

CLUB MASTER

User Manual

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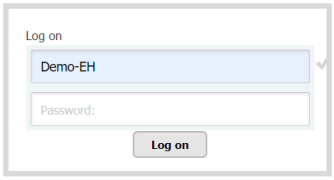
Logging On

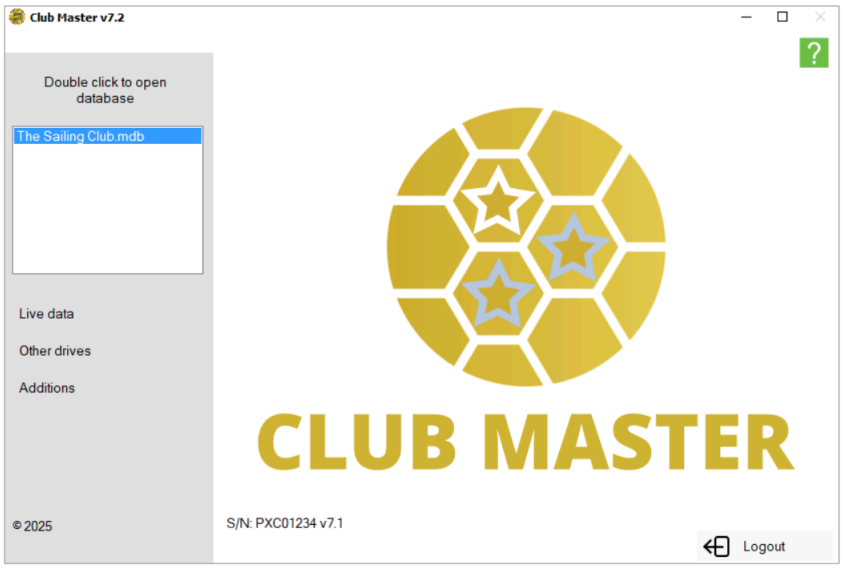
The software is online and can be accessed using the following link:

https://online.paxsoft.co.uk/

Your login details will be sent to you via email.



Once you are connected to the cloud click on the Demo Data button and you will see the following screen



You can now choose the relevant demo that you would like to look at. Once you have created your live database this will be displayed to allow you to log in. If your database has already been created it should automatically appear on the screen, if it doesn't then click on Live Data.

The default login details are:

User code: **USER01**

Passcode: **123456**

Either hit Enter on your keyboard or click on the Login button.

You should always exit from the software using the 'Exit' button on the bottom of the main menu screen. Confirm that you are closing Club Master on the smaller pop-up screen, and this will automatically close your browser window. Just closing your browser window which will not log you out of your database and will leave your user ID logged in.



Driving the Software

Here are a few notes on how to use the software which you may find useful as you start to navigate your way around.

- From any screen you can access the help file by clicking on the ? at the top right.
- All screens can be driven by using the mouse or the keyboard. For the keyboard controls refer to Keyboard Shortcuts in the Tutorial section of the help file.
- The package is menu driven. A single click on a menu selection will take you to the program. When in the program, the 'Exit' button will take you back to the menu.
- The database is NOT updated from any program until the 'Record' button is pressed. There is always a 'Cancel' button displayed alongside the 'Record' button that allows you to abort the current input.
- Where a field name as an * displayed next to it, it means that this is mandatory.

Using * and ^ in Grids

- An asterisk (*) in a grid column header indicates that extra information can be displayed via a 'double click' in that column for the appropriate grid entry.
- Similarly, a '^' symbol indicates that a 'right click' will display further selections.

The Navigation Bar



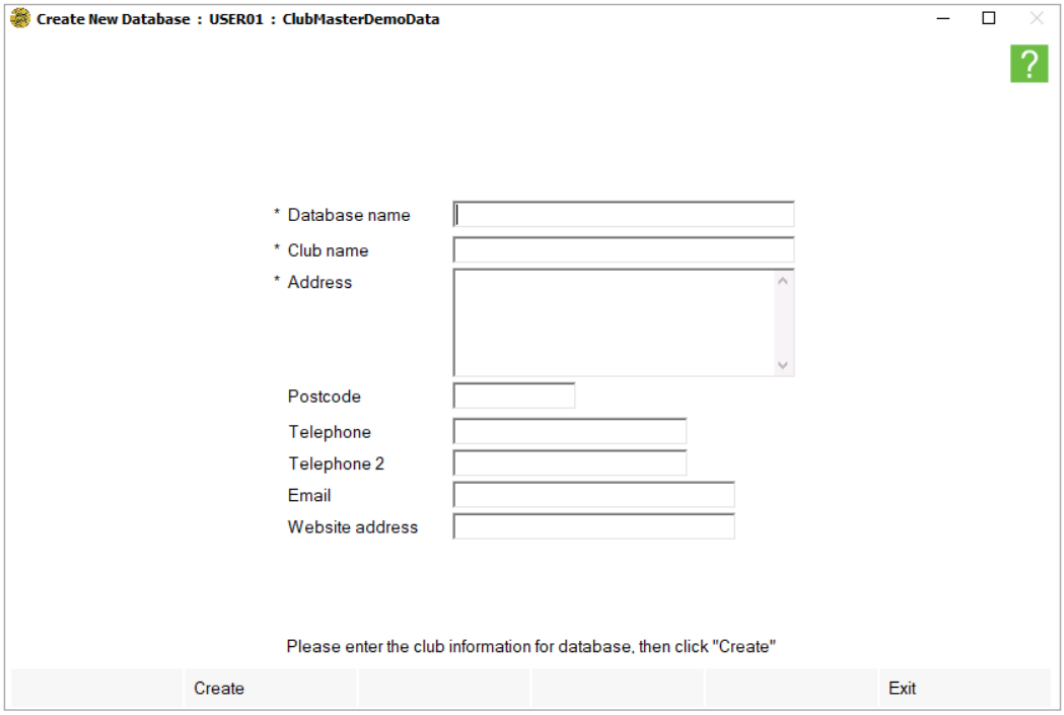
- These navigation controls will appear at the top right of the screen in many of the maintenance and enquiry programs.
- Clicking on the up arrow will select the first record in the group, left arrow the previous record, right arrow the next record and down arrow the last record in the group.
- Where available, the large 'C' icon will display a record count.



Creating Your Database

Once you have logged into the Demo data it is now time to create your own database.

Go to **Administration—Getting Started—Create New Database**



Enter the details for your club or organisation. The following fields are mandatory and the rest are optional:-

- Database name—this is the name of the file that you double click on when logging in
- Club name—this can't be changed once you have created your database.
- Address

Click on the Create button and you can now log out of the demo database and log into your live database.

All details apart from the database name can be amended at any point after creating your database from the System Maintenance screen.

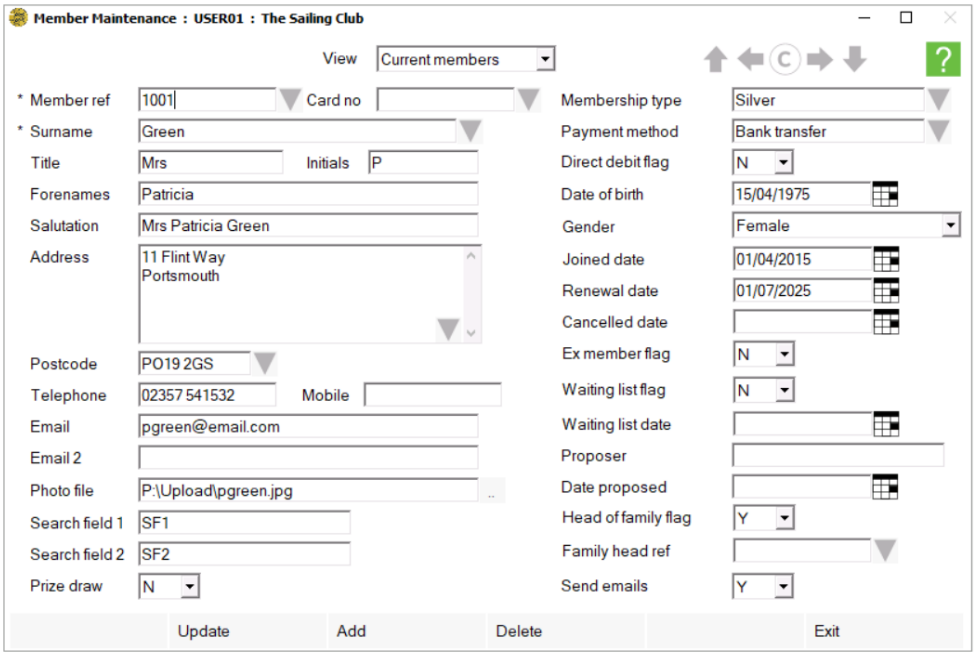


Members

Member Maintenance

There is no limit to the number of members that you can enter. These can either be entered manually or imported through the Administration section.

To add, amend or delete a member go to **Members—Member Maintenance**



Update This allows you to change any of the details on the screen. After making the changes click on the red Record button to save.

Add Add a new member.

Delete Will delete the member that is displayed on the screen.

The member reference and surname are mandatory fields.

Member ref You can choose to assign your own reference number or the system will assign the next reference number according to the setting in System Maintenance.

Card no If you have membership card numbers then this can be entered here.

Salutation This can be used when sending letters or emails to the member.

Photo file	A member photo can be displayed in the Member Enquiry screen. The photo will need to be uploaded to the cloud first. Refer to the Uploading files page in this manual for more details. The photos must be less than 500kb in size.
Search fields	You can use these fields to group together your members for reporting purposes. For example if you entered SF1 into the search field for some members then you can pull out reports for those members who have that search field assigned to them.
Membership type	Choose from the options in the drop down list box. These are set up and maintained in Administration—System Settings—Fee Maintenance.
Payment method	Choose from the options in the drop down list box. These are set up and maintain in Administration—System Settings—Payment Methods.
Direct debit	Y/N. If the member pays their renewal via direct debit then select Y.
Date of birth	Members date of birth.
Gender	Male / Female / Other.
Joined date	Date the member joined.
Renewal date	Date the members renewal is due. If you are using the membership renewals then you can choose to let the system increment this date according to their membership type.
Cancelled date	Date the membership was cancelled.
Ex member flag	If you wish to keep the person's details but they are no longer a member then set this flag to Y. You can view ex members in Member Enquiry and run reports.
Waiting list	If this member is on your waiting list set this flag to Y. You can view your waiting list in Member Enquiry or run reports.
Waiting list date	Enter the date they joined the waiting list.
Proposer	Name of the person who proposed this member.
Date proposed	Date the member was proposed.
Head of family flag	You are able to group members together by families. The head of the family will have this flag set to Y.
Family head ref	Members of a family should have the head of the family member reference in this field.
Send emails	This defaults to Y but if the member has requested that no email are to be sent then change this to N.

Member Enquiry

Members—Member Enquiry

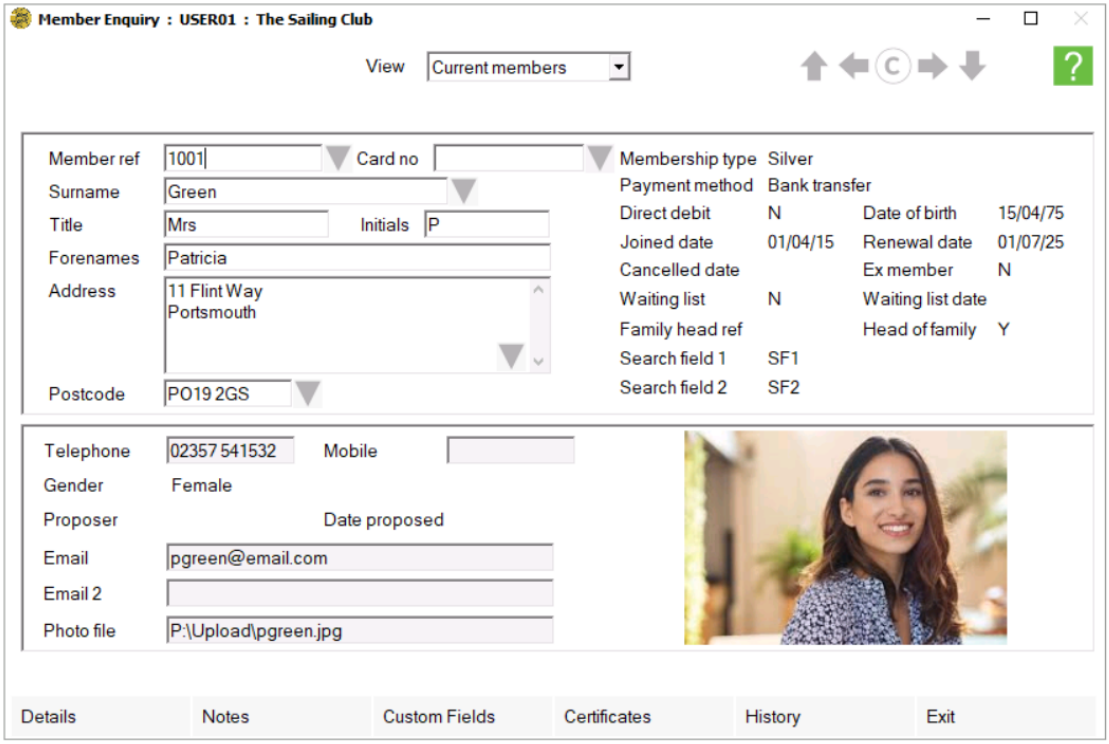
This screen allows you to view all the details on a member including Notes, Custom Fields, Certificates and Renewal History.

View The default is current members so you can only see those members who aren't ex members or on the waiting list. You can choose from:-

Current members
Ex members
Waiting list
All

You are able to navigate through your members by using the arrows at the top right of the screen or use the down arrows against Member ref, Card no, Surname, Address or Postcode to search for the member.

For example if you are looking for a member whose surname is Green then delete out anything from the surname field so it is blank and enter G and click the down arrow. This will display all those members with a surname beginning with G and you can click on the relevant record to select it. You can narrow the search down as much as needed, if you entered the word Green then it would only display members that matched that criteria.

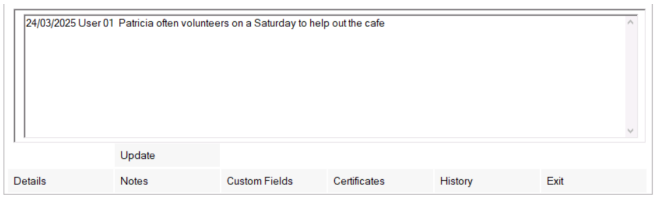


The buttons at the bottom of the screen will control what is displayed in the lower half of the screen. Member details is the default.

Notes

Click on Update and it will automatically enter the user code you are logged in with and 'today's date'.

You are free to enter as much free text as you need and click on Record to save.



Custom Fields

You can set up custom fields for you to use. There are 10 available and are set up and maintained in **Administration—System Settings—User Defined Fields**

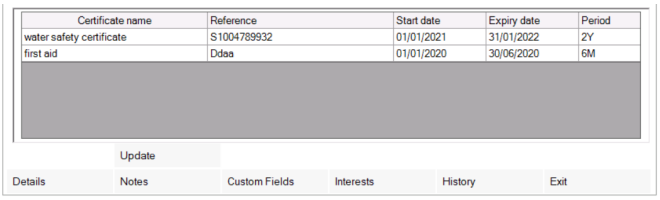
Click on Update and enter you text and click Record to save. You can enter up to 255 characters in each field.



Certificates

These are maintained in **Administration—System Settings—Certificates**.

Click on Update and Insert Line. Enter the certificate along with start and end dates if applicable and click on Record.



There is a toggle on the Certificates / Interests button. To view Interests click on Certificates and then Interests.

Interests

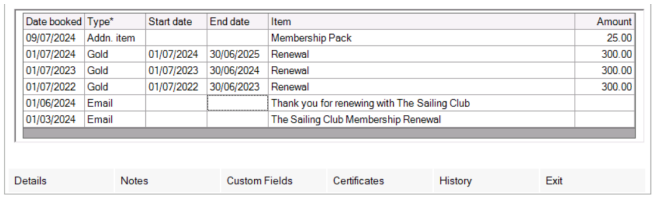
Click on Update and you can enter free text and Record to save.



History

This will display this members renewal and email history.

You can delete a members renewal history by double clicking in the Type column against the line you wish to remove.





Membership Renewal

Membership renewal is booked through **Members—Membership Renewal**

There are two ways to book the renewals:-

All renewals due All members that have a renewal date up to the date you enter will be displayed

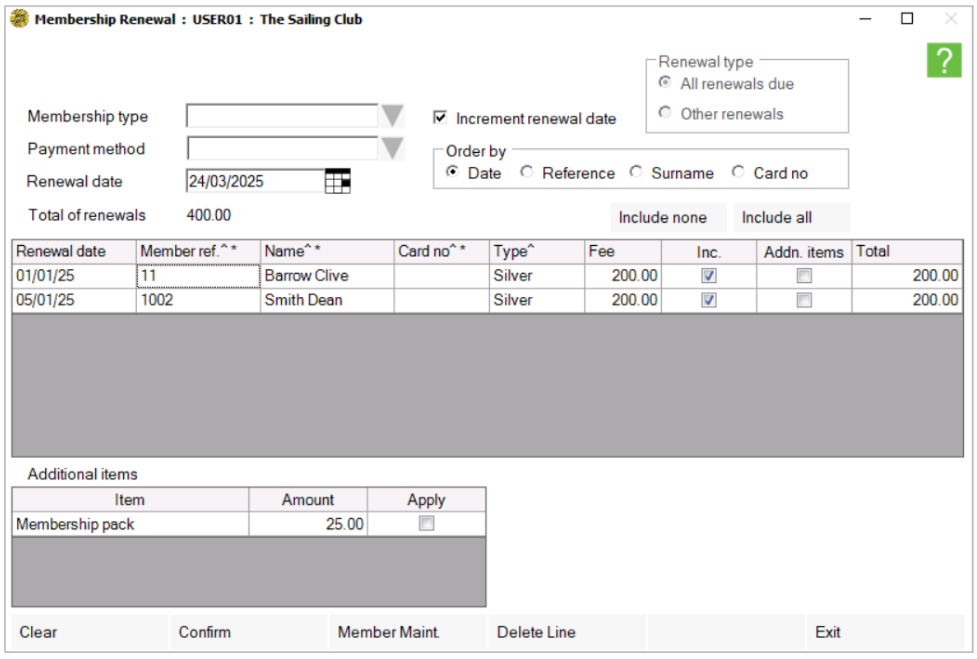
Other renewals This allows you to manually enter the members who you wish to book renewals for

All Renewals Due

Enter the renewal date and payment method and click on the All renewals date option and it will display all members that have a renewal date on or before the date entered.

If you want to only book renewals for certain membership types then make a selection in this field before selecting the 'All renewals due' option.

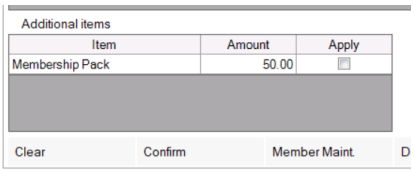
Once the members are displayed on the screen you need to select those members that have paid. Tick the 'Inc' column against the member and it will add the total figure. Alternatively you can click on 'Include all' and then untick those that haven't paid.



Additional Items

These are set up and maintained in **Administration—System Settings—Additional Items**

If you wish to apply additional items paid for by the member then tick the 'Addn. items' box and then tick the relevant additional items to be included at the bottom of the screen. The total of membership and additional items will be displayed.



Increment renewal date

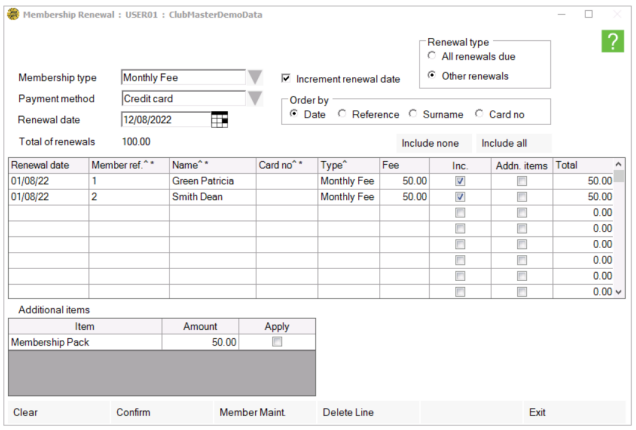
Leave this ticked if you would like the software to automatically increment the members renewal date based on the membership period.

When you have finished your selections click on Confirm and then Record to save.

Other Renewals

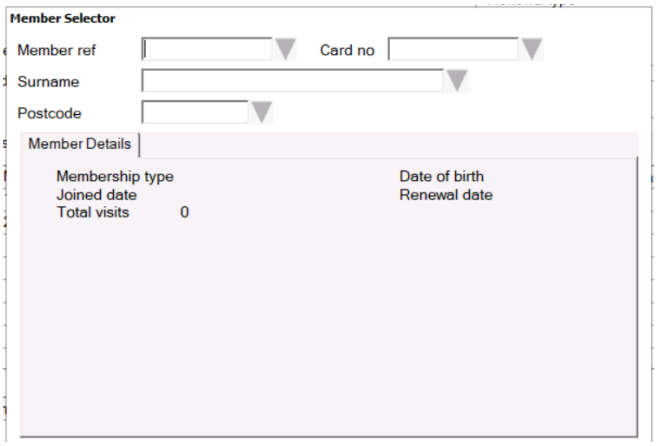
To book any other ad hoc renewals select this option.

Enter the Payment method and renewal date. If you leave the renewal date blank in the grid then it will default to the renewal date set at the top of the screen.



Member selection

You can select your member by either right clicking (^) or double clicking (*) in the Member ref, Name or Card no columns. If you right click you will get a list of all members. If you double click then you will get a search window. Enter the first character(s) of the member ref or surname or address and click on the down arrow. It will display all matches on your criteria for you to be able to select the correct member.



As with the renewals due option tick on the Addn. Items box and then the relevant item that you wish to add to the total.

You can also change the fee value if they have paid a different amount to their membership type.

When you have finished your selections click on Confirm and then Record to save.

Reports

There are many reports included in the software. Each report menu option has the printer icon 

All the reports allow you to enter criteria to determine what information is displayed. There are a number of different options in the operator field. Here is an explanation of each one:-

any value all the records are selected.

between a pair of values must be entered as the start and end values for a range to be selected. The range between "A" and "CZZZZ" would produce a list of records with first character in the range A to CZZZZ [inclusive].

not between as above, except that records other than those in the range are selected.

like enables matching using the first character of a code or with the wildcards "%" and "?". The value A% would produce a list of all records starting with the letter "A". ?A% produces a list of items where the second character is "A".

not like as above, except that records other than those specified are selected.

= equal to, an exact match.

<> not equal to.

> / < greater than (a numeric value), or later (alphabetically or date wise) or less than (a numeric value), or earlier (alphabetically or date wise).

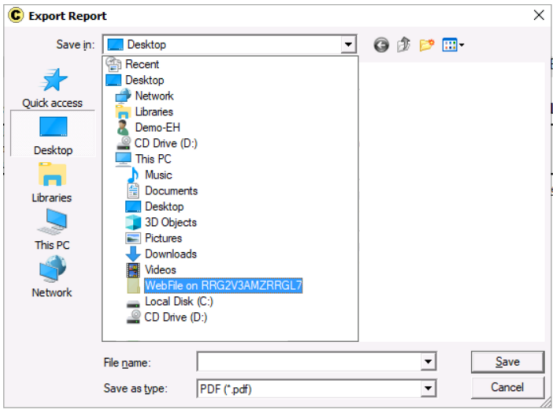
>= / <= greater than or equal to/ less than or equal to. This operator can be useful for dates. E.g. in Nominal Transaction List a date selection of >= 01/01/2025 will list out all transactions ever.

Exporting a Report

Each report can be printed or previewed. You can also export the report in a number of different formats. To do this first preview the report and then click on the Export icon at the top left. 

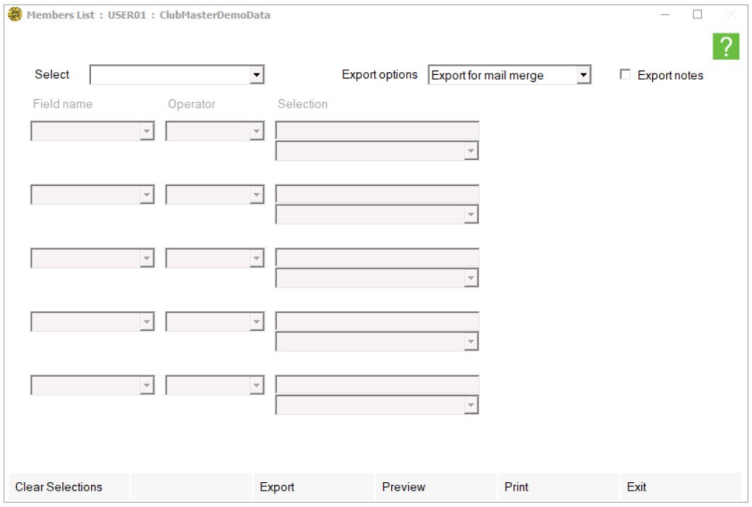
Change the file type and enter a file name.

Make sure that you choose the WebFile folder and then it will automatically save the report in your Downloads folder on your PC/MAC.



Here are the reports that are available:-

Members List



This report allows you to print or preview all the details that you have recorded against your members.

The Select field allows you to make a selection from:-

All Current members
All Waiting list
All Ex-members
All
Selections below

If you choose the Selections below option then you can then choose your criteria using up the 5 different fields. The operator sections are explained on the previous page.

You can choose to either Print or Preview the report or use the Export button to create a CSV file. The CSV file will be created on the cloud and will then need to be downloaded onto your local computer. See the Downloading files section in this help document for more information on this.

Report example

Club Master **Members List** **Page 1 of 1**

The Sailing Club **Printed: 24/03/2025**

All

Reference	Card no	Name	Type	Telephone	Email
1001		Mrs Patricia Green	Silver	02357 541532	pgreen@email.com
1002		Mr Dean Smith	Silver		dsmith@email.com
1003		Charlie Smith	Junior		csmith@email.com
11		Mr Clive Barrow	Silver		cbarrow@email.com
12	0	Mrs Sam Sharp	Silver		ssharp@email.com
13	0	Dr Thomas Barrance			tbarrance@email.com

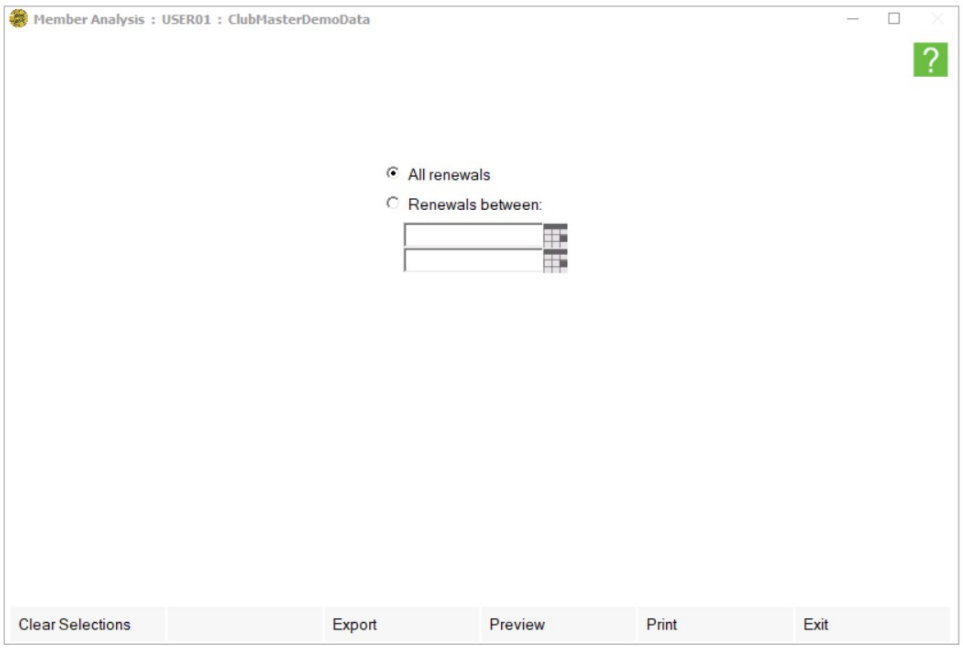
The printed members list will have the basic member details. For all the information you will need to use the export option.

Mail Merge

If you want to export your member information for mail merge purposes then select 'Export for mail merge' in the Export options filed, make your selections and click on Export.

Members Analysis

This report allows you to print or preview a list of member renewals. You can choose All renewals which will be everything or you can specify a date range and this will just list renewals processed



You can choose to either Print or Preview the report or use the Export button to create a CSV file. The CSV file will be created on the cloud and will then need to be downloaded onto your local computer. See the Downloading files section in this help document for more information on this.

Club Master **Member Analysis** **Page 1 of 1**

The Sailing Club **Printed: 24/03/2025**

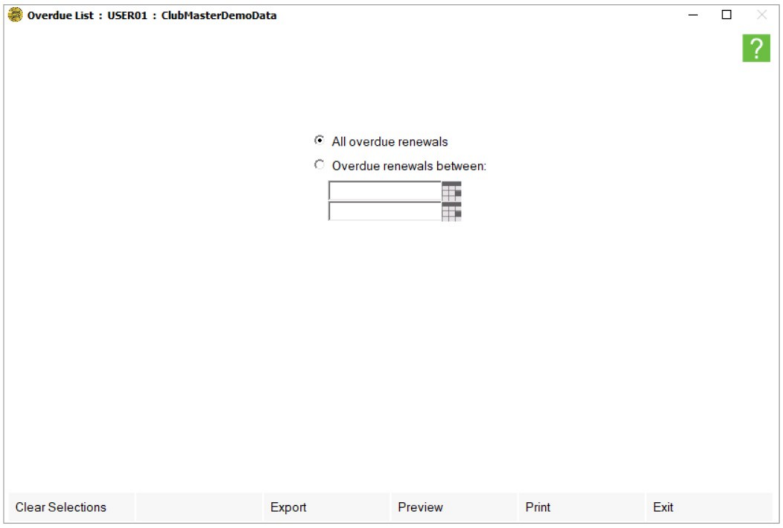
All renewals

Reference	Card no	Name	Type	Renewal date	Payment method	Fee
1001		Mrs Patricia Green	Gold	01/07/2023	Cash	300.00
1003		Charlie Smith	Junior	16/07/2023	Bank transfer	50.00
1001		Mrs Patricia Green	Gold	01/07/2024	PayPal	300.00
1001		Mrs Patricia Green	Gold	01/07/2022	Bank transfer	300.00
1001		Mrs Patricia Green	Membership Pack		Bank transfer	25.00
1002		Mr Dean Smith	Silver	05/01/2024	Bank transfer	200.00
1003		Charlie Smith	Junior	16/07/2024	Credit card	50.00
					Report Total	1,225.00

Report example

Overdue List

This report allows you to print or preview a list of renewals that are overdue. You can choose All overdue renewals or specify a date range and this will just list overdue renewals within this range.



You can choose to either Print or Preview the report or use the Export button to create a CSV file. The CSV file will be created on the cloud and will then need to be downloaded onto your local computer. See the Downloading files section in this help document for more information on this.

Club Master **Members Overdue List** **Page 1 of 1**

The Sailing Club **Printed: 24/03/2025**

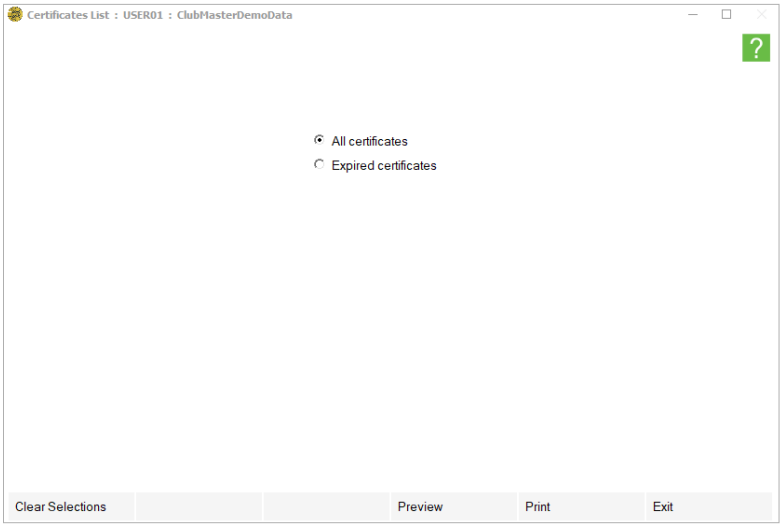
All overdue renewals

Reference	Card no	Name	Telephone	Email	Renewal date	Type	Fee
1002		Mr Dean Smith		dsmith@email.com	05/01/2025	Silver	200.00
11		Mr Clive Barrow		cbarrow@email.com	01/01/2025	Silver	200.00
No of outstanding members		2			Amount outstanding		400.00

Report example

Certificates List

This report allows you to print or preview a list of certificates that members hold and also if they have expired.



You can choose to either Print or Preview the report.

Club Master **Member Certificates List** **Page 1 of 1**

The Sailing Club **Printed: 24/03/2025**

All certificates

Reference	Card no	Name	Telephone	Email	Renewal date	Type	Fee
1001		Mrs Patricia Green	02357 541532	pgreen@email.com	01/07/2025	Silver	200.00

Certificate	Reference	Start date	Expiry	Period
Water Safety		01/04/2025	01/04/2026	1Y

Reference	Card no	Name	Telephone	Email	Renewal date	Type	Fee
1002		Mr Dean Smith		dsmith@email.com	05/01/2025	Silver	200.00

Certificate	Reference	Start date	Expiry	Period
Water Safety		01/01/2021	01/04/2026	1Y

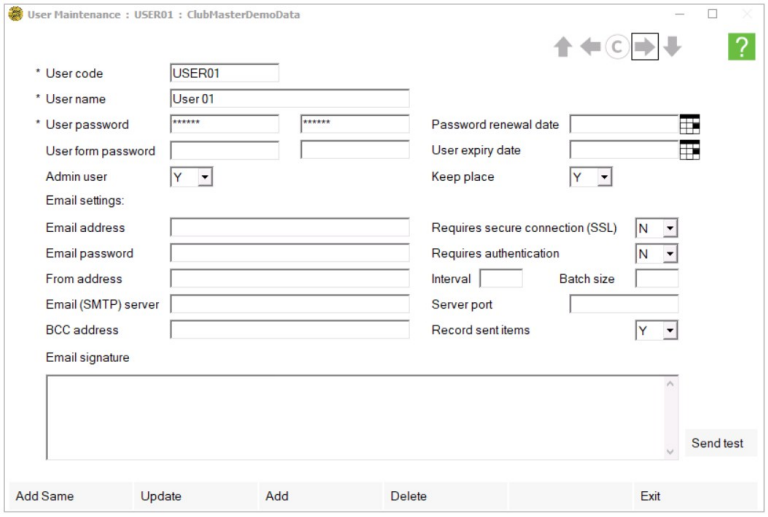
Report example



Member Communication

It is important to be able to easily communicate with your members. As well as recording contact details for your members such as telephone numbers and email addresses, you can also use the software to send email communication or export your member information for use in mail merge.

The first thing that you need to do is add your email settings. Because these could be different for different users, it is done in **Administration—System Settings—User Maintenance**. Be sure to select the user you are logged in as.



Example email settings

Email address This is the email account it will be sent from.

Email password The password for the email account.

From address This is the from email address that is displayed when your member received their email.

Email (SMTP) server, Requires secure connection, Requires suthentication, Server port Enter the details, you may need to speak to your email provider for these.

BCC address If you would like to retain a copy of the email that was sent enter your email address here.

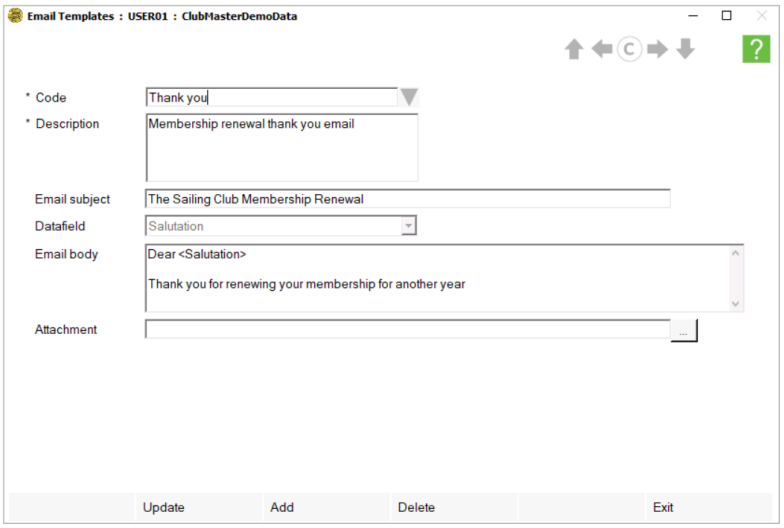
Email signature This is the signature that will be added at the bottom of your emails. This can be changed when the emails are sent if needed.

Interval & Batch size Some email providers won't allow large numbers of emails to be sent at the same time so you can use these fields to set how many emails will be sent in each batch and the amount of time between sending batches. If you entered 50 in the batch size and 30 in the interval it would mean the emails would get sent out every 30 mins in batches of 50 until all have been sent.

Email Templates

If you have a standard email that you send out then you would use an email template.

You can have as many templates as you need and they are set up in **Members—Email Templates**



Click on Add to add a new template or Update to change an existing one.

Code	Enter a code which you would select when sending your emails.
Description	Enter text to describe the email.
Email subject & body	Enter the text that you want to appear on your emails.
Datafield	When entering the email body you can insert various datafields to automatically populate that information when they email is sent, e.g. salutation, member fee.
Attachment	You can choose to send an attachment. The file must be uploaded to the cloud first.

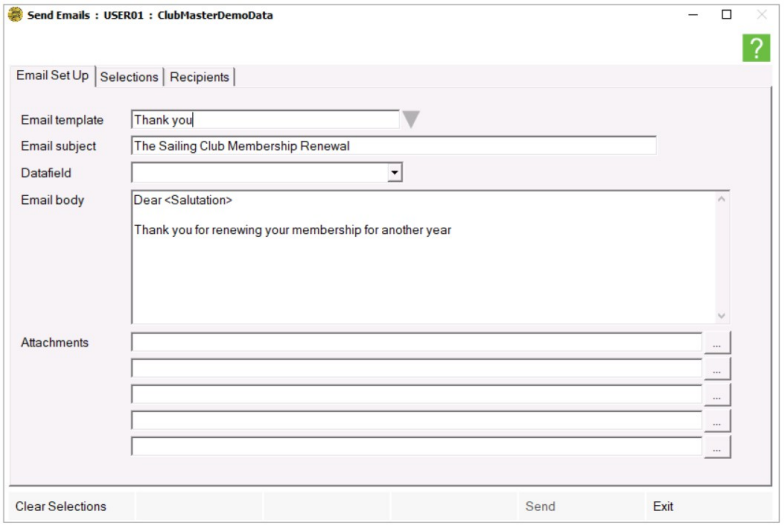
Click on Record to save.

Sending Emails

Members—Send Emails

Email Setup

Select an Email template code if you wish to use one, if not you can manually enter the information.

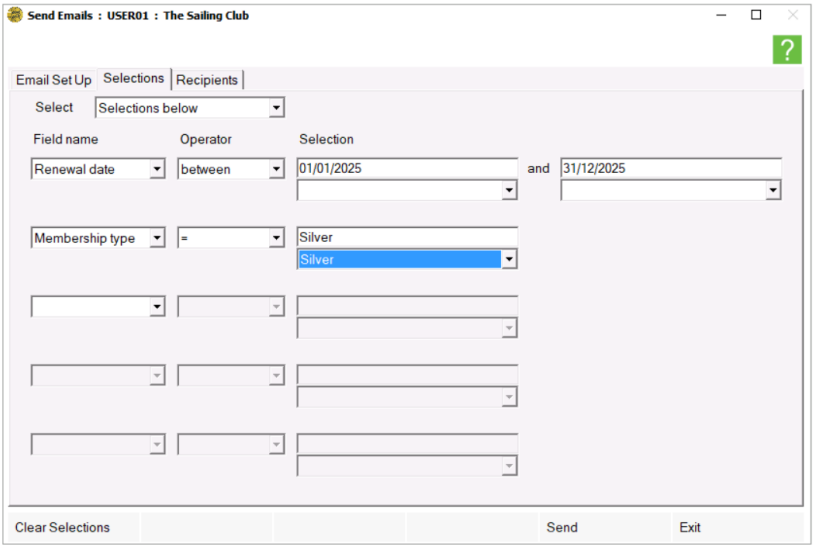


Selections

You can choose to send an email to:-

All members
All current members
All members on the waiting list
All ex members

You can also use a number of different selections to choose the recipients.



In this example it will send the email to members who have a renewal date between 01/01/2025 and 31/12/2025 and have a Silver membership type.

Recipients

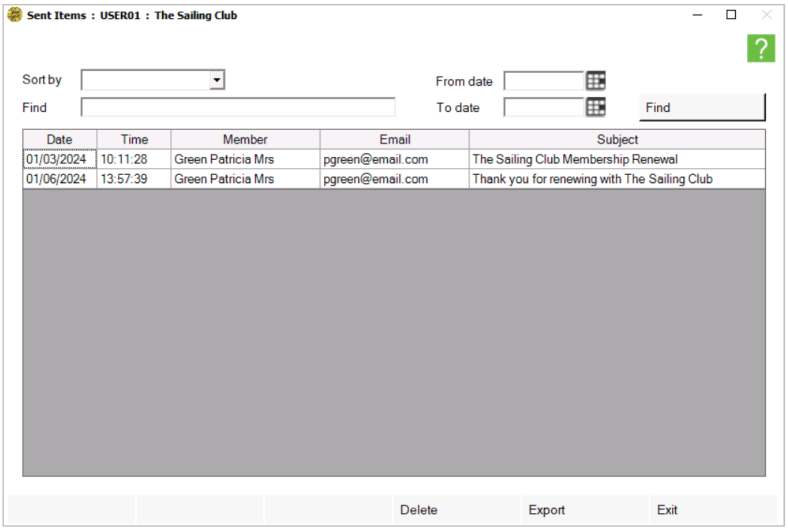
This screen will show you your members that have an email address and meet your criteria. They will default to be included but if there is someone you don't wish to email then untick the Inc box.



Click on Send to start emailing.

Sent Emails

Members—Sent Emails

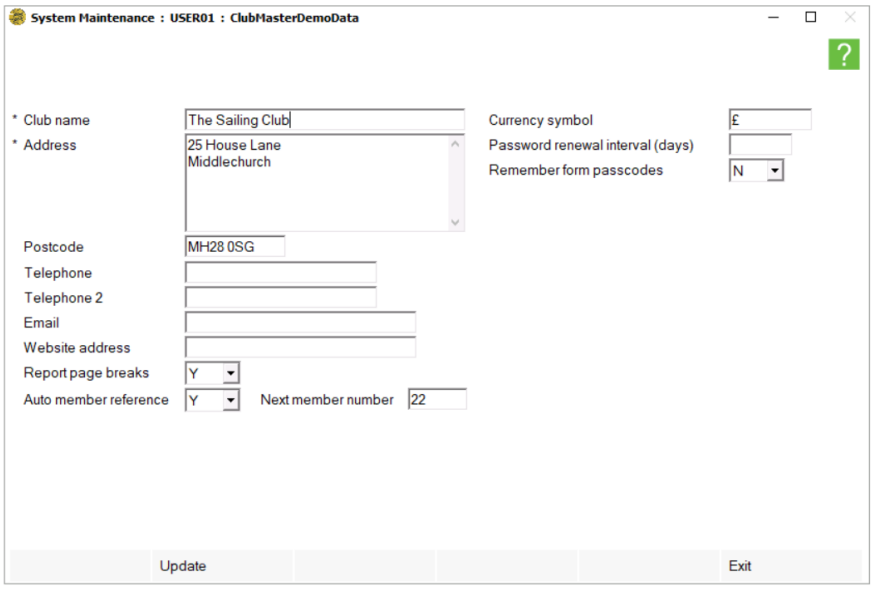


This screen will show you all the emails that you have sent. You can export this list to a CSV file if needed. You can also delete all sent items up to a certain date. Please note that this cannot be undone.

Maintenance

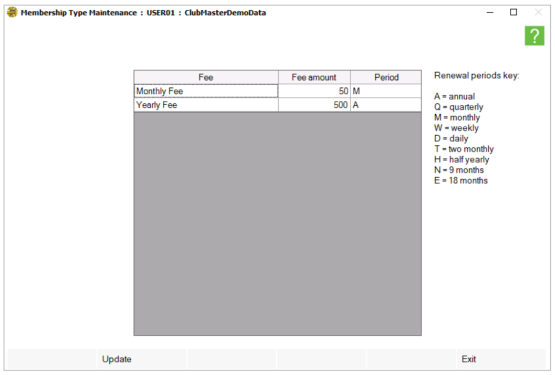
The main maintenance program is System Maintenance. This is where you maintain your club/organisation details. The details can be updated at any time as required.

Administration—System Settings—System Maintenance



Report page breaks	Y/N
Auto member reference	If you would like the system to assign the next available reference for new members then select Y and enter the next number in the next field.
Currency symbol	This defaults to £. If you are running in a different currency then enter that here.
Password renewal interval	You can enter the number of days before it asks the user to change their entry password.
Remember forms passcodes	If this is set to Y and you are using forms passcodes (see Access Settings) then it will remember the passcode for the user you are logged in as so you don't have to enter it every time.

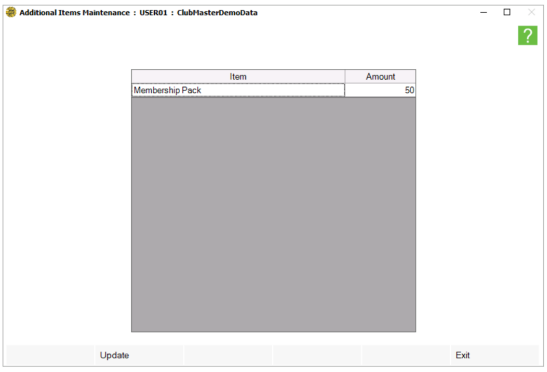
Membership Type Maintenance



Administration—System Settings—Membership Type

The fee code is assigned to the member in the Member Maintenance screen. When the fee amount is changed in this screen is will be automatically applied when the next member renewal is completed. Click on Update and Insert line to add a new fee or amend the existing records and click on Record to save.

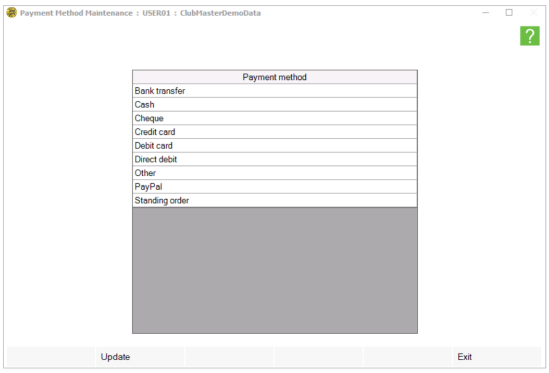
Additional Items Maintenance



Administration—System Settings—Additional Items

Any additional fees that are used in the Membership Renewal screen can be entered and maintained here.

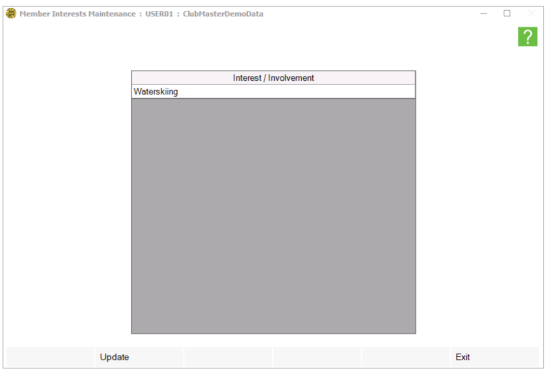
Payment Method Maintenance



Administration—System Settings—Payment Methods

Add any payment methods into this screen.

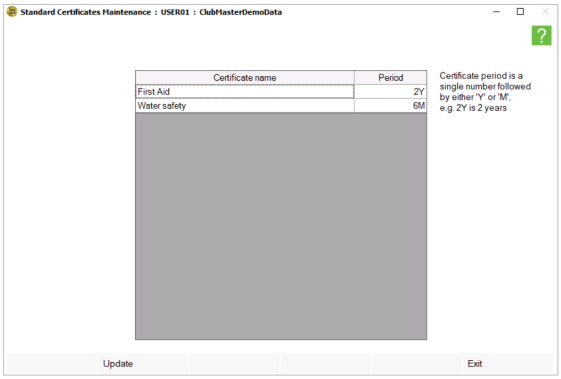
Member Interests Maintenance



Administration—System Settings—Interests

You can maintain members interests \ Involvements here and these are added to the member in Member Enquiry.

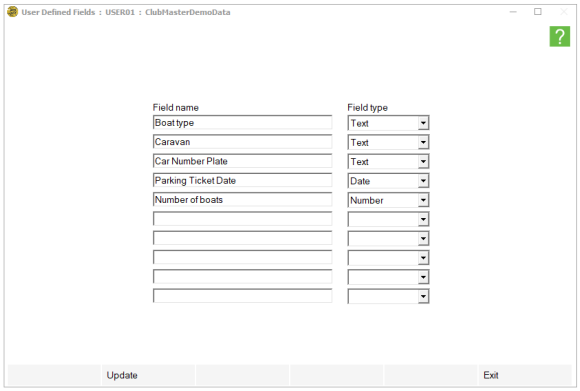
Certificate Maintenance



Administration—System Settings—Certificates

You can maintain members certificates here and these are added to the member in Member Enquiry.

User Defined Fields Maintenance



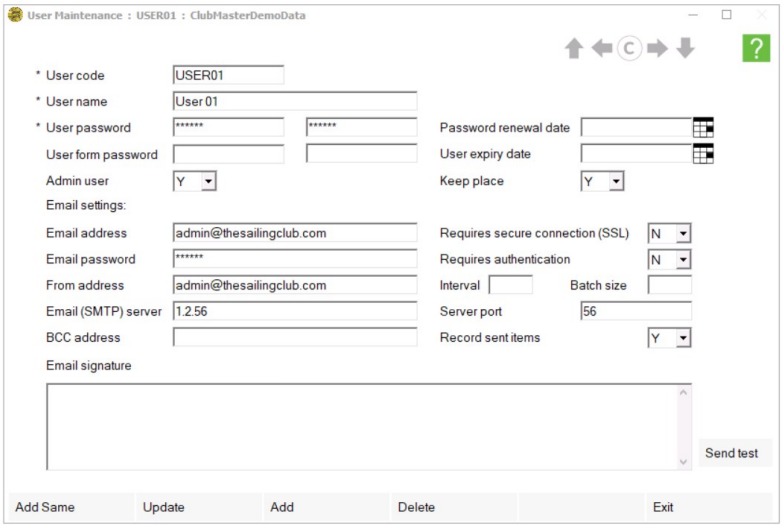
Administration—System Settings—User Defined Fields

You can add up to 10 user defined fields and these can be used for anything. It is a more bespoke way of adding information that is relevant to your club. Each field can be entered as either Text, Date or Number. The information is added to the member in Member Enquiry.

Administration

User Maintenance

This screen is used to set up different user logins. There is no limit to the number of different user codes that you can create.



User code You can enter a code up to 10 characters.

User name This is the name of the user.

User password Enter and confirm the users password which needs to be between 6 and 10 characters.

User form password You can add a password to any of the menu options as part of the access settings. If you wish this user to gain access then enter and confirm the passcode here.

Admin user Select Y if this user can access the Administration section of the program.

Email settings Refer to the Sending Emails section for more details.

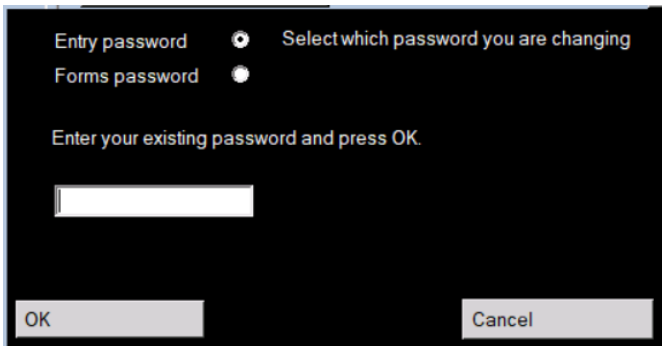
Password renewal date If you want to set a date that the password needs to be renewed then enter it here.

User expiry date If you have a temporary user then you can enter an expiry date here.

Keep place If this is set to Y then when you go to Member Enquiry it will go to the member you were last looking at. If it is set to N it will always default to the first member.

Click on Add to enter a new user record and click on Record to Save. You can also click on Add Same to add an identical user record for you to amend. Click on Update to amend an existing users details.

Change Password

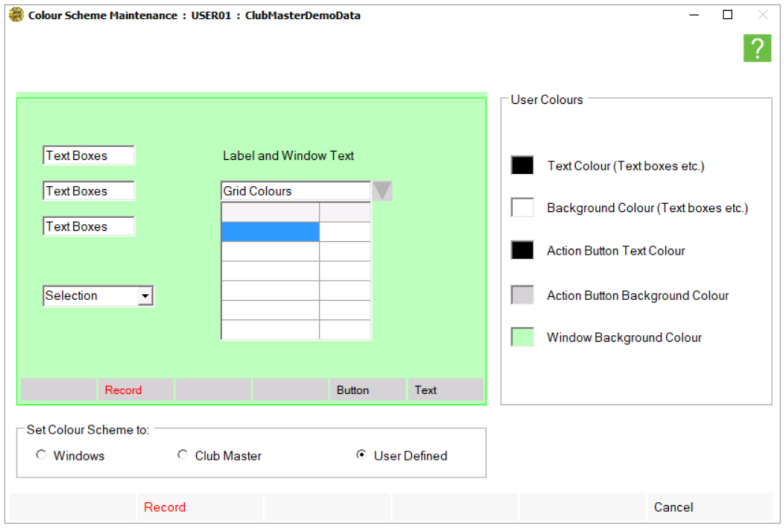


This allows the user that is logged in to change their own entry and forms password.

Colour Scheme

Each user can change the colour scheme. You can either choose from:-

Windows This will take the colour scheme from your Windows settings.
Club Master Will default to the standard Club Master colours.
User Defined You can choose different colours for different parts of the screen.



When you select the User defined option click on Update and then click on the colour boxes and a palette will be displayed for you to select your desired colour.

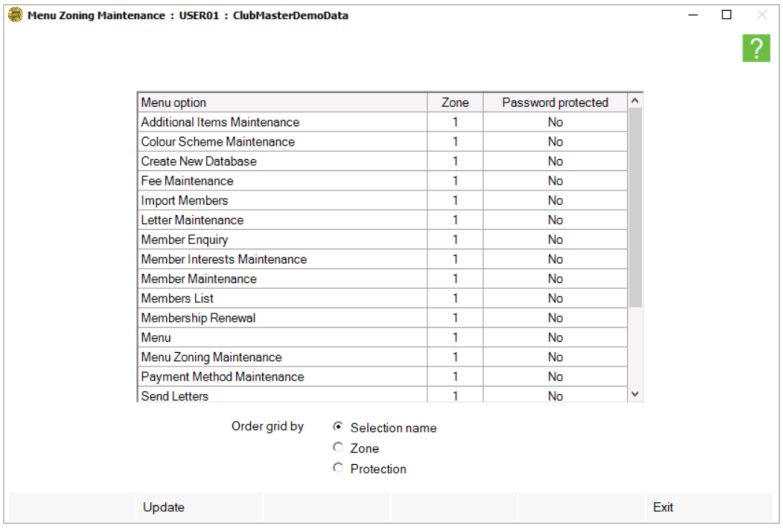
Click on Record to save.

Access Settings

Menu Zoning

The menu zoning allows you to restrict access to certain parts of the program for certain users. Every screen in the program is listing in Menu Zoning. As default everything is in Zone 1. You can then assign different parts of the program to different zones. For example you may wish to add the maintenance programs into Zone 2. Then use the User Access screen to restrict certain users from this option.

You can also add a password to the menu option. If you do this then only users that have a 'forms password' set in User Maintenance will be able to access the menu option.



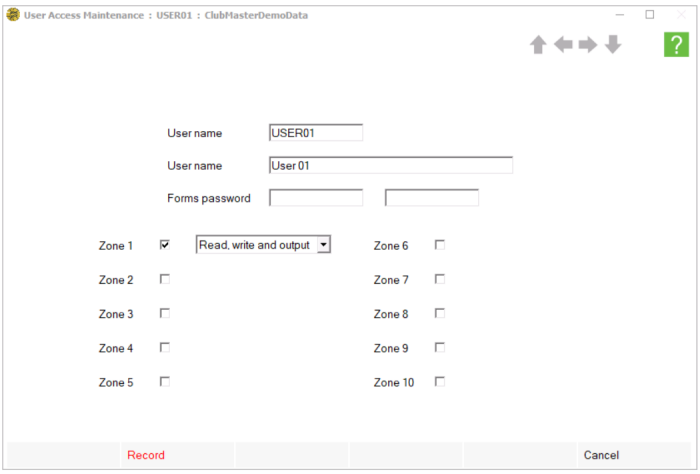
In the above example the Membership Renewal menu option is moved to Zone 2. You can then use the User Access screen to allow certain users to have access to this zone.

User Access

This is where you specify what access each user has. As default every user has full access to all zones.

You can choose from Read, Write & Output, Read Only, Read & Write and Read & Output. If you don't want the user to have any access then untick the box.

This example shows that USER01 has full access to Zone 1 only. Therefore any menu options that are in Zone 2 e.g. Membership Renewal it won't allow access.





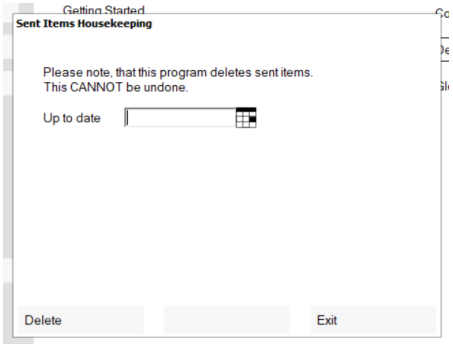
Housekeeping

Compact Database

This option clears down any temporary data to reduce the size of your database.

Delete Sent Items

This will clear down any sent emails up to a certain date to reduce the amount of information that is displayed in the Sent Items screen. Enter the Up to date and click on Delete. Please notes that this CAN'T be undone.

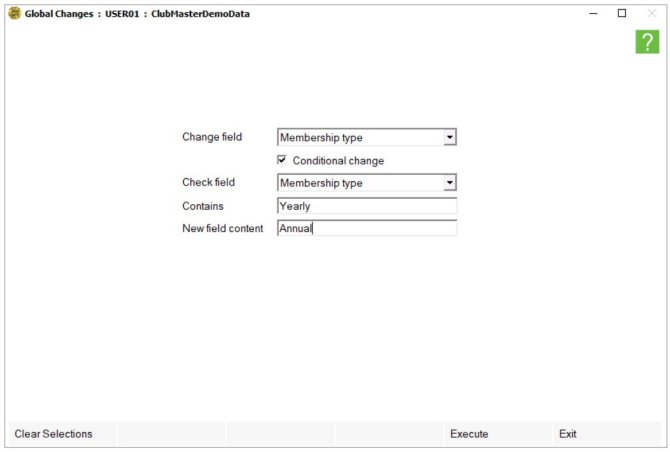


Global Changes

You can use this facility if you want to make changes to a particular field in Member Maintenance and want to either apply changes to all members or in certain circumstances.

In this example it will change the Membership type to 'Annual where is it is currently set to 'Yearly.

Click on Execute and you will be asked to confirm the changes. Please note that this CAN'T be undone.



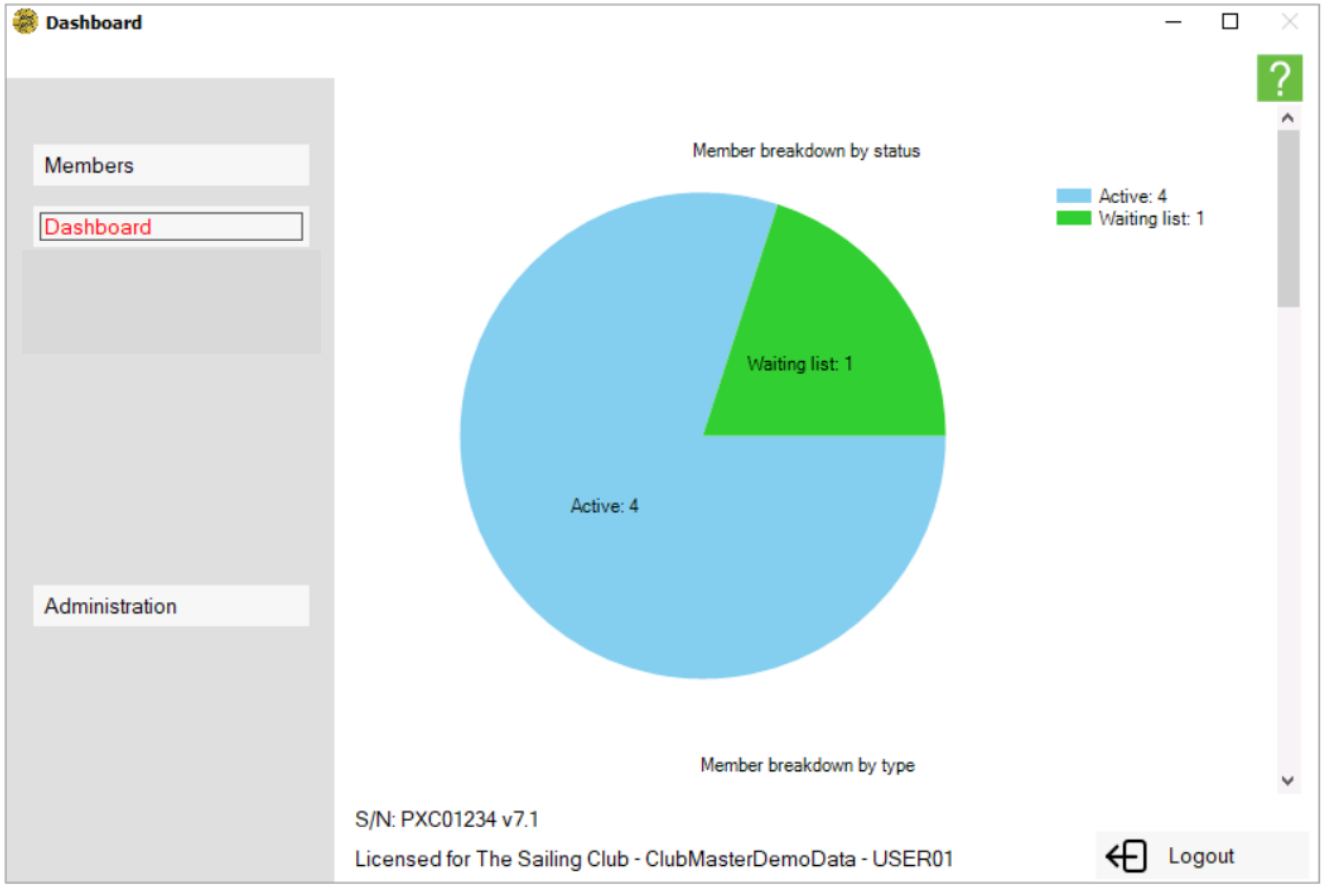


Dashboard

The Dashboard gives a quick visual representation of your members.

You can view the breakdown by membership type, gender and status. The status is if they are active, ex members or on the waiting list.

You can also see the breakdown of your membership renewals that are due in the next 12 months.



Uploading and Downloading Files

Uploading

There are a few places where you can attach files, member photographs in Member Maintenance or adding an attachment to an email. Before you can select them in Club Master they have to be uploaded to the cloud. To do this click on the grey tab with the down arrow at the top of your web browser screen



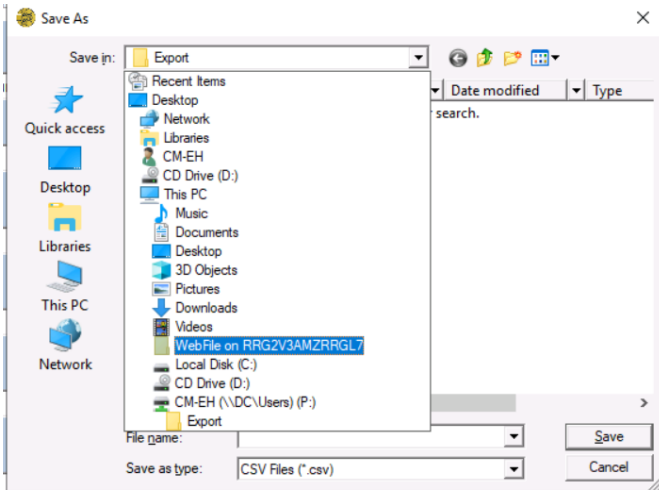
Then click on the icon with the cloud and the up arrow (From PC to Server)



This will then display a window which will allow you to browse the files on your local computer. Once you have located your file click on Open. This will then upload it to the server. It will now be available in the Uploads folder when you select your file in either Member Maintenance or Send Emails.

Downloading

When you choose to Export a report it will display a 'Save as' screen and ask where you want to save the file. Click on the down arrow next to Save in and choose the 'WebFile on .....' folder. Enter the file name and type if needed and click on Save. This will then automatically download into your Windows / MAC Downloads folder on your local computer.



If you have created a transfer using a report then the csv file will be stored in the cloud and will need to be downloaded onto your local computer. To do this click on the 'From server to PC' icon



Your file should be displayed on the screen. Click on it once to select it and click on Open. This will then automatically download into your Windows / MAC Downloads folder on your local computer.



Correcting Mistakes

Member Details

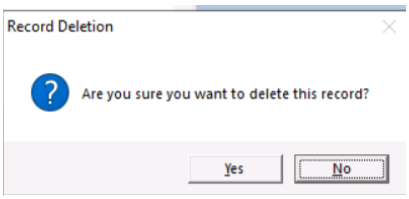
If you have entered any information about a member incorrectly then this can be changed in **Members—Member Maintenance**. Select the member and click on Update and make the changes and click on Record.

You can also use **Administration—Housekeeping—Global Changes** to change multiple member details at the same time.

Membership Renewals

You can easily reverse a members renewal if it was done incorrectly. Go to **Members—Member Enquiry** and select the member. Click on History to display all renewals and emails sent for the selected member.

Double click on the renewal you wish to delete and it will ask for confirmation to delete the record.





Support

With any software package, the availability of a good after sales support service is vital. While we have made the installation, set up, and day to day running of Club Master as easy as possible, it is inevitable that questions will arise.

Support is included in the monthly subscription and is available during usual office hours.



support@softwareforclubs.com