booking. **Allow booking as a resource** if you want this staff member to be available for bookings.

Photo Tab: Staff Member images can be loaded here.

Notes Tab: Any pertinent notes such as Availability and qualifications can be added here.

Public Notes Tab: These notes will display through the online bookings portal.

Branches: If the staff member works at several branches in a multi-branch database, these can be added here instead of adding a new staff member at each branch.

Note: The staff member needs to be created in the Head Office branch to be able to access multiple branches/branch groups. Access to Head office is not set by default in this situation.

Step 5. Save and **Exit** the New Staff screen.

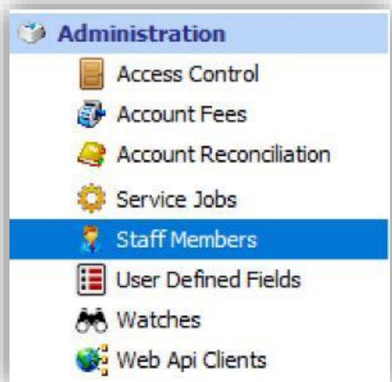
You have completed the steps required to add a new staff member in Clubware.

Configuring Staff for multiple branch access

The following tutorial outlines the steps required to configure staff members to allow access to multiple branches. This function is ideal for regional managers and staff who work over multiple branches and do not need access to all branches.

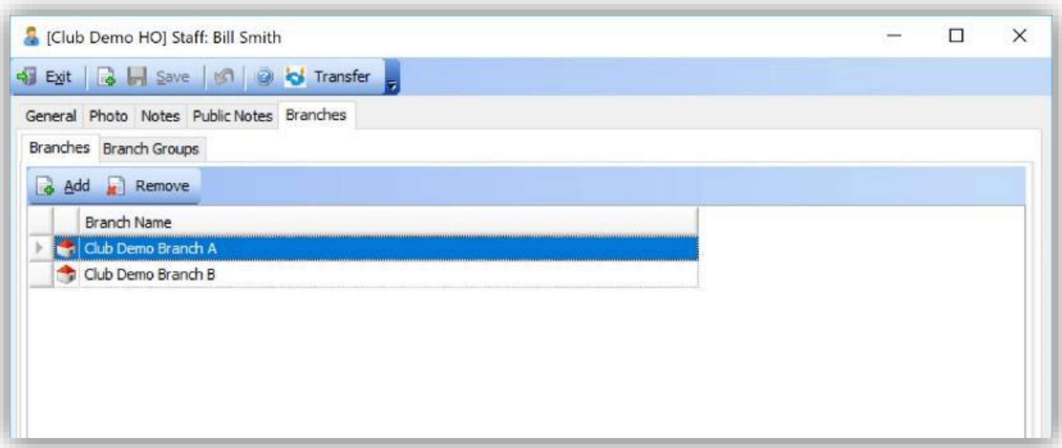
Note: The staff member must be located on Head Office to show the Branches tab.

Step 1. Select **Administration | Staff Members** from the navigation panel, as shown below



Step 2. Select the staff member and then **Edit** from the toolbar on the Staff Members screen.

Step 3 Select the branches tab. Select Add and then add the Branches or the Branch group the staff member will need access to.



Step 4. Select Save and exit.

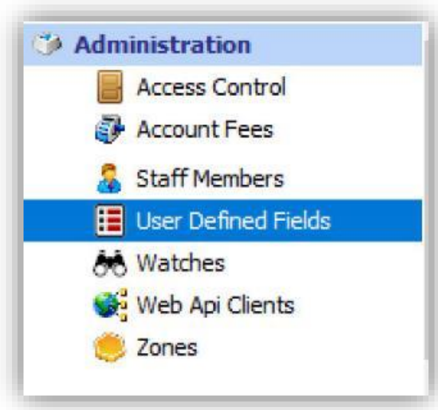
You have now completed the steps required to configure staff for multiple branch access.

User Defined Fields

The following tutorial describes how to create User Defined Fields.

Adding a User Defined Field

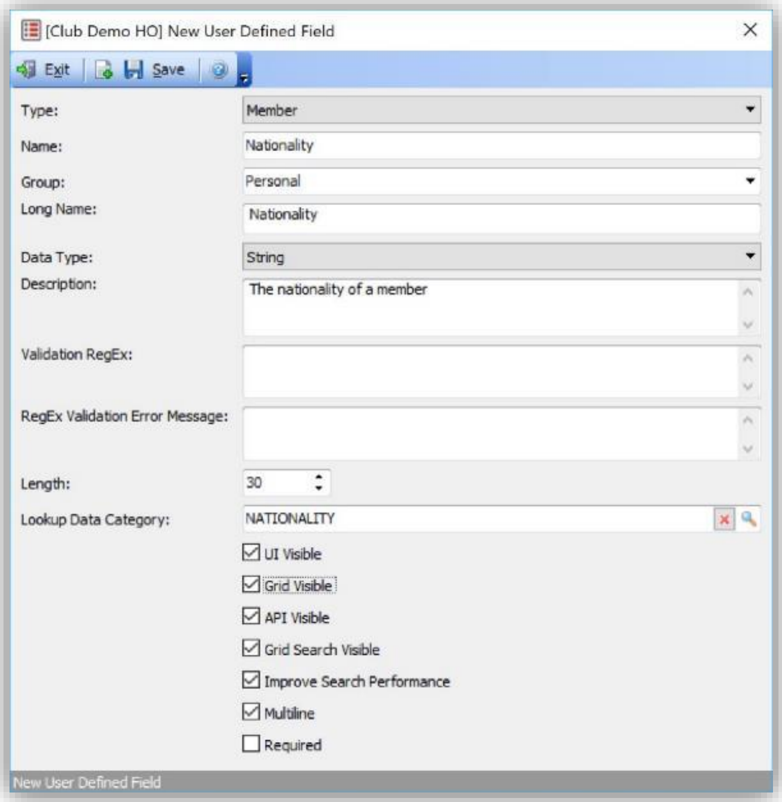
Step 1. Select **Administration | User Defined Fields** from the navigation panel, as shown below.



Step 2. Select Add from the toolbar on the User Defined Field Screen.

A New User Defined Field screen will display

Enter information as shown in the example below.



Main Points:

Type: This refers to the area within Clubware the User Defined Field will be active

Name: The name of the User Defined Field

Group: Allows for sorting and ordering on the User Defined fields tab

Long Name: This will be the display name of the User Defined Field.

Data Type: Defines the data type required

- Boolean - Yes/No
- Currency - Money
- Date - Date Only
- DateTime - Date /Time
- Decimal - Large Numbers
- Integer - Small Number
- String - Alpha Numeric expression

Description: There are internal notes for staff outlining the exact use of the User Defined Field

Validation RegEx: Regular Expressions can be added to Clubware should additional information such as vehicle registration numbers/drivers licence details be required. An internet search can assist in creating this.

RegEx Validation Error Message: Allows you to create a personalised error message to display should the details entered in the RegEx field not match the parameters.

Length: If the data type chosen is a string, then the option of a length will be given. This can be as many characters as needed

Lookup Data Category: Allows custom lookups to be used. (See tutorial Adding a Lookup Item for more information.)

UI Visible: Allows the field to be seen in Clubware

Grid Visible: The User Defined Field will display on the grid of the selected type.

API Visible: Allows use with the Web API. Please contact Clubware Support for more information on this.

Grid Search Visible: Allows the user to search on a grid for this user defined field.

Improve Search Performance: Allows the field to be reported on.

Multiline: Allows string types to populate over multiple lines.

Required: Make the User Defined Field compulsory.

Step 3. To be able to create report filters this field, the field needs to be enabled within Data Design. See tutorial Adding / Editing a Data Design for more information.

Step 4. If you require the field to be visible on a report, see the tutorial Modifying a Report Layout for more information.

You have completed the steps to add a User Defined Field in Clubware.

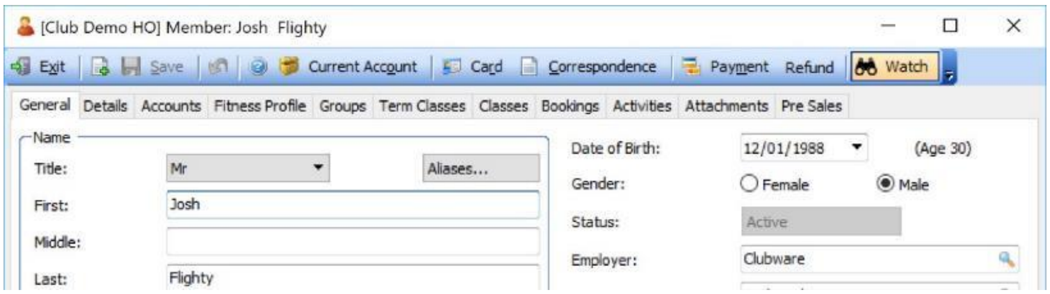
Watches

The following tutorial describes how to create a Watch for a member.

Adding a Watch on an individual Member

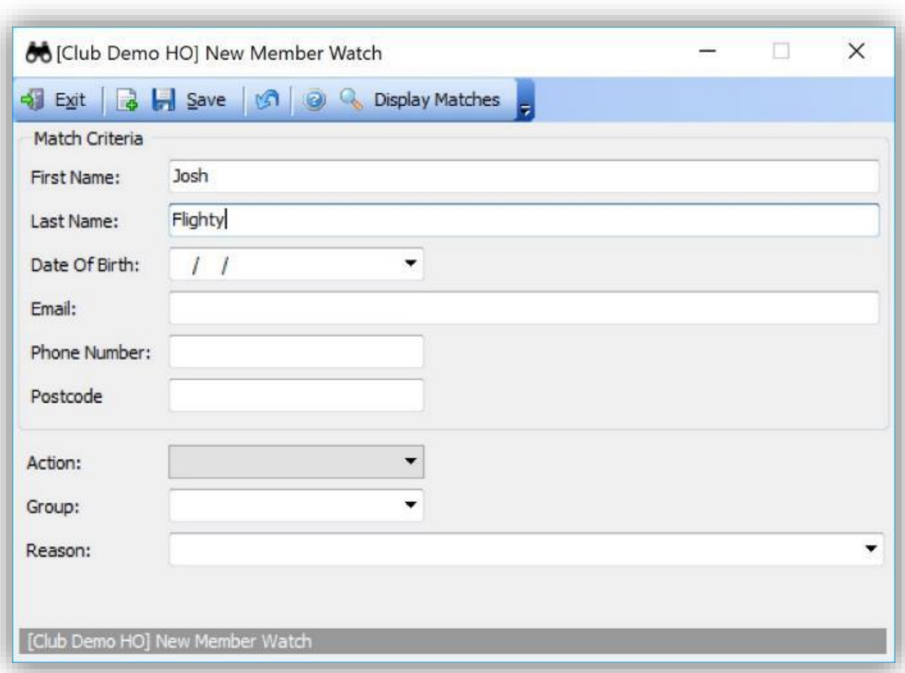
Step 1. Open the Member Record. (See the tutorial Finding a Member for more information.)

Step 2. Select Watch from the toolbar



Step 3. Click on Add

Step 4. Review and enter the appropriate Action and Reason (see Main Points in the tutorial Adding Watch criteria Via Administration)



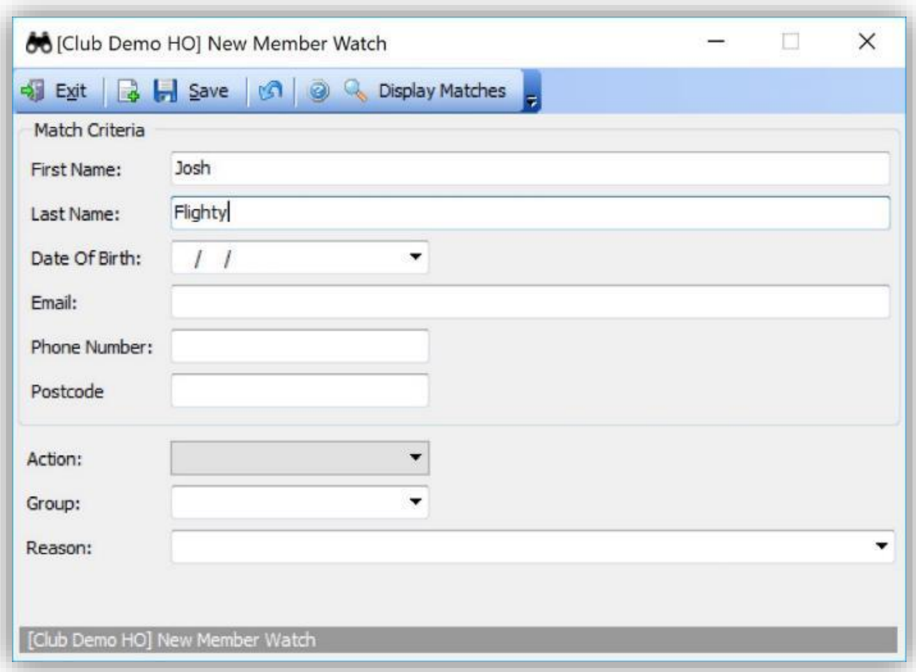
You have completed the steps required to add a watch to an individual member in Clubware.

Adding Watch criteria via Administration

Step 1. Select **Administration | Watches** from the navigation panel

Step 2. Click on Add

Step 3. Enter the Watch criteria and specify an Action and Reason



Main Points:

You do not need to complete all fields. Only the fields with values will be compared when determining if a member meets a watch list

Display Matches: Click this button to view members who meet this watch list

First Name: Enter a value to watch members with a first name matching this

Last Name: Enter a value to watch members with a last name matching this

Date of Birth: Enter a value to watch members with a D.O.B. matching this

Email: Enter a value to watch members with an email matching this

Phone Number: Enter a value to watch members with phone number matching this

Postcode: Enter a value to watch members with postcode matching this

Action: Choose whether to

- Stop At Gate: place a stop on the account
- Warn: warn the user when adding an account
- Block: prevent the user from adding an account

Group: An optional grouping or classification of the Watch

Reason: the reason that will be displayed when an account is added to a member who matches this watch list.

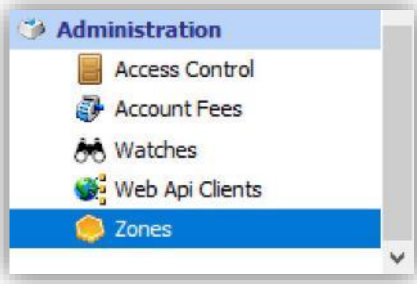
You have completed the steps required to add a watch criteria via administration in Clubware.

Zones

The following tutorial describes how to add a Zone in Clubware.

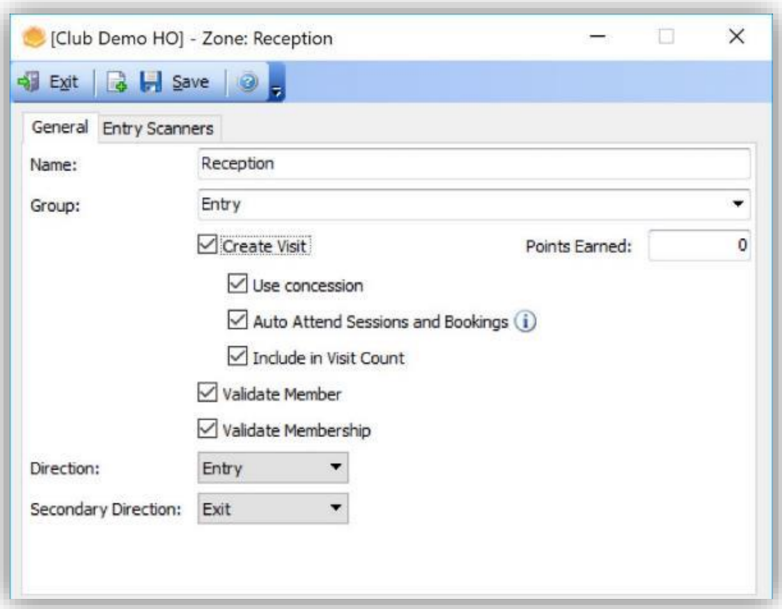
Adding a Zone

Step 1. Select **Administration | Zones** from the navigation panel



Step 2. Click on Add

Step 3. A New Zone screen will appear.
Complete the details as in the example below.



Main Points:

General Tab

Name: Enter the name of the zone.

Group: Create and allocate a group to sort different zones

Create Visit: Create a visit for the member in Clubware

- **Use a concession**: Tick checkbox to allow concession to be deducted when the arrival is created
- **Auto Attend Sessions and Bookings:** Arrive the member to classes and bookings at this point
- **Include in Visit Count:** Add a visit to the members visit count

Points Earned: If you want to use the loyalty system and assign loyalty points to members based on visits, enter the number of points to award here.
These will be awarded when a member records a visit at the facility.

Validate Member: Ensures the member is active.

Validate Membership: Ensures the member has an active membership and is not overdue or has a Stop at Gate.

Direction: Denotes if the zone is an entry or exit point.

Secondary Direction: Allows the zone to be a multidirectional access point

Entry Scanners Tab

Add, **Edit** or **Delete** entry devices for this machine. (See the tutorial Adding a Device for more information.)

You have completed the steps required to add a Zone in Clubware.

Release Notes

Clubware 2.6

Major Features

Activity Templates (100)

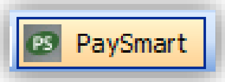
Individual or groups of activities can be added to a member based on a template. See _d2h_bmk__Ref360614580_121

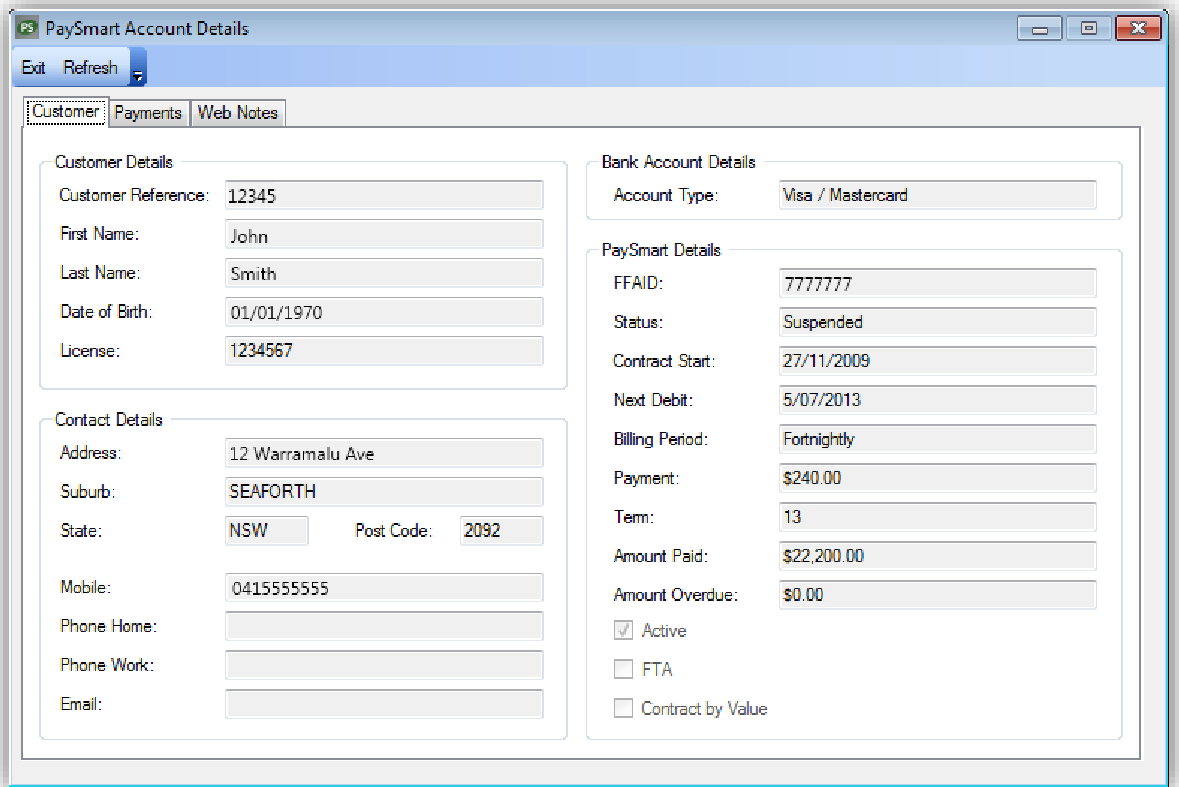
Access Control Integration with Paxton (96)

We have integrated with an access control hardware provider, allowing flexible control of entry points by members.

View Paysmart account details (172)

A new screen has been added that opens from the account screen to display Paysmart account details, to assist with reconciliation between Clubware and Paysmart. Click on the Paysmart button on a Paysmart billing account.

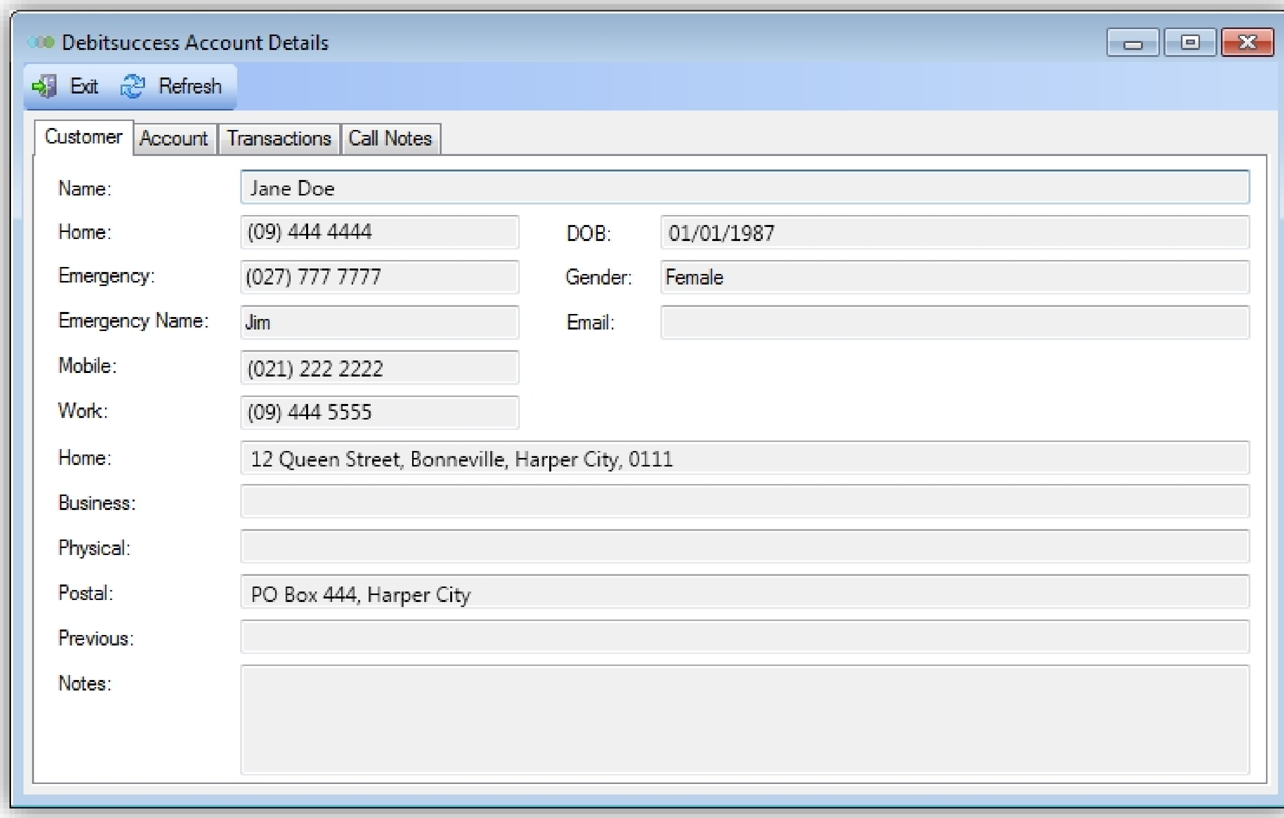


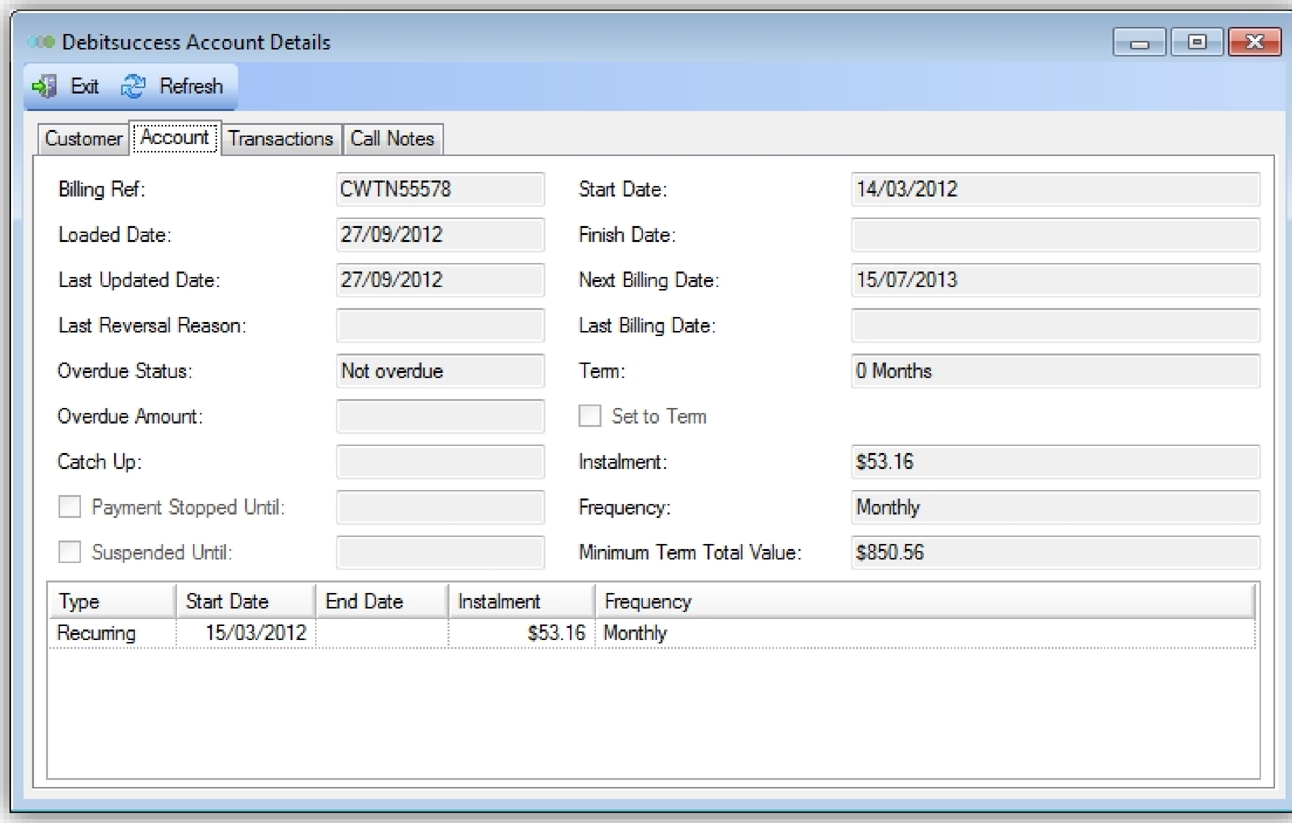


View Debitsuccess account details (91)

A new screen has been added that opens from the account screen to display Debitsuccess account details, to assist with reconciliation between Clubware and Debitsuccess. Click on the Debitsuccess button on a Debitsuccess billing account.

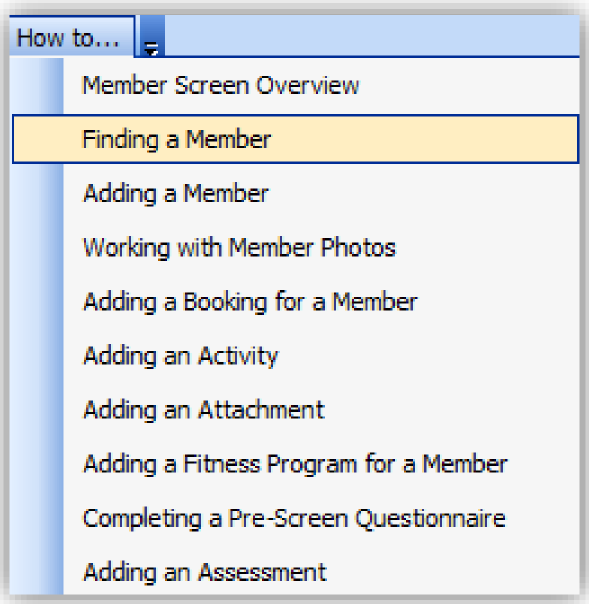

Debitsuccess


Debitsuccess Account Details
Exit
Refresh
Customer
Account
Transactions
Call Notes
Name:
Jane Doe
Home:
(09) 444 4444
DOB:
01/01/1987
Emergency:
(027) 777 7777
Gender:
Female
Emergency Name:
Jim
Email:
Mobile:
(021) 222 2222
Work:
(09) 444 5555
Home:
12 Queen Street, Bonneville, Harper City, 0111
Business:
Physical:
Postal:
PO Box 444, Harper City
Previous:
Notes:



How To's (456)

Links have been introduced throughout the application for How To guides.



Minor Features

Front Desk

- Billing Provider Stop Note field added and stops will be enforced by default.
- Activities now record the date it was completed. (178)
- Add USB Support for HID Scanners supported by Clubware (54)
- Arrivals screen now supports opening multiple gates and access control doors. (777)
- Change Barcode for Member at POS (227)
- POS screen will now popup if minimised when a product or an account barcode is scanned on a POS scanner. (693)
- Failures to connect to scanners, access control doors, gates etc. will now display in a notifications screen.
- The payment amount for a refund is set to the total refund amount. (641)
- Staff name and member name now displayed as first and last name on activity screen and member activity tab. (563)

Calendar

- Calendar now supports deselect all for resources and instructors and a today button. (38, 41)

Members

- Billing provider fields on accounts are now disabled if they are non-billing by default. This can be enabled in Tools | Options | Billing Providers | Enable billing fields on non-billing accounts). (1169, 1260)
- Members can be searched by DOB day and month. (138)
- Account renewal process updated (477)
- Visit history report via member screen now includes visit total and name. (144)
- Add 'Reset Points' button on member detail screen, this can be enabled in security. (37)
- Prospects can be searched by additional fields. (159)
- The account lookup screen will only show billing account templates on the unmatched members screen. (1189)
- Account invoices are now ordered by type and date. (143)
- InTouch Integration. (207)

Reports

- Add account description to the POS audit trail. (141)
- Reports can be exported to plain text CSV format. (477, 137)

Correspondence

- Printing order of the address labels are now sorted by last name. (148)

Administration

- New receipt printer settings for margins, including club logo, cutter, open cash drawer and font details (182)
- Account and account templates have a new billing provider field so specific validation can be applied based on the billing provider. (565, 725, 1170, 1188)
- Expected frequency and amount may be set on Account and Account Templates. This can be used to compare the expected frequency and amount with the billing provider's frequency and amount. (173)

Other

- Show status on splash screen when connecting to com/USB/access control. (234)
- Clubware has been certified by Microsoft to be Compatible with Windows 8. ()
- Clubware 2.0 has been rebranded to Clubware.

Fixes

Front Desk

- A member is no longer stopped at arrivals if their account expires today. (55)
- POS hot key popup items are now sorted by product name. (52)
- Arrival screen now displays “Expiry Due” instead of “Expired” for accounts that are due to expire. (614)
- Last assessment is now displayed on the arrivals screen. (56)
- Activity screen grouping now displays correctly when grouped by due date. (47)
- You can now make a payment/refund through POS greater than account total. (1197)
- Visit warnings only show if the option is ticked. (57, 616)
- Parking a sale after printing a receipt for an account payment no longer shows that account on the subsequent receipt. (1164)

Calendar

- Branch open and close times now show correctly on the calendar. (42)
- CTRL+F9 shortcut key now takes you to the resources and instructors calendar. (142)
- Adding a new time slot to the staff rostering no longer displays an error. (58)
- The calendar now warns if an instructor isn’t available between multiple available time slots (147)
- The new staff roster button is now enabled if you have the correct security permissions. (303)

Members

- Preferred contact and address logic updated. (35)
- Scanned or manually entered barcodes that are already assigned to another account will now prompt to move barcode. (140)
- Member search screen now sorts by branch, last name, first name. (145)
- Guarantor prompt now only appears once when adding a new member. (1275)
- Account end date is now calculated correctly when you adjust the term length. (615)
- Preferred time to call can be added when saving a new prospect. (45)
- Member form no longer freezes when changing an address and tabbing through state field. (49)
- Hold and suspend date no longer changes before save in some cases. (940)
- End date now saves when an end date is entered manually on a new ongoing account. (59)
- Member notes save when adding an account on a new member before saving the member. (43)
- An issue has been resolved with a new account being saved without a branch in some cases. (139)

Retail Management

- Printing purchase order from order screen now displays the full club name. (50)
- The same barcode can no longer be used on a product and account. (541)

Reports

- Reports based on the Member_AllInformationCurrentAccount view are now sorted by member last name. (622)
- Account payment refund quantity is now displayed as a negative on the POS Audit Trail. (39)

Correspondence

- Hyperlinks now work when using email as attachment merge or file merge. (1100)
- Inserted images in correspondence are now left aligned by default. (51)
- The activity notes field is no longer limited to 320 characters on activities when created using the activity merge wizard. (53)
- Duplicate PDF files are no longer sent when using email as attachment merge option in scheduled correspondence. (239)
- Correspondence error no longer displays when using the back button. (238)
- Mobile numbers are no longer prefixed twice with the country code when sending sms if the country code is already included in Clubware. (211)

Other

- Options no longer take a long time to load in a cloud environment due to checking com ports. (222)
- Branch drop down in options no longer shows deleted branches. (36)

Clubware 2.7

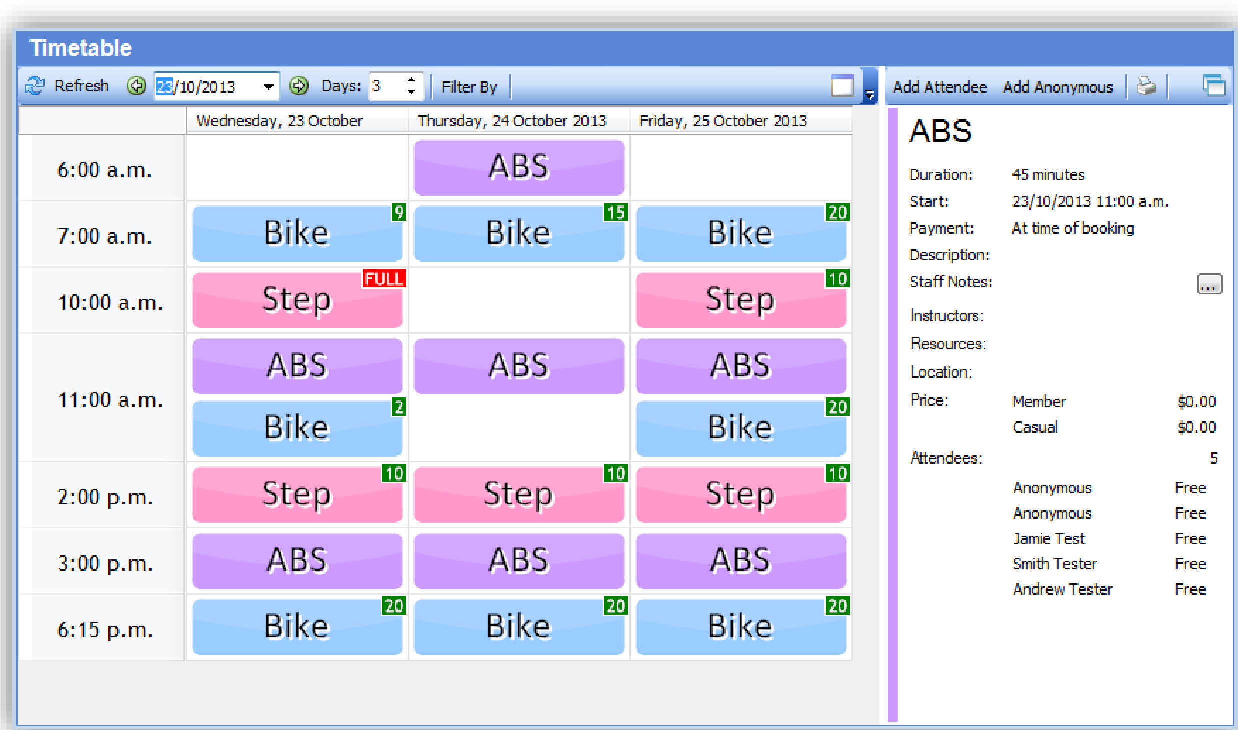
Major Features

Group Exercise

A new classes module has been added to support group exercise and the existing class management module has been renamed to term classes. It allows creation of classes and sessions that can be booked from the timetable in the front desk module, the arrivals area or the members screen. Classes can be configured to allow members, accounts, concession accounts, casuals or anonymous attendees and a cost if required. Classes can also be linked to resources, instructors and locations which will show in the relevant calendar.

The POS screen can be used to make a payment for a session and the purchasing of concession packs. A booking ticket can be printed for proof of booking when attending the session or to allow entry.

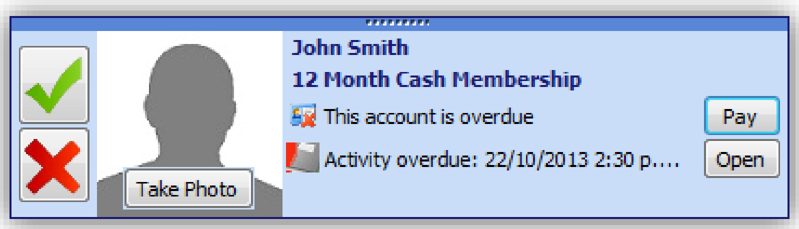
Online Bookings will be available in the next release of Clubware which will allow members to book classes using a website on their computer or smart phone.



Arrival Popup Screen

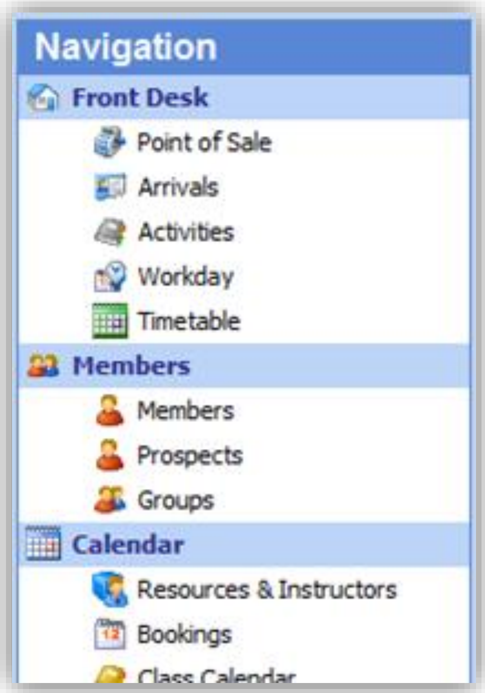
Redesign of the arrival popup screen to show more information and allow actions directly from the popup. The arrival popup has the following features plus more:

- A pay button is shown for overdue accounts if payments through POS is enabled in options.
- A pay button is shown for unpaid classes.
- A recharge button is shown for concession accounts that are low or have no concessions remaining.
- Messages are more descriptive without the need to read tooltips.
- An open button is shown for members that have activities they are overdue or upcoming.
- The member's photo can be taken if missing.
- The arrival message on a members account is always shown and will stop the member if stop at gate is ticked on the account.
- Allow or deny buttons will show for members that are stopped, allowing the staff member to choose if the member is allowed entry, this will be recorded and shown in the arrival area.
- Allowing a member will open the gate for the arrival zone.
- A remove button will show for members that are on hold allowing the hold to be removed.
- Visits can occur for members with no accounts but will be stopped by default.
- Visits can occur for deleted accounts but will be stopped by default.
- Member's last reciprocal visit will show in the members area.
- The manual arrival screen will no longer show and has been replaced with the standard arrival popup screen.
- The new arrivals button in the arrivals area allows the selection of the arrival zone.
- The class or booking that was auto attended will be shown.
- Concession accounts can no longer go into negative concessions.



Navigation

The navigation pane shows all modules stacked and allows expanding and collapsing by double clicking, this will allow quick navigation between modules. A single click on the module header will show the dashboard for the selected module.



Member Search

- The member search now defaults to a common search which automatically searches the members name, barcode, card number, phone, email, billing reference and Alias. Individual fields can still be searched by changing the search type. The default search can be changed back to Fullname via a setting in options. (2143)
- The member search now defaults to showing a list of recently used or arrived members to allow quick selection of members. (2143)
- The member search now has a new search type for Reciprocal Members, this will be available when searching for members from arrivals, POS, sessions, bookings and activities. The search is limited to name, DOB, barcode and card number and will only return the first 20 records. This can be disabled in options by unticking allow reciprocal member search. (1478)
- Search types are now grouped to allow quicker selection. (2174)

POS and Retail Management

- The POS screen now supports resizing and maximising. (1336)
- The product menu buttons are no longer limited to 8. Additional product menus can be created by adding hot key menus from the lookup area in the administration module. (1336)
- A product menu button that contains only 1 product will now show as the product name and will create a new sale item when pressed instead of showing the product menu screen. (1602)
-
- Maximum quantity for a sale item in POS has changed from 300 to 999. (2095)

Paysmart Billing Sync

- The Paysmart Billing Sync will now run automatically every hour or can be run from the synchronise menu on the main screen as required.
- Payments are synchronised as soon as the payments clear instead of when they are settled.
- New members will show in the unmatched members screen once created at Paysmart instead of only after the member's first payment.
- Billing provider stop notes are populated for overdue and cancelled accounts and will be stopped at gate by default. This can be turned off using a setting in options.

Minor Features

Front Desk

- The auto attend settings in options has been changed from hours to minutes. (1342)
- Change the default search on Activities and Workday home screens to Date Due. (2481)

Calendar

- Calendar background colour changed and lines have been refined. (1474)
- Ability to Cancel or Restore a booking from inside the booking (1477)

Members

- A card number can now be recorded against a member. The card number field is shown on the details tabs of the member screen and allows a card number or fob number for access control to be allocated to the member and not a specific account. (1344)
- The prospect screen now has tabs for details, bookings, attachments, classes, and groups. (642)
- Concession usage is now recorded and shown in a new concession usage tab on the members concession account. (1396)
- Promise payments are now supported using “allow entry if overdue until” on the account screen. This can be used to allow members entry till the selected date when their account is overdue. (1203)
- Prevent editing of the term on the account screen if not allowed to edit the account end date. (2097)
- Corporate details can be stored against an account. A new corporates area has been added to the administration module to create, edit and delete corporates. Account templates can then be marked as available for corporate members only, which will show a new corporate tab on the account screen. (2100)
- Inactive members can be converted back to prospects. (642)

Term Classes

- Term classes now shows search dialogs instead of dropdowns to allow quick access to create and edit. (1812)

Administration

- Allow account to be used at other centres can now be set on an Account Template. If ticked then any accounts created from the account template will allow entry at other branches. This is ticked by default for membership accounts. (1683)
- Fitness program templates can now be created, edited and deleted in the administrator module. (1536, 2117)

Other

- Search screens can be limited to return a maximum number of records. All records can then be displayed by clicking the ‘Show All’ link, which can be disabled in security settings. (2457)
- Custom buttons can now be added to the main screen, member screen and account screen to open applications installed on the local machine. These can be setup in the user defined buttons area in options. (2012)
- Selected search screens will show add and edit buttons if you have permissions that allow locations, resources, and product groups etc. to be created or edited directly from the search screen. (1682)
- Unmatched members will now prompt for an account when matching members and the member only has one account. (2010)
- Support for Paxton Access Control Software Version 4.28. (2436)
- Mobipost's Logo has been updated. (2009)
- New zones default Log Visit, Validate Member, Validate Membership to ticked. (2388)
- New settings to limit which machines can run service jobs and for which branch. (2464)

Minor Fixes

Front Desk

- POS Refunds swapping to positive totals when incrementing quantity using product hotkey. (2493).
- Shortcut for change staff member on the POS screen has changed to F2 to prevent conflict with new arrival shortcut. (1666)
- Transaction date and applied date for $0 transactions are now saved correctly when selling concession pack and products. (1707)
- Reciprocal members are not getting stopped on re-entry attempt (2370)

Calendar

- Charges generated incorrectly in a series (2428)

Members

- Minor fixes with creating and editing member fitness programs. (1536)
- Delete key now working in the members area. (1992)
- Hide WebExpress link on a Paysmart account once the reference has been moved or changed. (502)

Retail Management

- Stocktake grid now refreshes after a stocktake is completed. (1665)
- Stocktake grid now returns all results instead of the default number of records to display. (2091)
- Hot key menus are now sorted on the product screen to match the sort order shown on the POS screen. (1673)

Reports

- The Visit Summary (Account) report now includes reciprocal visits.
- The Visit Summary (Member) report is now the members total visits, not the total visits for the current account only, and includes reciprocal visits.
- The Visit Graph reports now includes reciprocal visits.
- Ctrl-Alt-Del on the reports grid no longer shows the deleted dialog. (1667)

Correspondence

- Member information view now displays money fields to only 2 decimal places. (2344)
- SMS text messages were being limited to 320 characters, the new limit is 2000 characters for Adhoc messages and 1500 for SMS correspondence documents. (2432)

- SMS service job fails if a contact record has a null value for mobile phone number (2462)
- SMS text are being marked as duplicate if a previous text has failed. (2463)

Administration

- Added a blank option for access control group on the account template screen. (1632)
- Bulk card page setup no longer shows an error if the printer has been removed or doesn’t exist on the local computer. (1711)
- Administration dashboard is now ordered alphabetically. (1398)
- Staff members can no longer login if they aren’t in a security group. (1993)
- Minor fixes for the staff screen. (1041)

Other

- Desktop shortcut renamed from Clubware 2.0 to Clubware. (1473)
- Renewal accounts now move the barcode on expired accounts before access control is synced. (2287)
- Closing or reconnecting serial ports may cause the system to hang in a Citrix environment. (1462)
- Rename "Show reminder for activities due in" on the entry tab in options to include bookings. (1398)
- The re-sync button for access control is no longer visible if the access control provider is set to none. (1043)
- Removed update reciprocal members on the maintenance screen. (1664)

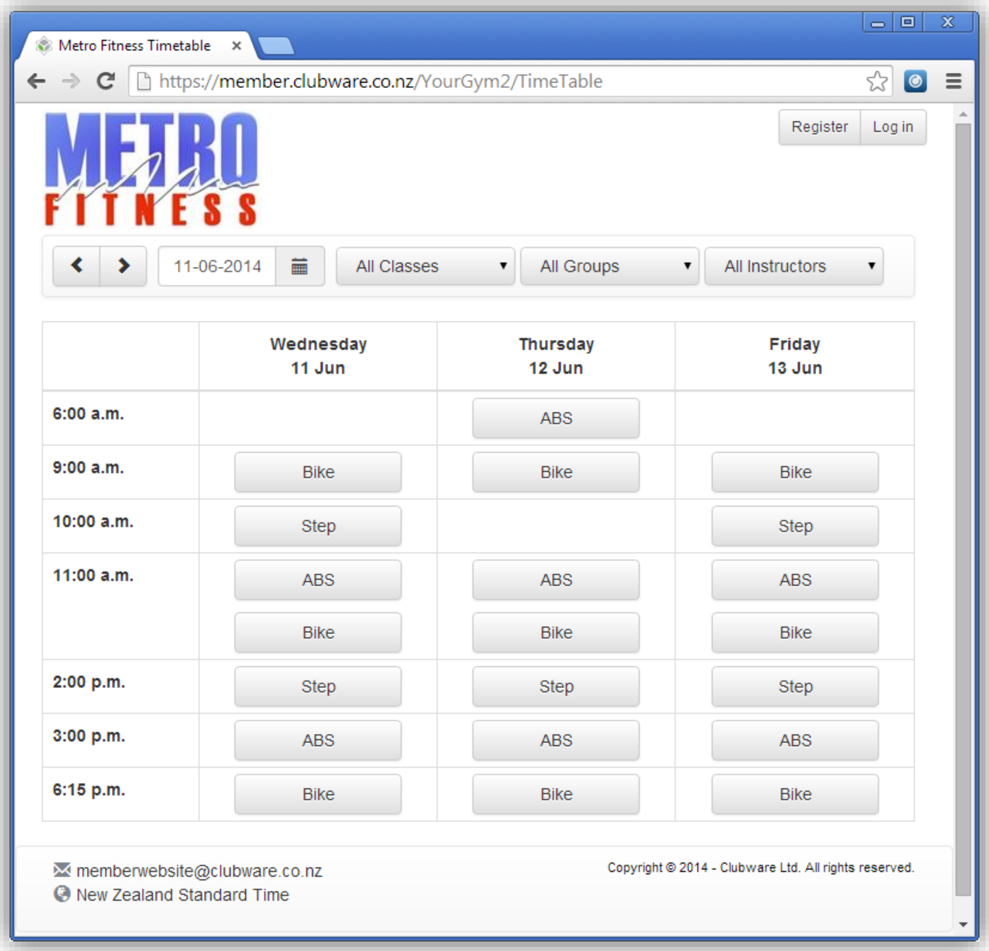
Clubware 3.0

Major Features

Member Website - Online Bookings

A new member website has been created to allow members to book classes online. Clubware will sync classes, sessions and member details to the website which is hosted by Clubware and display a timetable for each branch to the public. Members with valid email addresses can request a password and login to book a session, any sessions that are booked will be synced down to Clubware. (1334)

Please contact Clubware Support for training and to setup a member website for your club.



Access Control Integration with Inner Range Integriti

We have integrated with Inner Range Integriti (version 3.2.3) for access control. (3072)

Please contact Clubware Support or visit the following website for additional details: http://www.innerrange.com/products.php?id=195

Minor Features

Members

- Invoices can now be dragged and dropped between member accounts. (2622)
- A new security setting has been added to allow email address and user defined fields on the member screen to be compulsory fields. (2555)
- The Debitsuccess Account Details screen now shows the docket number on the transaction tab. (2628)
- The member area and member lookup screen now has a Scan Now button to search for a member by scanning their barcode or card number. (3540)

Reports and Correspondence

- A new security setting has been added to disable filters being created for reports and correspondence. (2624)

Other

- The grouping of settings in the options screen has changed to allow for better management. New security settings have been added to allow certain groups to be disabled. (2585)
- A new security setting has been added to prevent new groups being created in the following screens: Account Template, Corporates, Activity Template, Product Group. (2554)
- The visit time can now be adjusted to support a Paxton server being in a different time zone to the branch. (3087)
- Support for Paxton Net2 access control software version 5.1. (3091)
- Support for SQL Server 2014. (3164)
- Access control levels can be created against the Head Office and will then apply to all branches. (3417)

Minor Fixes

Front Desk

- The arrival popup is pinned and the stop sound is played if a members account is due to expire within the 'stop if due to expire in less than' setting. (2591)
- Switching hot key menus now closes the previous hot key menu. (2817)
- The arrival popup is now being displayed for the correct number of seconds that is configured in options. (3008)
- A visit created by Paxton will now be created with the correct entry allowed or denied outcome. (3238)
- Reward points are now deducted when products are refunded at POS. (3250)
- Reciprocal member accounts can no longer be opened from the arrival popup if the branch doesn’t have rights to edit reciprocal members. (3282)
- Duplicate visits are no longer recorded if multiple Clubware instances are open when using Paxton Net2. (3416)
- Arrival popup outcome is now correct for users in Net2 that don't exist in Clubware. (3460)
- Auto attendance now works for charge account bookings. (3395)

Members

- The member visit info screen is no longer limited to the last 500 visits. (2626)
- Members deleted from a billing group will no longer be stopped during an arrival when the billing member is overdue. (2613)
- Session bookings on the member screen can now be sorted by class name. (3232)
- Grace overdue is now correctly calculated when an account is edited and the grace days setting is set to 0 days. (3290)
- Member status calculation is now correct when account or hold ends today. (3299)
- Member statuses are no longer left as Inactive if the maintenance fails while updating the member statuses. (3308)

Calendar

- Deleted staff will no longer show on the staff roster page. (3014)

Retail Management

- Generating an order containing products with no units per outer no longer displays an error. (2523)
- Selecting a parent group header when adding a product group to a product no longer displays an error. (3025)

Classes

- Members with only a concession account can now be booked into a class allowing casuals. (2983)
- The session booking ticket now includes the primary instructor. (3171)
- The session and term session lists are now ordered by start date. (3222)
- Sessions will be shown as unpaid if the class only allows payment by concession and the member has no remaining concessions. (3274)

Term Classes

- The class at capacity message no long displays when enrolling a member to a term class with an unlimited size. (2958)
- Exceptional attendance members can now be viewed and edited for a session. (3474)

Reports

- The use of brackets in filters is now consistent and no longer displays an error for advanced bracket scenarios when running reports or correspondence. (2515, 2539)
- The ‘Visit Graph Hourly’ report now generates correctly when scheduled. (2565)
- Reports and correspondence that are saved to file or attached to an email no longer fail if the filename contains invalid characters. (2777)
- Exporting reports to XLS raw data with the report name longer than 31 characters no longer displays an error. (2781)
- The scheduled reports link now shows in the reports dashboard. (2816)

Correspondence

- The use of brackets in filters is now consistent and no longer displays an error for advanced bracket scenarios when running reports or correspondence. (2515, 2539)

Administration

- The ‘Access Control Group’ and ‘Billing Provider’ columns in the account templates area are now populated. (3158)

Other

- Club name in options is now a required field. (2982)
- The time fields ‘Centre open time’, ‘Centre close time’ and ‘Default booking start time’ no longer reset to 12:00am when editing. (3245)
- Paxton will only be synced with valid card numbers and barcodes between 1 and 99,999,999. (3249)
- Member card numbers and account barcodes containing a decimal place no longer causes errors when syncing with Paxton Net2. (3484)
- Test email in options will no longer perform a DNS check on the from email domain. (3697)

Clubware 3.1

Major Features

DPS EFTPOS Integration

The Point of Sale now supports integration with DPS for Australia, New Zealand and the UK. Please contact Clubware Support for additional information. (4084)

PC-EFTPOS Australia Integration

The Point of Sale now supports integration with PC-EFTPOS for Australia. Please contact Clubware Support for additional information. (3471)

Scheduled Maintenance and Backups

General maintenance, database maintenance and database backups are now scheduled and will run automatically every night at midnight, this can be configured under System in options. (3411)

Unmatched Members

Unmatched members are now shown in the member area on the navigation panel. A new wizard will help with matching the unmatched members to an existing member/account or to create a new member/account when required. (3396)

Address Layout

Improvements have been made for data entry of addresses to ensure accurate address information. (3129)

Billing Provider Account Code

Debitsuccess, DFC and Harlands can be configured to pass Clubware an account code during the syncing of new members and if an account template has the matching billing provider account code then the member and account will be automatically created in Clubware. (3296)

SMS

A new 'Do Not SMS' checkbox has been added to the member screen to allow members to opt out of SMS's. (2620)

The TXT button on the member screen has been moved to appear after the mobile phone number field and renamed to 'Send SMS'. (2620)

Activities can be created automatically against members when SMS's are sent via MobiPost by ticking 'Create activities for sent messages' under SMS in options.

Activities can be created automatically against members when SMS's are sent and received via IntelliMessaging by ticking 'Create activities for sent and received messages' under SMS in options. SMS replies from members will appear as new activities and will show to all staff members in the activities area. (3314)

UK Billing Integration

Support for syncing billing information with Harlands and DFC in the UK. (3266, 3144)

Minor Features

Front Desk

- Point of Sale will now allow a cashout amount to be entered when entering an EFTPOS payment type. Security permissions are available to disable this feature. (4147)
- Point of Sale will now allow a cashout only sale. Security permissions are available to disable this feature. (4147)
- The POS previous sales screen has a new column to show the type of the sale. (4364)
- A new screen has been added to POS to capture cheque details when adding a cheque payment. (3446)
- Error logging has been added to the Print Receipt button on the POS previous sales screen. (3648).
- A zone can be configured for exit by selecting the direction on the zone in options. If a zone is configured for exit then the departure date will be recorded against the member's last arrival if it occurred within the last 12 hours. A member's visit duration will be shown in the arrival area. (3644)
- A test button has been added to the gate settings screen. (3499)
- A new option has been added to gate settings to prevent the com port from being closed between gate activations. (3500)
- A diagnostic flag has been added to allow extra logging for scanners and gates. (3498)

Members

- Billing provider details can now be accessed from the unmatched member's area. (3387)
- The First Enrolled and Loaded On dates have been moved to the member details tab. (4355)
- The member save button is now enabled as soon as Date of Birth is edited. (4359)
- The reciprocal member search has been split into Full Name, Date of Birth and Barcode/Card Number. (4031)
- Member image resizing has been moved under General in options. Minor performance enhancements have been made for storing member images. (3635, 3719)
- Minor performance enhancements have been made when searching for members by barcode/card number. (4032).

Correspondence

- Emails will now be sent in the background allowing the use of Clubware to continue while sending emails for bulk correspondence. The status of the job can be checked in Service Jobs area in the Administration module. Emails that fail to send will be queued and attempted at a later time. (537)
- A new FullAddressMultiLine merge field has been added to the correspondence and reports editor that contains the address formatted over multiple lines. (4025)

Access Control

- Support for Paxton Net2 access control software version 5.02.2525. (4358)

- A PIN number can be recorded against a member and will be synced with Paxton access control. The PIN number can be automatically generated by ticking 'Generate pin numbers for new members' under Access Control in options. (3297)

Licensing

- Licenses are updated as part of the scheduled general maintenance. (3427)
- Demo licenses will be issued for up to 100 days and be extended by contacting Clubware Support. (4199, 4122)

Other

- Diagnostics information containing failed service jobs, errors, machine information and version information is sent to Clubware Support. This can be configured under Clubware Services in options. (3427)
- Currency, dates, times and tax will be displayed based on your branch country using the locale settings defined in Microsoft Windows. (3129)
- Service jobs and errors are deleted after 3 months as part of the general maintenance. (3451, 3634)
- Support has been removed for the Comms Gateway and the Debitsuccess sync via email. (4149)
- Support has been removed for Windows XP and Windows Server 2003. (4365)
- Support has been removed for Endless Rewards. (3386)

Minor Fixes

Front Desk

- Rewards points are now allocated to members when selling a product with a value of $0 and with points allocated to it. (3341)
- The on-screen keypad now works for editing payments, product prices, discounts etc. (3425, 4227, 3461, 4169)
- The round amount under POS in options no longer allows a negative amount. (4066)
- The POS rounding is now consistent. (4071, 4072, 4075, 4310)
- The POS rounding item on a reprinted receipt is now shown as the last item to match the original printed receipt. (4091)
- The POS will show validation messages when values are invalid instead of resetting the value to 0. (4187, 4188, 4232)
- Subtotal, tax and total are now correct when reviewing a completed refund sale with a discount. (3339)
- POS no longer displays an error when scanning a reciprocal member. (3340)

Members

- The member status is now immediately updated when an account is deleted. (3310)
- The visit re-entry logic now checks if the member is visiting on a different account and no longer denies the visit. (3558)

- Creating multiple activities for multiple members via the activity wizard no longer shows an error. (3348)
- The member's status is now updated when changing from prospect to active when the member screen is not saved. (4344)
- View permissions are now enforced when opening members and accounts from POS, activities, arrivals and bookings. (4156)
- Members are now correctly removed from unmatched records after matching if their name or billing reference starts or ends with a space. (3399, 4033)
- The member age is no longer shown when the DOB is blank. (4357)
- Minor performance enhancements for member and visit views. (4100)
- The new record button on the prospect screen now creates a new prospect instead of a new member. (4177)
- A new billing group member can now be set for a group where the original billing member has been deleted from the group. (4074)
- The preferred phone number is now correctly set when syncing with Debitsuccess and their preferred contact is email. (3370)
- The member screen no longer shows an error when changing the DOB to a date before 1/1/1753. (4041)
- Changing an existing account from non-corporate to corporate no longer displays an error. (3332)
- Minor performance enhancements when showing the account lookup screen for a member. (3584)

Calendar

- The staff rosters available and unavailable times now refresh automatically on the resources and instructors view when using the one day or workday view. (4229)
- Creating a recurring booking with a reminder no longer display's an error. (4080)

Retail Management

- The search in the product group lookup screen now functions correctly. (3338)
- The supplier main screen now displays columns for the address. (3704, 3705)

Classes

- Class timetable with multiple sessions on at the same time on multiple days now sorts consistently. (3251)
- A confirmation screen is now displayed when creating sessions in the past. (4114)

Reports

- Fields no longer overlap in the member listing reports. (4026)
- Calculated fields in reports are now included in the CSV export format. (3311)
- The retention report no longer returns an error. (3444)
- The GST disclaimer has been removed from the membership sales report. (3486)
- The property panel can now be resized on the report designer. (4030)

Correspondence

- SMS are no longer being truncated if it is more than 320 characters. (3353)

Administration

- The account reconciliation service job now handles accounts correctly after a billing reference has been removed. (3689)
- Service jobs and its items will now automatically retry after a set time if there are hardware failures or the process ends while a job is running and is left in progress. (4311)
- The member website sync send service job no longer fails when it includes deleted sessions. (3692)
- An SMS send service job item is now set to retry instead of failed when the internet connection to the SMS provider is lost part way through. (4043, 4077)
- The SMS send service job items that are retried are now included in the SMS check service job. (4076)
- The field chooser is now enabled on the service jobs view. (3639)
- Promotions are no longer shown in the Administration dashboard when the staff member doesn't have permissions to view promotions. (4078)
- Pressing the enter key on the security group policy screen now opens the security policy. (4046)
- Pressing the space key on a security group policy item now ticks or un-ticks the item. (4047)
- Security group permissions can no longer be opened from the staff screen. (3342)

Options

- Minor performance enhancements when loading the options screen in a remote app environment. (4011)
- The setting 'Allow account balances to be recalculated downwards' is no longer used and has been removed from options. (3485)
- The default records setting under General in options now increments by 100 when using the up down buttons. (4022)
- The branch name under System in options is now refreshed after a branch name is edited. (4215)
- The Enable group billing option under General in options can now be ticked without a warning. (4073)

Other

- The branch lookup screen now shows the head office at the top followed by the branches sorted by name. The branch lookup screen will now disable the OK button until a branch is selected. (3660, 3669)
- The computer time is now checked against a time server when Clubware is opened to make sure service jobs are using the correct time when syncing data. (4263)
- The event log is no longer flooded with errors when the scheduling engine cannot connect to the database. (3538)
- A security issue has been resolved when trying to connect to the database. (3512)

Clubware 4.0

Features

MY

- ***New ‘My’ Area***

  A new navigation area called ‘My’ has been added presenting the following items:

  Activities assigned to the staff member due today or in the past.

  Bookings will display for today if the logged in staff member is an instructor.

  Favourite Reports. Shows reports that the logged on staff member has nominated as a favourite to provide quick access to frequently used reports. Favourite reports can be set by staff member themselves or for security groups by the manager.

  Announcements for the current branch with the number of unread messages for the logged on staff member. The system defaults to showing announcements when logging on if there are any unread messages for the staff member. (5239, 5248)

- ***Branch and head office Announcements***

  Publish branch and head office announcements that are visible in the application and can be acknowledged by individual staff members. Announcements can be published for a branch or head office that staff members can access when they open Clubware. A date period can be configured to define the period of time the announcement should be displayed while staff members can acknowledge the message as read where permitted so that the announcement is no longer presented to them. (5926)

- ***Branch selector from the main screen***

  Provides the capability to change between branches from the main screen and presents a list of branches that a logged on staff member can access. (5241)

Front Desk

- ***Re-entries***

  Distinguish between member visits and re-entries to the facility. Configure the system to record the first entry made by a member as a visit and mark all following visits within a set period of time (e.g. 45 minutes) as re-entries. This allows the staff to view a more meaningful list of visits made by a member by excluding the re-entries, if any, on the visit information screen on the member record and get a better idea of how frequently the member visits the gym. The user has the option to view the visits marked as re-entries from the member screen. (10017)

- ***Enhance concession deduction rules when auto attending***

  Only one concession will be deducted for arrival and attendance to a session if both are within the session’s auto attend period. (11561)

Members

- ***Member titles***

  A title can be selected on member and staff member names, and additional titles can be added if required. (4727)

- ***Member Referrals***

  Record the member who referred another member. Reports can be generated based on this information. (5887)

- ***Search Members by PIN number***

  Members can be searched by their PIN number if the logged in user has the required permissions to search by PIN. (4907)

- ***Billing Ref on Invoices and Payments tabs***

  Billing Ref column has been added on Invoices and Payments tabs for billing accounts. (7522)

- ***Payment total on billing account details screen***

  The payment total is now displayed on the Debitsuccess and PaySmart account details screens. (8603)

- ***Overdue amount excluding fees for Debitsuccess***

  The overdue amount excluding fees is now displayed on the Debitsuccess account details screen. (8605)

- ***Support for Projected End Date from Debitsuccess***

  A projected end date for fixed term contracts can optionally be synched from Debitsuccess. Reporting views that have account end date have been updated so custom reports can be written for reporting on members whose fixed term accounts are projected to end soon. (4989)

- ***Archived Date and Archived Reason for PaySmart***

  The 'Archived Date' and 'Archived Reason' is now displayed on the PaySmart account details screen (8606)

- ***History of email correspondence to members***

  A new setting has been added to allow you to save an activity against a member when you send them an email from Clubware, so that you can see a history of emails that have been sent to a member via Activities. The content of the email is not stored against the activity. (3636)

- ***Members pre-paid to a session by concession allowed entry***

  Members that have pre-paid for a class using concession card accounts can now enter the facility to attend the class in case they have no concessions left. (11681)

Reports

- ### *Open entities from reports*

  Open application screens from clickable links within generated reports. The entity names display as hyperlinks and the details screen can be opened subject to security permissions for the type. The presentation of links within the generated report output can be toggled on-and-off to suit reporting scenarios. (5886)

- ### *Report filtering for branches and branch groups*

  Run reports for branch groups through filtering for the current branch, one of the branches to which a staff member has access, all of the branches to which a staff member has access, or a specific branch group. (6518)

- ### *Send scheduled reports to staff members in selected security groups*

  Scheduled reports can now be setup to send to staff members in selected security groups, which can be run as a single report or for each staff member. (5234)

- ### *Limit reporting by security groups*

  The availability of reports and report filters is now managed through security groups so that a staff member will only be presented with the reports and filters they are authorised to view.

  Permission to export report definitions is now also controlled through security groups. (5928)

- ### *Validations for Data Design and Report Filters*

  Improvements have been made to how data designs and report filters are validated. (5707)

Correspondence

- ### *Salesforce Marketing Cloud Integration*

  Use Salesforce Marketing Cloud (SFMC) to send Emails and SMS correspondence.

  Clubware correspondence types can be configured to drive distribution through Email and SMS templates managed in the SFMC site. Dynamic content fields defined for SFMC collateral can be mapped to Clubware data design values for scheduled mass distributions. Limited support is also available to import member contact activity from SFMC campaigns through the creation of Clubware activities using a data import job.

  Ad-hoc Emails and SMS from the member screen will not use SFMC. (5834)

Administration

- ### *Club details settings have been moved*

  The club details have been moved from branch settings to the branch. ‘Club Name’ has been renamed to ‘Public Name’. (7384)

- ### *Changes to Options*

  Options has been renamed to Branch settings. Various settings have been moved to the branch and machine settings. (6463)

- ### *Open Date and Shutdown Date for Branches*

  An open date and shutdown date can optionally be set for a branch. The status of a branch is also now supported based on these dates and branch closures.

  Clubware will calculate the status of branches, accounts, account templates, promotions, staff, and announcements. (5188, 5909, 5935)

- ### *Branch closures*

  Manage when branches are temporarily closed for events such as holidays or refurbishment. (5876)

- ### *Branch Groups*

  Create branch groups that are used in preference to selecting individual branches each time. Groups can be used to filter reports and manage staff branch access. Branches can also be assigned to more than one group to reflect geographical and operational contexts. (5889)

- ### *Photo, Summary, and Detailed Notes for Staff Members*

  Some old fields (GST Number, Bank, Branch and Bank Account) have been removed from the staff member. Detail tab has been renamed to Notes.

  Public friendly photo, summary and notes for instructors can now be maintained in the application that can be made available for web sites and mobile application through the web API. (4520, 4724, 4765)

- ### *Filter inactive accounts in the reconciliation screen*

  A new filter to include inactive accounts has been added to the account reconciliation main screen. (8604)

- ### *Include or Exclude Ended Account Templates*

  A button has been added to allow you to include or exclude ended account templates when viewing them on the account template main screen and on the account template search screen. (8844)

- ### *Specify start and end dates for Account Templates*

  Permits defining a date range when an account template is active to support the scheduling of price changes and the preservation of historical price points for reporting. The date range also influences a new status value so that active or retired templates are more easily identified. (4976)

- ### *Reciprocal access to branches and branch groups*

  Allow reciprocal access to branch groups on account templates. The reciprocal access to branches and branch groups can be overridden on the member account if the user has permission to do so. (5180)

- ### *Multiple branch access for staff members*

  Staff members can now be created at the head office and access can be set for select branches and branch groups. (5095)

- ***Start Date and End Date for Staff Members***

  An optional start date and end date can now be set for a staff member. This influences the calculation of a new status which will be one of pending, active, ended or deleted. A warning will be presented when creating bookings, classes, and term classes that are after the staff member's end date. (6375)

- ***User Defined Fields***

  Permits an unlimited number of custom fields to be added to Clubware entities so that additional information of value to a customer can be captured and maintained. The new engine also supports the creation of non-system lookups that can be used to define drop-down lists rather than free-text entry. (5880, 4594)

- ***Web API***

  The new web API provides access to data stored and managed by the Clubware system. This supports integration with partners such as business intelligence providers, or website, kiosk, and mobile application developers. The data made available to partners is controlled through secure views and integrator specific contracts can be defined providing a highly configurable and secure access point. (5879)

- ***Data Export***

  Support for exporting data to the file system, FTP, SFTP, and FTPS locations. Exports can be based on data designs and exported in plain text and csv formats. Exports can be scheduled for regular execution. Multiple files can be created and ordered in the definition, in addition to supporting placeholders, with formatting, that resolve during its execution. (6381)

- ***Promotional discounts***

  Create reusable and non-reusable promotional discount codes for a specified date range and selected account templates.

  Reusable codes can be created for date range periods and limited to a maximum usage threshold during a specified period of time, e.g. 10 per day for 7 days.

  Non-reusable codes are unique codes that can only be used once. The Clubware application provides a wizard that can generate large volumes of codes. (5892)

- ***Member security for disabling tabs***

  Access to the following tabs on the member screen is now limited via security permissions: Activities, Attachments, Bookings, Classes, Fitness Profiles, Groups, Pre-sales, and Term Classes. (4725)

- ***Improved Zone Management***

  Manage zones, machines and devices from the Administration area. (5864)

- ***Watch Lists***

  Place a member on a watch list so they can't sign up again.

  A manager can add a member to the watch list and select which member fields to match based on the following fields: first name, last name, date of birth, email, phone number, address and post code. A reason is also required with one of the following actions (stop at gate, warn, block).

When an account is created the system will check the watch lists and perform the action that was configured if a match is found. (5924)

- ### *Setup of Clubware on a new machine*

  The process to set up Clubware on a new machine has improved. Note that only administrators or staff members with Add machine permissions can configure Clubware for first time use. (6192, 5238)

- ### *FTP credentials*

  FTP credentials for FTP/FTPS/SFTP servers can be configured in the Administration area. These credentials can then be used when exporting and importing files using the Data Export and Data Import features. (6339)

- ### *Status and service job type filters for service jobs*

  The service job main screen can now be filtered by status and service job type. The selections will be remembered for each user. (10176)

- ### *Support low quality mode for DirectShow cameras*

  Different resolution and framerate options supported by the camera can be selected for DirectShow cameras. (6739)

- ### *Allow resources to be grouped*

  A new Group field has been added to resources. The category field has been removed and a new checkbox added to determine if a resource is a location. (6745)

- ### *'Wan' and 'Show records for this branch only' settings*

  The Wan option in the branch settings has been removed. This means that you cannot setup a branch that doesn't inherit from head office anymore.

  The 'Show members for this branch only' and 'Show products for this branch only' settings have been combined into a new setting called 'Show records for this branch only'. (5539)

- ### *Support for Endless Rewards removed*

  The support for integration with Endless Rewards has been removed. (8453)

Access Control

- ### *Manage Access Control*

  A new access control module has been created in the Administration area to manage access control configuration when logged into head office. (5236, 5861, 9195, 9197)

- ### *Import Paxton/Integriti visits by schedule*

  Import visits on a scheduled basis when Clubware is not monitoring the events real-time. For sites where real-time monitoring is enabled, the feature can be employed to import historical information where outage periods have been experienced. (4722)

- ***Staff member access control synchronisation***

  Staff members can now be synched with Paxton and Integriti access control systems. Staff members can have a card or PIN number assigned to them, and access will be calculated based on the security group they are in and the branches they have access to.

  Staff members who have not yet commenced employment or departed will have their permission removed and be denied access to a facility. (4731, 8140, 8143, 9195)

- ***Support for Paxton 5.3.4427.3364***

  The supported Paxton version is 5.3.4427.3364. An error will be displayed if using a Paxton version less than 5.3.4427.3364. (6304)

- ***Support PIN number access with Integriti***

  Support for member and staff PIN numbers with Integriti has been added. (4818)

- ***Multiple site code support for Integriti***

  The system now supports multiple site codes for Integriti. A new admin area is available for card templates. (4851)

- ***Member access control groups***

  An access control group can be set on a member access level. This can then be selected on a member. The purpose of this feature is to allow more control over the access level a member is assigned. (8132)

  You can now see the access level the member has for other branches on the member screen. (8141)

- ***Member access control levels enhancements***

  Member access levels are calculated for each branch a member has access to, and additional permissions can be applied to users created in Integriti. (8137, 10064)

- ***Assistive/disabled entrance access support***

  The system now supports access control conditions where a member requires access to a facility through an assistive/disabled entrance, configured on a per-member basis. The arrivals popup and arrivals main screen will report access to the facility made through the entrance. (4730, 8136)

- ***Support for Mag Raw 88 card type***

  Mag Raw 88 card types are now supported to create arrivals for facilities using Inner Range Integriti access control. Please note that this card type is not supported for Inner Range Integriti enrolment stations. (11397)

Fixes

Front Desk

- A shortcut key that would open the cash drawer when a sale was not yet ready to be completed has been disabled. (10229)
- Additional concession will no longer be deducted at arrival when you are auto attended to a session that has already been paid by concession. (11422)
- It is now mandatory to select a member when adding an activity, so that the activity will display on the activity main screen. (5233)
- The 'Overdue' label now displays against a member in the arrivals main screen if the member's account is overdue by more than the grace overdue amount. (4471)
- The current sale is no longer lost when you open a previous sale while a partially completed sale is in progress. (7607)
- 'Discount' is now displayed on the POS receipt instead of 'Less' for more clarity. (4492)
- You can now use the POS onscreen keypad when applying discounts to a refund and for cheque payments. (4602, 5139)

Members

- Columns dragged off the member or prospect main screen no longer re-display when you run another search. (4840)
- The billing provider and billing reference on an account are now enabled when changing the account type from non-billing to billing, and disabled when changing from billing to non-billing. (4990)
- You can no longer add a new account when clicking the Current Account button on a member with no accounts if you do not have permissions to add accounts. (4711)
- A prompt is now displayed when changing the account type when the initial account has no invoices. (5584)
- The next payment date on the Financials tab on the account is now cleared when all invoices are deleted. When the current invoice is a one off and is due in the past, the system will show the next payment date as today's date. (4474)
- You are now prevented from changing existing accounts to a Charge account. (4641)
- Duplicate entry cards are no longer printed when you print bulk cards when there are members included who do not have an account. (4715)
- An overflow error has been prevented by limiting the term length of an account to 100 years. (4973)
- An error message is displayed if a time out occurs when retrieving PaySmart account details. (5280)

Calendar

- The time on all future bookings are now updated when the time is changed on a recurring booking series, and you will be warned if the new time is outside of the resource or instructor's available hours. (9753, 9771)
- The paid amount on a booking is now refreshed after making a payment via POS against a charge account booking. (5268)

Retail Management

- Head office product groups now display on the product main screen and product form. (4472)
- When selecting a product group for a product, only the product groups from head office and the logged in branch will be displayed. (4473)
- Dates are now saved on an order when focus remains on the date, and the save button is now enabled as soon as you edit an existing date on an order. (4700)
- A warning is now displayed if the user tries to print an order without completing the mandatory fields. (4646)
- You can now sort the Product Groups main screen. (5518)

Classes

- The Add new record button on a Class now adds a new class rather than a session. (6173)
- Deleting the last session on the Sessions main screen no longer displays an error. (5664)

Term Classes

- Instructor name is refreshed on the term class if you open the instructor from the term class and edit their name. (5062)

Reports

- Subtotal counts for each salesperson are now populated in the Membership Sales report. (4519)
- Corrections have been made to how a member’s age is calculated on member listing reports. (4716)
- You are now prevented from saving duplicate filters. (4880)
- The Booking Reconciliation report now displays all the bookings that are on at the same time. (5642)
- The paper size settings on reports are now defaulted to A4 to prevent some display issues. (4436)
- The missing columns are now listed in the error message when viewing a data design that has missing fields. (5099)
- Email addresses of recipients are now validated while scheduling a report. (9268)

Correspondence

- Old or expired scheduled jobs will no longer be sent when the Clubware scheduling service is started (5361)
- Email display name is now optional when sending emails. (10410)
- Available merge fields on the correspondence designer are now sorted alphabetically. (4448)
- ID fields are no longer displayed on the correspondence filter results step of the correspondence merge wizard. (4926)

Administration

- The maximum term on account templates has been changed from 99 to 999. (5638)
- You can now remove an access control group from an account template (5706)

- Scheduled service jobs are no longer created for deleted branches. (4503)
- An error no longer occurs when changing the option 'Allow this staff member to be booked as a resource' on an existing staff member with an email address. (6671)
- The records displayed on the branch main screen are now based on the ‘Show records for this branch only’ setting. (6535)
- Staff members can now open a branch if they have only ‘View’ security permission to branches. (5573)
- Fields on the data design screen are now sorted alphabetically. (5675)
- The layout of the Data Design main screen can now be saved per user. (5676)
- The Field Chooser is now enabled on the Entry Cards main screen. (5367)

Access Control

- Connection from Clubware to Paxton Net2 doors are re-established after the connection to Net2 is lost and restored. (9317)
- A user friendly error message is displayed when testing connection to the access control server without entering the appropriate credentials. (4506)

Other

- Filtering has been added to the error log screen to prevent time outs when opening the screen if there are a lot of errors, and you can now use the arrow keys and enter key to navigate between errors. (5606, 10196)
- Validation has been added to some dates to prevent invalid dates from being entered.(5556)
- A security issue has been resolved when the Clubware service loses connection to the database. (5286)
- Improvements have been made to the database upgrade process to prevent the screen from becoming non responsive. (9141)

Clubware 4.2

Features

Members

- ***Visit Counts and additional visit information***

  Member visit count will only include the visits to zones that have 'Include in Visit Count' ticked. The Visit Information screen is updated to include the exit time, duration, and the visited zone of the visit (11678, 11618)

- ***Support for Debitsuccess Billing Account Code***

  A billing account code can now be provided by Debitsuccess during the syncing of new members and if an account template has the matching billing provider account code then the member and account will be automatically created in Clubware. (10199)

- ***Delete billing invoices that don't exist at Debitsuccess***

  Billing invoices that don't match a Debitsuccess pay schedule will be deleted in Clubware when synching with Debitsuccess. (10208).

- ***Debitsuccess Pay Schedule Descriptions***

  Pay schedule descriptions are now displayed on the Debitsuccess account details screen. (10211)

Reports

- ***Stored Procedure support***

  Reports can now be based on stored procedures rather than views which has a number of significant advantages.

  Performance can often be substantially faster with a report based on a stored procedure.

  Reports can be written with dynamically named columns which is useful for displaying columns of data for date ranges. (10461)

- ***Do not email reports to staff that have no content***

  Scheduled reports can be configured so that an email is not sent if there is no data in the report. This will prevent staff members from receiving reports that have no content. (10974)

- ***View all values for a field under report filters***

  You can now lookup all values for a field under report filters. Previously you could only view a maximum of 200 values. (CLUB-1610)

- ***Security permissions for custom filters***

  Security permissions have been added for custom report filters under each report to limit the use of custom report filters per security group. By default only Administrator level users will be able to use custom filters when running and scheduling reports. (8752)

Access Control

- ### *Third Party Access control Provider Support via WebAPI*

  WebAPI Access Control Servers can be applied to head office or branches. Access Control Users can be retrieved via the WebAPI. Cards can be enrolled via the WebAPI, allowing the latest scanned card to be allocated to a member or staff member in Clubware. Arrivals and departures can be created with an option to display arrival pop ups for any arrivals made in the last 30 seconds. (12044, CLUB-2264, CLUB-1935, CLUB-1976)

- ### *Gantner Access Control Integration*

  The Clubware Gantner Access Control Server acts as a message broker between Clubware WebAPI and the Gantner GAT DIRECT.Connect.

  The application receives messages from Gantner GAT DIRECT.Connect when cards are scanned and converts these to arrivals, departures and enrolments. This information is passed to Clubware resulting in visits being created (or updated on departure) and arrival pop-ups being displayed.

  The user will also be able to enrol card numbers in the member and staff member UI in Clubware.

  The Clubware Gantner Access Control Server does not control opening hours and so these hours should be configured through the Gantner software.

  WebAPI Access Control Servers need to be configured in Clubware for the branches that wish to use Clubware Gantner Access Control.

- ### *Support for Inner Range Integriti firmware v16.0.4*

  Inner Range Integriti firmware v16.0.4 is now supported.

Administration

- ### *Zone Groups and Visit Options for Zones*

  You can group zones together to distinguish between different areas being visited by members.

  When a member exits a zone, the exit time against the last visit for that zone group is updated.

  Visit options have been added to the zone which allow you to determine if concessions are deducted or not, if you want to auto attend sessions and bookings, and if you want to exclude the visit from the member visit count and from reports. (10395)

- ### *Clubware United States*

  United States is now supported in Clubware. (10538)

- ### *Clubware India*

  India is now supported in Clubware. (CLUB-3911)

- ### *Approval of Promotions*

  Promotions can be configured to be approved before they can be used in Clubware. A Promotion can be created by a staff member and another staff member can approve or reject it. (10485)

- ***Alternate Branches for Branch Closures***

  An alternate branch can be selected that your members can visit during your branch closure. (12437).

- ***Collapsed view of Reports under Security Groups***

  The reports under the Reports tab on the Security Group editor will now be collapsed by default. This makes finding your report filters in this area easier. (CLUB-2180)

- ***Service Jobs screen will display today's jobs by default***

  Previously the Service Jobs screen used to display the last seven days of jobs by default, the default has been changed so only today's jobs display. (CLUB-2672)

WebAPI

- ***Extra logging information for Web API calls***

  When logging is enabled, additional information such as response status, body (POST/PUT requests only) and internal exceptions can be stored for all the calls made to the Clubware Web API. This information can be useful for troubleshooting purposes. (CLUB-3327)

- ***Compression in Web API***

  The Web API now supports "gzip" and "deflate" compression schemes to improve transfer speed and bandwidth utilization. (12200)

- ***Session Booking Count is exposed through the WebAPI***

  The Booking Count is now returned against a session through the WebAPI. This will assist in checking how full the session is. (CLUB-2326)

Fixes

Front Desk

- Creating a manual arrival for a member will now open a gate that is connected via serial port. (CLUB-2884)
- The re-entry attempt is now checked against the last successful visit to zones that do not have a zone group. (CLUB-1886)
- The 'Maximum number of records to display on grids' setting now applies to the My Activities and Activities grids as well. (CLUB-1848).
- Members are now prevented access to the facility if they have a charge account unless they have a booking on at the time or within the auto attend period. (CLUB-2474)
- An error notification no longer appears on start-up if a serial scanner is configured for both Arrivals and POS using the same COM port. (CLUB-2888)
- The new price is displayed correctly on the Point of Sale screen when you edit the price of a product. (CLUB-1954)
- Right click to remove attendee from the floating session summary screen no longer removes the wrong attendee when there is a long list of attendees. (6874)

Members

- The search performance in the member screen when searching for members by card number or pin number has been improved. (CLUB-2556)
- Performance improvements have been made to the 'Common' member search (CLUB-2633)
- Member is not created automatically if the same billing account code exists at another branch (CLUB-3961)
- The fixed account start date is now applied to new accounts created via Unmatched records if the account template has a fixed start date. (CLUB-2481)
- The member status is now recalculated and displayed correctly on both members when an account is transferred from one member to another. (9944)
- The Barcode/PIN/Card Number search now returns all the members that meet the search criteria. (CLUB-2252)
- Unmatched member wizard no longer jumps to the first step when you open and edit a member or account from the last step. (9066)
- The Activities and User Defined Fields screens of reciprocal members now open in read only mode when 'Allow opening of members for reciprocal visits with View permissions' is ticked. (11143, 11144)

Calendar

- Editing the start date of a staff roster no longer results in overlapping rosters being created for that staff member. (CLUB-1864)
- A validation warning is now displayed when saving a session or a booking with a location, resource or instructor that has an overlap when the start times are different. (5735)
- No longer incorrectly receive a validation warning that the location/resource/instructor is not available on some days when adding to future sessions when it is. (5738)

Correspondence / Reports

- Reports now use a different method to retrieve data which has helped to prevent Clubware from freezing for other users when a report is run. (CLUB-2185).
- The Visit Usage Summary report now calculates the visit count based on the selected date range in the filter. (CLUB-2207)
- Address labels now print at the selected printer when doing a label merge and at the default printer when doing a label merge using Quick merge. (9550)
- Scheduled jobs now run for the correct number of occurrences when a scheduled job is configured to run for a defined number of occurrences. (11642)

Access Control

- Visit times are now calculated correctly using the branch time zone when importing Paxton Net2 visits that occur while Clubware is not monitoring the access control door. (CLUB-3239)
- Problem fixed where some sites wouldn't import visits from Inner Range Integriti access control that occur while Clubware is not monitoring the access control door. (CLUB-1557)
- You no longer receive a 'credential clash' warning in Integriti after moving a pin number from one member to another in Clubware (CLUB-1882)

- PINs are now saved exactly as displayed in the UI, zeros are not added or removed. (CLUB-2572)

Administration

- Webcam is now recognised by Clubware in the United States CT4 environment. (CLUB-1961)
- An issue with the Data Import has been resolved where the activities were not being created. (12326)
- The Data Import has been fine tuned to perform faster. (CLUB-1950, CLUB-2039, CLUB-2179, CLUB-3170)
- Staff members with no security group can now be edited if you have permission to edit staff members. (7932)
- The “Last Visit Details: Account is not active” error will no longer be displayed when doing a re-sync from the Account Reconciliation screen. (CLUB-1592).
- The starting period on an invoice template will default to 0 Days so you don’t have to select ‘Days’ from the dropdown before saving. (CLUB-1885)
- Billing accounts that have an Expected Payment frequency set but have an empty (NULL) Expected Payment value no longer result in an endless loop during account reconciliation. You can view the error information for the account in the account reconciliation. (CLUB-2313)
- It is no longer possible to save a Data Export file that is based on a data design with no filter. (11047)
- The ‘SMS Status Check’ service job will now process successfully if a client has moved from Mobipost to Intellimessaging. (CLUB-2681)
- Display a validation error next to the Fixed Account End Date on an account template when 'Billing Company' is selected and 'Do not sync billing provider end date' is not selected. (CLUB-2483)
- A validation error is no longer displayed when setting a Fixed Account End date on an account template when there is no term specified. (CLUB-2480)

WebAPI

- Performance improvements have been made for the WebAPI for retrieving Activities by Member ID, retrieving an Account by Member ID, retrieving a Member by contact details, creating Invoices and creating multiple session bookings. (CLUB-2331, CLUB-2330, CLUB-2329, CLUB-2470, CLUB-2513)
- Requesting ReportResults method filtering by a unique identifier such as BranchID for a report that uses a Data Design that has a User Defined Field selected will no longer return an error. (CLUB-1884).
- Requesting ReportResults method for a report that uses an existing filter that has a branch group will no longer return an error. (CLUB-1846).
- You can now retrieve and update Stop on Arrival and Arrival Notes through WebAPI. (CLUB-2498)
- The default gender for the branch will be used if creating a member through the WebAPI without passing their gender. (CLUB-2432)

Other

- Performance improvements have been made for updating the notification badges that display the number of records in My Activities, My Calendar, My Announcements, and Unmatched

Members. As a result the system will no longer be unresponsive when there are a large number of records. (CLUB-1558)

- Additional indexes have been added to the Account and SessionBooking tables to prevent high CPU usage on the database server. (CLUB-2556)
- Clubware will now remain responsive if it cannot locate the backup path when doing start up checks. (11685)
- Clustered indexes have been added to unmatched record tables and the lookup data table. (CLUB-2389)
- The database has been changed to use CHECKSUM instead of TORN_PAGE_DETECTION for the detection of I/O faults. (CLUB-2384)

Clubware 4.3

4.3.1 Features

Member Website

Casual Payments through Member Website

Prospect Registration through member Website:

- Non-members may now register through the member website so that they can purchase concessions
- They must consent to having their personal details stored in the system and being contacted (CLUB-6580)
- People that don't complete the online sales process will still be downloaded to Clubware as a prospect (CLUB-3606)

Purchase Concessions through Member Website using Visa or Mastercard:

- Concession account templates can be configured to allow them to be sold online through the Member Website and Mobile App

  Note: there is a required change in behaviour around configuring the invoice templates for an Account Template which means that there is no longer a save button on the invoice template screen and they must be saved from the Account Template screen.
- Currently Visa and Mastercard are accepted for organisations billing through Debitsuccess and Paysmart
- A receipt is emailed to the member which includes a transaction number that can be used by the billing provider to look up details of the transaction. (CLUB-3631)
- New concession accounts are downloaded into Clubware and the source shows that they were sold through the Member Website
- Where a member purchases another account similar to one they've had before a new account will be created (the purchase will not recharge their account) (CLUB-4638)

Members must accept the Terms and Conditions to use the Member Website (CLUB-5204)

For organisations using Clubware 4.3.1 where classes are set to deduct the concession 'at booking' members will be unable to book through the Member Website if they are out of concessions (CLUB-4547)

4.3.1 Fixes

Arrivals

- An incorrect re-entry warning was shown for visits created through the WebAPI (Gantner etc.) (CLUB-5910)

Members

- Some search criteria didn't work as expected in the common search (e.g. barcodes that contained letters, phone numbers that contained spaces, email address search ending with '@') (CLUB-4196, CLUB-6567)
- When you attempted to create a new account from Unmatched records for a member who had a previous account with another branch the Branch defaults to the previous branch and cannot be changed. (CLUB-5056)

Access Control

- Allocating an access control card using the Assign Card button will now trigger a sync to the access control server. (CLUB-4087)
- Improvements have been made to display the Assign Card button when scanning an unknown card with Integriti readers; if the Assign Card button doesn't appear, try scanning the card again within 5 seconds. (CLUB-6016)
- When there was a connection error with Paxton a "Object reference not set to an instance of an object" error occurred (CLUB-6186)
- Refreshing access control users for WebAPI/Gantner access control server reset all users sync status rather than just new/updated users (CLUB-3623)
- There was a deadlocking error when creating arrivals via WebAPI/Gantner access control system (CLUB-7737)
- Scanning an unregistered token/card on a Gantner reader resulted in a successful entry after scanning it repeatedly in a short period of time (CLUB-8075)

Member Website

- Modifying the account template an account was based on didn't update to the member website (CLUB-6545)
- Members were able to book a class that was configured to only allow concessions or accounts when they didn't have the correct concession or account (CLUB-6816)

4.3 Features

Retail Management

Enhanced Head Office and branch product management

To allow greater control, consistency and visibility over products that are held at more than one branch the Clubware product management now supports the linking of head office products to branch products and faster creation, copying and duplication of product lines. (CLUB-2657)

- Allow head office products to be linked to branch products and a list of the linked products at the branches
- Add security permissions around the linking and un-linking of products
- Allow products to be created from head office to branches
- Allow head office to edit prices and maintain them across the branches
- Allow products to be cloned from Head Office to other branches (helpful for management of identical products at different locations)
- Allow products to be easily copied and modified (helpful for management of similar products with flavour or size variations at the same location)
- Allow bulk copy of products from head office to branches
- Allow products to be discontinued

Access Control

Support a mixture of access control server types in the same database (Paxton, Integriti and WebAPI/Gantner)

- Substantial work has been done to overcome limitations on what access control servers may be configured within the same Clubware environment. This removes a barrier that has forced some organisations to run multiple Clubware installations to support a mixture of access control servers. (CLUB-3504, CLUB-4706, CLUB-4971, CLUB-4972)

Support Multiple Paxton Net2 Versions

- Support a mixture of Paxton versions on different access control servers (5.02, 5.03 and 5.04) (CLUB-3621)

Support Paxton Net2 anti-passback

- Add Paxton anti-passback setting against members and staff members for branches using Paxton Net2 Professional (CLUB-2497)

Limit number of users synched to Paxton Net2

- Add settings to respect the 50,000 member limit on Paxton access control servers and to remove members beyond these limits (CLUB-3279)

Administration

Member facing / self-service suspensions

Branches are able to define rules for members to suspend their own accounts through the new Clubware mobile apps. The rules can cover the minimum and maximum periods that suspensions may be created for and whether there is a fee while the account is on hold. Both billing accounts and paid-in-full accounts may be configured with suspension rules (CLUB-4577)

- Add support for member facing / self-service suspensions for paid-in-full and Debitsuccess clients through the Mobile App

- Add configuration to account templates to allow staff to enter rules for self-service suspensions
- Add information user interface to accounts to display the number of days remaining that a member has for self-service suspensions

Member Website

- Refreshed look and feel (CLUB-2251)
- Members can authenticate using Google+ and Facebook logins which is faster and easier than using email validation (CLUB-2754, CLUB-3519)
- Allow links to include specific dates, classes, class groups, and instructors (helpful for sending marketing correspondence about classes to your members) (CLUB-2800)
- Now supports USA with new www.member.clubware.us domain (CLUB-1563)

WebAPI

- The method for authenticating with the WebAPI has changed, existing clients using the WebAPI must implement the new authentication method as the old method has been deprecated (CLUB-2258)
- Missing member and staff member photos now return a 404 (CLUB-2338)

4.3 Fixes

Arrivals

- Some Paxton access cards caused an exception when the 'assign card' button was pressed (CLUB-6121)

Members

- Fixed issue causing double points being accrued in some scenarios via the Web API (CLUB-11887)

Classes

- Fix exception when adding an anonymous attendee to a session (CLUB-6244)

Retail Management

- When the order form was resized the total extended cost field did not move correctly (CLUB-1755)
- Now able to save multiple products at different branches with the same barcode when managing products from head office (CLUB-2806)

Member Website

- If a session booking was cancelled in the member website before it was downloaded to Clubware the concession was still deducted (CLUB-4957)
- The primary instructor associated with a session is now cleared when all instructors are removed from a session (CLUB-2638)

- The 'reply to' email address was not being set for the reply address for emails sent from the member website (CLUB-5970)
- Setting a value on some fields on a class session, account, and account template where they had not previously had a value set did not update changes on the member website (CLUB-5964)

Reports

- Reports threw exceptions when run outside the head office (CLUB-6119)

Administration

- You are no longer allowed to exceed the character limit of the Account Template description (CLUB-5104)
- No longer receive an error when syncing sessions to the member website where a resource is mistakenly referred to as the primary instructor (CLUB-4969)

Other

- Prevent deadlocks when refreshing service job status (CLUB-4446)
- Manual access control sync could cause deadlocks (CLUB-6137)
- The Clubware Gantner Services needed to be restarted after a device was added for it to be picked up (CLUB-5367)
- The settings did not display on the Clubware Gantner Configuration Manager until you click on a field (CLUB-5366)

Clubware 4.4

4.4 Features

Real Time Paxton Sync

There is now a new way to synchronise access control information to Paxton access control servers using a real-time sync that will typically push individual member changes to the access control servers in less than 5 seconds. (CLUB-3862)

- Configuration is simple, in the Access Control Server settings on the General tab when the Access Control Provider is Paxton a Synchronisation Method option is displayed
    - The Scheduled Job option uses the existing method where (usually hourly) service jobs will synchronise member access control information to the access control server: (CLUB-4202)
    - The Real Time option is new and uses a new access control server synchronisation service. (CLUB-6725)
- If you're using the new real-time sync you won't need to trigger a manual synchronisation after you create a new member, just assign a card and save the member! (CLUB-7101)
- The new real-time sync maintains long running connections to the Paxton access control servers, so for sites experiencing orphaned connections this will hopefully be a problem of the past. (CLUB-6726)

- The results of the real-time sync are displayed in the new Access Control - Real Time service job; a service job will be created for each access control server for each day (midnight to midnight). (CLUB-6758, CLUB-6724)
- Only a single access control server synchronisation service regardless of the size of your organisation, unless you require a fall-over service, in which you can start a second one that will go into hibernation until the first one falls over (CLUB-4357)

Access Control

Some small changes have been added to assist with troubleshooting:

- You can now open members and staff members from the Access Control Service Jobs to assist with solving the cause of the sync problem (CLUB-4254)
- If a member fails to synchronise to a Paxton or Integriti access control server then the failure reason is now displayed on the member and the last column of the *Access Control Server → Users* tab (CLUB-4316, CLUB-7105)

Microsoft

- Clubware has now been tested and confirmed to work with Microsoft Windows Server 2016 (CLUB-6645)
- Clubware has now been tested and confirmed to work with Microsoft SQL Server 2016 and 2017 (CLUB-4767)

Administration

Member facing / self-service suspensions

Club managers can now define the rules for self-service suspensions through the mobile apps for members with Paysmart billing accounts. An accordance with Paysmart's practices the suspension will be tied to the billing period.

- Add the self-service suspension rules to Account Templates so that the Manager can configure self-service suspensions(CLUB-7133)
- Synchronise the self-service suspensions created through the Mobile App back to Clubware (CLUB-7456)

Member Website

- If you book a class in a future week you are now returned to that week when you return to the timetable view (CLUB-6398)
- Greater detail has been added to the member website synchronisation service so that it is easier to troubleshoot problems (CLUB-7294)

Correspondence

Correspondence for Prospects is now enabled ('Prospect - All Information' data design) which can allow you to create more targeted campaigns (CLUB-10286)

-

4.4 Fixes

Member

- The Assign Card button was not appearing on the arrival popup when using Direct Entry Wiegand card format with Integriti access control. (CLUB-9538)
- Members and Prospects with 'Do not SMS' or 'Do not Email' ticked were being included in the scheduled correspondence by default if the chosen filter did not specifically exclude them. (CLUB-10068)
- You were allowed to transfer a member when you did not have permission to do so (CLUB-4149)
- Members are also matched on First name, Last name and Email when synced down from Debitsuccess to avoid duplicate prospect/member records being created (CLUB-7473)
- During the Debitsuccess sync a member's preferred phone, address and email were synced every time a member was modified or visited; now they only sync if they have changed (CLUB-8623)

Member Website

- Account Templates and Staff that belonged to Head Office were not being synchronised to the Member Website in certain cases (CLUB-4873)
- Clubware would log "Member already exists" error during Member Website Sync Receive service job when a member is required to sync from Member Website to Clubware e.g. member uses the mobile app. As a result of the error, the member would not get marked as synced down to Clubware and the service job would try to sync the member each time (CLUB-10388)

Access Control

- Member does not sync with access control if there is a change to the account but not on the member status when using Integriti (CLUB-10565)
- The Assign Card button was not appearing on the arrival popup when using Direct Entry Wiegand card format with Integriti access control. (CLUB-9538)
- Some synchronisation queries that were very slow have been sped up (CLUB-3971)
- Real Time Access Control Service would stop working when used on large number of branches (CLUB-9356)
- When a suspension finished, the member did not have their access level recalculated, which meant that they were denied access by the access control system (CLUB-8370)
- Real Time Access Control Service would not update Paxton Net2 software with changes to the 'Members can arm/disarm the intruder alarm system' and anti passback settings if they were changed in Clubware until the service was restarted. (CLUB-9568)
- Real Time Access Control Service would fail to run. (CLUB-9755)
- The access level was not recalculated for an existing member if a new account was created automatically with the scheduled Debitsuccess sync (CLUB-9094)
- Real Time Access Control Service did not automatically reconnect after a deadlock event (CLUB-8869)

- Real Time Access Control Service would fail to run. (CLUB-9755)
- A friendly error is now displayed when connecting a Paxton desktop reader to Clubware and Net2 is not installed on the machine. (CLUB-6012)

Administration

- Some clients were experiencing database timeouts when a branch closure was created and an alternate branch was provided (CLUB-7690)

Clubware 4.5

4.5 Features

Front Desk

Vantiv EFTPOS Integration

The Point of Sale now supports integration with Vantiv for US. Please contact Clubware Support for additional information. (CLUB-6347)

Vantiv Eftpos supports transactions such as:

- Eftpos and Credit Card payments and refunds
- Eftpos Cashouts
- Signature required transactions
- Non card present reversals
- Partially approved payments

Adyen EFTPOS Integration

The Point of Sale now supports integration with Adyen for Australia, New Zealand, UK and US. Please contact Clubware Support for additional information. (CLUB-7901)

Adyen Eftpos supports transactions such as:

- Eftpos and Credit Card payments and refunds
- Eftpos Cashouts
- Signature required transactions
- Non card present reversals

POS Refactoring/Enhancements

The Point of Sale has been updated to allow displaying, adding and removing multiple payments inline. These changes apply to both integrated and non-integrated Eftpos modes and apply to all the supported Eftpos integrations. Other general enhancements provide further ease of usability of the Point of Sale system. (CLUB-8512)

Members

Support Discover and JCB card types through Debitsuccess sync

Discover and JCB card types are now supported through the Debitsuccess sync (for accounts that have been setup with these card types in Debitsuccess). (CLUB-9437)

Member Website

Host UK Member Websites in the UK

UK Member Website is now hosted in the UK to conform to the GDPR rules. (CLUB-6458)

Remove Google+ share option

Google+ share option on the class details screen has been removed as Google+ consumer accounts were shut down by Google on April 2nd, 2019. (CLUB-8624)

4.5 Fixes

Front Desk

- You could scan an additional product onto a sale after an electronic transaction was added to the sale (CLUB-3903)
- Points were deducted from the member when a sale using points as the payment method was discarded (CLUB-1842)
- Payment method buttons became unresponsive after you closed the Account Payment or Account Refund form using the cross (CLUB-3834)
- Focusing on the Cancel button and pressing Enter using keyboard would not cancel or close the form but proceed instead (CLUB-8921)

Members

- The calculation of start date, term and end date would show different results when modifying any of these on a member's account. The new behaviour is as below (CLUB-7604)
    - If you change the start date, it will change the end date based on the Term
    - If you change the Term, it will change the end date according to the term
    - If you change the end date, it will change the term but not change the start date
- Searching using a User Defined Field on the member grid now works (CLUB-8400)
- Reward points for a new account were not being rewarded to the member after adding the account (CLUB-9432)
- NOLOCK is added to Member Search View for improved performance (CLUB-7889)
- NOLOCK is added to Main Member View for improved performance (CLUB-7884)

Reports

- Restriction on importing reports from different Clubware version has been removed for Clubware v4.2 reports and above (CLUB-4700)

Access Control

- Arrivals, Departures and Enrollments via the WebAPI at a branch were created using timezone of the database server instead of the branch timezone (CLUB-3800)
- When creating or updating a member via the WebAPI, the State field of the address was being populated with the Address Type rather than the specified State (CLUB-8132)
  - The Clubware Gantner Access Control Service state would not be retained after upgrading Clubware Gantner Access Control (CLUB-8272)

Clubware 4.6

4.6 Features

Access Control

Support Paxton version 6.01.8113

Clubware now works with the latest version of Paxton (v6.01.8113). Clubware is still backward compatible with Paxton versions 5.02.2525, 5.03.4427 and 5.04.6217. (CLUB-6444)

Support Integriti version 19

Clubware now works with the latest version of Integriti (v19). Clubware is still backward compatible with Integriti v4 up to v19. (CLUB-5153)

Administration

Clubware Singapore

Singapore is now supported in Clubware. (CLUB-10127)

4.6 Fixes

Front Desk

- Account payment/refund amount processed using Adyen Eftpos integration displayed twice on the POS Audit Trail report (CLUB-11018)
- When pay date is backdated for an account payment or account refund, the date applied was being set to the pay date rather than today’s date (CLUB-8914)
- You could not enter an Adyen Merchant Account that is longer than 20 characters in Branch Settings. It has been updated to accommodate 100 characters (CLUB-11193)
- Clubware would display an error when discarding or parking an account payment (CLUB-10936)
- Clubware would display an error when processing an account refund (CLUB-10748)
- Clubware would stop responding upon adding an account payment against a newly created account (CLUB-10500)

- Couldn't close the POS screen after opening a previous sale to review when DPS Eftpos integration is configured (CLUB-11044)
- Cannot complete a cash refund for a product if total refund ends in 5c unless you click 'Complete Sale' directly, if rounding amount is 10c (CLUB-11013)
- You were unable to apply discount or edit the price of class session on POS (CLUB-10660)
- If you did not have a POS printer configured when using integrated Adyen Eftpos in Clubware, the system would be stuck on 'Awaiting input from customer on terminal.' popup when you try to process or cancel an Eftpos transaction (CLUB-11255, CLUB-11051)
- You could not edit price of a $0 product (CLUB-11181)
- You were unable to purchase accounts with points (CLUB-11394)
- Points were not being deducted when points were used to pay for an account (CLUB-11424)

Members

- Suspension days remaining were being calculated incorrectly for accounts that had a start date over a year ago (CLUB-11256)
- If an email address contained a space, those members would fail to sync to the member website (CLUB-10658)
- The non-billing members in a group were being allowed to enter the branch when the account of the billing member's account was expired or overdue (CLUB-9693)
- Billing transactions processed by Debitsuccess in New Zealand contained ‘ADFIT’ in the transaction description rather than ‘Debitsuccess’ (CLUB-6732)
- Clubware would throw an exception when trying to create a new member from unmatched records if they had multiple billing invoices (CLUB-10842)

Classes

- 'Access is denied' error would be displayed on the session booking item in the Member Website Send Sync service job when syncing session bookings to the Member Website, although the sync would actually be successful (CLUB-10073)

Reports

- For US and India, running a report or scheduled correspondence with a date filter would result in an error if the filter was for a date after the 12th of the month (CLUB-9678, CLUB-9682)
- Running the activity wizard after running a report and a scheduled correspondence would result in an error if the report was filtered on a date after the 12th of the month (CLUB-5312, CLUB-9682)
- Running a report resulted in incorrect results if a field that was being filtered on was not ticked in the reports data design (CLUB-3842)
- Cash rounding item was being displayed in the POS Audit Trail report sub totals (CLUB-9325)
- Eftpos payment method was displayed and recorded differently in POS and Account Payments ('Eftpos' and 'EftPos' respectively) causing two different groups for Eftpos transactions in POS reports (CLUB-10896)

Access Control

- A new 'Access Control - Real Time' service job would not start for next day occasionally. The Access Control Sync to Paxton would not work as a result (CLUB-11007)
- Introduced in an earlier 4.6 release: Member Access Level was not getting removed when the member should not have access anymore e.g. member's account ends (CLUB-10991)
- New Zealand Time Zones were displayed for Paxton Access Control Server regardless branch's country (CLUB-11251)
- Introduced in an earlier 4.6 release: New member was not being synched with Integriti access control (CLUB-11067)
- Real Time Access Control Service would occasionally fail to create a new service job, or get stuck in retry status (CLUB-10579, CLUB-10501)
- 'Sync with Access Control' menu option was missing when a new Integriti Access Control server was created (CLUB-9475)
- 'Object reference not set to an instance of an object' error was displayed on the access control service job item when syncing a new member to Integriti, although the member had synced successfully (CLUB-11062)
- 'Index was out of range' error was displayed on the access control service job item when syncing a member with no card or card template, although the member had synced successfully (CLUB-11062)

Other

- The 'How To' tutorials were not being displayed when the grid in the navigation pane had a badge count (CLUB-9454)

Clubware 4.7

4.7 Features

Classes

Class Waitlist

Classes can now be setup to allow waitlist. For an online class that is full, when a spot becomes available, the first member in the waitlist will be automatically added as attendee in the class. This feature allows businesses to have more chances of running full classes when members cancel their bookings.

This feature is also fully supported through the Web API. (CLUB-8472)

Member Website

Clubware Real Time Service

There is now a new way to synchronise information to and from the Member Website using a real-time sync that will typically push and pull information within 10 seconds.

A new service job type called 'Member Website Sync - Real Time' has been added that lists all the information that gets synced to and from member website. Note that the existing 'Sync with Member Website' menu option has been removed as it is now redundant. (CLUB-8472)

Access Control

Additional logs for Integriti

Extra logs have been added for Integriti around Member syncing to assist with troubleshooting if required (CLUB-11601)

Others

Mywellness (Technogym) Integration

One way integration with Mywellness (Technogym) is now supported. Once you enable Mywellness from branch settings, the following information will be synced to Mywellness. Any updates to these entities will also be synced to Mywellness.

- Members (excluding Prospects and deleted Members)
- Member's current account
- Member's last visit

A new service job type called 'Mywellness Sync - Real Time' has been added that lists all the information that gets synced to Mywellness. (CWI-80)

4.7 Fixes

Members

- Next payment date on account would show today's date if there was a one off AND a recurring invoice (CLUB-2496)
- Member search in the Members grid did not work when you searched by Alias that had numbers in them through Common search (CLUB-11425)
- User was unable to add prospects when 'Add' security policy under Prospects was allowed but 'Edit' security policy under 'Member' was not allowed.
  Also, when was able to edit Prospect information when user did not have 'Edit' security policy under Prospects (CLUB-11636)
- When switching between branches or accessing branch information from Head Office, selected branch's billing company/provider credentials were not being used (CLUB-8065, CLUB-11667)
- Fixed MyWellness UserEmailAndDataMatchFound Error (CLUB-11882)
- Added handling of rate limits to MyWellness API calls (CLUB-11883)

Retail Management

- POS failed to scan items after completing a sale (CLUB-11629)
- Product stock levels were being deducted even when the sale was discarded (CLUB-11670)

Classes

- Introduced in an earlier 4.7 release:
  Members were not added as attendee from waitlist by the Clubware Real Time Service when a spot became available for an online class (CLUB-11643)
- Introduced in an earlier 4.7 release:
  Waitlisted members were not added as attendee from waitlist when the time zone of branch hosting the class was different from the time zone of the machine running the Clubware Real Time Service (CLUB-11718)
- Concession card visit was not being refunded to the member if they cancelled a booking online made using the concession card account (CLUB-11598)
- Sorting the Sessions grid by Time was causing Clubware to not respond (CLUB-11600)

Term Classes

- Bulk Class Rollover for Term Classes was failing (CLUB-11638)

Reports

- Change and Cashout lines have been removed from the payment z off reports. Cash is now displayed for ease of use. Cash is total cash recorded via POS – total of Change and Cashout (CLUB-11669)

Access Control

- Newly created member access level would get sorted incorrectly when a deleted member access level exists (CLUB-11043)
- Access Control Server 'LastVisitCheckDateUTC' was not being reset after each Access Control Visit Import for Integriti. The import job would run successfully but would grow in size after each sync job (CLUB-11616)

Administration

- Multiple service jobs were picking up the same data export job (CLUB-9431)
- The process that checks for Service Job Items was causing high CPU usage (CLUB-11611)
- Introduced in an earlier 4.7 release:
  The Clubware Real Time Service job would stop syncing to member website due to failure in fetching a service job (CLUB-11818)

Web API

- You could not create a session through Web API without passing an instructor and resource (CLUB-3651)

Others

- The 'Test Email Settings' button under Branch Settings > Email was always using the existing saved credentials. Now you can change the credentials and test the settings before saving (CLUB-11575)
- An exception was occurring related with an existing memory file in the Clubware Process manager under the Event Viewer (CLUB-11599)

Index

A

B

C

D

E

F

G

H

I

L

M

N

O

P

R

S

T

U

V

W

Z

For more information about Clubware contact:

clubware Australia

Ph +61 1800 114 777
Email support@clubware.com.au
Web www.clubware.com.au

clubware New Zealand

Ph +64 9 481 0490
Email support@clubware.co.nz
Web www.clubware.co.nz

clubware™