



# *My Tennis*

*Club Administration User Manual*

*Version 3.0*

Making membership easy

## ***Preface***

This document describes Information Processing Corporation (IPC) and Sports Marketing Australia (SMA) software and services. All inquiries pertaining to this document are welcome, and should be sent to SMA at the following address:

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To obtain a copy of this manual, send your request to the above address or [support@sportsmarketing.com.au](mailto:support@sportsmarketing.com.au)

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## Getting Started

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By entering the following URL in the browser, the user can display the My Tennis home page.

<https://www.securedvirtualnet.com/tennisau/backend/default.htm>

From the main menu displayed, select Club.



**Figure 1: Administrative Menu Options: Main Page**

This club login screen allows the user to access the MY TENNIS functions. Users will need a current user ID and password.



The screenshot shows the 'Club Login Page' interface. At the top left is the Tennis Australia logo. A blue navigation bar contains 'Home' and 'Help' links. Below the navigation bar, the text 'Welcome to Club Administration' is displayed. The main content area is titled 'Please Login.' and contains the following fields:

- Organisation: Tennis Australia (dropdown menu)
- Association: Tennis Victoria (dropdown menu)
- Club: CAULFIELD PARK TC (dropdown menu)
- User ID: ipc helpdesk (text input)
- Password: [masked with dots] (password input)

A 'Submit Form' button is located below the password field.

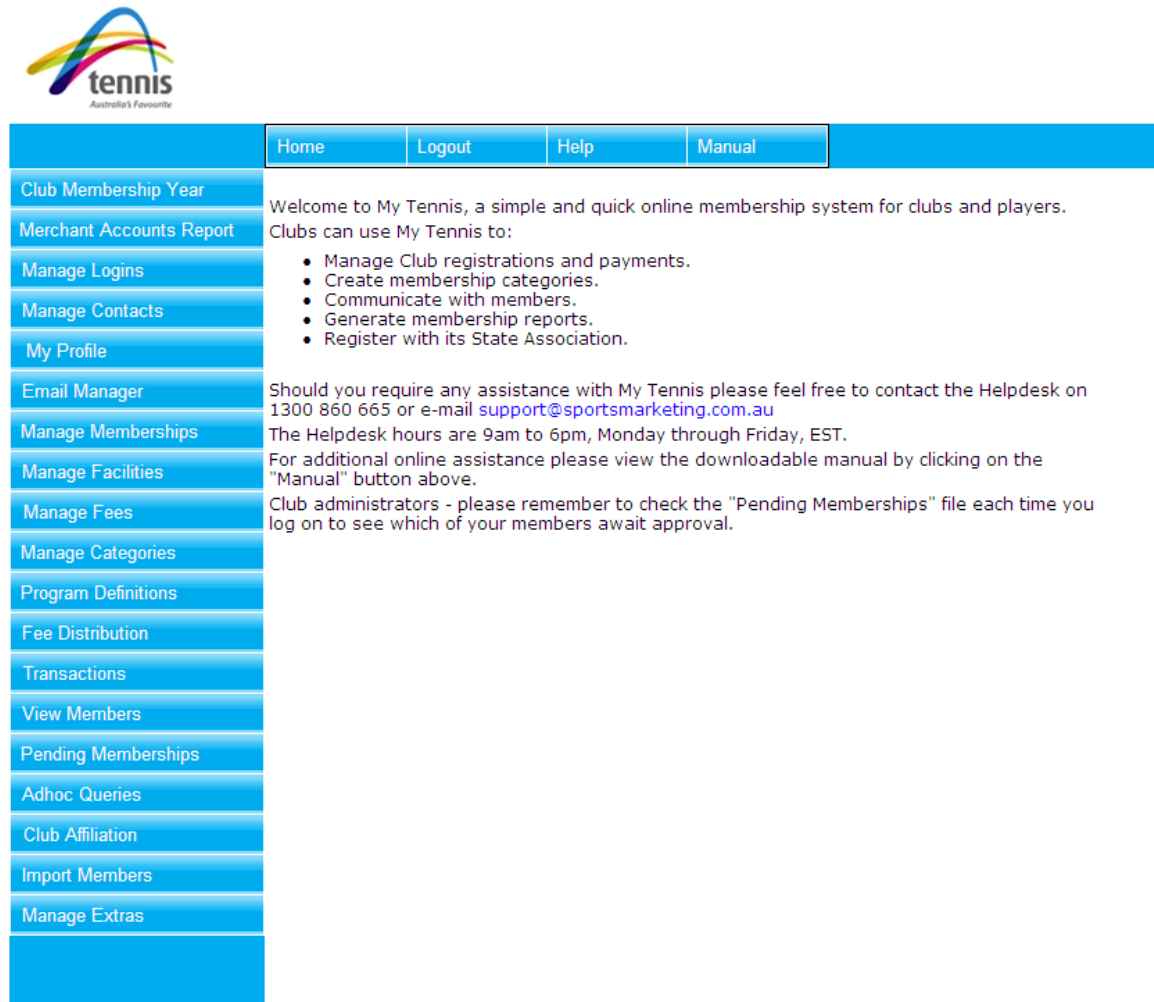
**Figure 2: Club Login Page**

The MY TENNIS homepage is first accessed when the URL is entered. To log in follow these steps:

1. From the Menu option on the top, select **Club**. A Club Administration screen is displayed.
2. From the **Organization** field, select Organization from the drop down list. This populates the Association (State) field with Associations linked to the Organization.
3. From the **Association** field, select the Association from the drop down list. This populates the Club field with Clubs affiliated under the Association (State).
4. From the **Club** Field, select the Club from the drop down list.
5. In the **User ID** field, enter user ID. This is a unique ID.
6. In the **Password** field, enter the password. Passwords are case sensitive.
7. Click on the **Submit Form** button or press the **Enter** key.

The User ID and Password are unique for each person. For access to the MY TENNIS application or password related issues contact the MY TENNIS application administrator.

After the user logs into the application, the main menu screen is displayed.



**Figure 3: Main Menu Screen**

Two additional buttons appear along the top menu bar. These buttons are active on all screens used in Club Administration

**Help** – Will show the current contact information for the Sports Marketing Association help desk

**Manual** – Will display a new window with the online version Club Administrator User Manual

The left side menu displays various options for the user to select a function to perform.

**Club Membership Year** – Add and define the membership year for the club

**Merchant Account Report** – Allow the club to view payments using the merchant facility.

**Manage Logins** – Add and maintain user accounts that can administer the system at the club level.

**Manage Contacts** – Add and maintain contacts affiliated with the club.

**My Profile** – Maintain the club information.

**Email Manager** – Compose and send emails to contacts and members affiliated with the club.

**Manage Memberships** – Add and maintain club level memberships, define membership periods and registration periods; assign fees to memberships and optionally define pro-rata schedule for memberships.

**Manage Facilities** – Add and maintain facilities to the club.

**Manage Fees** – Add and maintain fees for various memberships and services at the club level.

**Manage Categories** – Add and maintain club level categories and associate them with corresponding state level categories.

**Program Definitions** – View, add and maintain the programs in the club.

**Fee Distribution** – Allows the user to view payments and how the payments are distributed at the different levels within a specified date range

**Transactions** – Allows the user to view transactions during a specific date range.

**View Members** – Allows the user to add new members and/or view current members and perform various management functions.

**Pending Memberships** – Shows all the pending memberships in the club and allows user to update / process these memberships.

**Adhoc Queries** – View and export requested information. The MY TENNIS operations management team post database queries to this management page for this very purpose.

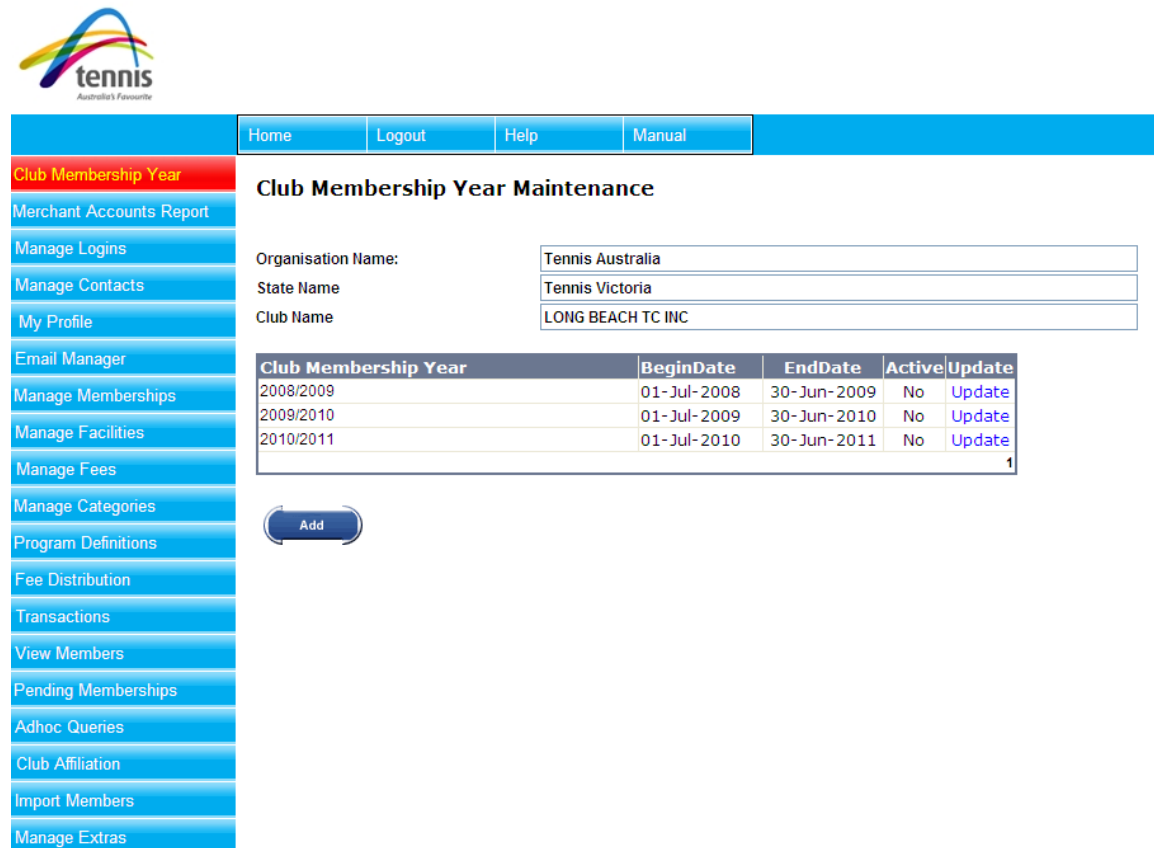
**Club Affiliation** – Provides a series of screens to review and update the club information during the affiliation process.

**Import Members** – Allows club administrator to import a list of memberships from a excel spread sheet to the system.

**Manage Extras** – Allows the user to define additional items to be purchased during online registration. Manage Extras also give the user the ability to audit the number of items sold and mark the items fulfilled for the members.

## Club Membership Year

The Club Membership Year will allow the club to add and define the membership year for the club.



The screenshot shows the 'Club Membership Year Maintenance' screen. On the left is a navigation menu with options like 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', etc. The main content area has a header 'Club Membership Year Maintenance' and three input fields for 'Organisation Name' (Tennis Australia), 'State Name' (Tennis Victoria), and 'Club Name' (LONG BEACH TC INC). Below these is a table of membership years.

Club Membership Year	BeginDate	EndDate	Active	Update
2008/2009	01-Jul-2008	30-Jun-2009	No	<a href="#">Update</a>
2009/2010	01-Jul-2009	30-Jun-2010	No	<a href="#">Update</a>
2010/2011	01-Jul-2010	30-Jun-2011	No	<a href="#">Update</a>

Below the table is an 'Add' button.

**Figure 4: Club Membership Year Maintenance Screen**

All defined Membership Years are displayed in the Club Membership Year table. The information displayed includes:

- Club Membership Year
- Begin Date
- End Date
- Active
- Update

To add a Club Membership Year, follow these steps:

1. Click on the **Add** button. The following screen is displayed:



	Home	Logout	Help	Manual
<b>Club Membership Year</b>	Club Membership Year Maintenance			
Merchant Accounts Report				
Manage Logins	Organisation Name:	Tennis Australia		
Manage Contacts	State Name	Tennis Victoria		
My Profile	Club Name	LONG BEACH TC INC		
Email Manager	Description:			
Manage Memberships	Begin Date:			DD/MM/YYYY
Manage Facilities	End Date:			DD/MM/YYYY
Manage Fees	Active:	Yes		
Manage Categories	Association Membership Year:	<Select Association Peri		
Program Definitions		Cancel	Add	
Fee Distribution				
Transactions				
View Members				
Pending Memberships				
Adhoc Queries				
Club Affiliation				
Import Members				
Manage Extras				

**Figure 5: Club Membership Year Add Screen**

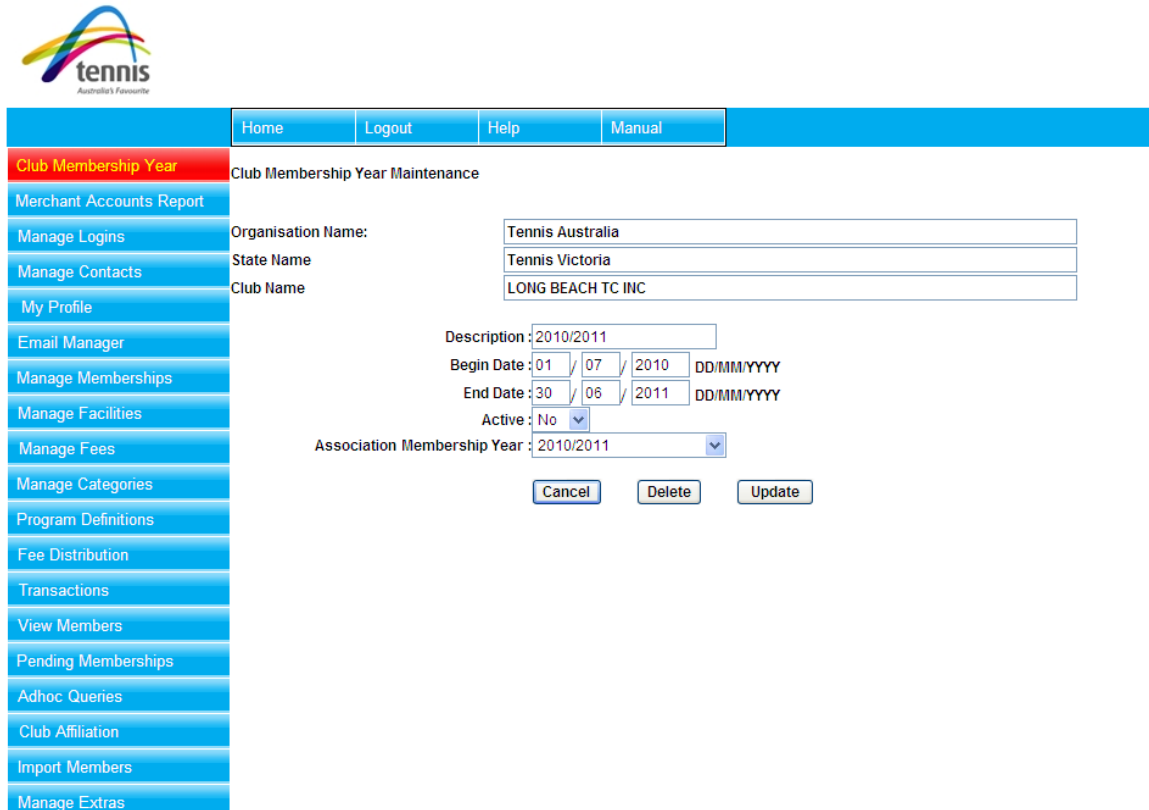
2. In the **Description** field, enter the Club Membership Year name or description (i.e. 2010/2011).
3. In the **Begin Date** fields, enter the begin date of the Club Membership Year in the format DD / MM / YYYY.
4. In the **End Date** fields, enter the end date of the Club Membership Year in the format DD / MM / YYYY.
5. In the **Active** field, enter Yes if the year is to be considered the Active year or current for the club; enter No if the year is not currently the active year. This allows for the user to set up a new membership year in advance.
6. In the **Association Membership Year** field, use the drop down box to select the Association membership year corresponding to this club membership year.
7. Click on the **Update** button. This saves the Club Membership Year information in the database and displays the Club Membership Year information in the Club Membership Year table.

All fields are required

To stop adding the new Club Membership Year information select the **Cancel** button.

To update information for a defined Club Membership Year, follow these steps:

1. Click on the **Update** button under the Update column in the Club Membership Year table. The following screen is displayed



**Figure 6: Club Membership Year Update Screen**

2. In the **Description** field, update the Club Membership Year name or description (i.e. 2010/2011) appropriately.
3. In the **Begin Date** fields, update the begin date of the Club Membership Year in the format DD / MM / YYYY.
4. In the **End Date** fields, update the end date of the Club Membership Year in the format DD / MM / YYYY.
5. In the **Active** field, enter Yes if the year is to be considered the Active year or current for the club; enter No if the year is not currently the active year. This allows for the user to set up a new membership year in advance.
6. In the **Association Membership Year** field, use the drop down box to select the Association membership year corresponding to this club membership year.
7. Click on the **Update** button. This saves the Club Membership Year information in the database and displays the Club Membership Year information in the Club Membership Year table.

All fields are required

To stop updating the new Club Membership Year information select the **Cancel** button.

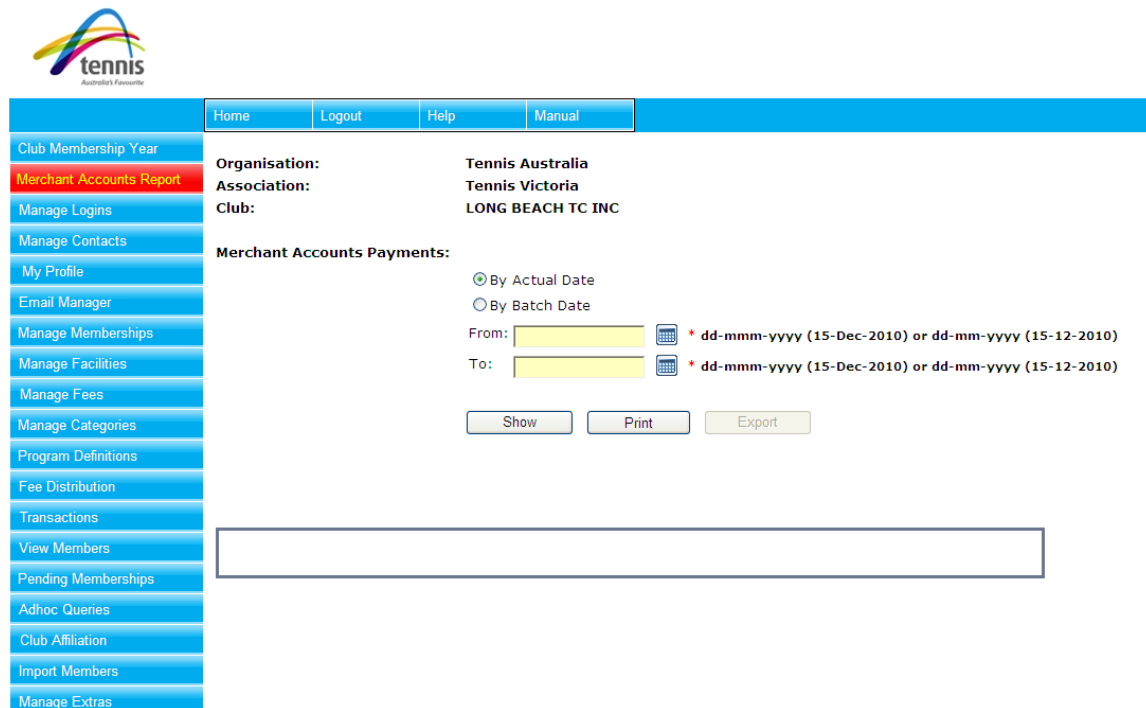
To delete an existing Club Membership Year, select the **Delete** button

A pop-up message is displayed. This pop-up message asks 'Are you sure?' To continue with the delete select the **OK** button. The **Delete** and **Update** buttons on the Club Membership Year Update screen will be disabled and the **<Back** button will show an updated Club Membership Year table with the year in question deleted.

To stop the delete select the **Cancel** button when the pop-up message is displayed

## Merchant Account Report

The Merchant Account Report will allow the club to view payments using the merchant facility. This will allow you to balance with the merchant facility.



The screenshot shows the 'Merchant Accounts Report' page in a web application. On the left is a vertical navigation menu with items like 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', etc. The main content area displays the following information:

- Navigation: Home, Logout, Help, Manual
- Organisation: Tennis Australia
- Association: Tennis Victoria
- Club: LONG BEACH TC INC
- Merchant Accounts Payments:
  - By Actual Date
  - By Batch Date
  - From: [text box] [calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)
  - To: [text box] [calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)
  - Buttons: Show, Print, Export
- A large empty rectangular box at the bottom of the main content area.

Figure 7: Merchant Account Report Home Screen

To view the payments the following fields need to be defined with selected information:

Select how to view the payments:

- By Actual date (the transaction date)
- By Batch date (the date a batch of transactions are sent for processing)

Select the Date/Time Range.

- From Date
- To Date
  - Dates can be entered using the text box in the format shown or by using the calendar popup to pick each date

Select **Show**

- The Payments are listed on screen based on the criteria defined (see following page for screen sample).



Home
Logout
Help
Manual

- Club Membership Year
- Merchant Accounts Report
- Manage Logins
- Manage Contacts
- My Profile
- Email Manager
- Manage Memberships
- Manage Facilities
- Manage Fees
- Manage Categories
- Program Definitions
- Fee Distribution
- Transactions
- View Members
- Pending Memberships
- Adhoc Queries
- Club Affiliation
- Import Members
- Manage Extras

**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**Merchant Accounts Payments:**

By Actual Date  
 By Batch Date

From:   dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)  
To:   dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

**12 Transactions from 01-Jun-2010 to 02-Jun-2010**

Date Time	Association	Member Name	Credit Card	Authorization Code	Reference Code	Amount
01/06/2010 18:27	Tennis Victoria	BiJan Mochayedi-Holmes	484XXXXXXXXXX7087	A-097956	272	\$24.00
01/06/2010 20:22	Tennis Victoria	Lachlan King	838XXXXXXXXXX9699	A-237780	273	\$24.00
01/06/2010 20:39	Tennis Victoria	Max Pearson	484XXXXXXXXXX9773	A-099788	274	\$24.00
01/06/2010 22:50	Tennis Victoria	Cristina Babira	460XXXXXXXXXX8379	A-117950	275	\$24.00
01/06/2010 23:01	Tennis Victoria	Greg Garganis	618XXXXXXXXXX0744	A-R83265	276	\$12.00
01/06/2010 23:06	Tennis Victoria	John Batsakis	631XXXXXXXXXX8277	A-344656	277	\$24.00
02/06/2010 00:07	Tennis Victoria	Aleksandar Ceran	618XXXXXXXXXX6383	A-R66159	278	\$24.00
02/06/2010 00:38	Tennis Victoria	Stefan Momirovski	462XXXXXXXXXX1031	A-273794	279	\$24.00
02/06/2010 01:20	Tennis Victoria	Lachlan Townsend-Booth	618XXXXXXXXXX7273	A-R05298	280	\$12.00
02/06/2010 01:25	Tennis Victoria	Joseph Townsend-Booth	618XXXXXXXXXX7273	A-R39008	281	\$12.00
02/06/2010 19:22	Tennis Victoria	Matthew Gould	618XXXXXXXXXX0705	A-R62525	282	\$24.00
02/06/2010 23:43	Tennis Victoria	Finn Rooney	468XXXXXXXXXX2590	A-518982	283	\$12.00
<b>Total Transactions Approved</b>					12	\$240.00
<b>Total Transactions Denied</b>					0	\$0.00
<b>Total Transactions</b>					12	\$240.00

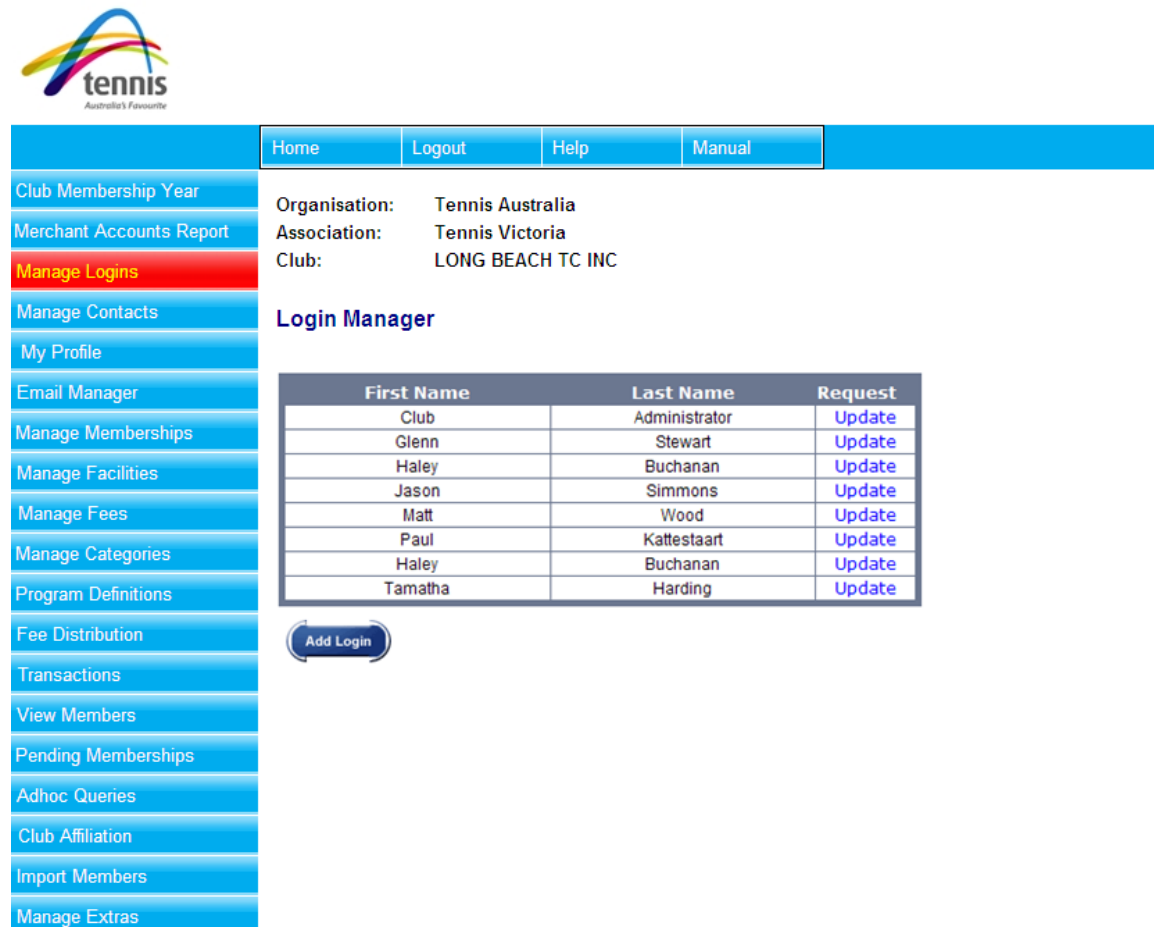
**Figure 8: Merchant Account Report Results Screen**

To print the results, Click on print button.

To export the results to an excel sheet, click on export button.

## Manage Logins

The Manage Logins menu option allows the user to set up and maintain the logins for the club.



Organisation: Tennis Australia  
 Association: Tennis Victoria  
 Club: LONG BEACH TC INC

**Login Manager**

First Name	Last Name	Request
Club	Administrator	<a href="#">Update</a>
Glenn	Stewart	<a href="#">Update</a>
Haley	Buchanan	<a href="#">Update</a>
Jason	Simmons	<a href="#">Update</a>
Matt	Wood	<a href="#">Update</a>
Paul	Kattestaart	<a href="#">Update</a>
Haley	Buchanan	<a href="#">Update</a>
Tamatha	Harding	<a href="#">Update</a>

[Add Login](#)

**Figure 9: Manage Login Screen**

All defined Logins are displayed in the Login Manager table. The information displayed includes:

- First Name
- Last Name
- Request

To add a Login, follow these steps:

1. Click on the **Add Login** button. The following screen is displayed:

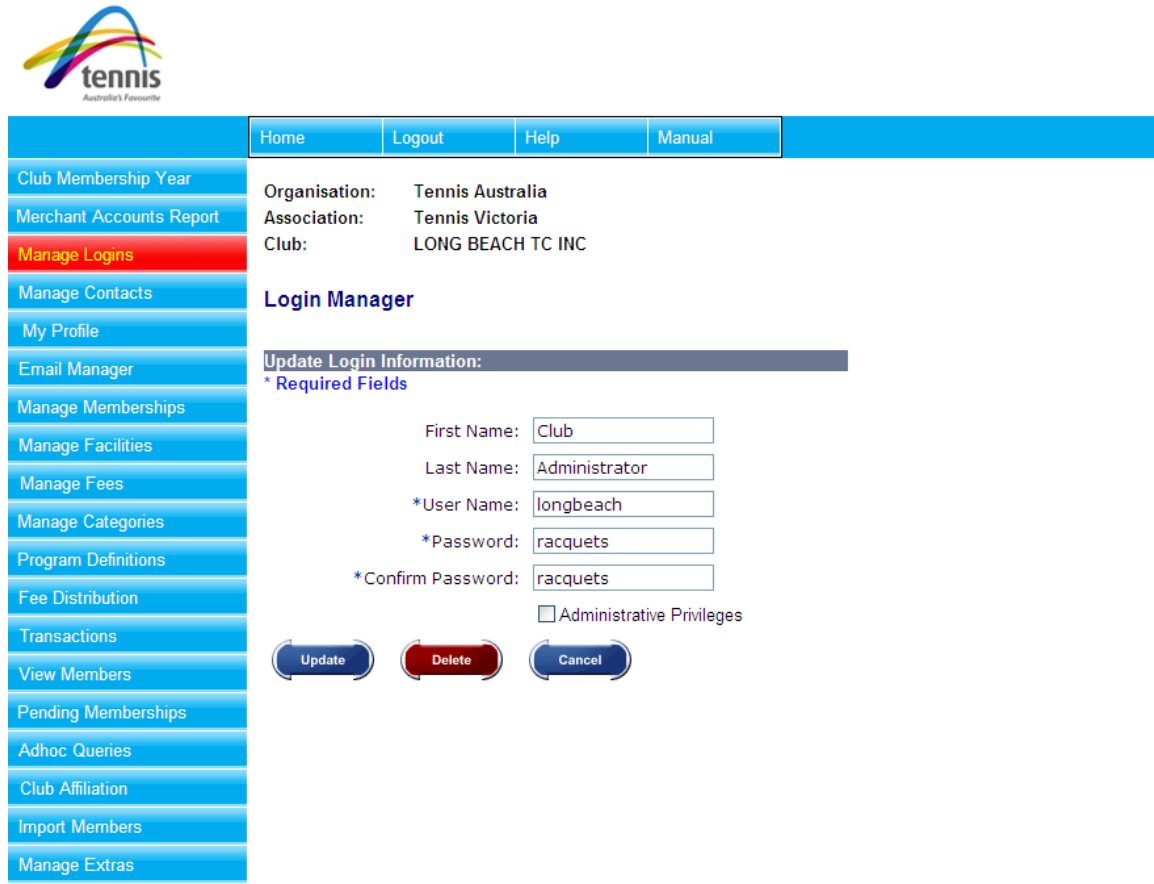


	Home	Logout	Help	Manual
Club Membership Year	Organisation: Tennis Australia			
Merchant Accounts Report	Association: Tennis Victoria			
<b>Manage Logins</b>	Club: LONG BEACH TC INC			
Manage Contacts	<b>Login Manager</b>			
My Profile	<b>* Required Fields</b>			
Email Manager	<b>Add Login Information</b>			
Manage Memberships	*First Name: <input type="text"/>			
Manage Facilities	*Last Name: <input type="text"/>			
Manage Fees	*User Name: <input type="text"/>			
Manage Categories	*Password: <input type="text"/>			
Program Definitions	*Confirm Password: <input type="text"/>			
Fee Distribution	<input type="checkbox"/> Administrative Privileges			
Transactions	<input type="button" value="Add Login"/> <input type="button" value="Cancel"/>			
View Members				
Pending Memberships				
Adhoc Queries				
Club Affiliation				
Import Members				
Manage Extras				

**Figure 10: Add Login Screen**

2. In the **First Name** field, enter the First Name of the user.
3. In the **Last Name** field, enter the Last Name of the user.
4. In the **User Name** field, enter User Name. This is the name that will be used for log in purposes. This is an alphanumeric field. This is a required field.
5. In the **Password** field, enter the password for this user. Passwords are case sensitive. This is an alphanumeric field. This is a required field.
6. In the **Confirm Password** field, reenter the password for the user exactly as entered previously. Passwords are case sensitive. This is an alphanumeric field. This is a required field.
7. Administrative Privileges allows the user to add, update and delete other user login profiles. Select the option **Administrative Privileges** to give this user the ability to add and maintain the Login Manager screen.
8. Click on the **Add Login** button. This saves the login information in the database and displays the Login information in the Login Manager table.

To update defined Login information, click on the **Update** button under the Request column for the login.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
**Manage Logins**  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

Organisation: Tennis Australia  
Association: Tennis Victoria  
Club: LONG BEACH TC INC

### Login Manager

Update Login Information:

\* Required Fields

First Name: Club  
Last Name: Administrator  
\*User Name: longbeach  
\*Password: racquets  
\*Confirm Password: racquets

Administrative Privileges

Update Delete Cancel

**Figure 11: Update Login Screen**

1. In the **First Name** field, enter the First Name of the user.
2. In the **Last Name** field, enter the Last Name of the user.
3. In the **User Name** field, enter User Name. This is the name that will be used for log in purposes. This is an alphanumeric field. This is a required field.
4. In the **Password** field, enter the password for this user. Passwords are case sensitive. This is an alphanumeric field. This is a required field.
5. In the **Confirm Password** field, reenter the password for the user exactly as entered previously. Passwords are case sensitive. This is an alphanumeric field. This is a required field.
6. Administrative Privileges allows the user to add, update and delete other user login profiles. Select the option **Administrative Privileges** to give this user the ability to add and maintain the Login Manager screen.
7. Click on the **Update** button. This saves the changes to the login information in the database.

To delete a user's ability to login to the club information, select the **Update** button under the Request column for the login.

Select the **Delete** button. A pop-up message is displayed. This pop-up message asks 'Are you sure?' To continue with the delete select the **OK** button. The login user list is displayed along with a successful delete message.

To stop the delete select the **Cancel** button.

## Manage Contacts

The My Contacts menu option allows the user to set up and maintain the Contacts for the club. The list of contacts is an option in the email manager where a single email can be easily sent to everybody who has a relationship with your club.



**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**Contact Manager:**

First Name	Last Name	Title	Start Date	End Date	View
Ken	Dixon	President	01-Jul-2008		<a href="#">View</a>
Jackie	McGuire	Treasurer	01-Jul-2008		<a href="#">View</a>
Ivonne	Van Eerd	Secretary	12-Oct-2009		<a href="#">View</a>
Greg	Gunn	Club Coach	01-Jul-2001		<a href="#">View</a>
John	Mackenzie	Pennant Secretary	01-Jul-2007		<a href="#">View</a>
Beverley	Lewis	Senior Social Coordinator	01-Jul-2008		<a href="#">View</a>
Jackie	McGuire	Baseline Administrator	01-Jul-2007		<a href="#">View</a>
Joan	Walmsley	Play Tennis Day Co-ordinator	01-Jul-2004		<a href="#">View</a>

[Add Contact](#) [All Contacts](#)

**Figure 12: Manage Contacts Screen**

All defined Contacts are displayed in the Contact Manager table. The information displayed includes:

- First Name
- Last Name
- Title
- Start Date
- End Date
- View

To add a Contact, follow these steps:

Click on the **Add Contact** button. The following screen is displayed:



	Home	Logout	Help	Manual
Club Membership Year	<b>Organisation:</b> Tennis Australia			
Merchant Accounts Report	<b>Association:</b> Tennis Victoria			
Manage Logins	<b>Club:</b> LONG BEACH TC INC			
<b>Manage Contacts</b>	<b>Find Contact by My Tennis ID or Address.</b>			
My Profile	My Tennis ID:	<input type="text"/>	<input type="button" value="Search by My Tennis ID"/>	
Email Manager	First Name:	<input type="text"/>		
Manage Memberships	Last Name:	<input type="text"/>		
Manage Facilities	Address:	<input type="text"/>		
Manage Fees	Suburb:	<input type="text"/>		
Manage Categories	State:	<input type="text"/>		
Program Definitions	Post Code:	<input type="text"/>		
Fee Distribution	Email Address:	<input type="text"/>	<input type="button" value="Search by Address"/>	
Transactions	<input type="button" value="Back"/>			
View Members				
Pending Memberships				
Adhoc Queries				
Club Affiliation				
Import Members				
Manage Extras				

**Figure 13: Add Contact Screen – Find Contact by My Tennis ID or Address**

The Find Contact Tennis ID screen is used to link the Officer Bearer to his/her My Tennis ID. There are two distinct searches that are used to find the My Tennis ID. The first search would be by the My Tennis ID. To Search for the Office Bearer using the My Tennis ID follow these steps:

- Enter the My Tennis ID in the **My Tennis ID** field.
- Select the **Search by My Tennis ID** button.
- Results are displayed :

The search returned the following results. Please select a member from the list.

If the contact is not shown, clear the search results and enter a new address or click 'Create New My Tennis ID'

MyTennis ID	First Name	Last Name	Address Line 1	Address Line 2	City	State	Country	Post Code	Email	Select
61700000268	Francis	Lauchlan	1/1077 Toorak Rd		CAMBERWELL	VIC	AUS	3124	kmb@infoproc.com	Select

**Figure 6B: Find Contact-Search By Tennis ID Results**

If the Office Bearer is displayed in the list choose the **Select** link to add the Office Bearer information.

Another way to search for an Officer Bearer is to search by the Address information. To Search by Address information, enter information in one or more of the address fields. To reduce the result list, enter as much information as possible. However, spelling can

prevent you from getting an accurate result. For Example, you may know the Office Bearer as Rob, but in the system, he was added as Robert. If you enter information in every field, and you do not get any results, you may want to remove some information (i.e. Address) and try again. To search by address, enter information in at least one of the following fields:

- Enter the Office Bearer's first name in the **First Name** field.
- Enter the Office Bearer's last name in the **Last Name** field.
- Enter the Office Bearer's address in the **Address** field. This is address line one only.
- Enter the Office Bearer's city in the **City** field.
- Enter the Office Bearer's state in the **State** field.
- Enter the Office Bearer's post code in the **Post Code** field.
- Enter the Office Bearer's email in the **Email Address** field.
- Select **Search by Address** button.
- Results are displayed.

The search returned the following results. Please select a member from the list.

If the contact is not shown, clear the search results and enter a new address or click 'Create New My Tennis ID'

MyTennis ID	First Name	Last Name	Address Line 1	Address Line 2	City	State	Country	Post Code	Email	Select
61700769286	Marika	Rose	11 Barnato Gve		ARMADALE	VIC	AUS	3143		Select
61700708066	Robyn	Rose	2/11 Grandview Avenue		Glen Iris	VIC	AUS	3146		Select
61700465899	Kevin	Rose	47 St John Circle (Heritage G		CHIRNSIDE PARK	VIC	AUS	3116		Select
61700466089	Stephen	Rose	75 Margaret St		RESEARCH	VIC	AUS	3095		Select
61700352520	Sam	Rose	12 Clover Close		BERWICK	VIC	AUS	3806		Select
61700338854	Marion	Rose	8 Erica Ave		GLEN IRIS	VIC	AUS	3146	kmb@infoproc.com	Select
61700339737	Howard	Rose	8 Erica Ave		GLEN IRIS	VIC	AUS	3146	kmb@infoproc.com	Select
61700159410	Sheryl	Rose	60 McBean Ave		Macedon	VIC	AUS	3440		Select
61700160427	Owen	Rose	60 McBean Ave		Macedon	VIC	AUS	3440		Select
61700221787	Todd	Rose	PO BOX 932		REDCLIFFS	VIC	AUS	3496		Select

1 2 3 4 5 6

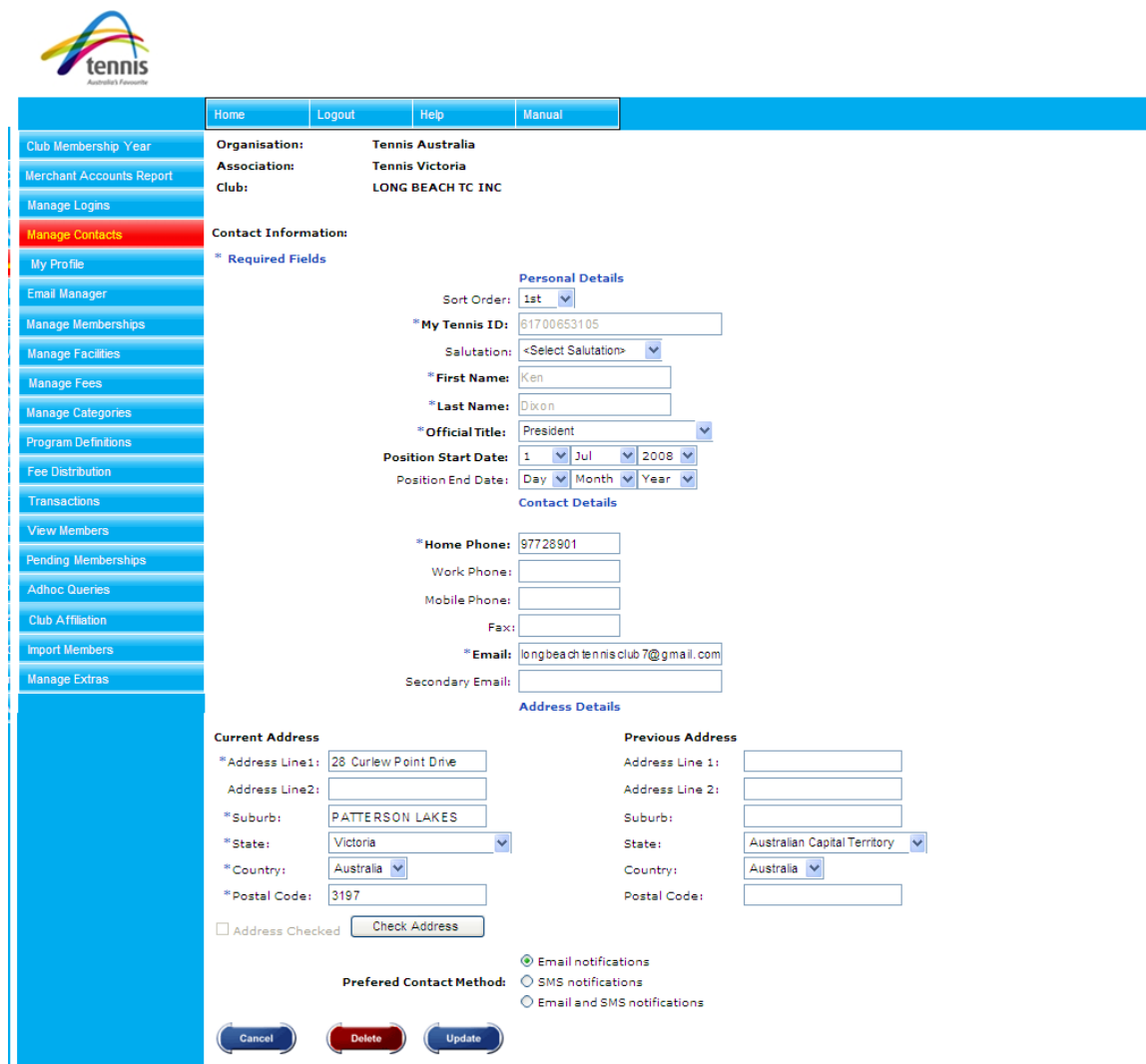
Create New My Tennis ID

Back

**Figure 13C: Find Contact-Search By Address Information Results**

If the Office Bearer is displayed in the list choose the **Select** link to add the Office Bearer information.

When choosing **Select** from the Results list, the following screen is displayed:



The screenshot shows the 'My Tennis' web application interface. On the left is a navigation menu with options like 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', 'Manage Contacts' (highlighted), 'My Profile', 'Email Manager', 'Manage Memberships', 'Manage Facilities', 'Manage Fees', 'Manage Categories', 'Program Definitions', 'Fee Distribution', 'Transactions', 'View Members', 'Pending Memberships', 'Adhoc Queries', 'Club Affiliation', 'Import Members', and 'Manage Extras'. The main content area displays contact information for 'Tennis Australia' and 'LONG BEACH TC INC'. It includes sections for 'Personal Details' (Sort Order, My Tennis ID, Salutation, First Name, Last Name, Official Title, Position Start/End Dates), 'Contact Details' (Home, Work, Mobile, Fax, Email, Secondary Email), and 'Address Details' (Current and Previous Address). A 'Check Address' button and 'Preferred Contact Method' options (Email, SMS, or both) are also visible. At the bottom are 'Cancel', 'Delete', and 'Update' buttons.

**Figure 14: Adding a Contact – With an Existing My Tennis ID**

The information about the Office Bearer is displayed. This information includes:

- My Tennis ID (this is a read only field)
- First and Last Name (these are read only fields)
- Contact Details (Phone Numbers and Email Addresses)
- Address Information (Current Mailing Address)
- Preferred Contact Method (this is utilized by the email manager)

All the contact information can be updated except for the My Tennis ID, First Name and Last Name. All bold fields are required data. The additional information needed for the Office Bearer include:

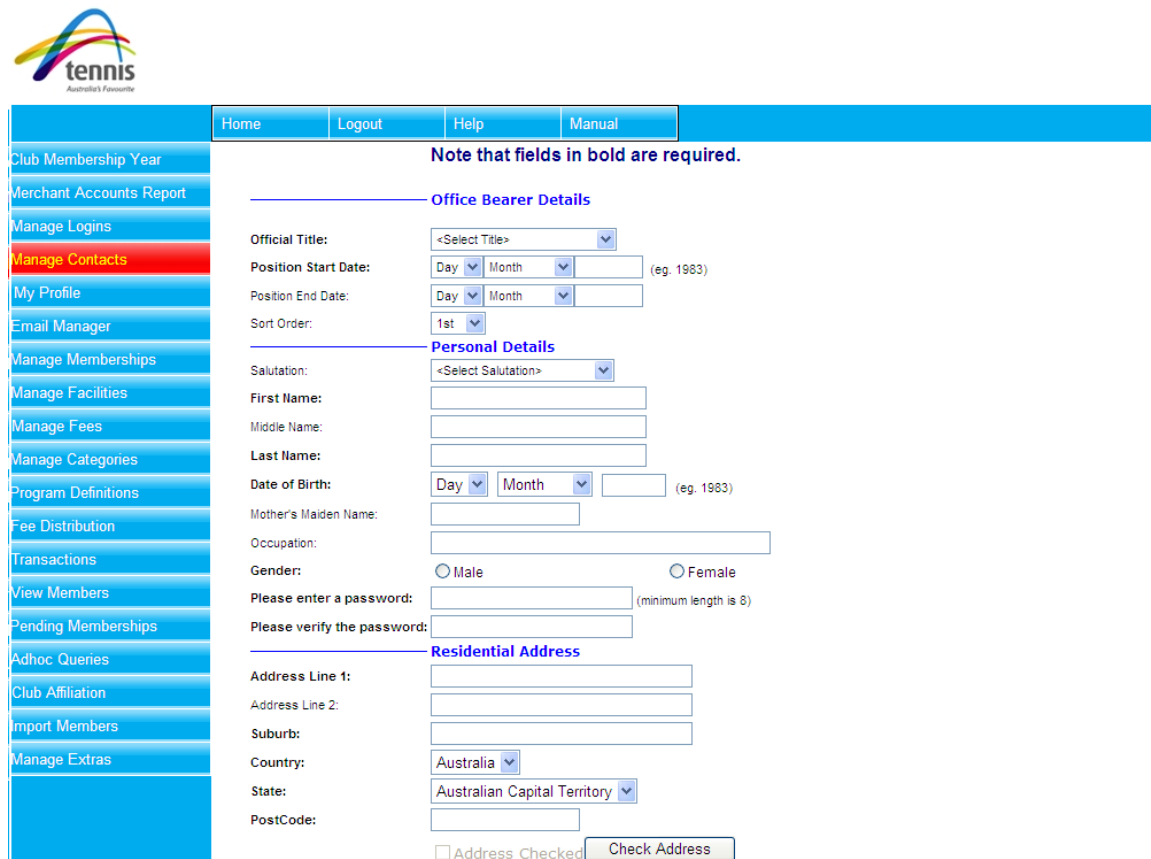
- Salutation – select a salutation from the drop down list
- Official Title – Select from the drop down list the title of this Office Bearer.
- Position Start Date – the start date for the Office Bearer for the position selected as official title.

- Position End Date – if the Office Bearer has finished the term for this position, the Position End Date should be filled in (rather than deleting the Office Bearer). This is preferable for historical record keeping.

When all required information has been updated and added, select the **Update** button. This saves the contact information in the database and displays the Contact information in the Manage Contact table.

To stop the update process without making changes to the database select the **Cancel** button.

If the Office Bearer does not have a My Tennis ID, you will be able to add the Office Bearer as a club Contact and a My Tennis ID will be created for the Office Bearer. To enter the Office Bearer's information and create a My Tennis ID for the Office Bearer, select **Create New My Tennis ID** button. The following screen is displayed:



The screenshot shows a web interface for creating a new My Tennis ID. On the left is a navigation menu with 'Manage Contacts' highlighted. The main content area has a blue header with 'Home', 'Logout', 'Help', and 'Manual' links. Below the header is a note: 'Note that fields in bold are required.' The form is titled 'Office Bearer Details' and contains the following fields:

- Official Title:** A dropdown menu with '<Select Title>'.
- Position Start Date:** A date picker with 'Day', 'Month', and 'Year' (eg. 1983) dropdowns.
- Position End Date:** A date picker with 'Day', 'Month', and 'Year' (eg. 1983) dropdowns.
- Sort Order:** A dropdown menu with '1st'.

The form is then titled 'Personal Details' and contains the following fields:

- Salutation:** A dropdown menu with '<Select Salutation>'.
- First Name:** A text input field.
- Middle Name:** A text input field.
- Last Name:** A text input field.
- Date of Birth:** A date picker with 'Day', 'Month', and 'Year' (eg. 1983) dropdowns.
- Mother's Maiden Name:** A text input field.
- Occupation:** A text input field.
- Gender:** Radio buttons for 'Male' and 'Female'.
- Please enter a password:** A text input field with '(minimum length is 8)'.
- Please verify the password:** A text input field.

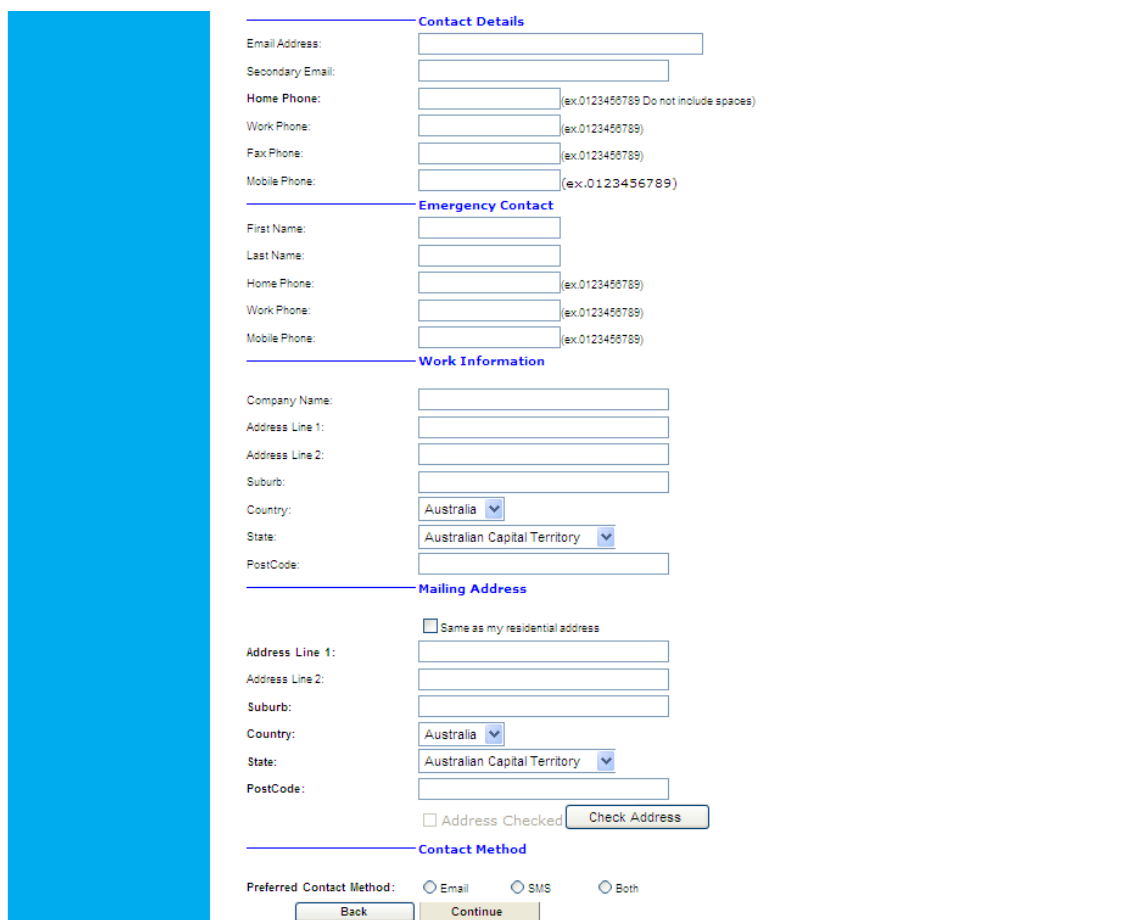
The form is then titled 'Residential Address' and contains the following fields:

- Address Line 1:** A text input field.
- Address Line 2:** A text input field.
- Suburb:** A text input field.
- Country:** A dropdown menu with 'Australia'.
- State:** A dropdown menu with 'Australian Capital Territory'.
- PostCode:** A text input field.

At the bottom of the form, there is a checkbox labeled 'Address Checked' and a 'Check Address' button.

**Figure 15A: Adding Contact – Creating My Tennis ID, Part 1**

Enter all the information that is requested on the screen. Office Bearer Details, Salutation, First Name, Middle Name, Last Name, Date of Birth, Mother's Maiden Name, Occupation, Gender, Password, Residential Address, Contact Details, Emergency Contact, Work Information, Mailing Address, Medical Information and click Continue to move to the next screen. The fields that are marked bold are required fields.



**Contact Details**

Email Address:

Secondary Email:

Home Phone:  (ex:0123456789 Do not include spaces)

Work Phone:  (ex:0123456789)

Fax Phone:  (ex:0123456789)

Mobile Phone:  (ex:0123456789)

**Emergency Contact**

First Name:

Last Name:

Home Phone:  (ex:0123456789)

Work Phone:  (ex:0123456789)

Mobile Phone:  (ex:0123456789)

**Work Information**

Company Name:

Address Line 1:

Address Line 2:

Suburb:

Country:

State:

PostCode:

**Mailing Address**

Same as my residential address

Address Line 1:

Address Line 2:

Suburb:

Country:

State:

PostCode:

Address Checked

**Contact Method**

Preferred Contact Method:  Email  SMS  Both

Figure 15B: Adding Contact – Creating My Tennis ID, Part 2

Fields defined below are the required for the Office Bearer information.

1. In the **First Name** field enter the first name for this Office Bearer. This is a required field.
2. In the **Last Name** Field enter the last name for this Office Bearer. This is a required field.
3. In the **Date of Birth** field, enter the Office Bearer's date of birth. This is a required field.
4. In the **Gender** field, enter the gender of the Office Bearer. This is a required field.
5. In the **Password** field, enter an eight or more character password for the Office Bearer. This is a required field. This password will allow the Office Bear to log into his/her profile and update the profile. The password field is two fields for verification purposes.
6. In the **Residential Address Line 1** field enter the address for this Office Bearer. This is a required field.
7. In the **Address Line 2** field enter any additional address information if applicable. This would include suite numbers.
8. In the **City** field enter the city for this Office Bearer. This is a required field.

9. In the **Country** field select the country for this Office Bearer. This is a required field. Once the country has been selected, the state choices are populated in the State drop down list box.
10. In the **State** field, select the state for this Office Bearer. This is a required field.
11. In the **Postal Code** field, enter the post code.

Addresses are verified by the data validation software. Once the address is entered; the **Check Address** button must be selected. The software will check the validity of the address. Matches for the address will be listed. Below is an example of the address check functionality.

### Select appropriate address:

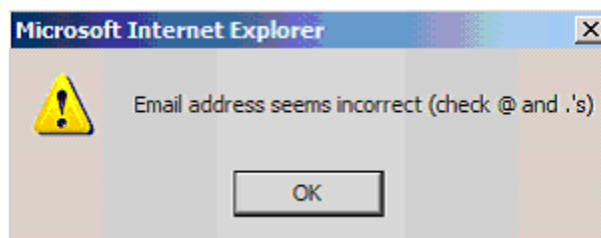
<input type="radio"/>	33/44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33 44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33, Level 3 44 Cumberland Street, THE ROCKS NSW 2000
< >	

Select Correct Address

Select the correct address from the list by selecting the option in the row that list the correct address. Then **Select Correct Address** button. The selected address will populate the address fields.

If the correct address is not listed, try again. Abbreviations may cause problems so spelling the whole word such as 'street' may return better results. In addition, removing the street or road may increase your results helping you find the address match.

12. In the **Email** field enter a valid email address for this Office Bearer. The system checks to see if this is a valid email format. If the '@' part is missing, a warning message (see below) will display when the Office Bearer is being added to the system, preventing the add from continuing. This is a required field.



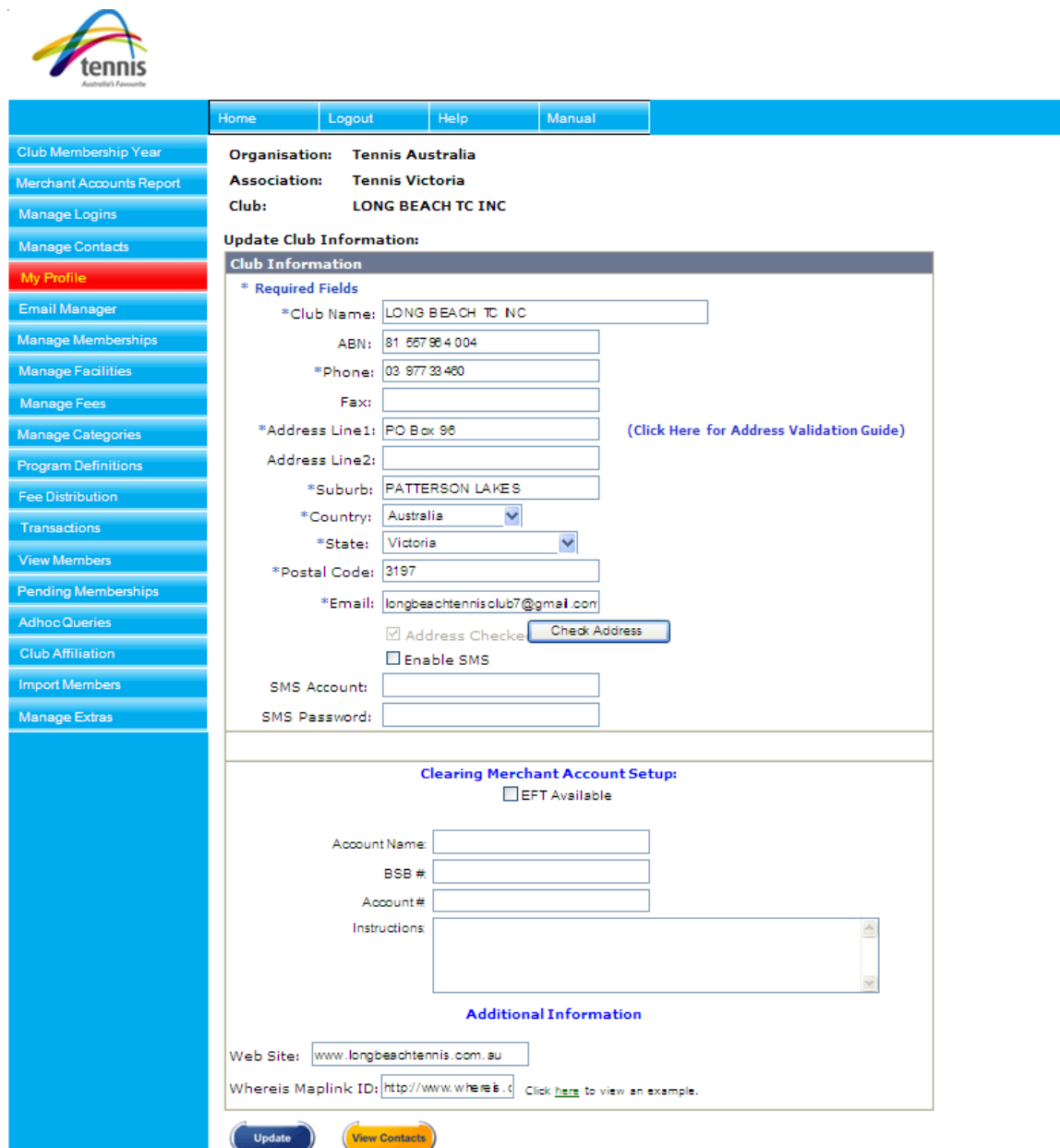
13. In the **Home Phone** field enter the home telephone number for this Office Bearer. This is a required field.
14. Mailing address is required. If the mailing address is the same as the residential address, select the **Same as my residential address** option. Otherwise enter the mailing address for the Office Bearer in the Mailing Address fields. This information will be checked by the validation software. Select **Check Address**. Select the correct address and then select the **Select Correct Address** button. This will populate the mailing address fields with the validated address.

15. In the Office Bearer Details information make sure the following information has been added.
  - a. Official Title – from the drop down list the standard title for Office Bearers are listed. Select the title that is appropriate. If nothing is listed, select other then type in the title that is appropriate for the Office Bearer.
  - b. Position Start Date – enter the position start date by selecting the day, month and year from the drop down list boxes.
16. Select the **Continue** button. This creates a My Tennis ID for the Office Bearers and saves the Contact information and participant information in the database and displays the Contact information in the Contact Manager table.

To update defined Contact information, click on the **View** button under the View column for the contact in the Contact Manager table.

## My Profile

The My Profile menu option allows the user to maintain the club information.



The screenshot shows the 'My Profile' interface. On the left is a navigation menu with 'My Profile' highlighted. The main content area is divided into sections: 'Update Club Information' and 'Clearing Merchant Account Setup'. The 'Update Club Information' section contains various input fields for club details, with some marked as required. The 'Clearing Merchant Account Setup' section includes a checkbox for 'EFT Available' and fields for account name, BSB number, account number, and instructions. An 'Additional Information' section at the bottom contains fields for a web site and a Whereis Maplink ID.

Home	Logout	Help	Manual
------	--------	------	--------

**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**Update Club Information:**

**Club Information**

**\* Required Fields**

\*Club Name: LONG BEACH TC INC

ABN: 81 557 98 4 004

\*Phone: 03 977 33 480

Fax:

\*Address Line 1: PO Box 98 (Click Here for Address Validation Guide)

Address Line 2:

\*Suburb: PATTERSON LAKES

\*Country: Australia

\*State: Victoria

\*Postal Code: 3197

\*Email: longbeachtennisclub7@gmail.com

Address Check

Enable SMS

SMS Account:

SMS Password:

**Clearing Merchant Account Setup:**

EFT Available

Account Name:

BSB #:

Account #:

Instructions:

**Additional Information**

Web Site: www.longbeachtennis.com.au

Whereis Maplink ID: http://www.whereis... Click here to view an example.

Figure 7: My Profile Screen

The My Profile Screen is used to maintain the club's information. The required fields are marked with an asterisk. To update the information, follow these steps:

1. In the **Club Name** field enter the club name. This is the name that will appear on the membership registration forms. This is a required field. The State level also has maintenance capability to this field.
2. **ABN** is your Australian business number. This field can appear on receipts generated during registrations. This field is not required. If this field is not supplied, an ABN will not appear on the receipt.
3. In the **Phone** field enter the telephone number for the club. This is a required field.
4. In the **Fax** field enter the fax number for the club if applicable.
5. In the **Address Line 1** field enter the address for the club. This is a required field.
6. In the **Address Line 2** field enter any additional address information if applicable. This would include suite numbers.
7. In the **Suburb** field enter the suburb for the club. This is a required field.
8. In the **Country** field select the country for club. This is a required field. Once the country has been selected, the state choices are populated in the State drop down list box.
9. In the **State** field, select the state for the club. This is a required field.
10. In the **Post Code** field, enter the postcode for the club's address. This is a required field.

Addresses are verified by the data validation software. Once the address is entered; the **Check Address** button must be selected. The software will check the validity of the address. Matches for the address will be listed. Below is an example of the address check functionality.

#### Select appropriate address:

<input type="radio"/>	33/44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33 44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33, Level 3 44 Cumberland Street, THE ROCKS NSW 2000
< >	
<input type="button" value="Select Correct Address"/>	

Select the correct address from the list by selecting the option in the row that list the correct address. Then **Select Correct Address** button. The selected address will populate the address fields.

If the correct address is not listed, try again. Abbreviations may cause problems so spelling the whole word such as 'street' may return better results. In addition, removing the street or road may increase your results helping you find the address match.

[\(Click Here for Address Validation Guide\)](#)

Use the on screen link [\(Click here for Address Validation Guide\)](#) for additional hints for finding a correct address.

11. In the **Email** field enter a valid email address for this club. The system checks to see if this is a valid email format. If the '@' part is missing, a warning message will display not allowing the changes to be made to the association until the email address is corrected. This is a required field.
12. If you would like to send out SMS through the Email Manager the **Enable SMS** must be selected. The **SMS Account** and **SMS Password** are required if the Enable SMS option is selected. When the Enable SMS is selected, the SMS text field will be enabled on the Email Manager screen. If not selected, the SMS text field will be disabled.
13. If your club allows members to use electronic funds transferred as payment for the membership, the **Enable EFT** must be selected. In the **Account Name**, **BSB #** and **Account #** fields, enter the bank account information for the electronic transfer of funds. This will be displayed to the member on the receipt page and via email when EFT payment is selected. In the **Remit Instructions for EFT** field, enter the instructions for the member who is choosing to pay by EFT. Enter the instructions the exact way you would like the member to see the instructions.
14. In the Web Site field enter the URL for the club's website if applicable.
15. The **Whereis Maplink ID** will be used on any public web pages built to advertise your club. Whereis provides access to a map and directions to address.
16. Click on the **Update** button. This saves the changes to the Club's information in the database.

To view contacts for this club, click on the **View Contacts** button. This displays the contacts entered in Manage Contacts screen on the same page.

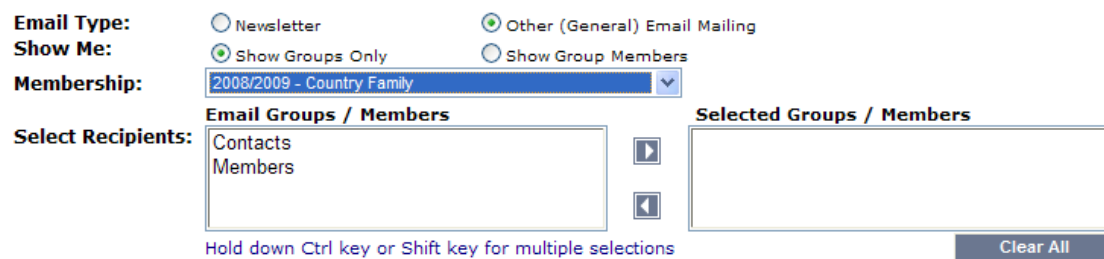
## Email Manager

---

The Email Manager will allow the user to send emails to club members.

An email address for the club must be set up correctly in “My Profile” before the email manager can be used.

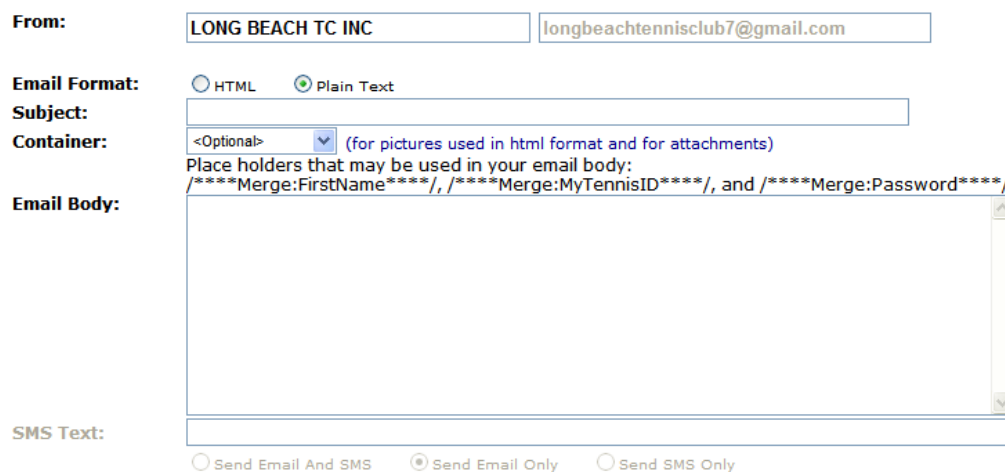
The top portion of the email manager screen defines who we are going to send an email to.



**Email Type:**  Newsletter  Other (General) Email Mailing  
**Show Me:**  Show Groups Only  Show Group Members  
**Membership:** 2008/2009 - Country Family  
**Select Recipients:** Email Groups / Members  
Contacts  
Members  
**Selected Groups / Members**  
Clear All  
Hold down Ctrl key or Shift key for multiple selections

**Figure 8: Email Manager: Send To**

1. The **Email Type** option defines the classification of the email. The Email Type Classification is important in regards to the opting out of correspondence when the members resister. During registration, members have the option to not receive newsletters and/or not receive general emails. The Email Type indicator will determine which email correspondence you are sending. Based on the indicator, members who opted out will not receive the email correspondence.
2. The **Show Me** option allows you to select whole groups of recipients, show individuals from the groups or show specific lists, such as club presidents.
3. The **Memberships** option allows you to select current or previous membership periods.
4. The **Select Recipients** box contains either “groups” or “individuals” depending on the selected **Show Me** option. Using your mouse select the recipients and click the arrow button that moves the selected items to the **Selected Groups** box the right.



The screenshot shows the 'Email Manager: Body' form. It includes fields for 'From' (LONG BEACH TC INC and longbeachtennisclub7@gmail.com), 'Email Format' (HTML and Plain Text), 'Subject', 'Container' (with a dropdown menu and instructions for pictures), 'Email Body' (a large text area with merge placeholders: /\*\*\*\*Merge:FirstName\*\*\*\*/, /\*\*\*\*Merge:MyTennisID\*\*\*\*/, and /\*\*\*\*Merge:Password\*\*\*\*/), and 'SMS Text'. At the bottom, there are radio buttons for 'Send Email And SMS', 'Send Email Only', and 'Send SMS Only'.

**Figure 9: Email Manager: Body**

The middle portion of the screen defines the email's from email address, subject, and body.

1. The **From** shows the club name, which will show up as who the email is from. There are two possible email addresses that can be used: The club's email address, defined in **My Profile**, or an unattended email box that may be setup on the email server from which the emails are sent. Some companies require that emails sent to their employees pass a rigorous test in order not to be considered spam. One such test, which is rarely deployed, is no spoofing. Spoofing guarantees that the return email address is on the same email server from which the email is sent. This is the **spooft proof email address** option and it must be set up in order to be selected.
2. The **email format** can be HTML, also known as "rich text" since it can have fonts, colors, and pictures, or plain text.
3. The **Subject** can be considered the header of the email. The contents should reflect the body of the email. This is a required field.
4. The **Container** is where you can store rich text email pictures. For example if you are composing a newsletter type of email, you can upload pictures to a container called "newsletter" and use the "rich text editor" to bring in the pictures.
5. The **Email Body** is the contents of your email. If you select plain text, just type your email content here. If you select HTML, use the "Edit Rich Text Format" button.
6. The Email Manager will allow you to merge member names, My Tennis ID number or member passwords into the Email Body of the email, when the state association is sending a bulk email. This will allow the email to be more personal to the email recipient. To use the merge functionality in the Email body the following yes words must be used:
  - a. To merge a member's first name, in the body of the email where you want the first name to appear, enter **/\*\*\*\*Merge:FirstName\*\*\*\*/** Please note that there are four \* (asterisks) on either side of the wording and there are no spaces between the words.
  - b. To merge a member's My Tennis ID, in the body of the email where you want the My Tennis ID to appear, enter, **/\*\*\*\*Merge:MyTennisID\*\*\*\*/** Please note that there are four \* (asterisks) on either side of the wording and there are no spaces between the words.

- c. To merge a member's password, in the body of the email where you want the password to appear, enter, /\*\*\*\***Merge:Password**\*\*\*\*/ Please note that there are four \* (asterisks) on either side of the wording and there are no spaces between the words.
7. **SMS Text** is the plain text that will be sent if SMS is selected. You have the option to send an SMS and Email or just an SMS message. If both communications are selected, the email message needs to be included in the Email Body section and the SMS message in the SMS Text section. Please note that an SMS account must be defined for this field to be enabled. SMS account is defined in the My Profile screen.

Below is a picture of the rich text editor. Please note that you must allow pop-ups for this screen to be displayed.

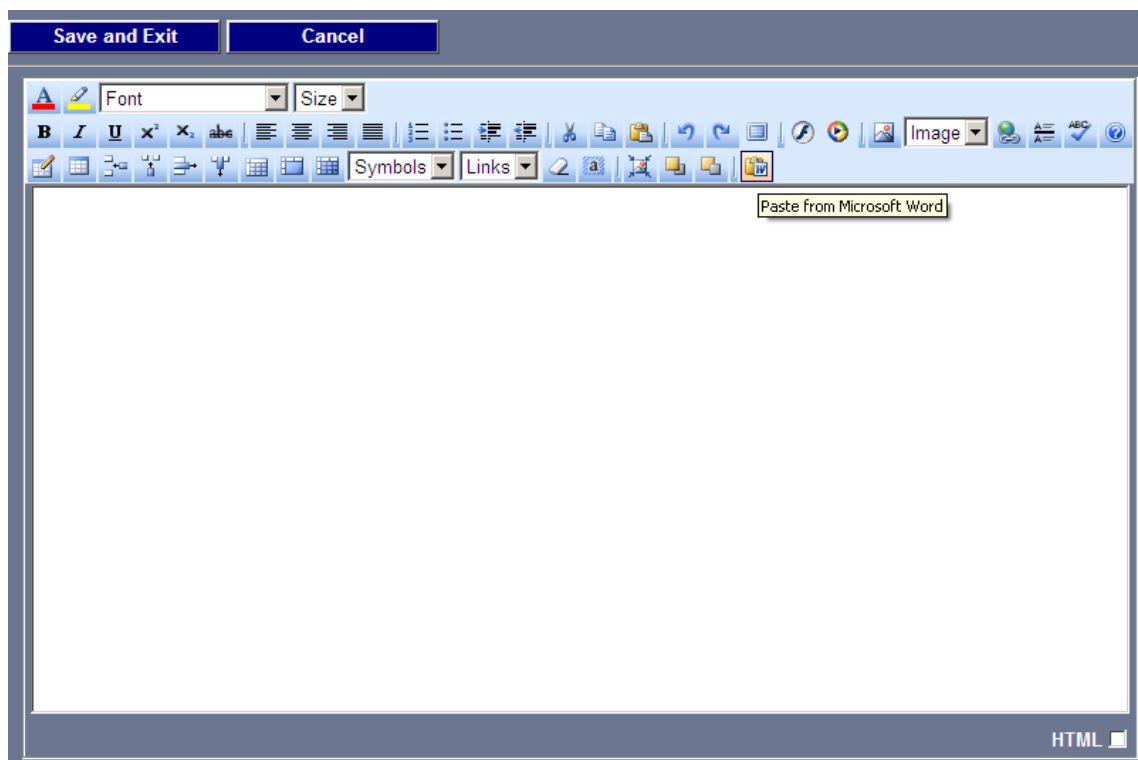


Figure 10: Email Manager: Rich Text

One of the most important buttons on this screen is "Paste from Microsoft Word" icon on the end of the second row of features. You can use Microsoft Word, which you may be thoroughly familiar with, to create rich text with different fonts and colors, along with tables and shading, select all in Word, copy it to your clipboard, and using the "Paste from Microsoft Word" button, let this pop up screen convert to HTML for you.

Below the body of the document is the manage attachments and templates functionality.

**Attachments:**

Available	Selected
<input type="text"/>	<input type="text"/>

**Manage Files:**

**Figure 11 : Email Manager: Attachments**

To attach a file, such as a Word document or a PDF, you must first upload the document to the server. To do this, click the **Manage Files** button.

This button brings up a screen that lets you add files by browsing your computer and group them into containers. **Containers** might be useful if you have a lot of pictures and wish to keep them organized. For example, all documents that will be attached to the

### Manage Email Files

These are files (pictures, pdf, documents, etc ...) that are stored on the server and can be referenced in emails.

**Container:**  (Just a name such as General, Newsletter, Attachments)

**Title:**

**Description:**

**Classification:**

**File To Upload:**

**Figure 12: Email Manager: Manage Files**

The **classification** allows the email manager to understand the difference between a picture and an attachment.

**Send Tech Log:**

**Figure 22: Email Manager: Submit**

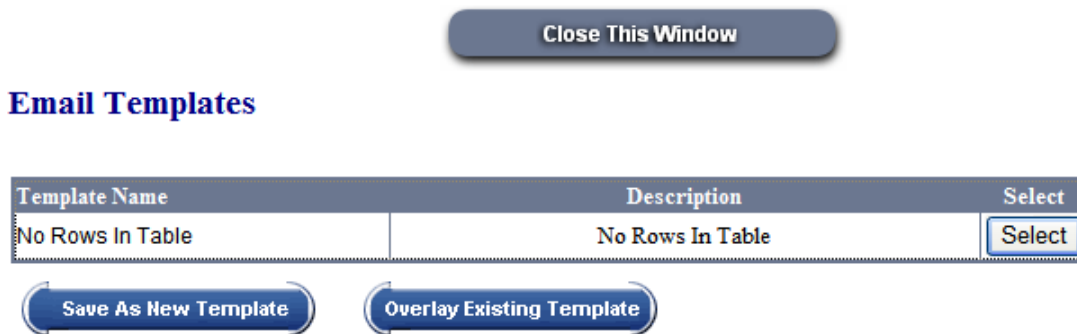
The **Send Tech Log** is an email address that defaults to address in **My Profile**. The MY TENNIS system sends emails out through a server process. The tech log is a notification that the email request has been processed and contains details showing the

names and email addresses of the people the email has been sent to as well as the names of people that the system skipped and the reason the person was skipped (for example no email address or opted out of newsletters)

Lastly, you must click the **Submit** button. Your email request is queued and is processed by the server. You will receive a technical log showing all recipients the email manager attempted to deliver the email to.

## Using and Saving Templates

When an email is created it can be saved as a template and used for future emails. Once an email has been composed, select the **Save Template** button. The following pop-up screen is displayed.



**Figure 23A: Email Manager - Save Template – Template List Screen**

This screen lists all the templates for your club. To save the email as a template, select **Save As New Template**. The follow screen is displayed:



**Figure 23B: Email Manager - Save Template – Name Template**

This screen allows you to name the template and give a brief description of the template. A distinct name and description will help you distinguish between templates at a later date. For example, if you send out quarterly newsletters for members, you the name of the templates may be: Newsletter First Quarter and the description may include: Newsletter to welcome to the new financial year. Once the **Template Name** and **Description** have been defined, select **Add** to save the template to the database. Select **Close This Window** to view the Email Manager screen.

Once the templates have been defined, they can be used at a later time when creating another email from the email manager. To use an existing template, select the **Select Template** button. The following screen is displayed:



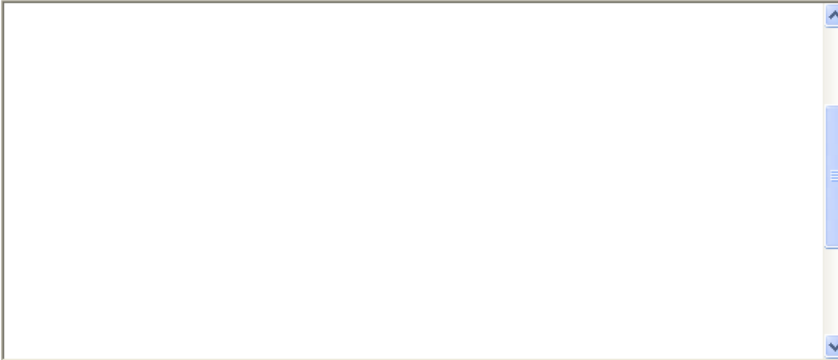
**Figure 23C: Email Manager -Select Template**

A table displays all the saved templates. Using the Template Name and Description, chose the template that you would like to use for this body of the email. Choose the **Select** button. The following screen is displayed:

## Email Templates

Template Name:

Description:

Current Image: 

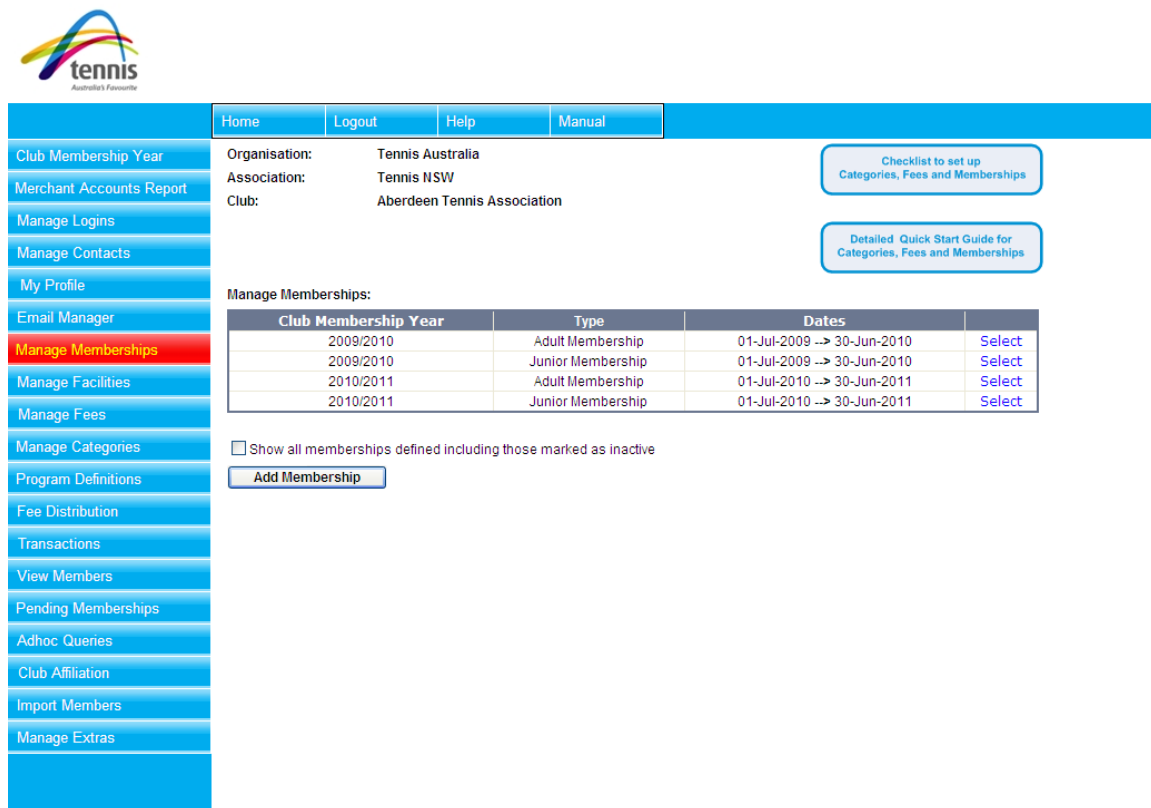
**Figure 23D: Email Manager -Select Template**

This screen gives you the opportunity to review the body of the email to make sure this is the template you want to use. Choose **Select Template** and the save template is now the body of your email.

Changes can be made to the Template and saved. To save the changes, select the **Save Template** button. Select the Template Name from the list table, and select the option Overlay Existing Template. This will save your changes to the template. Or you can save it as a new template, by selecting **Save As New Template** and giving the template a new name

## Manage Memberships

The Manage Membership menu option allows the user to define and maintain the membership types, membership timeframe criteria, also known as membership periods and registration periods related to the club. Manage Memberships also allows the club administrator to assign fees to memberships and optionally a define pro-rata schedule for memberships. When a membership is defined at the club level as associated club level category is assigned. Corresponding state level memberships and state level categories are also linked to the membership.



The screenshot shows the 'Manage Memberships' screen. On the left is a navigation menu with options like 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', 'Manage Contacts', 'My Profile', 'Email Manager', 'Manage Memberships' (highlighted), 'Manage Facilities', 'Manage Fees', 'Manage Categories', 'Program Definitions', 'Fee Distribution', 'Transactions', 'View Members', 'Pending Memberships', 'Adhoc Queries', 'Club Affiliation', 'Import Members', and 'Manage Extras'. The main content area shows the following information:

- Organisation: Tennis Australia
- Association: Tennis NSW
- Club: Aberdeen Tennis Association

There are two buttons: 'Checklist to set up Categories, Fees and Memberships' and 'Detailed Quick Start Guide for Categories, Fees and Memberships'. Below this is a table titled 'Manage Memberships':

Club Membership Year	Type	Dates	
2009/2010	Adult Membership	01-Jul-2009 -> 30-Jun-2010	Select
2009/2010	Junior Membership	01-Jul-2009 -> 30-Jun-2010	Select
2010/2011	Adult Membership	01-Jul-2010 -> 30-Jun-2011	Select
2010/2011	Junior Membership	01-Jul-2010 -> 30-Jun-2011	Select

Below the table is a checkbox labeled 'Show all memberships defined including those marked as inactive' and an 'Add Membership' button.

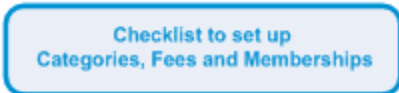
**Figure 24: Manage Memberships Screen**

The Manage Membership option lists the defined memberships related to the club. The table lists the following information for each membership:

- Membership Year
- Type
- Dates (Begin Date and End Date of the membership year)
- Request

To display all the memberships defined including the inactive ones, select the check box.

The Manage Memberships Screen also provides two on-screen links to guides designed to assist the club administrator when setting up memberships and preparing for a new Club Membership Year.



**Figure 24A: On Screen Link for Checklist**

By selecting the link for a Checklist to set up Categories, Fees and Memberships the user will see an overview of the four main tasks required to define memberships. The checklist shows the frequency of each task, the purpose of each task and the some additional notes related to completion of each task. The guide is shown below.

## My Tennis Club Set up Checklist



### Membership setup checklist

My Tennis now provides clubs the flexibility to operate a club membership year but has also been enhanced to allow clubs to charge pro rata. As a result the process of setting up category's, fees and membership periods has changed slightly. To set up your club in preparation for registering members, there are four key steps that you must undertake. The frequency of each step may vary as shown below.

Task	<input type="checkbox"/> Define Financial Period	<input type="checkbox"/> Define Club Categories	<input type="checkbox"/> Define Club Fees	<input type="checkbox"/> Define Memberships
Menu Option	<b>Financial Period</b>	<b>Manage Categories</b>	<b>Manage Fees</b>	<b>Manage Memberships</b>
Frequency	Created once a year	Checked once a year, if state categories do not change there is no need to change club categories	Reviewed periodically, if fees change then all the total club fees for all memberships that use the modified fee change	At least once a year when financial year changes as well as when new memberships are offered
Purpose	<ul style="list-style-type: none"> <li>Define the club's financial year</li> <li>Link to an existing state association financial year</li> </ul>	<ul style="list-style-type: none"> <li>Create club categories to be used at the club level</li> <li>Link to existing state association categories</li> <li>Defines similar characteristics for multiple memberships</li> </ul>	<ul style="list-style-type: none"> <li>Set up fees to be charged by the club</li> </ul>	<ul style="list-style-type: none"> <li>Define available memberships for club</li> <li>Link to existing state memberships</li> <li>Assign club fees including optional pro rata fees</li> </ul>
Other Notes		<ul style="list-style-type: none"> <li>Multiple memberships can be assigned to one category (You should not create a category for each different membership that you offer)</li> <li>Once members are registered to a membership that is linked to a category, the category cannot be changed.</li> </ul>	<ul style="list-style-type: none"> <li>Multiple fees can be assigned to one membership (except when using pro-rata)</li> </ul>	<ul style="list-style-type: none"> <li>Membership names can be used to descriptively define the club offering</li> <li>Once members are added to a membership the membership details cannot be changed.</li> </ul>

Use the Quick Start Guide for a more detailed explanation of how to complete each of the tasks shown above.

**Figure 24B: Checklist for Categories, Fees and Memberships**



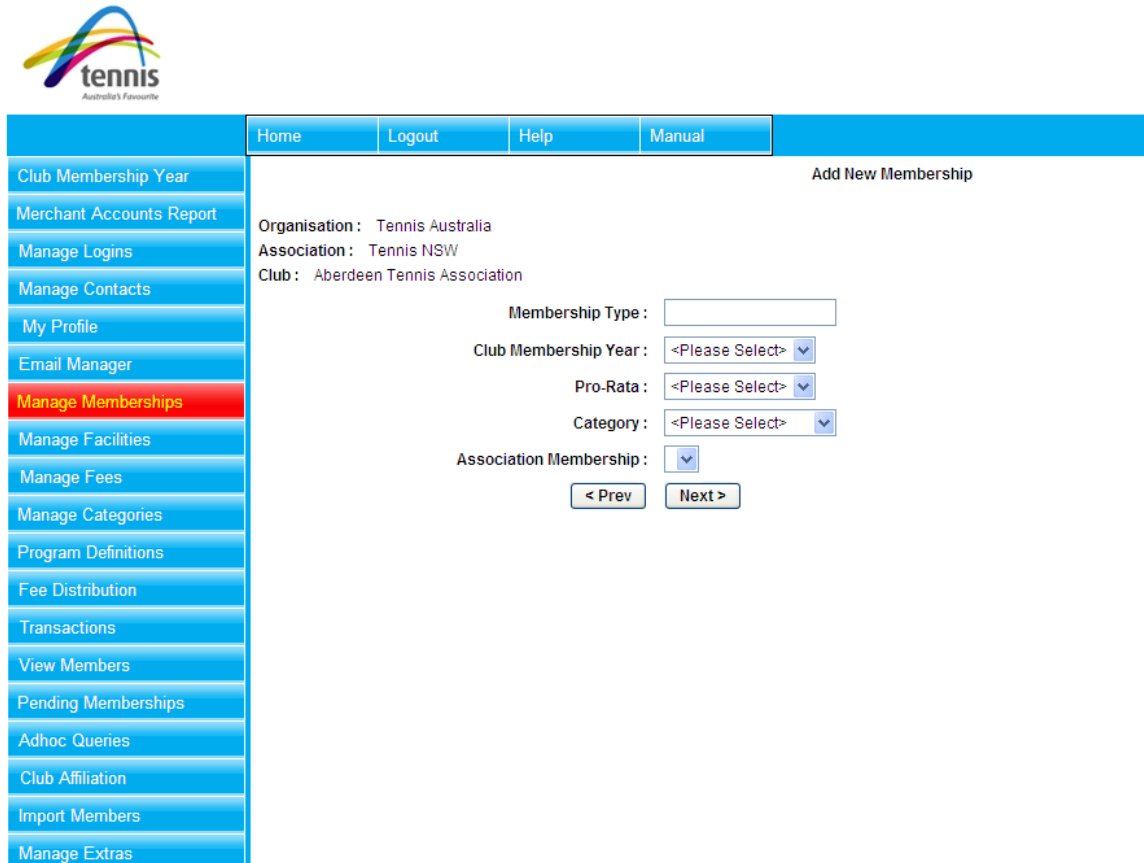
**Figure 24C: On Screen Link for Detailed Quick Start Guide**

By selecting the link for a Detailed Quick Start Guide for Categories, Fees and Memberships the user will see excerpts from this user manual specifically geared to the step by step process for defining the Club Membership Year, Club Categories, Club

Fees and Club Memberships. The on screen link allows the Club Administrator easy access to this information from the screens needed in the set up process.

To add a Membership, follow these steps:

1. Click on the **Add Membership** button. The following screen is displayed:



The screenshot shows the 'Add New Membership' screen. On the left is a navigation menu with the following items: Club Membership Year, Merchant Accounts Report, Manage Logins, Manage Contacts, My Profile, Email Manager, **Manage Memberships** (highlighted in red), Manage Facilities, Manage Fees, Manage Categories, Program Definitions, Fee Distribution, Transactions, View Members, Pending Memberships, Adhoc Queries, Club Affiliation, Import Members, and Manage Extras. The main content area has a blue header with 'Home', 'Logout', 'Help', and 'Manual' buttons. Below the header, the text reads: 'Organisation : Tennis Australia', 'Association : Tennis NSW', and 'Club : Aberdeen Tennis Association'. The form fields are: 'Membership Type' (text input), 'Club Membership Year' (dropdown menu with '<Please Select>' selected), 'Pro-Rata' (dropdown menu with '<Please Select>' selected), 'Category' (dropdown menu with '<Please Select>' selected), and 'Association Membership' (dropdown menu). At the bottom of the form are '< Prev' and 'Next >' buttons.

**Figure 25: Add New Membership Screen 1 - Definition**

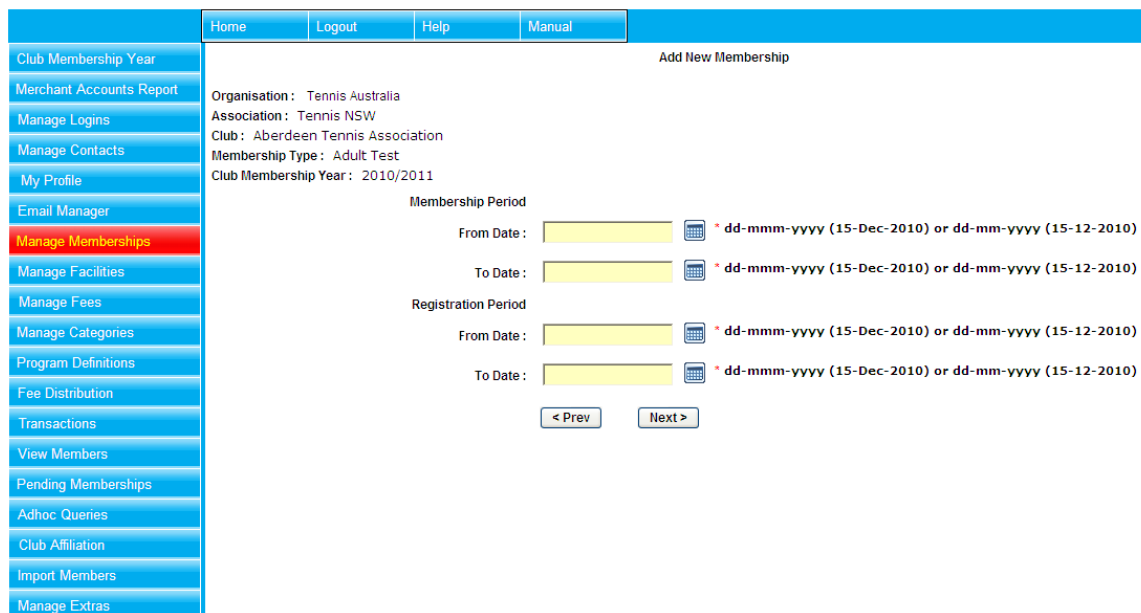
2. In the **Membership Type** field, enter the type or name of your club membership (ie. Adult Membership). This is a required field.
3. In the **Club Membership Year** field, select a Club Membership Year to be associated with this membership from the drop down list provided. It is the Club Membership Year for the memberships set up in a previous step and linked to a Membership Year of the state association. This is a required field.
4. In the **Pro-rata** field, select "Yes" or "No" from the drop down list provided. This is a required field.  
If you select "Yes" this membership will offer pro-rata pricing for club fees based on the month of the membership period that the participant registers. After you assign the club membership fee on the following screen, a 12 month table will be displayed and you will be able to create the appropriate fee for each month of the year. As the membership year advances this fee will automatically be applied.

**Please note:**

- a. A pro rata fee in any given month cannot be greater than the total club membership fee.
- b. A pro rata fee schedule cannot be set up when the total club membership fee has multiple components

If you select “No” there will be no pro-rata adjustment for the club membership fee. The club membership fee will be the same regardless of the month of the membership period that the participant registers.

5. In the **Category** field, select the club category that this membership fits. Club Categories deal with attributes or characteristics of a membership (i.e. Individual versus family; or Junior versus Adult) and were set up in a previous step and linked to a corresponding category of the state association. This is a required field.
6. In the **Association Membership** field, select the association (state) membership corresponding to this club membership. This is a required field.
7. Select **Next>** button and the following screen is displayed.

The screenshot shows the 'Add New Membership' interface. On the left is a navigation menu with 'Manage Memberships' highlighted. The main content area displays the following information:

- Organisation: Tennis Australia
- Association: Tennis NSW
- Club: Aberdeen Tennis Association
- Membership Type: Adult Test
- Club Membership Year: 2010/2011

There are two main sections for date selection:

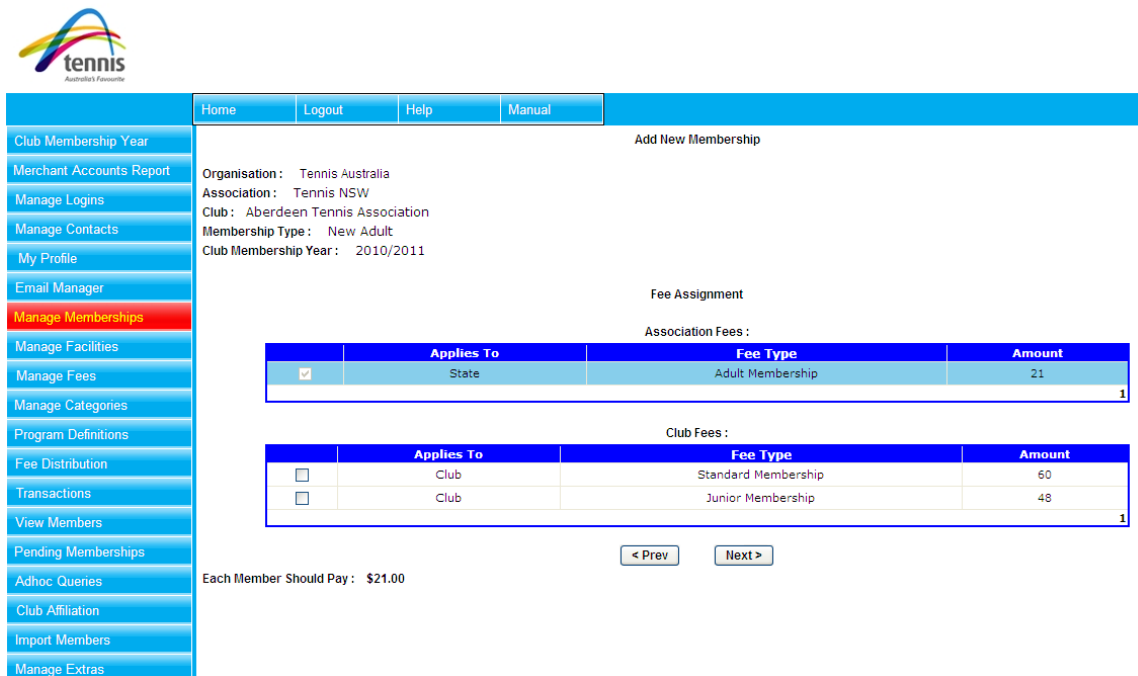
- Membership Period:**
  - From Date: [Text box with calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)
  - To Date: [Text box with calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)
- Registration Period:**
  - From Date: [Text box with calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)
  - To Date: [Text box with calendar icon] \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

At the bottom of the date selection area are two buttons: '< Prev' and 'Next >'.

**Figure 26: Add New Membership Screen 2 - Dates**

8. In the **Membership Period: From Date** field enter the starting date for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.
9. In the **Membership Period: End Date** field enter the ending date for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.

10. In the **Registration Period: From Date** field enter the starting date registrations will be accepted for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.
11. In the **Registration Period: End Date** field enter the last date that registrations will be accepted for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.
12. Select **Next>** button and the following screen is displayed.



Organisation : Tennis Australia  
 Association : Tennis NSW  
 Club : Aberdeen Tennis Association  
 Membership Type : New Adult  
 Club Membership Year : 2010/2011

Fee Assignment

Association Fees :

	Applies To	Fee Type	Amount
<input checked="" type="checkbox"/>	State	Adult Membership	21

Club Fees :

	Applies To	Fee Type	Amount
<input type="checkbox"/>	Club	Standard Membership	60
<input type="checkbox"/>	Club	Junior Membership	48

< Prev      Next >

Each Member Should Pay : \$21.00

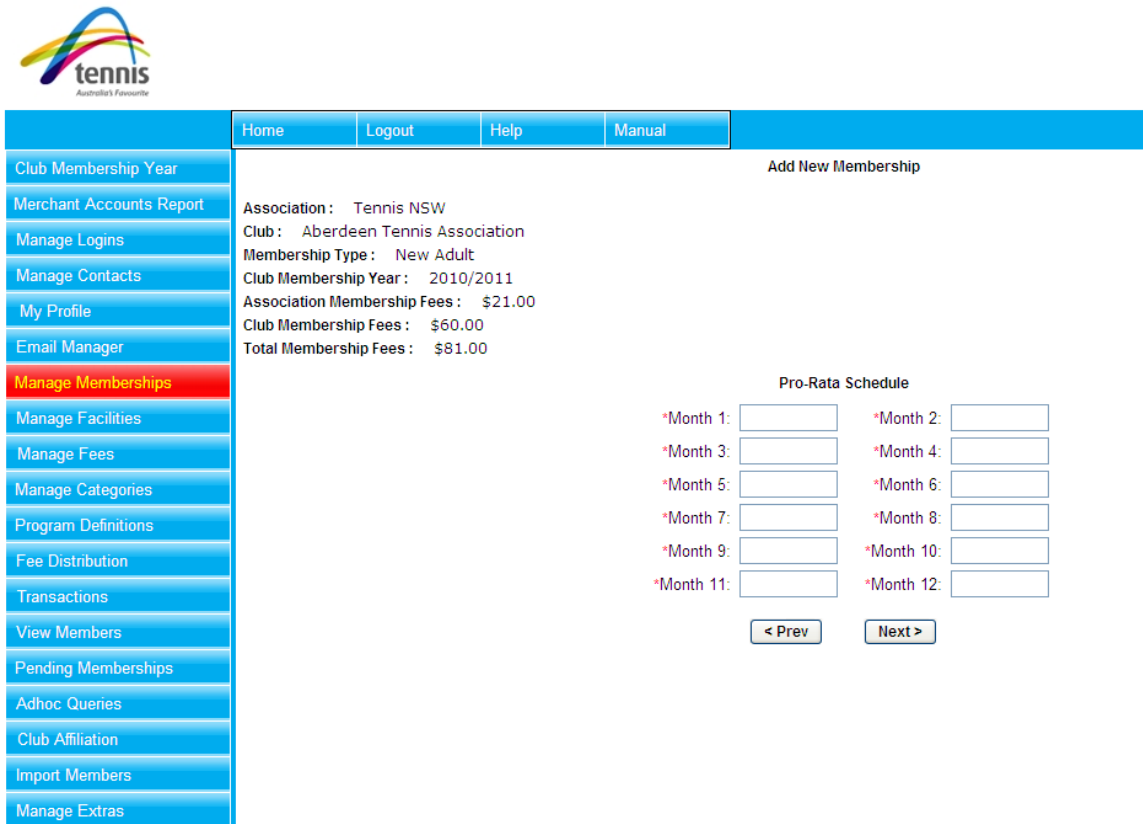
**Figure 27: Add New Membership Screen 3 – Fee Assignment**

13. On the Fee Assignment screen of the Add New Membership process two tables are displayed, showing Association Fees and Club Fees. The appropriate association (state) fees are already assigned based on the association (state) membership selected when the club membership was defined (Add New Membership Screen 1). The tick box is preselected and disabled for input.
14. In the **Club Fees** table, select appropriate club fees to be assigned to this membership by ticking the corresponding tick box(es). The club fees were defined in a previous step using Manage Fees. It is required that at least one fee be selected. Multiple fees are permitted to show a breakdown of fees on corresponding invoices and receipts.

**Please note:**

- a. Multiple fees are not permitted if a pro rata fee schedule is to be set up for this membership. In this case, a club fee with all fee components in one aggregate amount should be set up in Manage Fees.

15. Select **Next>** button
  - a. If the Pro-Rata option was selected previously the following screen will be displayed
  - b. If the Pro-Rate option was not selected the screen shown in Figure 29 will be displayed



The screenshot shows the 'Add New Membership' screen. On the left is a sidebar menu with 'Manage Memberships' highlighted. The main content area displays membership details for Tennis NSW, Aberdeen Tennis Association, and a new adult membership for 2010/2011. The total membership fees are \$81.00. Below this is a 'Pro-Rata Schedule' table with 12 input fields for monthly fees, and 'Prev' and 'Next' navigation buttons.

Pro-Rata Schedule	
*Month 1:	<input type="text"/>
*Month 2:	<input type="text"/>
*Month 3:	<input type="text"/>
*Month 4:	<input type="text"/>
*Month 5:	<input type="text"/>
*Month 6:	<input type="text"/>
*Month 7:	<input type="text"/>
*Month 8:	<input type="text"/>
*Month 9:	<input type="text"/>
*Month 10:	<input type="text"/>
*Month 11:	<input type="text"/>
*Month 12:	<input type="text"/>

**Figure 28: Add New Membership Screen 4 – Pro-Rata Schedule**

16. Complete the **Pro-Rata Schedule** table by entering the dollar amount to be charged as the Club Membership Fee based on the month of the membership period that the participant registers.
 

**Please note:**

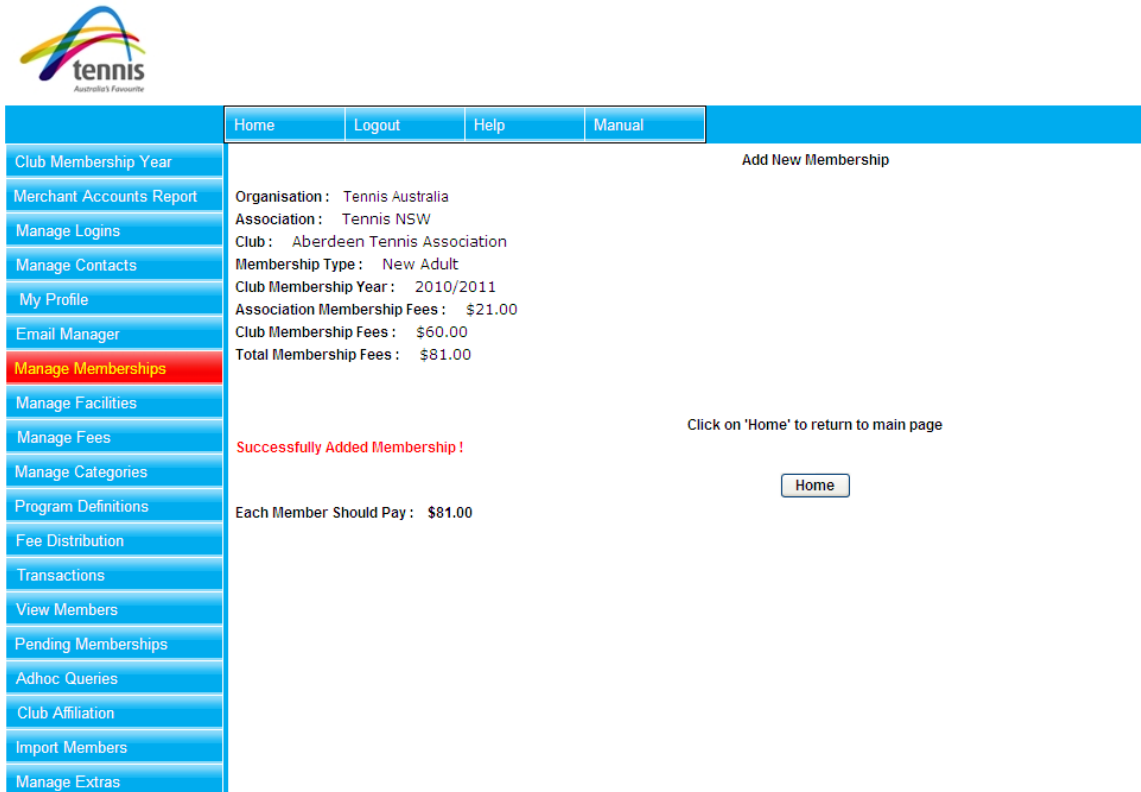
  - a. A pro rata fee in any given month cannot be greater than the total club membership fee.
  - b. A pro rata fee schedule cannot be set up when the total club membership fee has multiple components
  - c. If Pro-Rata has been selected then an entry in each field corresponding to a month of the membership period is required
17. Select **Next>** button and the following screen is displayed.



	Home	Logout	Help	Manual	
Club Membership Year	Add New Membership				
Merchant Accounts Report	Organisation : Tennis Australia				
Manage Logins	Association : Tennis NSW				
Manage Contacts	Club : Aberdeen Tennis Association				
My Profile	Membership Type : New Adult				
Email Manager	Club Membership Year : 2010/2011				
Manage Memberships	Association Membership Fees : \$21.00				
Manage Facilities	Club Membership Fees : \$60.00				
Manage Fees	Total Membership Fees : \$81.00				
Manage Categories	Membership is ready to be Added				
Program Definitions	Click on 'Enter' to add or 'Back' to make changes				
Fee Distribution	<input data-bbox="938 625 1003 651" type="button" value=" &lt; Back "/>				
Transactions	<input data-bbox="1078 625 1143 651" type="button" value=" Enter &gt; "/>				
View Members	Each Member Should Pay : \$81.00				
Pending Memberships					
Adhoc Queries					
Club Affiliation					
Import Members					
Manage Extras					

Figure 29: Add New Membership Screen 5 – Membership ready to Add

18. Select **Enter>** button and the following screen is displayed and the defined Membership is saved in the database



Home Logout Help Manual

Club Membership Year Add New Membership

Merchant Accounts Report Organisation: Tennis Australia

Manage Logins Association: Tennis NSW

Manage Contacts Club: Aberdeen Tennis Association

My Profile Membership Type: New Adult

Email Manager Club Membership Year: 2010/2011

Manage Memberships Association Membership Fees: \$21.00

Manage Facilities Club Membership Fees: \$60.00

Manage Fees Total Membership Fees: \$81.00

Manage Categories Click on 'Home' to return to main page

Program Definitions Each Member Should Pay: \$81.00

Fee Distribution

Transactions

View Members

Pending Memberships

Adhoc Queries

Club Affiliation

Import Members

Manage Extras

Home

**Figure 30: Add New Membership Screen 6 – Successfully Added**

19. Select **Home**> button and the new membership just added will be displayed in the table on the Manage Memberships screen

If the **<Back** button is selected at any time during the Add New Membership set up process, the first screen in the Add New Membership set up process (Figure 25) will be displayed and membership information will not be saved to the database.

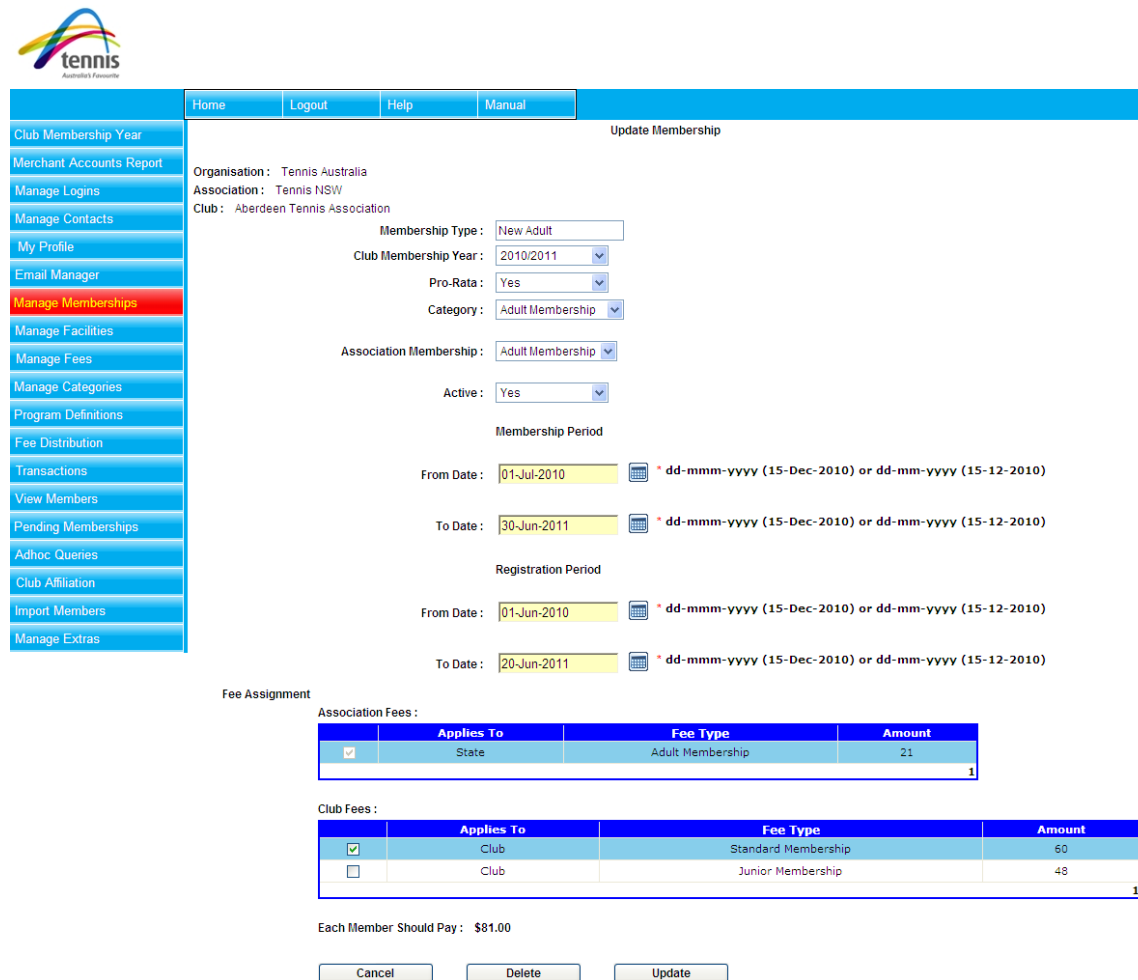
To update an existing Membership, click on the **Update** link under the Request column for the defined Membership. When you update Membership information you will overwrite information that has been previously entered.

To delete an existing Membership where no participants have registered, click on the **Update** link under the Request column for the defined Membership for a **Delete** option.

Select the **Delete** button. A pop-up message is displayed. This pop-up message asks 'Are you sure?' To continue with the delete select the **OK** button. The Update Membership – Update Successful Screen (Figure 33) will display. Select **Home**> button and the updated membership will be displayed in the table on the Manage Memberships screen

To stop the delete select the **Cancel** button.

Click the **Update** link under the Request column for a defined membership and the following screen will be displayed.



Organisation : Tennis Australia  
 Association : Tennis NSW  
 Club : Aberdeen Tennis Association

Membership Type : New Adult  
 Club Membership Year : 2010/2011  
 Pro-Rata : Yes  
 Category : Adult Membership  
 Association Membership : Adult Membership  
 Active : Yes

Membership Period  
 From Date : 01-Jul-2010 \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)  
 To Date : 30-Jun-2011 \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

Registration Period  
 From Date : 01-Jun-2010 \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)  
 To Date : 20-Jun-2011 \* dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

Fee Assignment

Association Fees :

	Applies To	Fee Type	Amount
<input checked="" type="checkbox"/>	State	Adult Membership	21

Club Fees :

	Applies To	Fee Type	Amount
<input checked="" type="checkbox"/>	Club	Standard Membership	60
<input type="checkbox"/>	Club	Junior Membership	48

Each Member Should Pay : \$81.00

Cancel Delete Update

**Figure 13: Update Membership Screen**

The Update Membership screen allows the user to update the membership information.

1. In the **Membership Type** field, enter the type or name of your club membership (ie. Adult Membership). This is a required field.
2. In the **Club Membership Year** field, select a Club Membership Year to be associated with this membership from the drop down list provided. It is the Club Membership Year for the memberships set up in a previous step and linked to a Membership Year of the state association. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
3. In the **Pro-rata** field, select “Yes” or “No” from the drop down list provided. This is a required field.  
 If you select “Yes” this membership will offer pro-rata pricing for club fees based on the month of the membership period that the participant registers. After you assign the club membership fee on the following screen, a 12 month table will be displayed and you will be able to create

the appropriate fee for each month of the year. As the membership year advances this fee will automatically be applied.

**Please note:**

- a. A pro rata fee in any given month cannot be greater than the total club membership fee.
- b. A pro rata fee schedule cannot be set up when the total club membership fee has multiple components

If you select “No” there will be no pro-rata adjustment for the club membership fee. The club membership fee will be the same regardless of the month of the membership period that the participant registers. This field can be changed and pro-rata can be added to an existing membership. The new pricing will only apply to those members registered after the change has been made (fees are not retroactively applied).

4. In the **Category** field, select the club category that this membership fits. Club Categories deal with attributes of a membership (i.e. Individual versus family; or Junior versus Adult) and were set up in a previous step and linked to a corresponding category of the state association. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
5. In the **Association Membership** field, select the association (state) membership corresponding to this club membership. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
6. In the **Membership Period: From Date** field enter the starting date for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
7. In the **Membership Period: End Date** field enter the ending date for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
8. In the **Registration Period: From Date** field enter the starting date registrations will be accepted for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
9. In the **Registration Period: End Date** field enter the last date that registrations will be accepted for this membership. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field. If there are already members registered to this membership, this field will be disabled for input and cannot be changed.
10. The appropriate association (state) fees are already assigned based on the association (state) membership selected when the club membership was defined (Add New Membership Screen 1). The tick box is preselected and disabled for input.

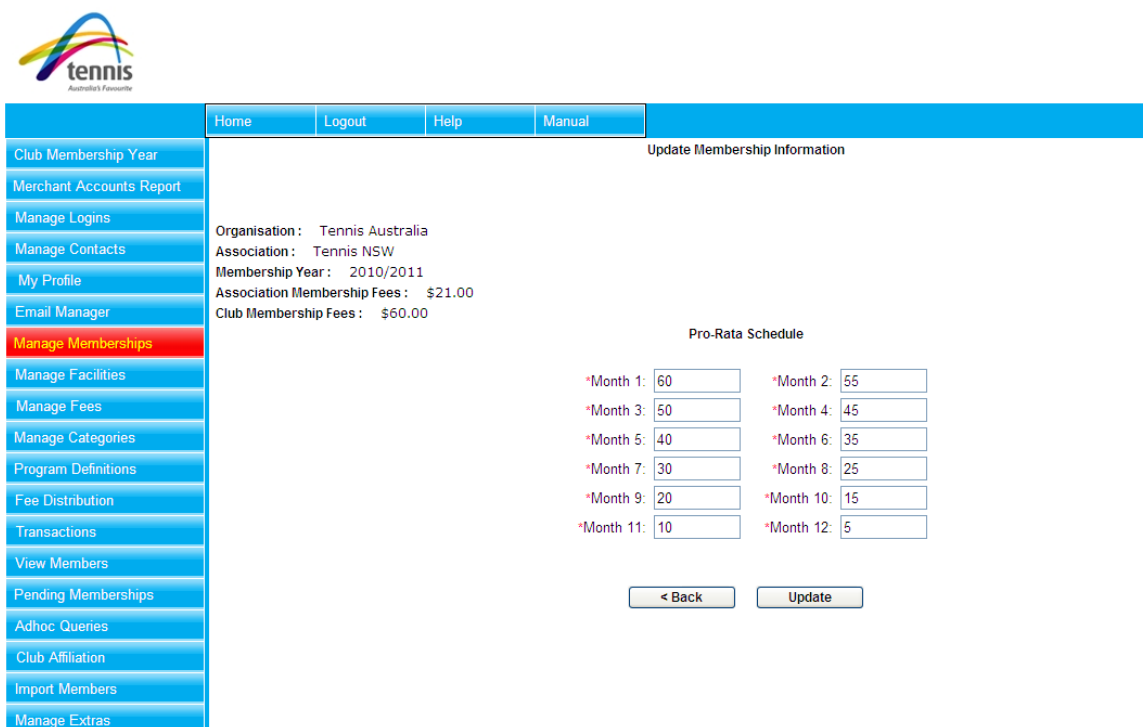
11. In the **Club Fees** table, select appropriate club fees to be assigned to this membership by ticking the corresponding tick box(es). The club fees were defined in a previous step using Manage Fees. It is required that at least one fee be selected. Multiple fees are permitted to show a breakdown of fees on corresponding invoices and receipts.

**Please note:**

- a. Multiple fees are not permitted if a pro rata fee schedule is to be set up for this membership. In this case, a club fee with all fee components in one aggregate amount should be set up in Manage Fees.

The new pricing will only apply to those members registered after the change has been made (fees are not retroactively applied).

12. Click on the **Update** button.
  - a. If the Pro-Rata option was selected previously the following screen will be displayed
  - b. If the Pro-Rate option was not selected the screen shown in Figure 33 will be displayed



The screenshot shows a web application interface for updating membership information. On the left is a navigation menu with 'Manage Memberships' highlighted. The main content area displays the following information:

- Organisation: Tennis Australia
- Association: Tennis NSW
- Membership Year: 2010/2011
- Association Membership Fees: \$21.00
- Club Membership Fees: \$60.00

Below this information is a 'Pro-Rata Schedule' table with 12 columns, each containing a month label and a text input field with a numerical value:

Pro-Rata Schedule	
*Month 1: 60	*Month 2: 55
*Month 3: 50	*Month 4: 45
*Month 5: 40	*Month 6: 35
*Month 7: 30	*Month 8: 25
*Month 9: 20	*Month 10: 15
*Month 11: 10	*Month 12: 5

At the bottom of the table are two buttons: '< Back' and 'Update'.

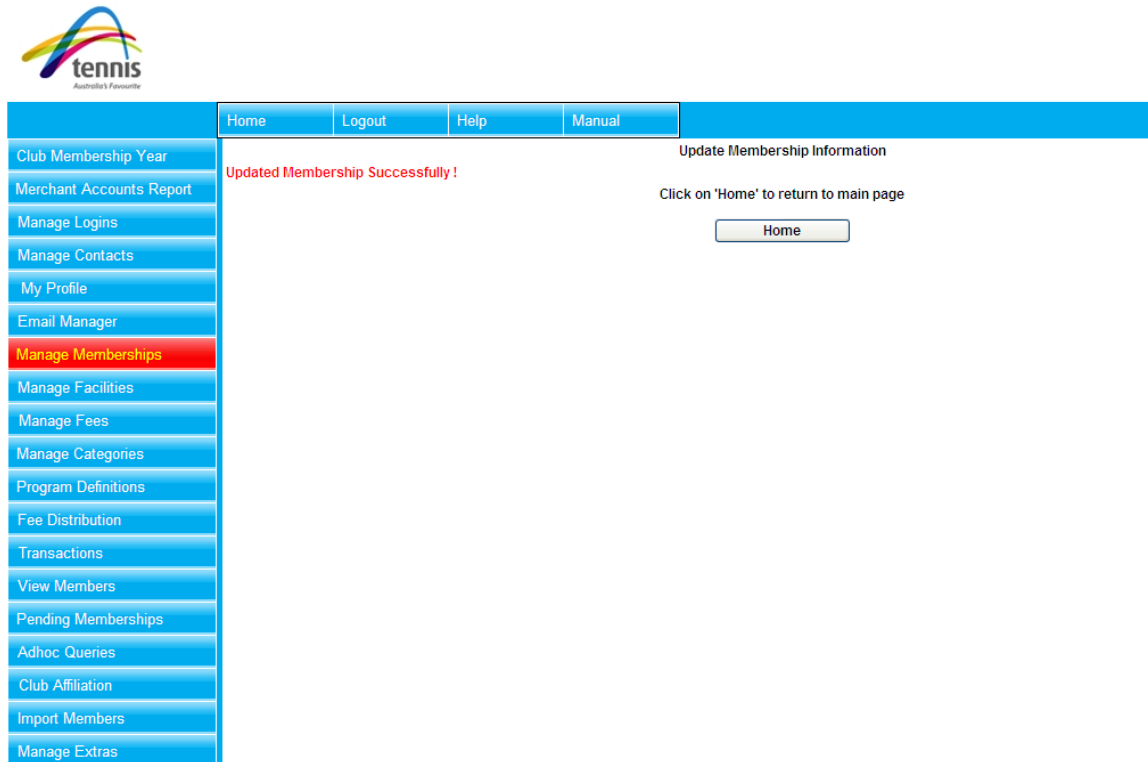
**Figure 32: Update Membership – Pro-Rata Schedule**

13. Complete the **Pro-Rata Schedule** table by entering the dollar amount to be charged as the Club Membership Fee based on the month of the membership period that the participant registers.

**Please note:**

- a. A pro rata fee in any given month cannot be greater than the total club membership fee.
- b. A pro rata fee schedule cannot be set up when the total club membership fee has multiple components

14. c. If Pro-Rata has been selected then an entry in each field corresponding to a month of the membership period is required
- Select **Update>** button and the following screen is displayed and the updated Membership is saved in the database



**Figure 33: Update Membership – Update Successful**

15. Select **Home>** button and the updated membership will be displayed in the table on the Manage Memberships screen

**Please Note:**

- If the membership has not been used and there are no members registered using the membership, all fields can be updated and/or the entire membership can be deleted.
- If there are members registered to the membership, certain fields cannot be changed and are disabled for update. These fields are:
  - Club Membership Year
  - Category
  - Association Membership
  - Membership Period (From and To)
  - Registration Period (From and To)
- If there are members registered to the membership, it cannot be deleted

## Manage Facilities

The Manage Facilities option in the Club Management will allow you to access the screen to add and manage facilities.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
**Manage Facilities**  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

Organisation: **Tennis Australia**  
Association: **Tennis NSW**  
Club: **Aberdeen Tennis Association**

**Club Facilities Listing:**

Name	Address	Update
Aberdeen Tennis Association	Jefferson Park, McQueen St, New England Highway, ABERDEEN, NSW, 2336, AUS	Update
< >		

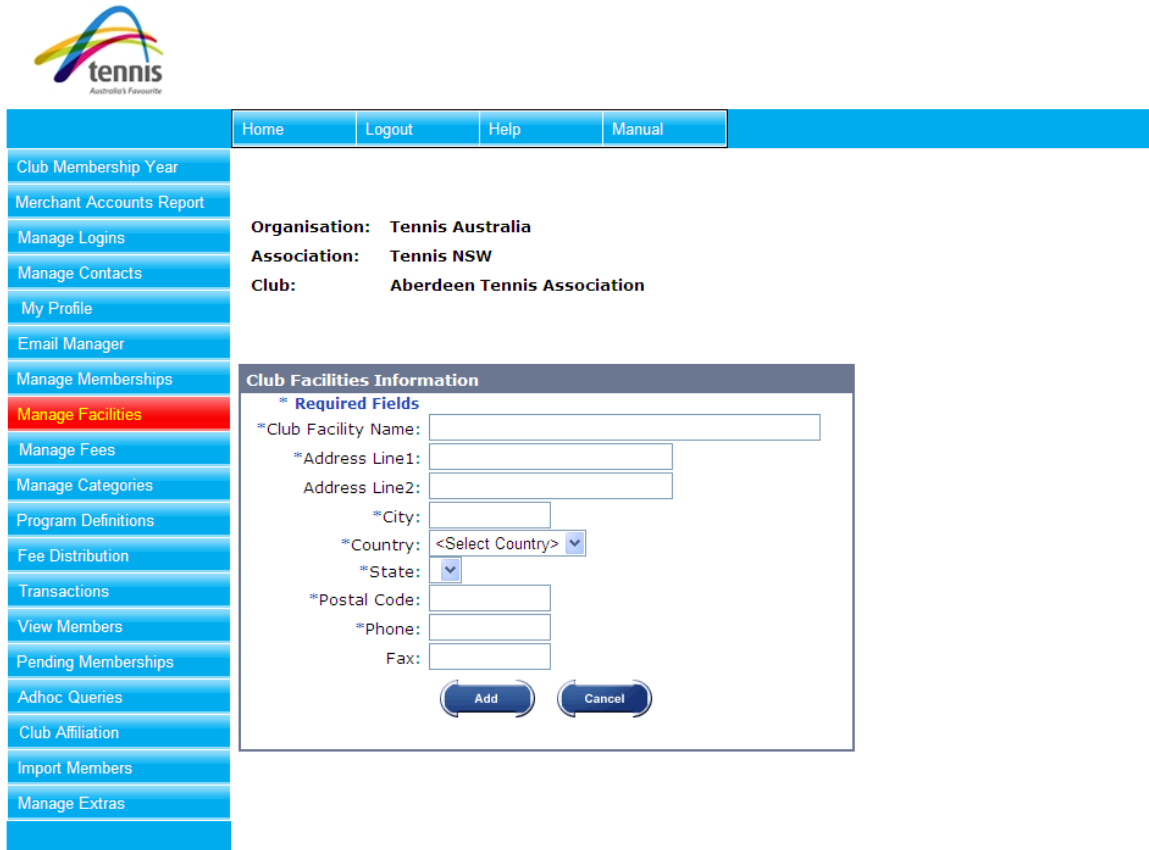
Add

**Figure 34: Manage Facilities Screen**

The Manage Facilities option lists the defined facilities in the club. The table lists the following information:

Name  
Address  
Update

To add a Facility, follow these steps:  
Click on the **Add** button. The following screen is displayed:



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
**Manage Facilities**  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

**Organisation: Tennis Australia**  
**Association: Tennis NSW**  
**Club: Aberdeen Tennis Association**

**Club Facilities Information**

**\* Required Fields**

\*Club Facility Name:

\*Address Line1:

Address Line2:

\*City:

\*Country: <Select Country>

\*State:

\*Postal Code:

\*Phone:

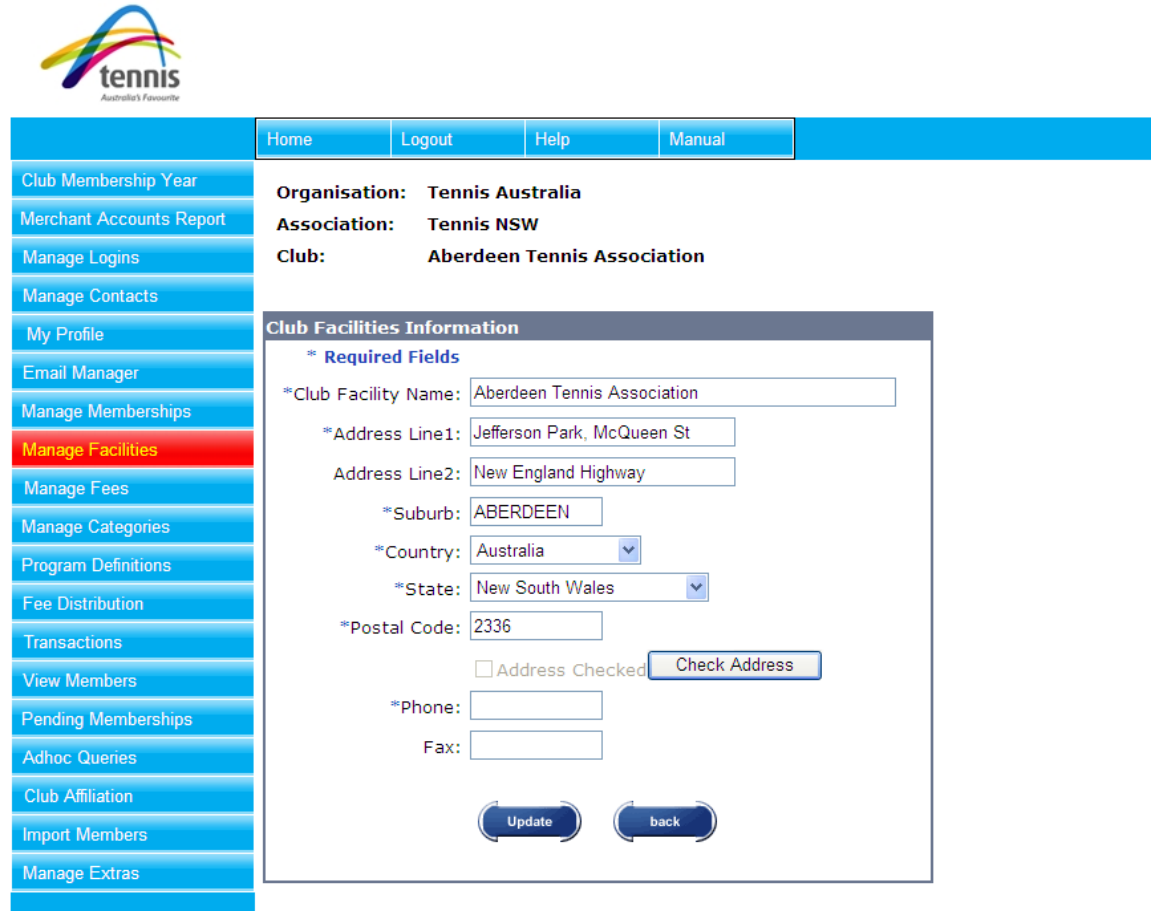
Fax:

Add Cancel

**Figure 35: Add Facilities Screen**

1. In the **Club Name** field, enter the name of the club.
2. In the **Address Line1** field, enter the address of the club.
3. In the **Address Line2** field, enter the address of the club.
4. In the **suburb** field, enter the suburb where the club is located.
5. In the **Country** field, select the country from the drop down list.
6. In the **State** field, select the state in which the club is located.
7. In the **Postcode** field, enter the postcode of the location.
8. In the **Phone** field, enter the phone number of the club.
9. In the **Fax** field, enter the fax number in the club.
10. Click on the **Submit** button. The defined facility is saved in the database, and is listed in the Facility table on the Manage Facility screen.

To update a Facility, click on the **Update** link under the Update column for the defined facility. When you update the facility information, you will over-write information that has been previously entered.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
**Manage Facilities**  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Quenes  
Club Affiliation  
Import Members  
Manage Extras

**Organisation: Tennis Australia**  
**Association: Tennis NSW**  
**Club: Aberdeen Tennis Association**

**Club Facilities Information**

**\* Required Fields**

\*Club Facility Name: Aberdeen Tennis Association

\*Address Line1: Jefferson Park, McQueen St

Address Line2: New England Highway

\*Suburb: ABERDEEN

\*Country: Australia

\*State: New South Wales

\*Postal Code: 2336

Address Checked

\*Phone:

Fax:

**Figure 36: Updating a Facility Screen**

The Update Facility Information screen allows the user to update the facility information.

1. In the **Club Facility Name** field, enter the name of the facility.
2. In the **Address Line1** field, enter the address of the club.
3. In the **Address Line2** field, enter the address of the club.
4. In the **suburb** field, enter the suburb where the club is located.
5. In the **Country** field, select the country from the drop down list.
6. In the **State** field, select the state in which the club is located.
7. In the **Postcode** field, enter the postcode of the location.

Addresses are verified by the data validation software. Once the address is entered; the **Check Address** button must be selected. The software will check the validity of the address. Matches for the address will be listed. Below is an example of the address check functionality.

## Select appropriate address:

<input type="radio"/>	33/44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33 44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33, Level 3 44 Cumberland Street, THE ROCKS NSW 2000
< >	

Select Correct Address

Select the correct address from the list by selecting the option in the row that list the correct address. Then **Select Correct Address** button. The selected address will populate the address fields.

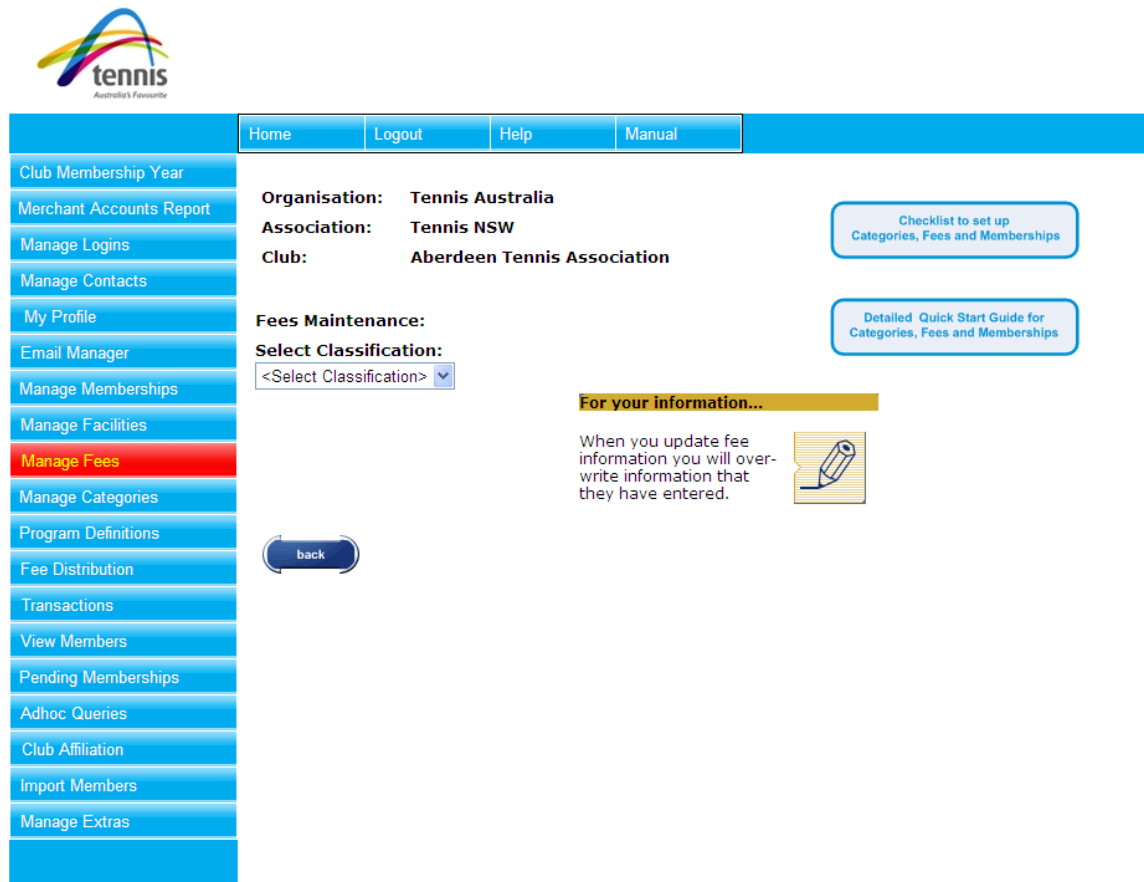
If the correct address is not listed, try again. Abbreviations may cause problems so spelling the whole word such as 'street' may return better results. In addition, removing the street or road may increase your results helping you find the address match.

8. In the **Phone** field, enter the phone number of the club.
9. In the **Fax** field, enter the fax number in the club.
10. Click on the **Update** button. The defined facility information is updated in the database, and is listed in the Facility table on the Manage Facility screen

After updating the Facility Information, the user is taken back to the Manage Facility screen.

## Manage Fees

The Manage Fees menu option allows the user to define the fees for memberships available in the club. The Fee Structure must be defined before the Fees can be assigned during the Add or Update Membership process.



The screenshot shows the 'Manage Fees' screen. On the left is a vertical menu with options: Club Membership Year, Merchant Accounts Report, Manage Logins, Manage Contacts, My Profile, Email Manager, Manage Memberships, Manage Facilities, **Manage Fees** (highlighted in red), Manage Categories, Program Definitions, Fee Distribution, Transactions, View Members, Pending Memberships, Adhoc Queries, Club Affiliation, Import Members, and Manage Extras. At the top right of the main content area are links for Home, Logout, Help, and Manual. The main content area displays the following information: Organisation: Tennis Australia, Association: Tennis NSW, Club: Aberdeen Tennis Association. There are two callout boxes: 'Checklist to set up Categories, Fees and Memberships' and 'Detailed Quick Start Guide for Categories, Fees and Memberships'. Under 'Fees Maintenance', there is a 'Select Classification:' dropdown menu currently showing '<Select Classification>'. A 'back' button is located below the dropdown. An information box titled 'For your information...' contains the text: 'When you update fee information you will overwrite information that they have entered.' with a pencil icon.

Figure 14: Manage Fees Screen – Fee Maintenance

The Manage Fees Screen also provides two on-screen links to guides designed to assist the club administrator when setting up fees and preparing for a new Club Membership Year.

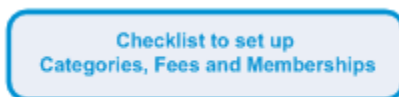


Figure 38A: On Screen Link for Checklist

By selecting the link for a Checklist to set up Categories, Fees and Memberships the user will see an overview of the four main tasks required to define memberships. Defining the fees is one of those tasks. The checklist shows the frequency of each task, the purpose of each task and the some additional notes related to completion of each task. The guide is shown below.

## My Tennis Club Set up Checklist



### Membership setup checklist

My Tennis now provides clubs the flexibility to operate a club membership year but has also been enhanced to allow clubs to charge pro rata. As a result the process of setting up category's, fees and membership periods has changed slightly. To set up your club in preparation for registering members, there are four key steps that you must undertake. The frequency of each step may vary as shown below.

Task	<input type="checkbox"/> Define Financial Period	<input type="checkbox"/> Define Club Categories	<input type="checkbox"/> Define Club Fees	<input type="checkbox"/> Define Memberships
Menu Option	Financial Period	Manage Categories	Manage Fees	Manage Memberships
Frequency	Created once a year	Checked once a year, if state categories do not change there is no need to change club categories	Reviewed periodically, if fees change then all the total club fees for all memberships that use the modified fee change	At least once a year when financial year changes as well as when new memberships are offered
Purpose	<ul style="list-style-type: none"> <li>Define the club's financial year</li> <li>Link to an existing state association financial year</li> </ul>	<ul style="list-style-type: none"> <li>Create club categories to be used at the club level</li> <li>Link to existing state association categories</li> <li>Defines similar characteristics for multiple memberships</li> </ul>	<ul style="list-style-type: none"> <li>Set up fees to be charged by the club</li> </ul>	<ul style="list-style-type: none"> <li>Define available memberships for club</li> <li>Link to existing state memberships</li> <li>Assign club fees including optional pro rata fees</li> </ul>
Other Notes		<ul style="list-style-type: none"> <li>Multiple memberships can be assigned to one category (You should not create a category for each different membership that you offer)</li> <li>Once members are registered to a membership that is linked to a category, the category cannot be changed.</li> </ul>	<ul style="list-style-type: none"> <li>Multiple fees can be assigned to one membership (except when using pro-rata)</li> </ul>	<ul style="list-style-type: none"> <li>Membership names can be used to descriptively define the club offering</li> <li>Once members are added to a membership the membership details cannot be changed.</li> </ul>

Use the Quick Start Guide for a more detailed explanation of how to complete each of the tasks shown above.

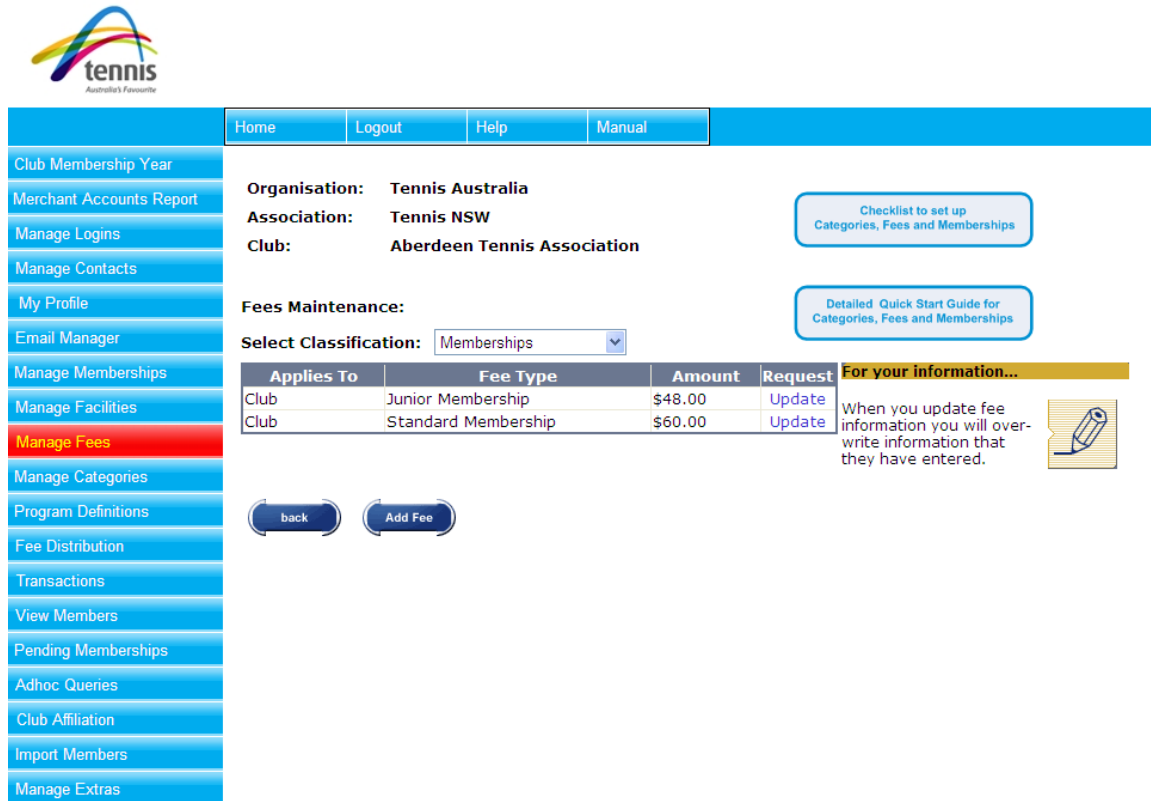
**Figure 38B: Checklist for Categories, Fees and Memberships**



**Figure 38C: On Screen Link for Detailed Quick Start Guide**

By selecting the link for a Detailed Quick Start Guide for Categories, Fees and Memberships the user will see excerpts from this user manual specifically geared to the step by step process for defining the Club Membership Year, Club Categories, Club Fees and Club Memberships. The on screen link allows the Club Administrator easy access to this information from the screens needed in the set up process.

To Define a Fee, select the Classification from the drop down list. The following screen is displayed which shows all defined Fees in the Fee Maintenance table.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
**Manage Fees**  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

Organisation: **Tennis Australia**  
Association: **Tennis NSW**  
Club: **Aberdeen Tennis Association**

Checklist to set up Categories, Fees and Memberships

Detailed Quick Start Guide for Categories, Fees and Memberships

Fees Maintenance:  
Select Classification: Memberships

Applies To	Fee Type	Amount	Request
Club	Junior Membership	\$48.00	Update
Club	Standard Membership	\$60.00	Update

**For your information...**  
When you update fee information you will overwrite information that they have entered.

back Add Fee

**Figure 39: Manage Fees – Fee Maintenance Results**

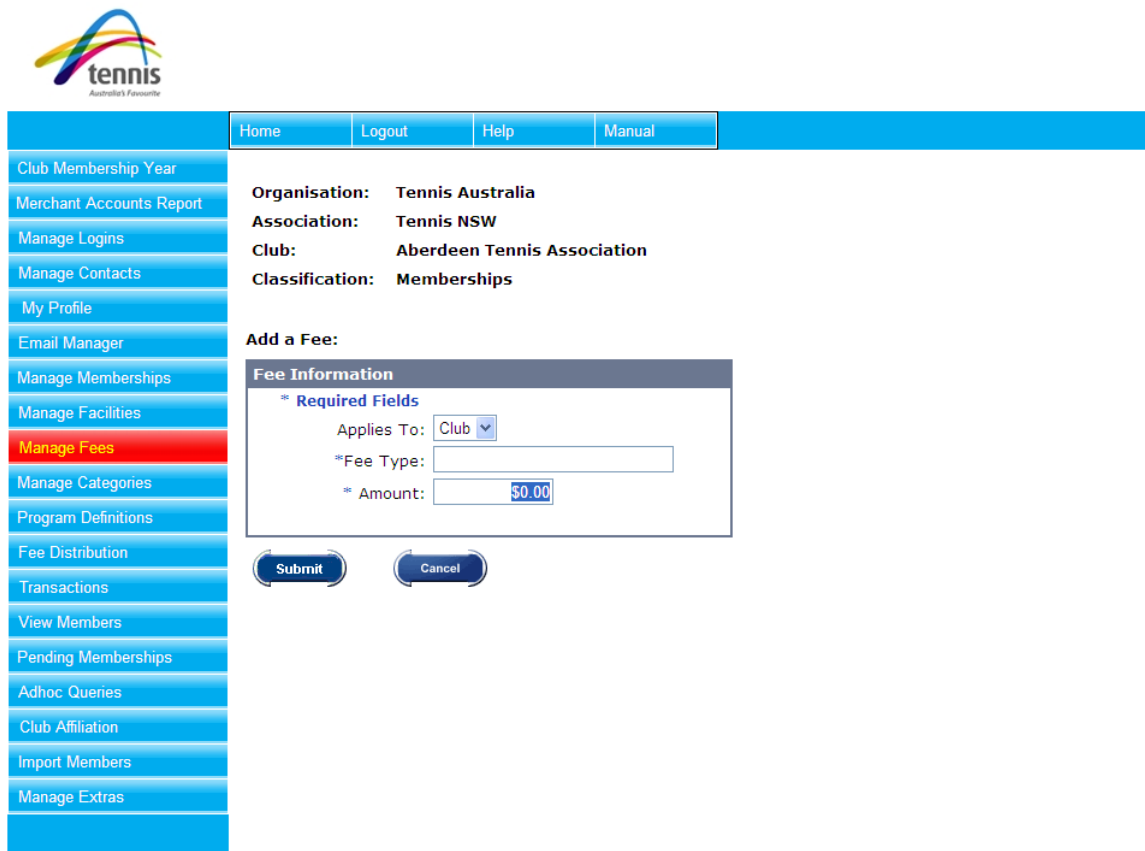
A fee is independent of a membership type and membership category. The assignment of a fee to a membership takes place during the Manage Membership process. The definition of a fee, its name and amount is defined here, on the fee maintenance screen.

The information displayed includes:

- Applies To (State, Club, National)
- Fee Type
- Amount
- Request

To add a Fee, follow these steps:

1. Click on the **Add Fee** button. The following screen is displayed:



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
**Manage Fees**  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

**Organisation:** Tennis Australia  
**Association:** Tennis NSW  
**Club:** Aberdeen Tennis Association  
**Classification:** Memberships

**Add a Fee:**

**Fee Information**

\* Required Fields

Applies To: Club

\*Fee Type:

\* Amount: \$0.00

Submit Cancel

**Figure 40: Manage Fees – Add Fee**

2. In the **Applies To** field, select to which entity the fee will apply. At the Club level, the fees only apply to the Club. This is populated in the **Applies To** field.
3. In the **Fee Type** field, enter the fee type. If this is a Family Club Member fee, then enter this type in the **Fee Type** field. This is a required field.
4. In the **Amount** field, enter the fee for this fee type. This is a required field.
5. Click the **Submit** button. The assigned fee is saved in the database, and is listed in the Defined Fee table on the Manage Fee screen.

To update defined Fee, click on the **Update** link under the Request column for the assigned fee. When you update assigned fee information you will over-write information that has been previously entered.



	Home	Logout	Help	Manual
Club Membership Year	<b>Organisation: Tennis Australia</b>			
Merchant Accounts Report	<b>Association: Tennis NSW</b>			
Manage Logins	<b>Club: Aberdeen Tennis Association</b>			
Manage Contacts	<b>Classification: Memberships</b>			
My Profile	<b>Update Fee Information:</b>			
Email Manager	<b>Fee Information</b>			
Manage Memberships	* <b>Required Fields</b>			
Manage Facilities	Applies To: <input type="text" value="Club"/>			
<b>Manage Fees</b>	*Fee Type: <input type="text" value="Standard Membership"/>			
Manage Categories	*Amount: <input type="text" value="\$60.00"/>			
Program Definitions	<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>			
Fee Distribution				
Transactions				
View Members				
Pending Memberships				
Adhoc Queries				
Club Affiliation				
Import Members				
Manage Extras				

**Figure 15: Manage Fees – Update Fee**

The Update Fee Information screen allows the user to update the fee information.

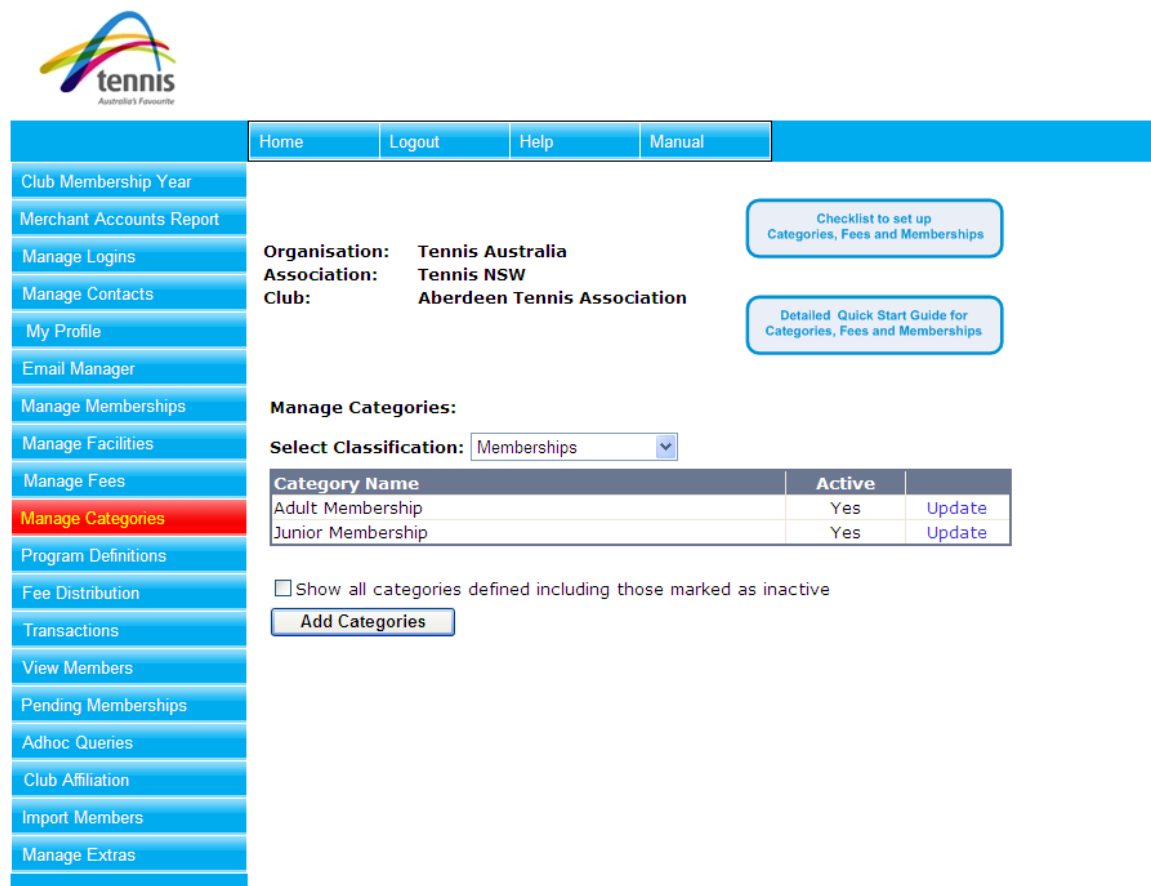
1. In the **Applies To** field, select to which entity the fee will apply. At the Club level, the fees only apply to the Club. This is populated in the **Applies To** field.
2. In the **Fee Type** field, enter the fee type. If this is a Family Club Member fee, then enter this type in the Fee Type field. This is a required field.
3. In the **Base Amount** field, enter the fee for this fee type. This is a required field.
4. Click the **Update** button. The changes to the assigned fee are saved in the database, and are listed in the Defined Fee table on the Manage Fee screen.

To delete a defined fee, select the **Delete** button. A screen displays asking the user to confirm the delete request by selecting the **Delete** button again. Doing this will delete the fee, show a Delete Successful message and display the remaining defined fees.

To stop the delete select the **Cancel** button.

## Manage Categories

The Membership Categories deal with attributes or characteristics of a membership (i.e. Individual versus family; or Junior versus Adult). Before a Membership can be created a category must be defined. The Manage Categories process allows the user to add and maintain club level categories and link them with corresponding association (state) level categories.



The screenshot shows the 'Manage Categories' page in the My Tennis system. On the left is a navigation menu with 'Manage Categories' highlighted. The main content area includes a top navigation bar with 'Home', 'Logout', 'Help', and 'Manual'. Below this, the user's organization details are displayed: Organisation: Tennis Australia, Association: Tennis NSW, and Club: Aberdeen Tennis Association. There are two callout boxes: 'Checklist to set up Categories, Fees and Memberships' and 'Detailed Quick Start Guide for Categories, Fees and Memberships'. The 'Manage Categories' section features a 'Select Classification' dropdown menu set to 'Memberships'. Below this is a table of categories:

Category Name	Active	
Adult Membership	Yes	<a href="#">Update</a>
Junior Membership	Yes	<a href="#">Update</a>

Below the table is a checkbox labeled 'Show all categories defined including those marked as inactive' and an 'Add Categories' button.

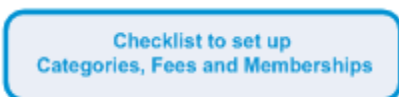
**Figure 42: Manage Categories**

The information displayed includes:

- Category Name
- Active
- Request

To display all the categories defined including the inactive ones, select the check box.

The Manage Categories Screen also provides two on-screen links to guides designed to assist the club administrator when setting up categories and preparing for a new Club Membership Year.



**Figure 43A: On Screen Link for Checklist**

By selecting the link for a Checklist to set up Categories, Fees and Memberships the user will see an overview of the four main tasks required to define memberships. Defining the fees is one of those tasks. The checklist shows the frequency of each task, the purpose of each task and the some additional notes related to completion of each task. The guide is shown below.



*Membership setup checklist*

My Tennis now provides clubs the flexibility to operate a club membership year but has also been enhanced to allow clubs to charge pro rata. As a result the process of setting up category's, fees and membership periods has changed slightly. To set up your club in preparation for registering members, there are four key steps that you must undertake. The frequency of each step may vary as shown below.

Task	<input type="checkbox"/> Define Financial Period	<input type="checkbox"/> Define Club Categories	<input type="checkbox"/> Define Club Fees	<input type="checkbox"/> Define Memberships
Menu Option	Financial Period	Manage Categories	Manage Fees	Manage Memberships
Frequency	Created once a year	Checked once a year, if state categories do not change there is no need to change club categories	Reviewed periodically, if fees change then all the total club fees for all memberships that use the modified fee change	At least once a year when financial year changes as well as when new memberships are offered
Purpose	<ul style="list-style-type: none"> <li>Define the club's financial year</li> <li>Link to an existing state association financial year</li> </ul>	<ul style="list-style-type: none"> <li>Create club categories to be used at the club level</li> <li>Link to existing state association categories</li> <li>Defines similar characteristics for multiple memberships</li> </ul>	<ul style="list-style-type: none"> <li>Set up fees to be charged by the club</li> </ul>	<ul style="list-style-type: none"> <li>Define available memberships for club</li> <li>Link to existing state memberships</li> <li>Assign club fees including optional pro rata fees</li> </ul>
Other Notes		<ul style="list-style-type: none"> <li>Multiple memberships can be assigned to one category (You should not create a category for each different membership that you offer)</li> <li>Once members are registered to a membership that is linked to a category, the category cannot be changed.</li> </ul>	<ul style="list-style-type: none"> <li>Multiple fees can be assigned to one membership (except when using pro-rata)</li> </ul>	<ul style="list-style-type: none"> <li>Membership names can be used to descriptively define the club offering</li> <li>Once members are added to a membership the membership details cannot be changed.</li> </ul>

Use the Quick Start Guide for a more detailed explanation of how to complete each of the tasks shown above.

**Figure 43B: Checklist for Categories, Fees and Memberships**



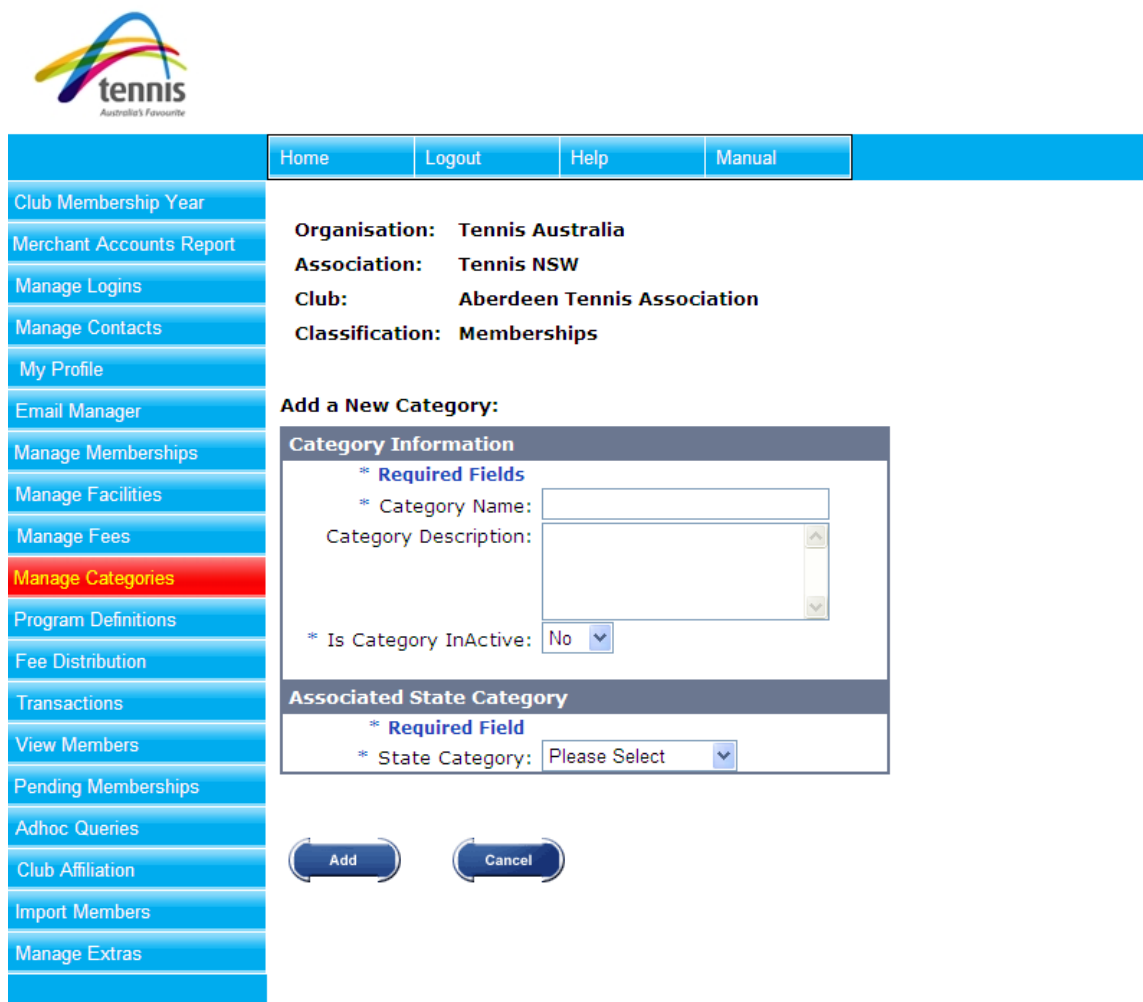
**Figure 43C: On Screen Link for Detailed Quick Start Guide**

By selecting the link for a Detailed Quick Start Guide for Categories, Fees and Memberships the user will see excerpts from this user manual specifically geared to the

step by step process for defining the Club Membership Year, Club Categories, Club Fees and Club Memberships. The on screen link allows the Club Administrator easy access to this information from the screens needed in the set up process.

To add a Category, follow these steps:

1. Click on the **Add Categories** button. The following screen is displayed



The screenshot shows the 'Add a New Category' screen. At the top, there is a navigation bar with 'Home', 'Logout', 'Help', and 'Manual'. Below this, a sidebar menu lists various options, with 'Manage Categories' highlighted in red. The main content area displays the following information:

**Organisation:** Tennis Australia  
**Association:** Tennis NSW  
**Club:** Aberdeen Tennis Association  
**Classification:** Memberships

**Add a New Category:**

**Category Information**

\* **Required Fields**

\* **Category Name:** [Text Field]  
**Category Description:** [Text Area]  
\* **Is Category InActive:** No [Dropdown]

**Associated State Category**

\* **Required Field**

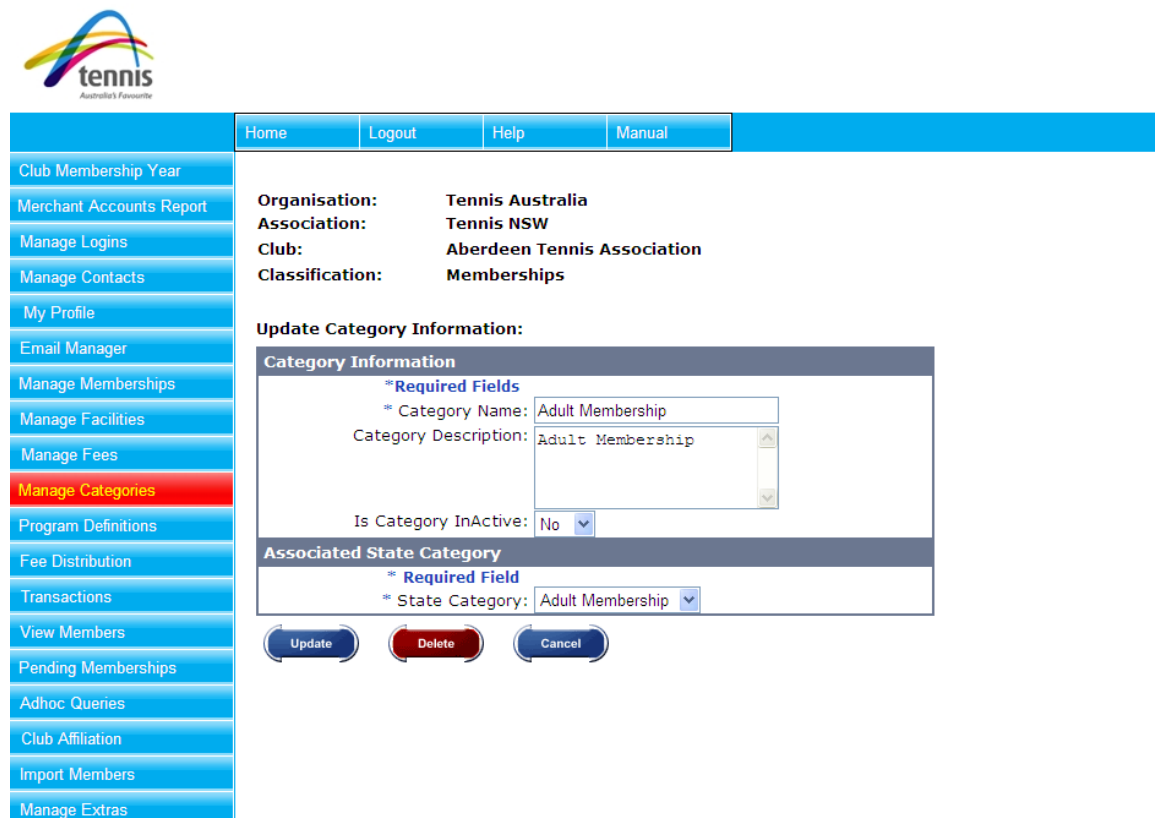
\* **State Category:** Please Select [Dropdown]

At the bottom, there are two buttons: 'Add' and 'Cancel'.

**Figure 16: Add Categories**

2. In the **Category Name** field, enter the name of the category. This is required field.
3. In the **Category Description** field, enter the description of the category.
4. Select if the category is active or not in **Is Category InActive** field. This is a required field.
5. In **State Category** field, select the state category to which the category is associated. This is a required field.
6. Select **Add** button to insert the information in to the database. It takes back to the Manage Categories screen with the category added to a new row.

To update a Category, click on the **Update** link under the Request column for the defined Category. When you update category information you will over-write information that has been previously entered.



**Figure 45: Update Categories**

1. In the **Category Name** field, enter the name of the category. This is required field.
2. In the **Category Description** field, enter the description of the category.
3. Select if the category is active or not in **Is Category InActive** field. This is a required field.
4. In **State Category** field, select the state category to which the category is associated. This is a required field.

Select **Update** button to modify the information in to the database. It takes back to the Manage Categories screen with the category.

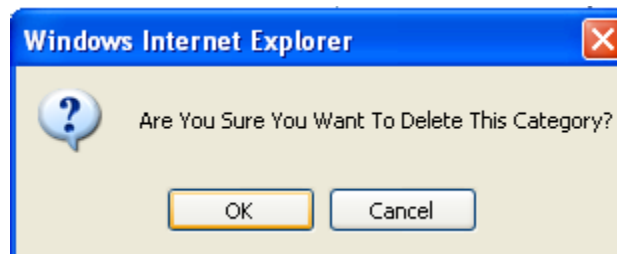
You can delete a category if it has never been used. “Been used” is defined as registration that uses this category. To delete a Category, select **Update** under the Request column for the defined category.



	Home	Logout	Help	Manual
Club Membership Year	<b>Organisation:</b> Tennis Australia			
Merchant Accounts Report	<b>Association:</b> Tennis NSW			
Manage Logins	<b>Club:</b> Aberdeen Tennis Association			
Manage Contacts	<b>Classification:</b> Memberships			
My Profile	<b>Update Category Information:</b>			
Email Manager	<b>Category Information</b>			
Manage Memberships	* <b>Required Fields</b>			
Manage Facilities	* Category Name: Adult Membership			
Manage Fees	Category Description: Adult Membership			
<b>Manage Categories</b>	Is Category InActive: No			
Program Definitions	<b>Associated State Category</b>			
Fee Distribution	* <b>Required Field</b>			
Transactions	* State Category: Adult Membership			
View Members	<input type="button" value="Update"/>			
Pending Memberships	<input type="button" value="Delete"/>			
Adhoc Queries	<input type="button" value="Cancel"/>			
Club Affiliation				
Import Members				
Manage Extras				

**Figure 46: Delete Categories**

Click on the **Delete** button and you are displayed the following.



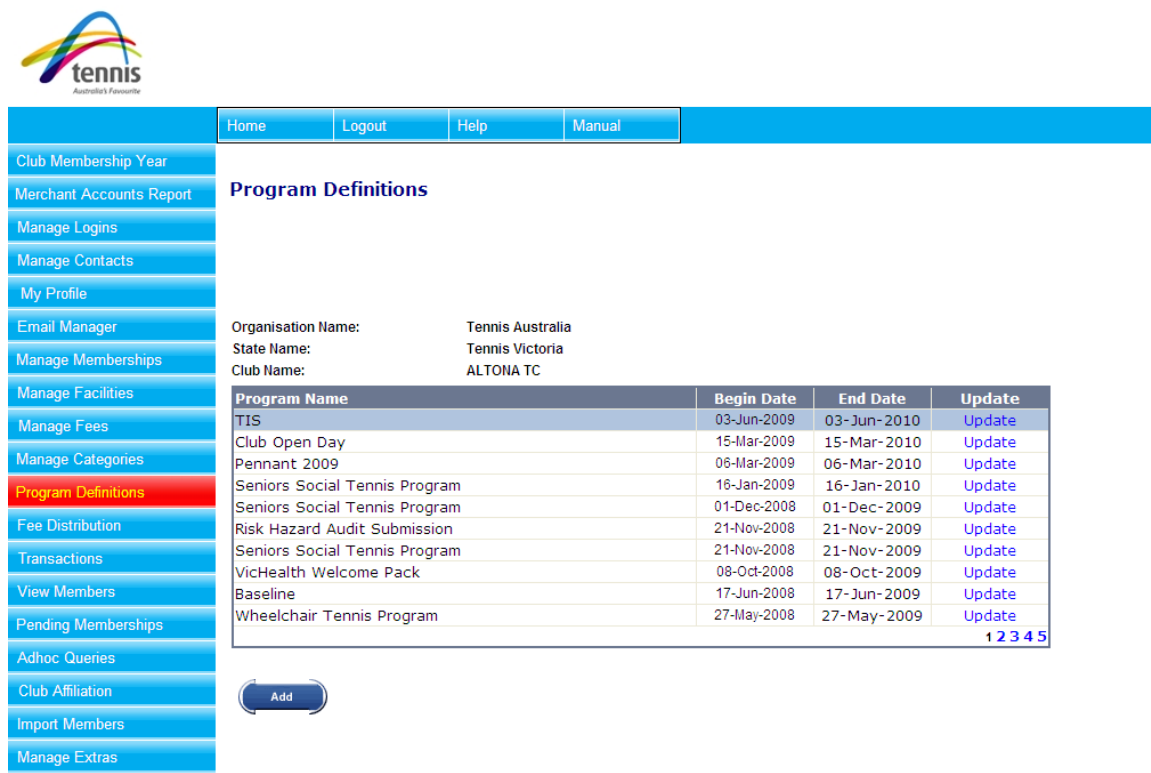
Select the OK button. If the category is in use, you will see a message similar to below and the deletion of the category is not performed.

**Edit Error: Cannot delete this category. There are 27 rows pointing to this category. Try making the category inactive.**

To stop the delete select the **Cancel** button.

## Program Definition

The Program Definition option in the Club Management will allow you to access the screen to view, add and manage programs.



Program Name	Begin Date	End Date	Update
TIS	03-Jun-2009	03-Jun-2010	<a href="#">Update</a>
Club Open Day	15-Mar-2009	15-Mar-2010	<a href="#">Update</a>
Pennant 2009	06-Mar-2009	06-Mar-2010	<a href="#">Update</a>
Seniors Social Tennis Program	16-Jan-2009	16-Jan-2010	<a href="#">Update</a>
Seniors Social Tennis Program	01-Dec-2008	01-Dec-2009	<a href="#">Update</a>
Risk Hazard Audit Submission	21-Nov-2008	21-Nov-2009	<a href="#">Update</a>
Seniors Social Tennis Program	21-Nov-2008	21-Nov-2009	<a href="#">Update</a>
VicHealth Welcome Pack	08-Oct-2008	08-Oct-2009	<a href="#">Update</a>
Baseline	17-Jun-2008	17-Jun-2009	<a href="#">Update</a>
Wheelchair Tennis Program	27-May-2008	27-May-2009	<a href="#">Update</a>

1 2 3 4 5

[Add](#)

**Figure 47: Program Definition**

The information displayed includes:

- Program Name
- Begin Date
- End Date
- Update

To add a Program, follow these steps:

1. Click on the **Add** button. The following screen is displayed



Home
Logout
Help
Manual

Club Membership Year

Merchant Accounts Report

Manage Logins

Manage Contacts

My Profile

Email Manager

Manage Memberships

Manage Facilities

Manage Fees

Manage Categories

Program Definitions

Fee Distribution

Transactions

View Members

Pending Memberships

Adhoc Queries

Club Affiliation

Import Members

Manage Extras

## Program Definitions

Program Name:

Starts On:   Ends On:

Program Dates:

Registration Dates:

Late Registration Date:

Does Program Require Active Memberships

Organisation Membership:

State Membership:

Club Membership:

Closed Program Type:

Program Age Dependent:

**Program Information:**

this element contains the text that appears on the **registration selection page** that is presented to the general public

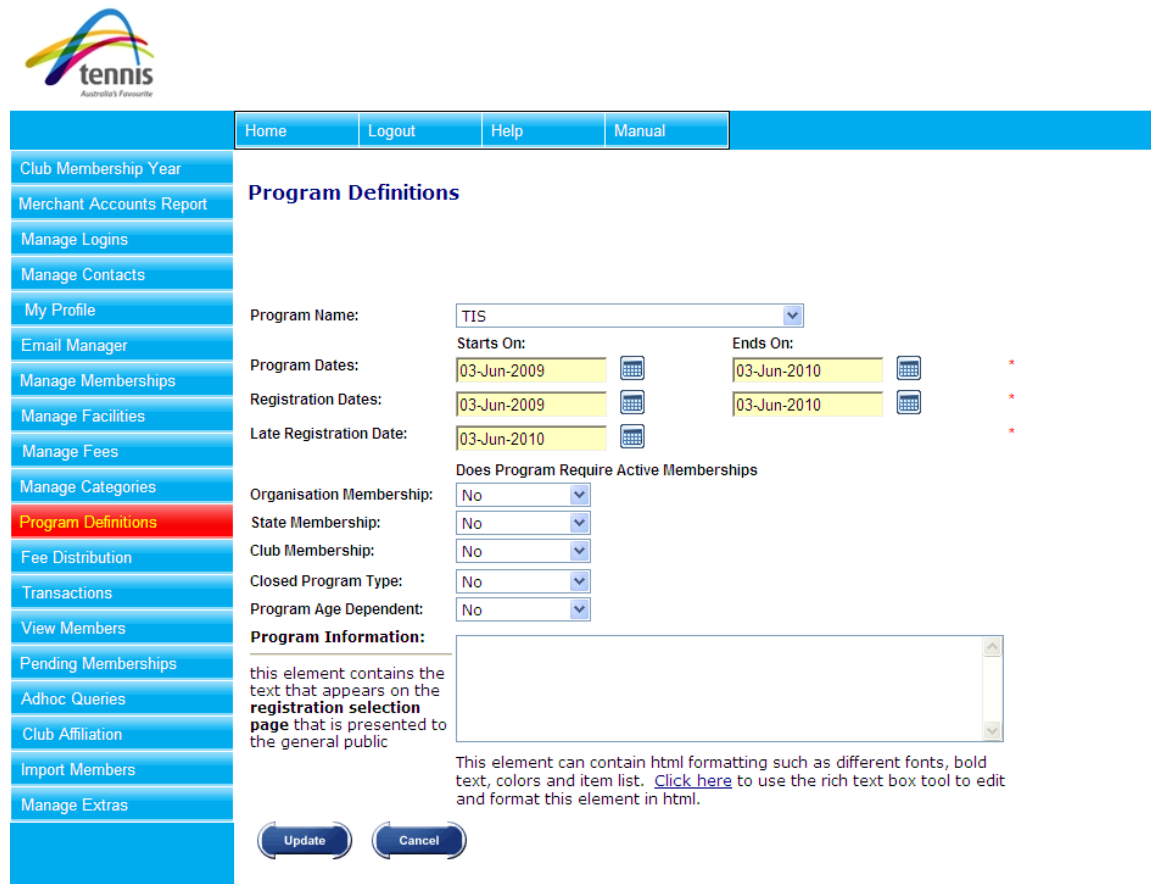
This element can contain html formatting such as different fonts, bold text, colors and item list. [Click here](#) to use the rich text box tool to edit and format this element in html.

**Figure 48: Add Program Definition**

2. In the **Program Name** field, select the name of the program.
3. In the **Program Dates** field, select the Starts On and Ends On dates by clicking on **pick** button and navigating to the appropriate date. This is a required field.
4. In the **Registration Dates** field, select the Starts On and Ends On dates by clicking on **pick** button and navigating to the appropriate date. This is a required field.
5. In the **Late Registration Date** field, select the date by clicking on **pick** button and navigating to the appropriate date. This is a required field.
6. In the **Organization Membership** field, select if it requires active memberships by selecting the correct answer.
7. In the **State Membership** field, select if it requires active memberships by selecting the correct answer.
8. In the **club Membership** field, select if it requires active memberships by selecting the correct answer.
9. In the **Closed Program type** field, select if the program is a closed type.
10. In the **Program Age Dependent** field, select if the program is dependent on age.
11. In the **Program Information** field, enter the information about the program.

12. Select **Add** button to insert the information about the new program in to the database. This will take us to the Program Definitions screen with the program displayed in the table.

To update a Program, click on the **Update** link under the Update column for the defined program. When you update the facility information, you will over-write information that has been previously entered.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
**Program Definitions**  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

**Program Definitions**

Program Name: TIS

Starts On: 03-Jun-2009 Ends On: 03-Jun-2010 \*

Registration Dates: 03-Jun-2009 03-Jun-2010 \*

Late Registration Date: 03-Jun-2010 \*

Does Program Require Active Memberships

Organisation Membership: No

State Membership: No

Club Membership: No

Closed Program Type: No

Program Age Dependent: No

**Program Information:**

this element contains the text that appears on the **registration selection page** that is presented to the general public

This element can contain html formatting such as different fonts, bold text, colors and item list. [Click here](#) to use the rich text box tool to edit and format this element in html.

Update Cancel

**Figure 49: Update Program Definition**

The Update Program Information screen allows the user to update the program information.

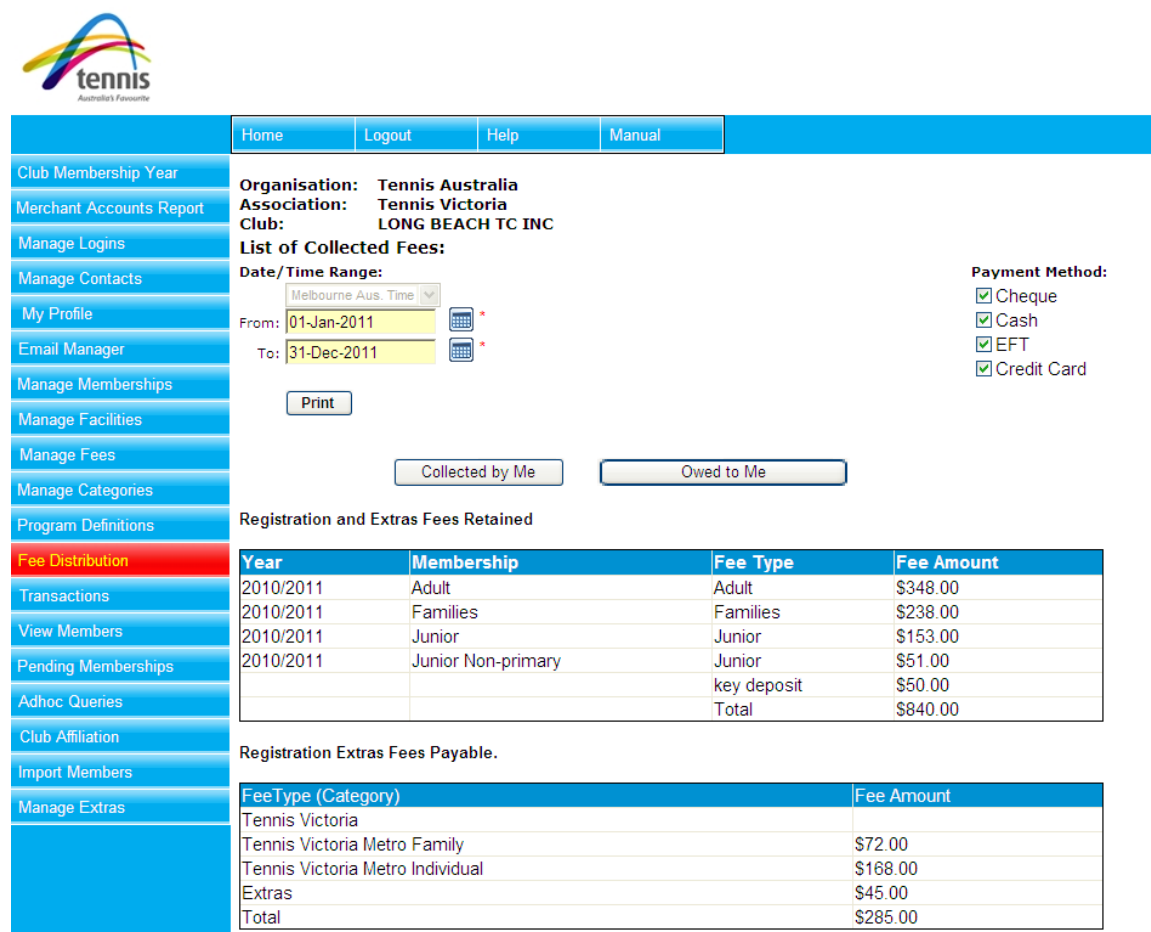
1. In the **Program Name** field, select the name of the program.
2. In the **Program Dates** field, select the Starts On and Ends On dates by clicking on **pick** button and navigating to the appropriate date. This is a required field.
3. In the **Registration Dates** field, select the Starts On and Ends On dates by clicking on **pick** button and navigating to the appropriate date. This is a required field.
4. In the **Late Registration Date** field, select the date by clicking on **pick** button and navigating to the appropriate date. This is a required field.

5. In the **Organization Membership** field, select if it requires active memberships by selecting the correct answer.
6. In the **State Membership** field, select if it requires active memberships by selecting the correct answer.
7. In the **club Membership** field, select if it requires active memberships by selecting the correct answer.
8. In the **Closed Program type** field, select if the program is a closed type.
9. In the **Program Age Dependent** field, select if the program is dependent on age.
10. In the **Program Information** field, enter the information about the program.
11. Select **Update** button to insert the information about the new program in to the database.

After updating Program Information, the user is taken back to the Program Definition screen.

## Fee Distribution

The Fee Distribution menu option allows the user to view the fees collected for each level in a given date range. This will allow the club to identify the monies that have been collected by the state and owed to the club, as well as the monies collected by the club and owed to the state. The fees displayed can be Membership Fees or Fees attributed to Extras purchased during the registration process.



The screenshot shows the 'Fee Distribution' menu option selected in the left-hand navigation pane. The main content area displays the following information:

- Navigation:** Home, Logout, Help, Manual
- Organisation:** Tennis Australia
- Association:** Tennis Victoria
- Club:** LONG BEACH TC INC
- List of Collected Fees:**
  - Date/Time Range:** Melbourne Aus. Time (dropdown), From: 01-Jan-2011, To: 31-Dec-2011
  - Payment Method:**
    - Cheque
    - Cash
    - EFT
    - Credit Card
  - Buttons:** Print, Collected by Me, Owed to Me
- Registration and Extras Fees Retained:**

Year	Membership	Fee Type	Fee Amount
2010/2011	Adult	Adult	\$348.00
2010/2011	Families	Families	\$238.00
2010/2011	Junior	Junior	\$153.00
2010/2011	Junior Non-primary	Junior	\$51.00
		key deposit	\$50.00
		<b>Total</b>	<b>\$840.00</b>
- Registration Extras Fees Payable:**

FeeType (Category)	Fee Amount
Tennis Victoria	
Tennis Victoria Metro Family	\$72.00
Tennis Victoria Metro Individual	\$168.00
Extras	\$45.00
<b>Total</b>	<b>\$285.00</b>

Figure 17: Fee Distribution

**Registration and Extras Fees Retained** shows the Registration Fees for Club Memberships and the Fees attributed to Extras that the club offers that have been collected during the registration process. These fees are kept by the club.

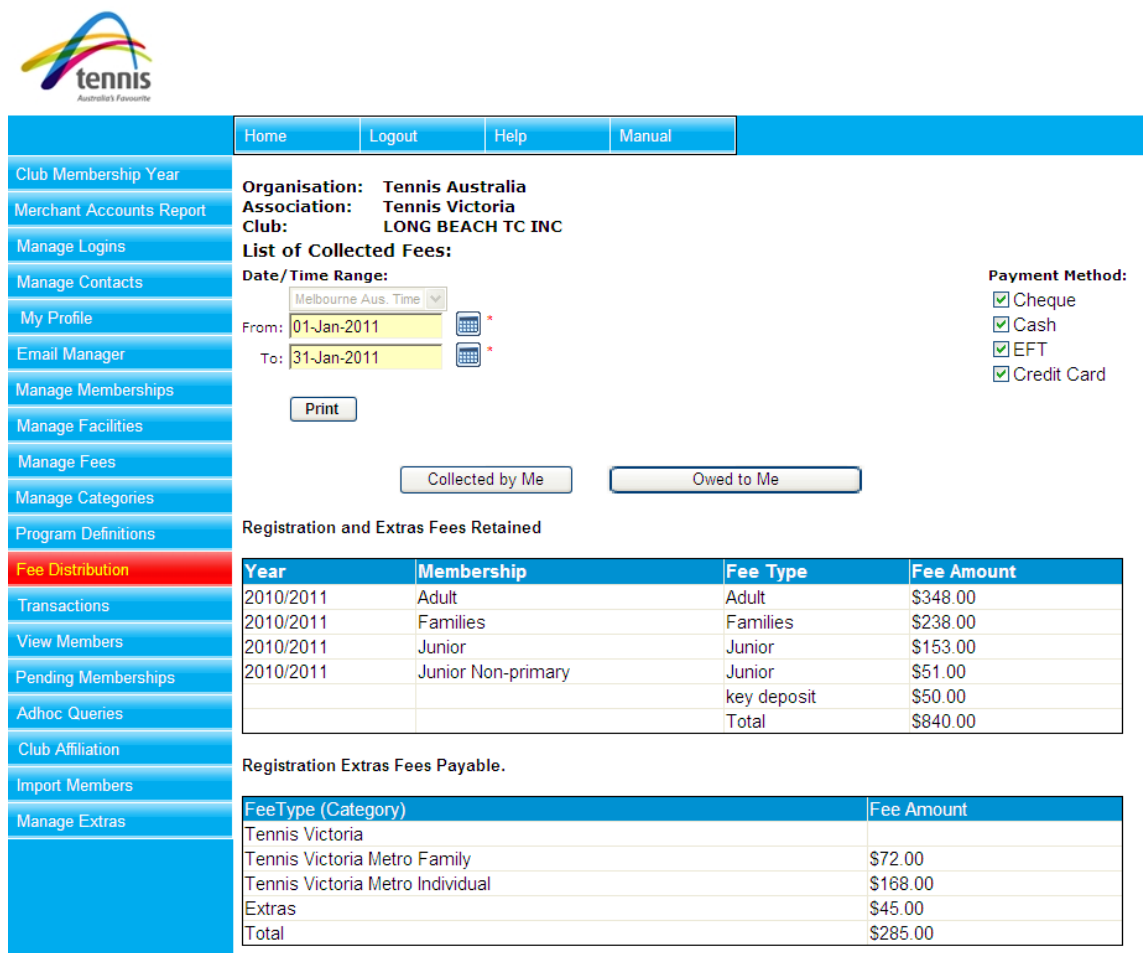
**Registration and Extras Fees Payable** shows the Registration Fees for State Memberships and the Fees attributed to Extras that the state offers that have been collected by the club during the registration process.

On the Fee Distribution screen, the default view is year to date.

To view a specific time period for fees paid, the user selects the Date/Time Range that the fees were collected and a Payment Method. The user selects on **Collected by Me** to view the fees collected by the club during the time period and payment methods specified.

To search for specific fees collected, follow these steps:

1. In the **From** Field, enter the start date for the Fee collected range.
2. In the **To** Field, enter the end date for the fee collect range.
3. Select all the payment methods that you wish to see the results for.
4. Click on the **Collected By Me** button. The following screen will display showing all fees collected by the club during the date range specified.



**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**List of Collected Fees:**  
**Date/Time Range:** Melbourne Aus. Time  
 From: 01-Jan-2011  
 To: 31-Jan-2011  
 Print

**Payment Method:**  
 Cheque  
 Cash  
 EFT  
 Credit Card

Collected by Me      Owed to Me

**Registration and Extras Fees Retained**

Year	Membership	Fee Type	Fee Amount
2010/2011	Adult	Adult	\$348.00
2010/2011	Families	Families	\$238.00
2010/2011	Junior	Junior	\$153.00
2010/2011	Junior Non-primary	Junior	\$51.00
		key deposit	\$50.00
		Total	\$840.00

**Registration Extras Fees Payable.**

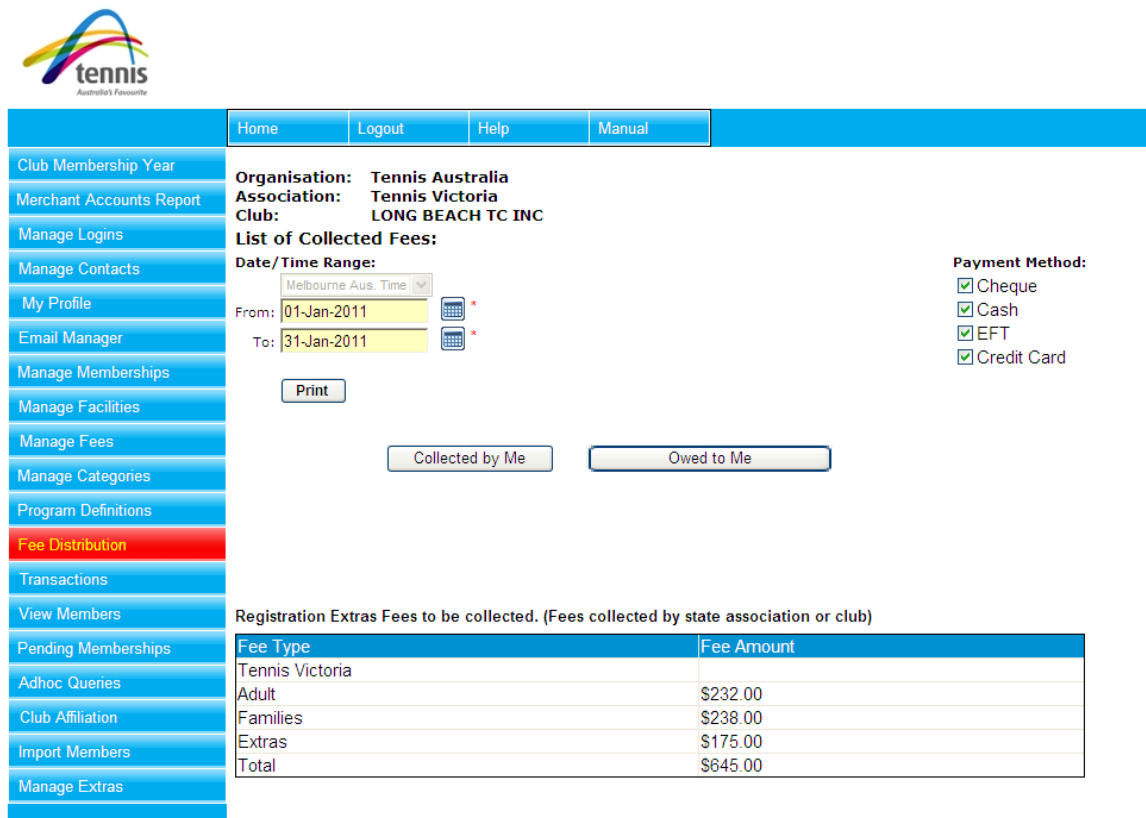
FeeType (Category)	Fee Amount
Tennis Victoria	
Tennis Victoria Metro Family	\$72.00
Tennis Victoria Metro Individual	\$168.00
Extras	\$45.00
Total	\$285.00

**Figure 51: Fee Distribution-Collected By Me**

To print the List of Fees that have been collected by the club during the registration process, click on the **Print** button

The user will select on **Owed to Me** to view the fees collected by the state during the time period and payment methods specified.

1. In the **From** Field, enter the start date for the Fee collected range.
2. In the **To** Field, enter the end date for the fee collect range.
3. Select all the payment methods that you wish to see the results for.
4. Click on the **Owed to Me** button. The following screen will display showing all fees collected by the state and owed to the club during the date range specified. This situation is usually limited to when the Club uses the State's merchant Id to process credit cards.



**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**List of Collected Fees:**

**Date/Time Range:**  
 Melbourne Aus. Time  
 From: 01-Jan-2011  
 To: 31-Jan-2011

**Payment Method:**  
 Cheque  
 Cash  
 EFT  
 Credit Card

**Registration Extras Fees to be collected. (Fees collected by state association or club)**

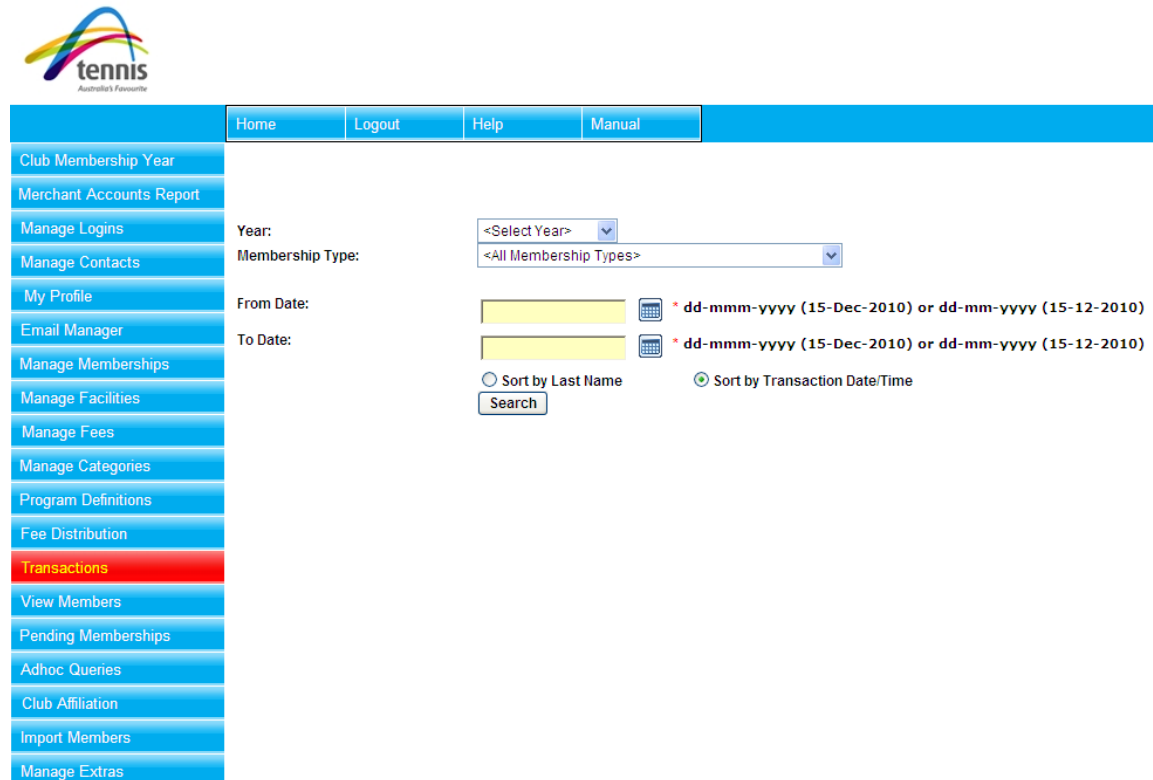
Fee Type	Fee Amount
Tennis Victoria	
Adult	\$232.00
Families	\$238.00
Extras	\$175.00
<b>Total</b>	<b>\$645.00</b>

**Figure 52: Fee Distribution-Owed to Me**

To print the List of Fees that is yet to be collected, click on the **Print** button.

## Transactions

The Transaction screen will allow the club to view transactions during a specific period of time. This is helpful for research purposes. Select **Transactions** to view the Transaction Selection Screen.



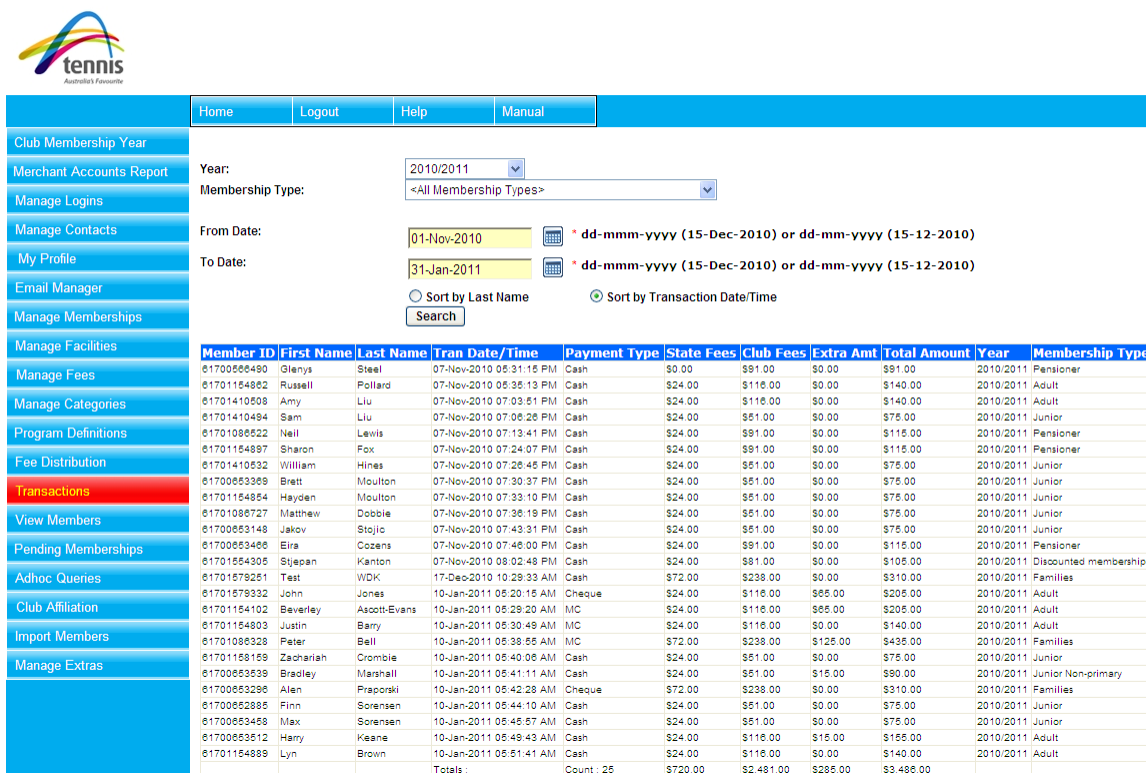
The screenshot shows the 'Transactions' selection screen. On the left is a navigation menu with the 'tennis Australia's Favourite' logo at the top. The menu items are: Club Membership Year, Merchant Accounts Report, Manage Logins, Manage Contacts, My Profile, Email Manager, Manage Memberships, Manage Facilities, Manage Fees, Manage Categories, Program Definitions, Fee Distribution, **Transactions** (highlighted in red), View Members, Pending Memberships, Adhoc Queries, Club Affiliation, Import Members, and Manage Extras. The main content area has a top navigation bar with 'Home', 'Logout', 'Help', and 'Manual'. Below this, the 'Year' field is a dropdown menu set to '<Select Year>'. The 'Membership Type' field is a dropdown menu set to '<All Membership Types>'. The 'From Date' and 'To Date' fields are text boxes with calendar icons, both containing yellow placeholder text. Below these fields are two radio buttons: 'Sort by Last Name' (unselected) and 'Sort by Transaction Date/Time' (selected). A 'Search' button is located at the bottom of the form.

**Figure 53: Transactions – Selection Screen**

To display a list of transactions for a specified date range, follow these steps:

1. Select the **Club Membership Year** from the drop down list provided which shows all Membership Years for this club. Once this selection is made Membership Types corresponding to the selected membership year will be available in the Membership Type drop down list. This is a required field.
2. Select the Membership Type from the drop down list displayed. All Membership Types can be selected instead of a specific membership type. This is a required field.
3. In the **From Date** field enter the starting date for the date range of transactions. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.

4. In the **End Date** field enter the ending date for the date range of transactions. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is a required field.
5. Select a button to sort the results by Last Name or Transaction Date.
6. Select **Search** and the following screen will be displayed



The screenshot shows the 'Transactions' screen in the My Tennis system. The interface includes a navigation menu on the left with options like 'Home', 'Logout', 'Help', and 'Manual'. The main area contains search filters for 'Year' (2010/2011), 'Membership Type' (<All Membership Types>), 'From Date' (01-Nov-2010), and 'To Date' (31-Jan-2011). There are radio buttons for sorting by 'Last Name' and 'Transaction Date/Time', and a 'Search' button.

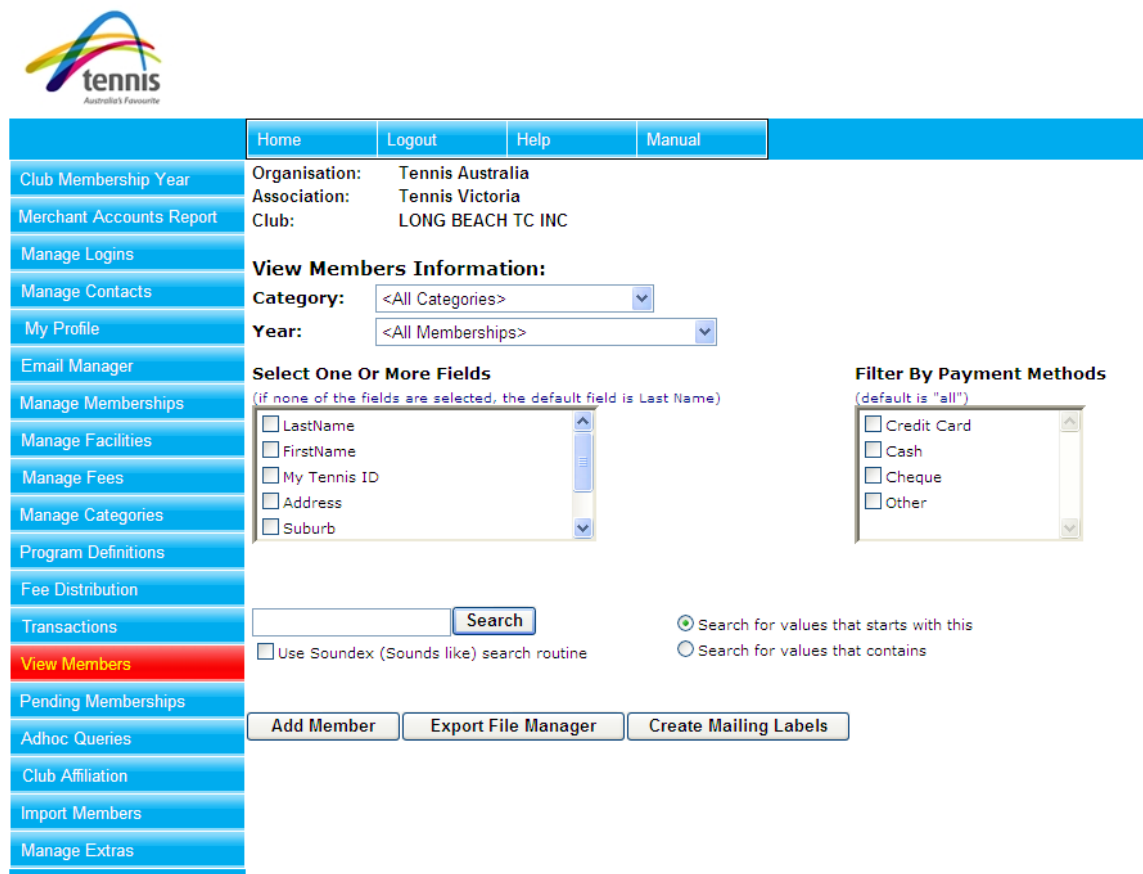
Member ID	First Name	Last Name	Tran Date/Time	Payment Type	State Fees	Club Fees	Extra Amt	Total Amount	Year	Membership Type
0170066490	Glenys	Steel	07-Nov-2010 05:31:15 PM	Cash	\$0.00	\$91.00	\$0.00	\$91.00	2010/2011	Pensioner
01701154802	Russell	Pollard	07-Nov-2010 05:35:13 PM	Cash	\$24.00	\$116.00	\$0.00	\$140.00	2010/2011	Adult
01701410508	Amy	Liu	07-Nov-2010 07:03:51 PM	Cash	\$24.00	\$116.00	\$0.00	\$140.00	2010/2011	Adult
01701410484	Sam	Liu	07-Nov-2010 07:06:26 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01701086522	Neil	Lewis	07-Nov-2010 07:13:41 PM	Cash	\$24.00	\$91.00	\$0.00	\$115.00	2010/2011	Pensioner
01701154897	Sharon	Fox	07-Nov-2010 07:24:07 PM	Cash	\$24.00	\$91.00	\$0.00	\$115.00	2010/2011	Pensioner
01701410532	William	Hines	07-Nov-2010 07:26:45 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653369	Brett	Moulton	07-Nov-2010 07:30:37 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01701154854	Hayden	Moulton	07-Nov-2010 07:33:10 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01701086727	Matthew	Dobbie	07-Nov-2010 07:36:19 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653148	Jakov	Stojic	07-Nov-2010 07:43:31 PM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653466	Eira	Cozens	07-Nov-2010 07:46:00 PM	Cash	\$24.00	\$91.00	\$0.00	\$115.00	2010/2011	Pensioner
01701554305	Stjepan	Kanton	07-Nov-2010 08:02:48 PM	Cash	\$24.00	\$81.00	\$0.00	\$105.00	2010/2011	Discounted membership
01701579251	Test	WDK	17-Dec-2010 10:29:33 AM	Cash	\$72.00	\$238.00	\$0.00	\$310.00	2010/2011	Families
01701579332	John	Jones	10-Jan-2011 05:20:15 AM	Cheque	\$24.00	\$116.00	\$65.00	\$205.00	2010/2011	Adult
01701154102	Beverley	Ascott-Evans	10-Jan-2011 05:28:20 AM	MC	\$24.00	\$116.00	\$65.00	\$205.00	2010/2011	Adult
01701154803	Justin	Barry	10-Jan-2011 05:30:49 AM	MC	\$24.00	\$116.00	\$0.00	\$140.00	2010/2011	Adult
01701086328	Peter	Bell	10-Jan-2011 05:38:55 AM	MC	\$72.00	\$238.00	\$125.00	\$435.00	2010/2011	Families
01701158159	Zachariah	Crombie	10-Jan-2011 05:40:06 AM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653539	Bradley	Marshall	10-Jan-2011 05:41:11 AM	Cash	\$24.00	\$51.00	\$15.00	\$90.00	2010/2011	Junior Non-primary
01700653295	Alan	Praporski	10-Jan-2011 05:42:28 AM	Cheque	\$72.00	\$238.00	\$0.00	\$310.00	2010/2011	Families
01700652885	Finn	Sorensen	10-Jan-2011 05:44:10 AM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653458	Max	Sorensen	10-Jan-2011 05:45:57 AM	Cash	\$24.00	\$51.00	\$0.00	\$75.00	2010/2011	Junior
01700653512	Harry	Keane	10-Jan-2011 05:49:43 AM	Cash	\$24.00	\$116.00	\$15.00	\$155.00	2010/2011	Adult
01701154889	Lyn	Brown	10-Jan-2011 05:51:41 AM	Cash	\$24.00	\$116.00	\$0.00	\$140.00	2010/2011	Adult
Totals:				Count: 25	\$720.00	\$2,481.00	\$285.00	\$3,486.00		

**Figure 54: Transaction Results**

The transactions are listed in the results table. The information provided includes My Tennis Id, name, transaction date and time, payment type, state fees, club fees, extras fees, total amount, membership year and membership type.

## View Members

The View Members menu option allows the user to view and manage members in a given membership year.



The screenshot shows the 'View Members' interface. On the left is a navigation menu with options like 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', 'Manage Contacts', 'My Profile', 'Email Manager', 'Manage Memberships', 'Manage Facilities', 'Manage Fees', 'Manage Categories', 'Program Definitions', 'Fee Distribution', 'Transactions', 'View Members' (highlighted), 'Pending Memberships', 'Adhoc Queries', 'Club Affiliation', 'Import Members', and 'Manage Extras'. The main content area shows:
 

- Home, Logout, Help, Manual navigation tabs.
- Organisation: Tennis Australia, Association: Tennis Victoria, Club: LONG BEACH TC INC.
- View Members Information:**
  - Category: <All Categories>
  - Year: <All Memberships>
- Select One Or More Fields** (if none of the fields are selected, the default field is Last Name):
  - LastName
  - FirstName
  - My Tennis ID
  - Address
  - Suburb
- Filter By Payment Methods** (default is "all"):
  - Credit Card
  - Cash
  - Cheque
  - Other
- Search box with a 'Search' button and radio buttons:
  - Search for values that starts with this
  - Search for values that contains
  - Use Soundex (Sounds like) search routine
- Buttons: Add Member, Export File Manager, Create Mailing Labels.

**Figure 55: View Members**

To filter the view for a specific category, in the **Categories** field, select the category to which the members should be displayed. To search for a specific member, by category or in all categories, in the Select One of More Fields box, click on the option you want to use to find a particular member, provide a full or partial value, and click the Search button.

By default the system searches by last name (surname). If you are not sure of the spelling you can select the **Soundex** option, which uses a “sounds like” pattern.

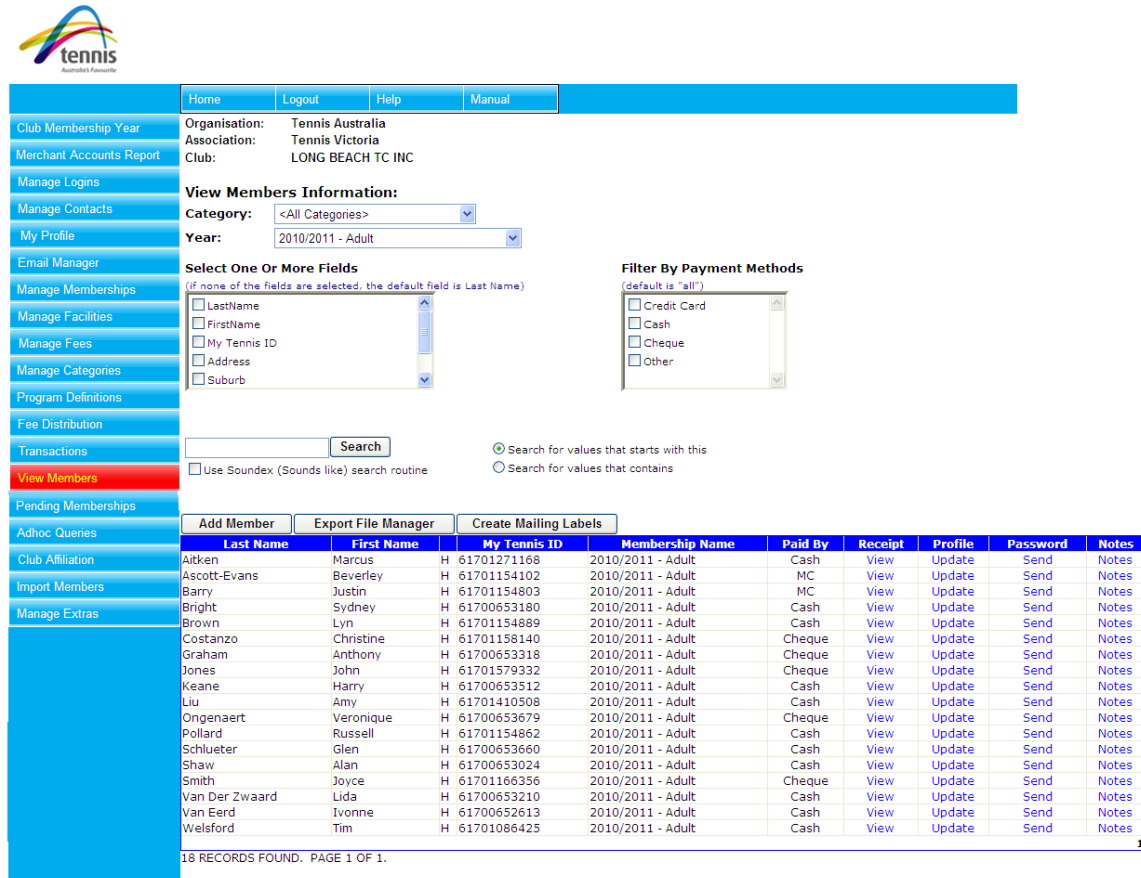
Other options to search by include:

- First Name
- My Tennis ID

- Street Address
- Suburb
- State

If you search by street address and know only the name of the street, be sure to select the “search for values that contains” option. Otherwise the system assumes you are searching for a value that begins with the value you have provided.

A search returns a list of those members that match. Searching without a “search for” value returns all members. Shown below is a sample of information returned:



The screenshot displays the 'View Members' results page. At the top, there are navigation links for Home, Logout, Help, and Manual. Below these, the system information is shown: Organisation: Tennis Australia, Association: Tennis Victoria, and Club: LONG BEACH TC INC. The 'View Members Information' section includes a 'Category' dropdown set to '<All Categories>' and a 'Year' dropdown set to '2010/2011 - Adult'. There are two filter sections: 'Select One Or More Fields' (with options for LastName, FirstName, My Tennis ID, Address, and Suburb) and 'Filter By Payment Methods' (with options for Credit Card, Cash, Cheque, and Other). A search bar is present with a 'Search' button and radio buttons for search criteria: 'Search for values that starts with this' (selected) and 'Search for values that contains'. Below the search filters, there are buttons for 'Add Member', 'Export File Manager', and 'Create Mailing Labels'. The main content is a table with 18 records, each with columns for Last Name, First Name, My Tennis ID, Membership Name, Paid By, Receipt, Profile, Password, and Notes. The table is paginated to show 18 records found on page 1 of 1.

Last Name	First Name	My Tennis ID	Membership Name	Paid By	Receipt	Profile	Password	Notes
Atken	Marcus	H 61701271168	2010/2011 - Adult	Cash	View	Update	Send	Notes
Ascott-Evans	Beverley	H 61701154102	2010/2011 - Adult	MC	View	Update	Send	Notes
Import Members	Barry	H 61701154803	2010/2011 - Adult	MC	View	Update	Send	Notes
Bright	Sydney	H 61700653180	2010/2011 - Adult	Cash	View	Update	Send	Notes
Manage Extras	Brown	H 61701154889	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Costanzo	H 61701158140	2010/2011 - Adult	Cheque	View	Update	Send	Notes
	Graham	H 61700653318	2010/2011 - Adult	Cheque	View	Update	Send	Notes
	Jones	H 61701579332	2010/2011 - Adult	Cheque	View	Update	Send	Notes
	Keane	H 61700653512	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Liu	H 61701410508	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Ongenaert	H 61700653679	2010/2011 - Adult	Cheque	View	Update	Send	Notes
	Pollard	H 61701154862	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Schlueter	H 61700653660	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Shaw	H 61700653024	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Smith	H 61701166356	2010/2011 - Adult	Cheque	View	Update	Send	Notes
	Van Der Zwaard	H 61700653210	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Van Eerd	H 61700652613	2010/2011 - Adult	Cash	View	Update	Send	Notes
	Welsford	H 61701086425	2010/2011 - Adult	Cash	View	Update	Send	Notes

Figure 18: View Members – Results


- Last Name (surname)
- First Name
- Head of Household Indicator
  - H indicates Head of Household in Family Memberships and all Individual Memberships; Blank indicates a Family Member in Family Memberships
- My Tennis ID
- Membership Name
- Paid By (Cash, Cheque, Credit)
- Receipt
- Profile
- Password
- Notes

The View Members Screen has four operational functions that can be performed.

Receipt	Profile	Password	Notes
<a href="#">View</a>	<a href="#">Update</a>	<a href="#">Send</a>	<a href="#">Notes</a>

Figure 57: View Members – Functions

Select **View** in the appropriate row under the **Receipt** column to display the payment receipt. The Receipt Function allows the administrator to send another receipt to the user via email by selecting the **Resend Email** button as shown on the screen that follows.



**DROUIN TC INC MEMBERSHIP REGISTRATION**

---

**Your Payment Receipt**  
[Tax Invoice](#)

<b>Account Name</b>	Allison Mc Arthur
<b>Receipt ID</b>	1-7-30-685549
<b>Association Name</b>	Tennis Victoria
<b>A.B.N.</b>	98 513 527 898
<b>Category Name</b>	Adult Membership
<b>Club Name</b>	DROUIN TC INC
<b>Membership Period</b>	01-Nov-2010 --> 31-Oct-2011
<b>My Tennis ID</b>	61701586207
<b>Total Cost</b>	\$80.00 AUD
<b>Total Amount Paid</b>	\$80.00 AUD
<b>Card Type</b>	---
<b>Card Number</b>	---
<b>Approval Number</b>	Cash
<b>Date Paid</b>	07-Dec-2010

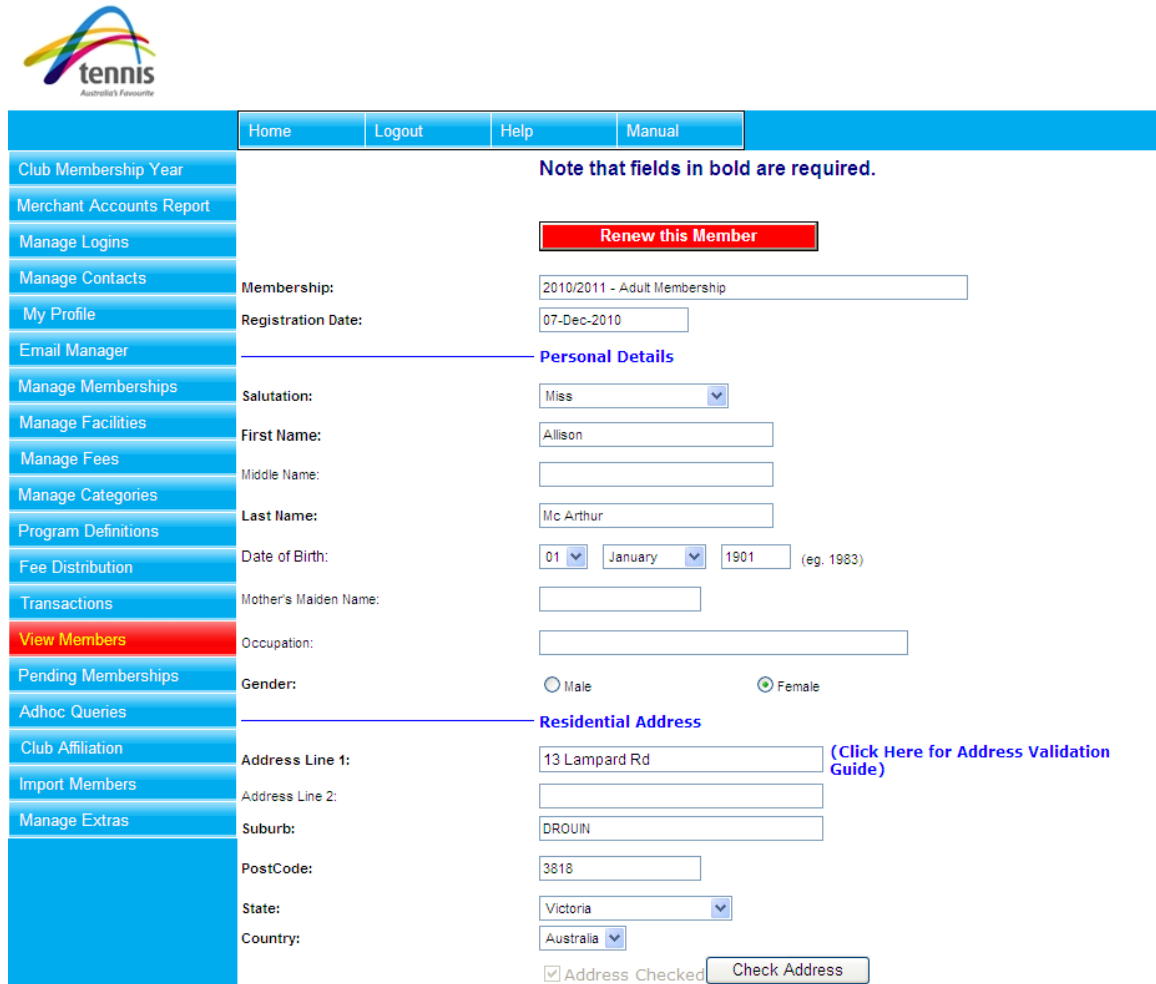
Registration	Fee
Tennis Victoria	\$24.00
DROUIN TC INC	\$56.00

Total amount paid includes processing fees and any optional membership extras selected during this membership registration process.

Figure 58: View Members – Receipt

Select **Update** in the appropriate row under the **Profile** column to display the member profile as shown on the screen that follows. The **Update** function allows the club administrator to update profiles (change mailing address, change email address, etc.) as well as renew existing members.

**Please Note:** Only the top part of the Profile Screen is displayed.



**Note that fields in bold are required.**

**Renew this Member**

Membership: 2010/2011 - Adult Membership

Registration Date: 07-Dec-2010

**Personal Details**

Salutation: Miss

First Name: Allison

Middle Name:

Last Name: Mc Arthur

Date of Birth: 01 January 1901 (eg. 1983)

Mother's Maiden Name:

Occupation:

Gender:  Male  Female

**Residential Address**

Address Line 1: 13 Lampard Rd [\(Click Here for Address Validation Guide\)](#)

Address Line 2:

Suburb: DROUIN

PostCode: 3818

State: Victoria

Country: Australia

Address Checked

**Figure 59: View Members – Update**

Select **Send** in the appropriate row under the **Password** column to display a screen that allows the club administrator to send the member their password to the email address in their profile. The pertinent information and various options for the Send Password function are shown on the screen that follows.


<b>Organisation:</b>	Tennis Australia
<b>Association:</b>	Tennis Victoria
<b>Club:</b>	DROUN TC INC
<b>Send Password Via Email To Member:</b>	
<b>Account Name:</b>	Allison Mc Arthur
<b>My Tennis ID :</b>	61701586207
<b>Email Address:</b>	kate_mc99@hotmail.com
<b>Reset Password:</b> (Optional)	<input type="checkbox"/> Generate A New Password And Send It
<b>Add Note To This Email:</b> (Optional)	<input type="text"/>
<input type="button" value="Send EMAIL"/> <input type="button" value="Cancel"/>	

Figure 60: View Members - Send Password

The send **Password** function has the option to send the existing password as stored in the database or to generate a new password. Once the member signs on to their profile they can change the password. Passwords are not sent in the clear. Rather than clear text, an image of the password is sent in the email.

There is also an option to add a note to the email that is sent with the password.

Select **Notes** in the appropriate row under the **Notes** column to show the information that is displayed on the screen that follows.



Home	Logout	Help	Manual
Club Membership Year	Member Name: <input type="text" value="Beaurain Timothy"/>		
Merchant Accounts Report	Member ID: <input type="text" value="61701581469"/>		
Manage Logins	Notes		
Manage Contacts	<b>Date Added</b>	<b>Note</b>	<b>Visible To User</b>
My Profile	10-Jan-2011	This is a test note for documentation purposes	No
Email Manager	<input type="button" value="Maintain Notes"/>		
Manage Memberships	State Memberships		
Manage Facilities	<b>Year</b>	<b>Name</b>	<b>Begin Date</b> <b>End Date</b>
Manage Fees	2010/2011	Country Individual	01-Nov-2010    31-Oct-2011
Manage Categories	Club Memberships		
Program Definitions	<b>Club</b>	<b>Year</b>	<b>Name</b> <b>Begin Date</b> <b>End Date</b>
Fee Distribution	DROUIN TC INC	2010/2011	Junior Membership    01-Nov-2010    31-Oct-2011
Transactions	Association Purchases		
<b>View Members</b>	Club Purchases		
Pending Memberships	<b>Product</b>	<b>Quantity</b>	<b>Price</b> <b>Date Ordered</b> <b>Date Fulfilled</b>
Adhoc Queries	Junior Comp Fee	1	20    03-Dec-2010    03-Dec-2010
Club Affiliation			
Import Members			
Manage Extras			

**Figure 61: View Members – Notes**

The **Notes** function permits you to add any notes about a member. A note can be anything that is deemed as appropriate by the club to carry with a person's profile. Files can be uploaded to be included with the notes. Any communication with the Email Manager will be recorded as a note to the member. In addition to Notes, information about State Memberships, Club Memberships, Association (State) Extras purchases and Club Extras Purchases are also displayed with the member's other information on the Note Screen.

To create new note, read an existing note, or update an existing note select the **Maintain Notes** button in the Notes section of the View Members – Note Screen, the following screen will be displayed.



Home   Logout   Help   Manual

- Club Membership Year
- Merchant Accounts Report
- Manage Logins
- Manage Contacts
- My Profile
- Email Manager
- Manage Memberships
- Manage Facilities
- Manage Fees
- Manage Categories
- Program Definitions
- Fee Distribution
- Transactions
- View Members**
- Pending Memberships
- Adhoc Quenes
- Club Affiliation
- Import Members
- Manage Extras

## Manage Notes

**Member Name:**

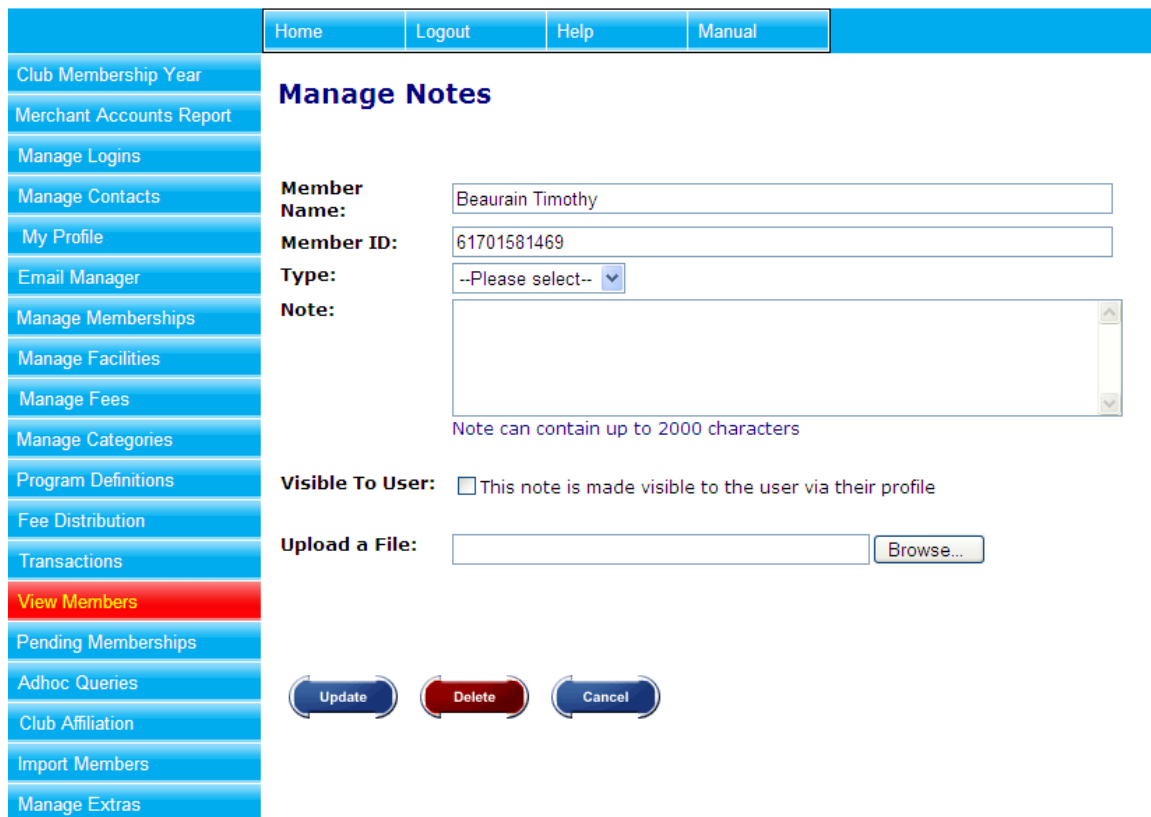
**Member ID:**

Date Added	Note	Visible To User	Update
10-Jan-2011	This is a test note for documentation purp...	No	<input type="button" value="Update"/>

**Figure 62: View Members – Manage Notes**

To create new note select the **Add** button and the following screen will be displayed.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
**View Members**  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

### Manage Notes

**Member Name:** Beaurain Timothy

**Member ID:** 61701581469

**Type:** --Please select--

**Note:**

Note can contain up to 2000 characters

**Visible To User:**  This note is made visible to the user via their profile

**Upload a File:**  Browse...

Update Delete Cancel

**Figure 63: View Members – Manage Notes – Add Note**

1. Select the type of note this is from the **Type** drop down field. This is a required field.
2. Enter the text for the note in the **Note** field. This note can contain up to 2000 characters. This is a required field.
3. Select the tick box if this note is to be made **Visible to the User**.
4. To add an attachment, in the select the Browse button. This will allow you to pull a document, email, picture, etc. from your computer. The file name is displayed in the **Upload a File** field. The file will be saved with the note on the My Tennis server. This is not a required field.
5. Select the **Update** button. This will save the note and attachment. It will also add the user id and date/time stamp to this note.

To read more than the first line of an existing note, update an existing note, view the attachment linked to an existing note or to delete an existing note, select the **Update** button. The following screen will be displayed.



	Home	Logout	Help	Manual						
Club Membership Year	<h2>Manage Notes</h2> <p><b>Member Name:</b> <input type="text" value="Beaurain Timothy"/></p> <p><b>Member ID:</b> <input type="text" value="61701581469"/></p> <p><b>Type:</b> <input type="text" value="Other"/></p> <p><b>Note:</b> <input type="text" value="This is a test note for documentation purposes"/></p> <p>Note can contain up to 2000 characters</p> <p><b>Visible To User:</b> <input type="checkbox"/> This note is made visible to the user via their profile</p> <p><b>Upload a File:</b> <input type="text"/> <input type="button" value="Browse..."/></p> <table border="1"> <thead> <tr> <th>Type</th> <th>File Name</th> <th>Select</th> </tr> </thead> <tbody> <tr> <td></td> <td>There are no Files for this member</td> <td>View</td> </tr> </tbody> </table> <p><b>Created:</b> <input type="text" value="10-Jan-2011 09:31:54"/></p> <p><b>Last Updated:</b> <input type="text" value="---"/></p> <p> <input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/> </p>				Type	File Name	Select		There are no Files for this member	View
Type					File Name	Select				
					There are no Files for this member	View				
Merchant Accounts Report										
Manage Logins										
Manage Contacts										
My Profile										
Email Manager										
Manage Memberships										
Manage Facilities										
Manage Fees										
Manage Categories										
Program Definitions										
Fee Distribution										
Transactions										
<b>View Members</b>										
Pending Memberships										
Adhoc Queries										
Club Affiliation										
Import Members										
Manage Extras										

**Figure 64: View Members – Manage Notes – Update Note**

On this screen you can optionally:

1. Change the type of note by selecting a new type from the **Type** drop down field. This is a required field.
2. Enter additional text to the note in the **Note** field. This note can contain up to 2000 characters. This is a required field.
3. Change the tick box selection controlling if this note is to be made **Visible to the User**.
4. Add new attachment(s). To add an attachment, in the select the Browse button. This will allow you to pull a document, email, picture, etc. from your computer. The file name is displayed in the **Upload a File** field. The file will be saved with the note on the My Tennis server. This is not a required field.
5. View an existing attachment by selecting **View** in the select column in the row showing the attachment to be viewed.
6. Select the **Update** button. This will save the note and attachment(s). It will also add the user id and date/time stamp to this note.

To delete a note entry, select the **Delete** button. A pop-up message is displayed. This pop-up message asks 'Are you sure?' To continue with the delete select the **OK** button. The note list is displayed along with a successful delete message.

To stop the delete select the **Cancel** button.

Additional information about memberships and extras purchased by the member depicted on the notes page are display only and are as follows:

#### State Memberships

A grid will display showing the state memberships purchased by the member and include the State Membership Years, Membership Names, and the Begin and end dates of the memberships.

#### Club Memberships

A grid will display showing the club memberships purchased by the member and include the Club Membership Years, Membership Names, and the Begin and end dates of the memberships.

#### Association Purchases

A grid will display showing the Association (state) level Extras purchased by the member and include the Product Names, Quantity, Price, Date Purchased and Date fulfilled of each item purchased.

#### Club Purchases

A grid will display showing the Club level Extras purchased by the member and include the Product Names, Quantity, Price, Date Purchased and Date fulfilled of each item purchased.

Along with the search results which include the additional functions discussed, there are three options provided to the club administrator.

- Add Member
- Export File Manager
- Create Mailing Labels

If you are adding a new member, then click the **Add Member** button. The following screen will be displayed to determine if a prospective new member exists.



	Home	Logout	Help	Manual
--	------	--------	------	--------

- Club Membership Year
- Merchant Accounts Report
- Manage Logins
- Manage Contacts
- My Profile
- Email Manager
- Manage Memberships
- Manage Facilities
- Manage Fees
- Manage Categories
- Program Definitions
- Fee Distribution
- Transactions
- View Members**
- Pending Memberships
- Adhoc Queries
- Club Affiliation
- Import Members
- Manage Extras

Select Membership Type :

My Tennis ID :

Account Name :

Address :

Surburb :

State :

Post Code :

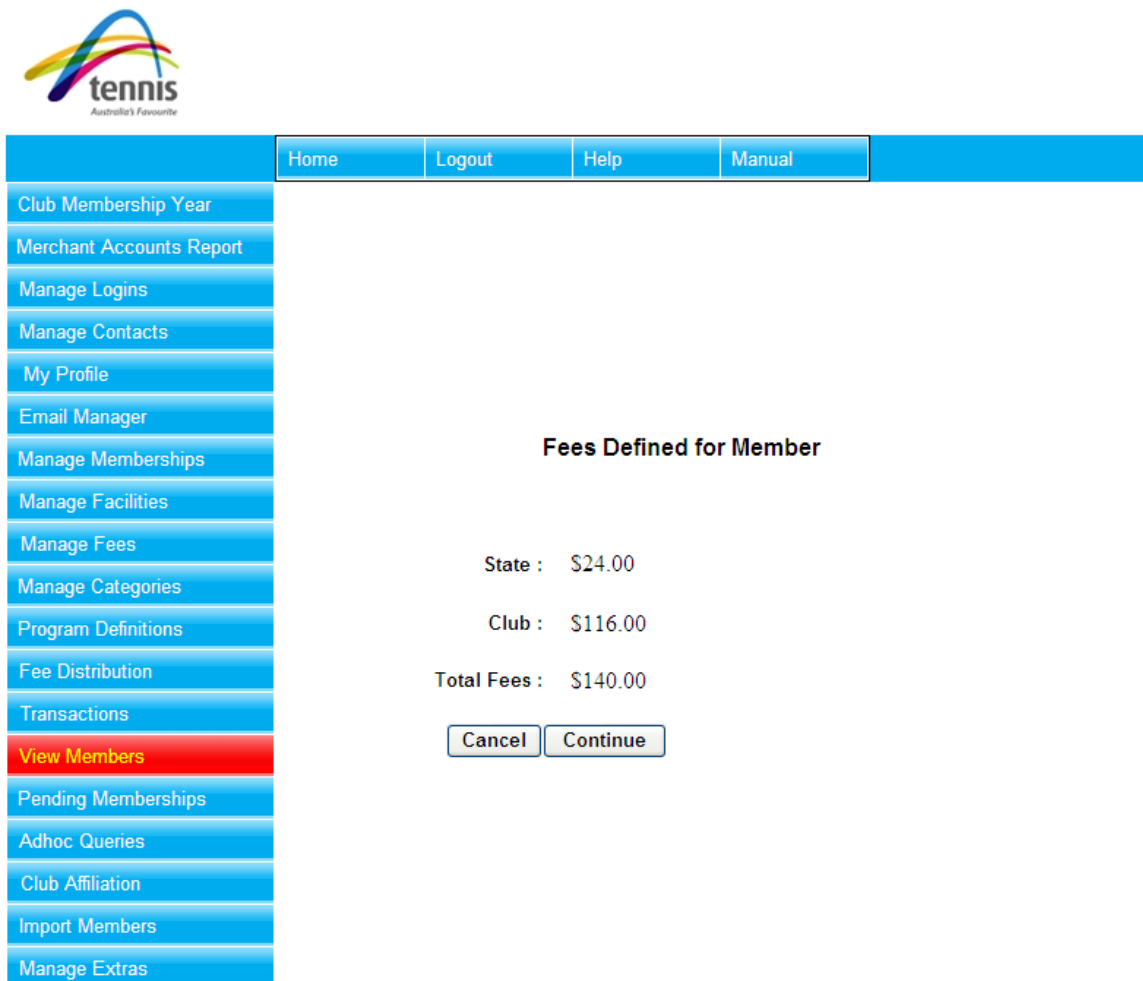
Existing Member  New Member

**Figure 65: View Members – Find Member**

Select the Membership type in the **Select Membership Type** field.

To search to see if the member exists in the database enter either the My Tennis ID in the **My Tennis ID** field and select **Check by Tennis ID** or the member's address in the Address field and select Check by Address. If the member exists, the Existing member option will be automatically selected and when you continue, the member's profile will be displayed for you to verify and update. It is always a good idea to select to search for the member first, which would help prevent duplicates.

If the member does not exist in the database, select **New Member** and Continue. The next screen is displayed:

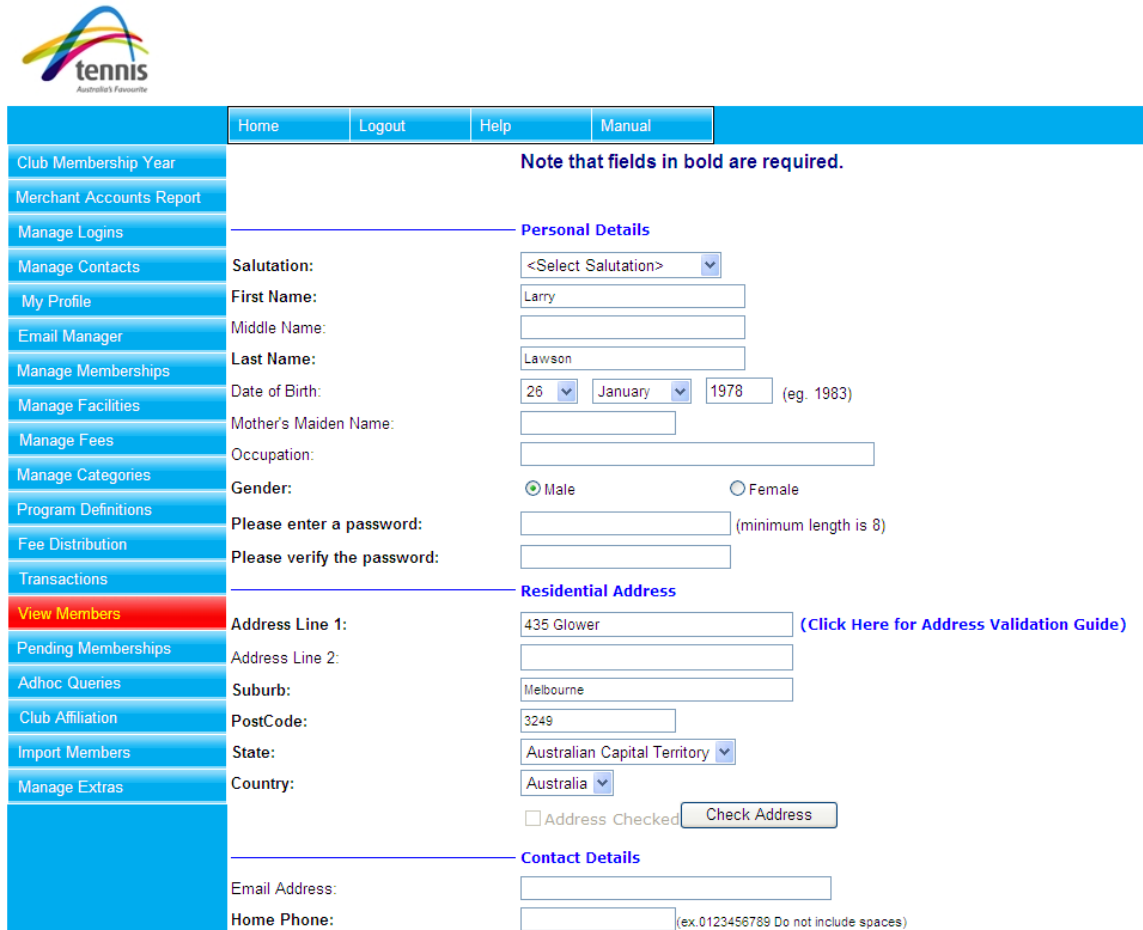


Navigation	Content
Home	
Logout	
Help	
Manual	
Club Membership Year	
Merchant Accounts Report	
Manage Logins	
Manage Contacts	
My Profile	
Email Manager	
Manage Memberships	
Manage Facilities	
Manage Fees	
Manage Categories	
Program Definitions	
Fee Distribution	
Transactions	
<b>View Members</b>	<b>Fees Defined for Member</b>
Pending Memberships	State : \$24.00
Adhoc Queries	Club : \$116.00
Club Affiliation	Total Fees : \$140.00
Import Members	<input type="button" value="Cancel"/> <input type="button" value="Continue"/>
Manage Extras	

**Figure 66: View Members – Add Member – Fee Verification**

Depending on the type of membership chosen on the previous screen, fees are calculated and displayed on this screen. Click on Continue to move to the next screen which gathers profile information for the new member.

**Please Note:** Only the top part of the Profile Screen is displayed.



**Note that fields in bold are required.**

**Personal Details**

Salutation: <Select Salutation> (dropdown)

First Name: Larry

Middle Name: (empty)

Last Name: Lawson

Date of Birth: 26 January 1978 (eg. 1983)

Mother's Maiden Name: (empty)

Occupation: (empty)

Gender:  Male  Female

Please enter a password: (empty) (minimum length is 8)

Please verify the password: (empty)

**Residential Address**

Address Line 1: 435 Glower (Click Here for Address Validation Guide)

Address Line 2: (empty)

Suburb: Melbourne

PostCode: 3249

State: Australian Capital Territory (dropdown)

Country: Australia (dropdown)

Address Checked

**Contact Details**

Email Address: (empty)

Home Phone: (empty) (ex. 0123456789 Do not include spaces)

**Figure 67: View Members – Add Member - Profile**

Enter all the information that is requested on the screen. First Name, Middle Name, Last Name, Date of Birth, Mother's Maiden Name, Occupation, Gender, Password, Residential Address, Contact Details, Emergency Contact, Work Information, Mailing Address, Medical Information. The fields that are marked bold are required fields.

Addresses are verified by the data validation software. Once the address is entered; the **Check Address** button must be selected. The software will check the validity of the address. Matches for the address will be listed. Below is an example of the address check functionality.

**Select appropriate address:**

<input type="radio"/>	33/44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33 44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33, Level 3 44 Cumberland Street, THE ROCKS NSW 2000
< >	

Select the correct address from the list by selecting the option in the row that list the correct address. Then **Select Correct Address** button. The selected address will populate the address fields.

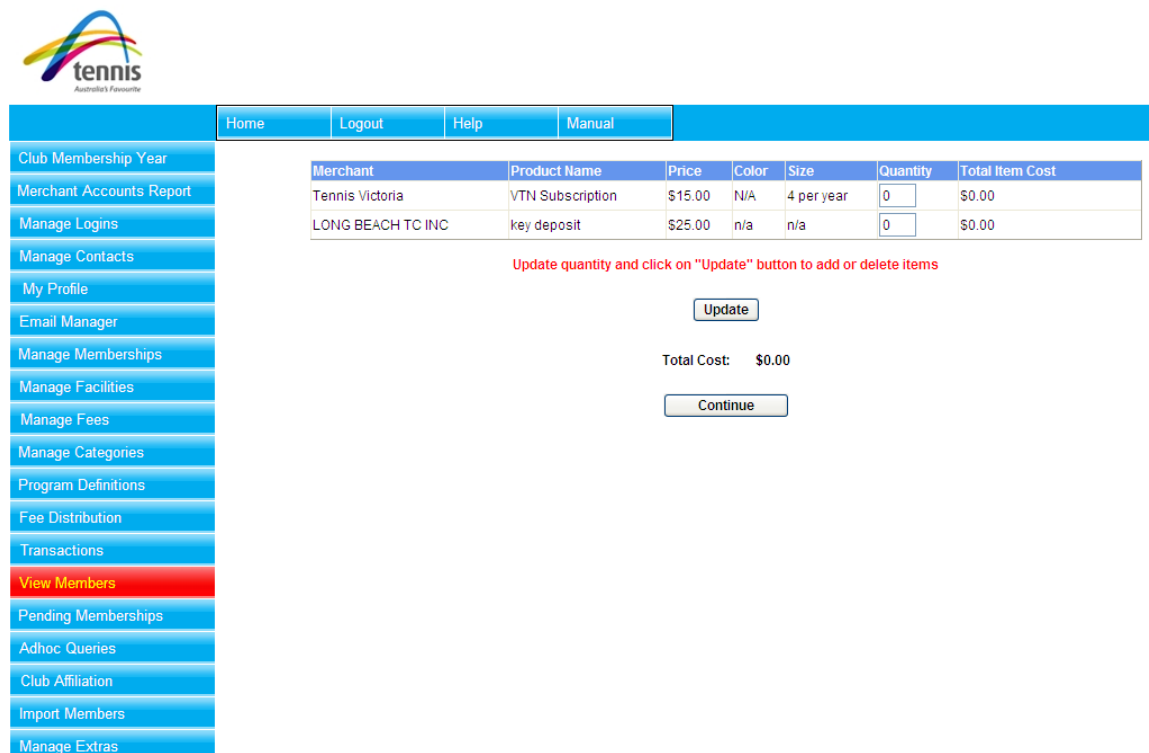
If the correct address is not listed, try again. Abbreviations may cause problems so spelling the whole word such as 'street' may return better results. In addition, removing the street or road may increase your results helping you find the address match.

[\(Click Here for Address Validation Guide\)](#)

Use the on screen link [\(Click here for Address Validation Guide\)](#) for additional hints for finding a correct address.

When all information has been entered and the address validations completed select the **Continue** button to move to the next screen.

If the state or club has Extras set up for members to purchase during the registration process, then the following screen will be displayed.



The screenshot shows the 'View Members' interface. On the left is a navigation menu with 'View Members' highlighted. The main content area features a table of extras:

Merchant	Product Name	Price	Color	Size	Quantity	Total Item Cost
Tennis Victoria	VTN Subscription	\$15.00	N/A	4 per year	<input type="text" value="0"/>	\$0.00
LONG BEACH TC INC	key deposit	\$25.00	n/a	n/a	<input type="text" value="0"/>	\$0.00

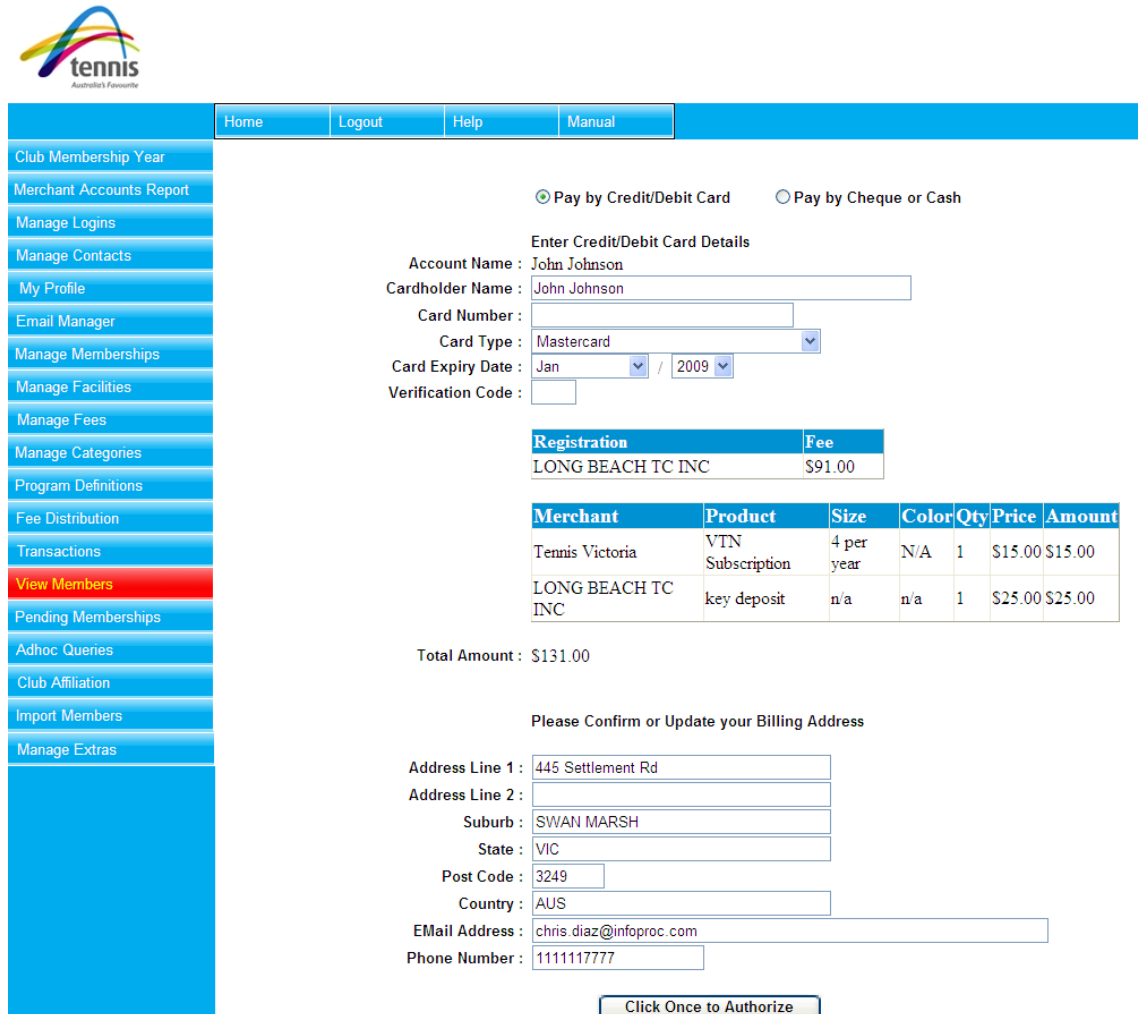
Below the table, there is a red instruction: "Update quantity and click on 'Update' button to add or delete items". An "Update" button is present. Below that, the "Total Cost: \$0.00" is displayed, followed by a "Continue" button.

**Figure 68: View Members – Add Member – Purchase Extras**

During the registration process, club administrators can select Extras for purchase as offered on this screen on behalf of the member.

To select an Extra, place the quantity desired in the row(s) of the Extra(s) to be purchased. Select the **Update** button to update the list and calculate cost for Extra(s) to be purchased.

If no Extras are to be purchased or if the total cost for Extras has been calculated, select the **Continue** button. The following screen will be displayed. If there are no Extras set up at the state or club level, this screen will be displayed when the profile page has been completed.



Pay by Credit/Debit Card     Pay by Cheque or Cash

Enter Credit/Debit Card Details

Account Name : John Johnson

Cardholder Name : John Johnson

Card Number : \_\_\_\_\_

Card Type : Mastercard

Card Expiry Date : Jan / 2009

Verification Code : \_\_\_\_\_

Registration	Fee
LONG BEACH TC INC	\$91.00

Merchant	Product	Size	Color	Qty	Price	Amount
Tennis Victoria	VTN Subscription	4 per year	N/A	1	\$15.00	\$15.00
LONG BEACH TC INC	key deposit	n/a	n/a	1	\$25.00	\$25.00

Total Amount : \$131.00

Please Confirm or Update your Billing Address

Address Line 1 : 445 Settlement Rd

Address Line 2 : \_\_\_\_\_

Suburb : SWAN MARSH

State : VIC

Post Code : 3249

Country : AUS

E-Mail Address : chris.diaz@infoproc.com


Phone Number : 111117777

**Figure 69: View Members – Add Member – Payment Screen – Credit Card**

If the club does not have a merchant account set up to process credit cards a message will be displayed explaining that credit cards are not accepted and to please choose Cheque, Cash or EFT.

Select the mode of payment and fill in the respective information. The above screen shows the fields that are to be filled in when paying by a credit/debit card. Enter the information and select **Click Once to Authorize** to complete the payment process.

Now, the member is successfully added and the following screen showing the receipt is displayed.



LONG BEACH TC INC MEMBERSHIP REGISTRATION

**Your Payment Receipt**

<b>A.B.N.</b>	81 557964 004
<b>Account Name</b>	John Johnson
<b>Receipt ID</b>	1-7-38-684500-878661
<b>Association Name</b>	Tennis Victoria
<b>Membership Type</b>	Pensioner
<b>Club Name</b>	LONG BEACH TC INC
<b>Membership Period</b>	01-Jul-2010 -- > 30-Jun-2011
<b>My Tennis ID</b>	61701579340
<b>Total Cost</b>	\$131.00
<b>Total Amount Paid</b>	\$131.00
<b>Card Type</b>	MasterCard
<b>Card Number</b>	512XXXXXXXXXX2346
<b>Approval Number</b>	A-020362
<b>Today's Date</b>	10-Jan-2011
<b>Please Note</b>	This charge will appear on your card statement as Tennis Victoria

Registration	Fee
LONG BEACH TC INC	\$91.00

Merchant	Product	Size	Color	Qty	Price	Total
Tennis Victoria	VTN Subscription	4 per year	N/A	1	\$15.00	\$15.00
LONG BEACH TC INC	key deposit	n/a	n/a	1	\$25.00	\$25.00

Total amount paid includes processing fees and any optional membership extras selected during this membership registration process.

To log in to your profile please visit [www.tennis.com.au/mytennis](http://www.tennis.com.au/mytennis). If you have any questions, you can contact our helpdesk via email at: [support@sportsmarketing.com.au](mailto:support@sportsmarketing.com.au).

We hope you enjoy being a part of the My Tennis community.

**Figure 70: View Members – Add Member – Credit Card Receipt**

Print the receipt by clicking print button and click on **Home** button to go the View Members screen

If Pay by Cheque, Cash or EFT is selected the following screen is displayed.



	Home	Logout	Help	Manual
--	------	--------	------	--------

- Club Membership Year
- Merchant Accounts Report
- Manage Logins
- Manage Contacts
- My Profile
- Email Manager
- Manage Memberships
- Manage Facilities
- Manage Fees
- Manage Categories
- Program Definitions
- Fee Distribution
- Transactions
- View Members**
- Pending Memberships
- Adhoc Queries
- Club Affiliation
- Import Members
- Manage Extras

### Process Check / Cash / EFT Payment

Name : John Johnson

Email Address :

Payment Method :

Cheque Number:

Bank Name :


Amount Due : 140.00

Amount Paid :

**Figure 71: View Members – Add Member – Other Payment Methods**

Enter the information and select **Post Payment** to complete the payment process.

Now, the member is successfully added and the following screen showing the receipt is displayed.



Tennis Victoria MEMBERSHIP REGISTRATION

---

**Your Registration Receipt**

<b>A.B.N.</b>	81 557964 004
<b>Account Name</b>	John Johnson
<b>Receipt ID</b>	1-7-24-684500-0
<b>Association Name</b>	Tennis Victoria
<b>Membership Type</b>	Adult
<b>Club Name</b>	LONG BEACH TC INC
<b>Membership Period</b>	01-Jul-2010 -- > 30-Jun-2011
<b>My Tennis ID</b>	61701579340
<b>Total Cost</b>	\$140.00
<b>Total Amount Due</b>	\$140.00
<b>Today's Date</b>	10-Jan-2011
<b>Please Note</b>	Print this receipt and keep for your record

Registration	Fee
Tennis Victoria	\$24.00
LONG BEACH TC INC	\$116.00

Total amount paid includes processing fees and any optional membership extras selected during this membership registration process.

To log in to your profile please visit [www.tennis.com.au/mytennis](http://www.tennis.com.au/mytennis). If you have any questions, you can contact our helpdesk via email at: [support@sportsmarketing.com.au](mailto:support@sportsmarketing.com.au).

We hope you enjoy being a part of the My Tennis community.

Figure 72: View Members – Add Member – Other Payment Methods Receipt

Print the receipt by clicking print button and click on **Home** button to go the View Members screen.

### EXPORT FILE MANAGER:

Once the search results are displayed in the View Members screen, the results can be exported to an excel sheet by clicking Export File Manager button. The file contains the entire member's profile information.

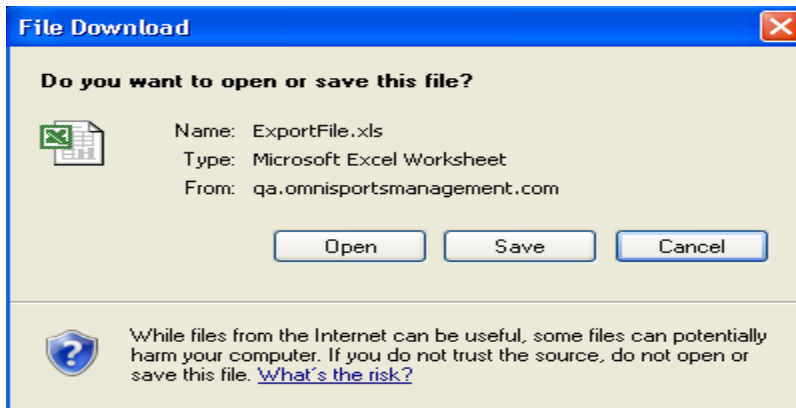


Figure 73: View Members – Export File Manager

Select the open option, to open the file. This is an internet version of the excel spreadsheet and does not format as well as the true excel version. To create a true excel version, select the Save button to save the document in the selected folder. Select Cancel to cancel the request.

### CREATE MAILING LABELS:

Once the search results are displayed in the View Members screen, View Members screen, the results can be exported to an excel sheet by clicking Export File Manager button. The file contains mailing address information that will allow the user to use mail merge. To create a mailing list, select **Create Mailing Labels** button. The file contains the mailing information listed in the file i.e., Name, Address, City, State and postcode.

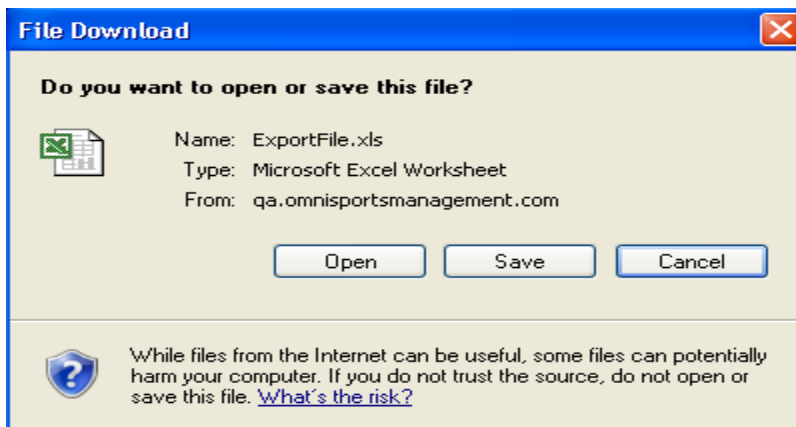


Figure 74: View Members – Create Mailing Labels

Select the open option, to open the file. This is an internet version of the excel spreadsheet and does not format as well as the true excel version. To create a true excel version, select the Save button to save the document in the selected folder. Select Cancel to cancel the request.

## Pending Memberships

Pending Memberships screen is used to display all the memberships that have pending status because the members registered online and selected a payment method other than credit card payments.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
**Pending Memberships**  
Adhoc Queries  
Club Affiliation  
Import Members  
Manage Extras

Organisation: Tennis Australia  
Association: Tennis Victoria  
Club: LONG BEACH TC INC

**Pending Membership Registrations**

Year	Name	Type	Begin Date	End Date	Amount	Update	Select
2010/2011 - Adult	Robert Robertson	Adult	01-Jul-2010	30-Jun-2011	140.00	<a href="#">Update</a>	<input type="checkbox"/>

Delete Selected Pending Memberships

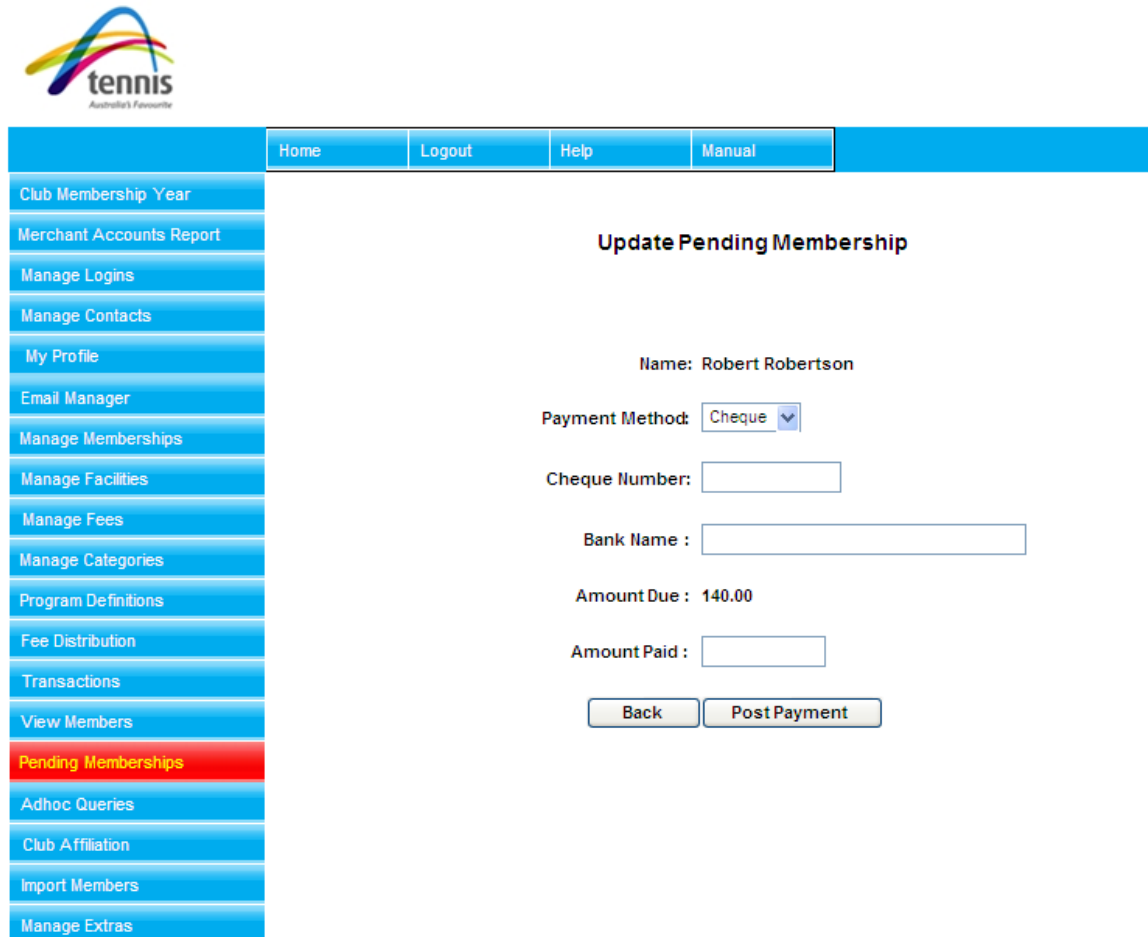
Figure 75: Pending Memberships

Pending Membership Registrations screen shows the following information

- Year
- Name
- Type
- Begin Date
- End Date
- Amount

There are also two functions available through the grid displayed. An **Update** link will allow the club administrator to process the payment.

Once the cheque, cash or EFT payment is received, select the **Update** link. The following screen will be displayed to update the payment information and to process the payment.



The screenshot shows a web interface for updating pending memberships. On the left is a vertical navigation menu with blue buttons for various functions: Club Membership Year, Merchant Accounts Report, Manage Logins, Manage Contacts, My Profile, Email Manager, Manage Memberships, Manage Facilities, Manage Fees, Manage Categories, Program Definitions, Fee Distribution, Transactions, View Members, Pending Memberships (highlighted in red), Adhoc Queries, Club Affiliation, Import Members, and Manage Extras. At the top of the main content area is a blue navigation bar with buttons for Home, Logout, Help, and Manual. The main content area is titled 'Update Pending Membership' and displays the following information and form fields:

- Name: Robert Robertson
- Payment Method: Cheque (dropdown menu)
- Cheque Number:
- Bank Name:
- Amount Due: 140.00
- Amount Paid:
- Buttons: Back and Post Payment

**Figure 76: Update Pending Memberships**

Select the Payment Method used for payment.

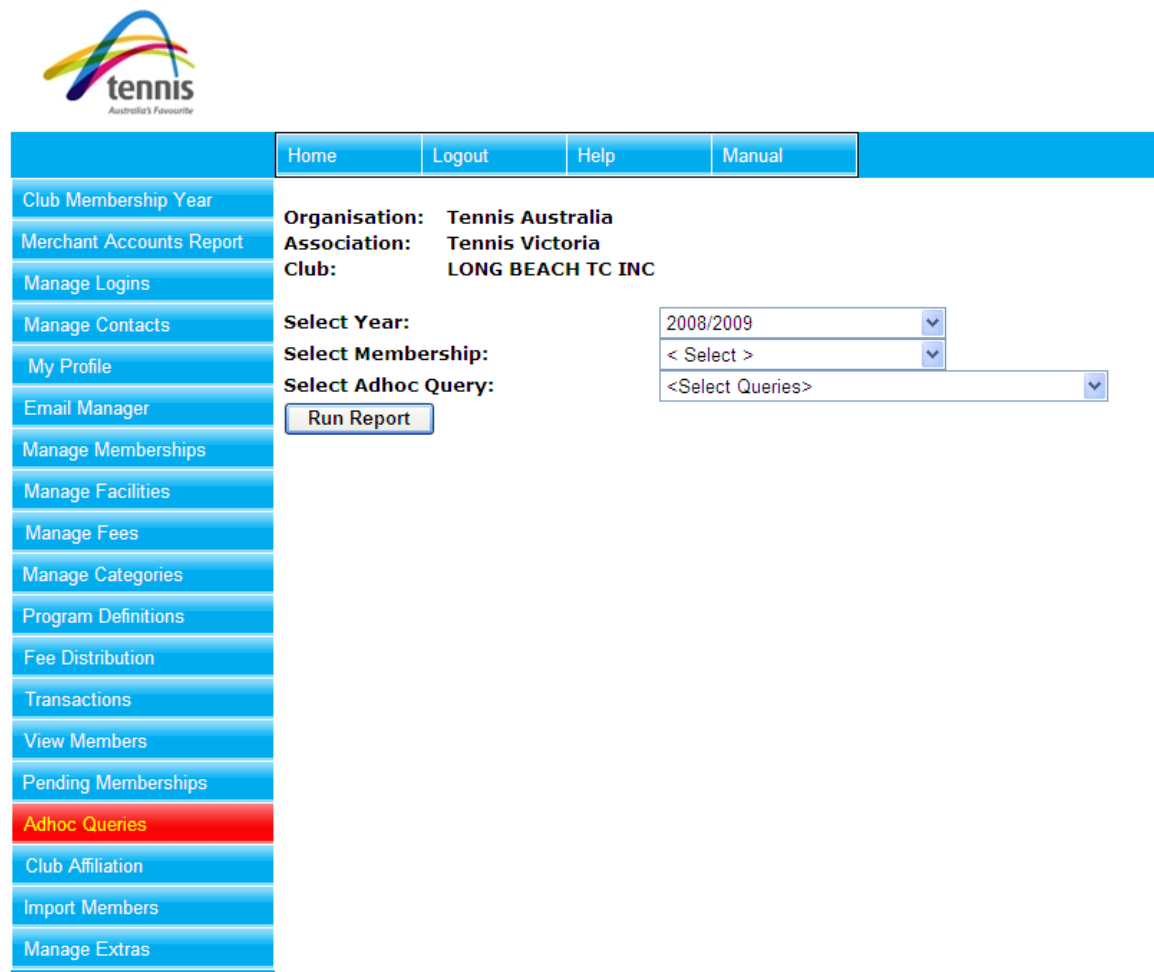
For Cheque, provide the Cheque Number, Bank Name and Amount Paid.  
For EFT, provide the EFT transaction information, Bank Name and Amount Paid.  
For Cash, provide the amount paid. (the screen will change dynamically as different payment method information is entered)

Select Post Payment to process the payment information. When the payment is processed the player is fully registered for the membership. A receipt will be mailed to the player with the payment information. Once the payment is posted the entry is removed from the Pending Memberships page.

A **Select** tick box will allow the club administrator to select pending memberships to be deleted using the **Delete Selected Pending Memberships** button.

## Ad-hoc Queries

Sometimes needed information is easily accessible through the existing functions in the MY TENNIS system. The MY TENNIS operations management team can usually make the needed information quickly accessible by creating database queries and posting them to this management page.





Home	Logout	Help	Manual
------	--------	------	--------

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
**Adhoc Queries**  
Club Affiliation  
Import Members  
Manage Extras

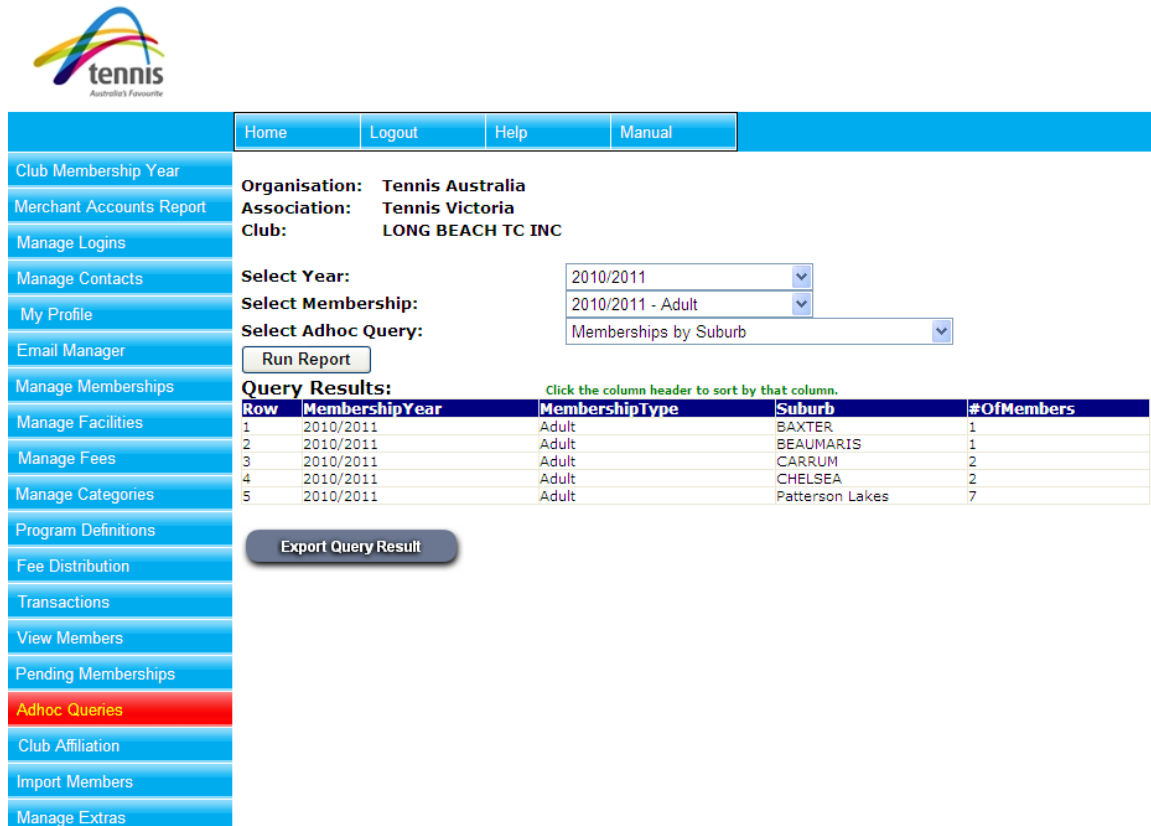
**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**Select Year:** 2008/2009  
**Select Membership:** < Select >  
**Select Adhoc Query:** <Select Queries>

Figure 77: Ad-hoc Queries - Home

1. Select the membership period (**Year**) to run the query against.
2. Select the Membership from the drop down list
3. Select the defined **Adhoc Query** from the drop down list.

A sample of an ad-hoc query request and its results are displayed on the following page.



The screenshot shows the 'Adhoc Queries' section of the My Tennis system. The left sidebar contains a menu with options like 'Home', 'Logout', 'Help', 'Manual', 'Club Membership Year', 'Merchant Accounts Report', 'Manage Logins', 'Manage Contacts', 'My Profile', 'Email Manager', 'Manage Memberships', 'Manage Facilities', 'Manage Fees', 'Manage Categories', 'Program Definitions', 'Fee Distribution', 'Transactions', 'View Members', 'Pending Memberships', 'Adhoc Queries' (highlighted), 'Club Affiliation', 'Import Members', and 'Manage Extras'. The main content area displays the following information:

**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

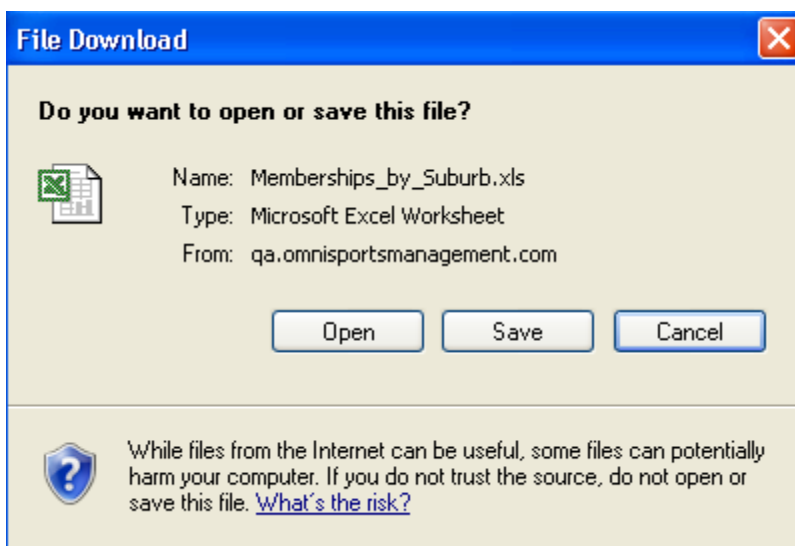
**Select Year:** 2010/2011  
**Select Membership:** 2010/2011 - Adult  
**Select Adhoc Query:** Memberships by Suburb

**Query Results:** Click the column header to sort by that column.

Row	MembershipYear	MembershipType	Suburb	#OfMembers
1	2010/2011	Adult	BAXTER	1
2	2010/2011	Adult	BEAUMARIS	1
3	2010/2011	Adult	CARRUM	2
4	2010/2011	Adult	CHELSEA	2
5	2010/2011	Adult	Patterson Lakes	7

**Figure 19: Ad-hoc Queries - Results**

When the Export Query Results button is clicked, the full query is executed on the database server and an Excel file is presented. You can open the file directly or save it to disk first.



**Figure 79: Ad-hoc Queries – Export Results**

## Club Affiliation

The Club Affiliation process is done on a yearly basis. The Club Affiliation is a series of screens that will allow you to review and update your club information.

The first screen is to initiate the process of creating the affiliation. If the club is not affiliated already to the current year, then the system asks the user to create affiliation for the current year.



The screenshot shows the 'Club Affiliation - Home' page. On the left is a vertical navigation menu with items like 'Merchant Accounts Report', 'Manage Logins', 'Manage Contacts', 'My Profile', 'Email Manager', 'Manage Memberships', 'Manage Facilities', 'Manage Fees', 'Manage Categories', 'Program Definitions', 'Fee Distribution', 'View Members', 'Pending Memberships', 'Adhoc Queries', 'Club Affiliation' (highlighted in red), and 'Import Members'. The main content area has a blue header with 'Home', 'Logout', and 'Help' buttons. Below the header, it displays club details: 'Organisation: Tennis Australia', 'Association: Tennis Victoria', and 'Club: 787 TENNIS INC'. Underneath, it says 'Manage Club Affiliation:' and 'Current Affiliation Year: 2009/10 Affiliation Year (From 01-Nov-2009 To 31-Oct-2010)'. A white box contains the text: 'You are eligible to register for the current year. Please click the button below and complete the required information.' Below this box is a 'Create Club Affiliation' button.

Figure 80: Club Affiliation – Home

Select the **Create Club Affiliation** button, the club details screen is displayed.

This information includes:

- Club Profile
  - Name
  - Mailing Address
  - Phone Numbers
  - Email
  - Website
  - ABN Number
- Club Office Bearers
- Court Information
- Facility Information

The Club Affiliation process is a similar to a wizard form. This is a four step process. This form will navigate you through the necessary information needed to be affiliated with the Club.

Once you affiliate with the state, you will have full functionality in the Club Management system, including setting up the system to allow membership registration.

The first step of the Club Affiliation Process is the Club information. The compulsory information is bolded.

Addresses are verified by the data validation software. Once the address is entered; the **Check Address** button must be selected. The software will check the validity of the address. Matches for the address will be listed. Below is an example of the address check functionality.

**Select appropriate address:**

<input type="radio"/>	33/44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33 44 Cumberland Street, THE ROCKS NSW 2000
<input type="radio"/>	Suite 33, Level 3 44 Cumberland Street, THE ROCKS NSW 2000
< >	
<input type="button" value="Select Correct Address"/>	

Select the correct address from the list by selecting the option in the row that list the correct address. Then **Select Correct Address** button. The selected address will populate the address fields.

If the correct address is not listed, try again. Abbreviations may cause problems so spelling the whole word such as 'street' may return better results. In addition, removing the street or road may increase your results helping you find the address match.

Once all the information is added and the questions answered, select the Next button to get to the second step of the Club Affiliation Process.

Note that fields in **bold** are required. Step 1 of 4

Club Affiliation Information	
<b>Club Name:</b>	LONG BEACH TC INC
<b>Mailing Address Line1:</b>	PO Box 96
Mailing Address Line2:	
<b>Suburb:</b>	PATTERSON LAKE
<b>Post Code:</b>	3197
<b>Country:</b>	Australia
<b>State:</b>	Victoria
	<input type="checkbox"/> Address Checked <input type="button" value="Check Address"/>
Phone:	03 97733460
Fax:	
<b>Email:</b>	longbeachtennisclub7@gmail.com
Website:	
ABN:	81 557964 004
<b>GST Registered:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
Do you have any development plans?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Do you have a business plan?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Have you provided input into the Performance bench mark indicators?	<input checked="" type="radio"/> Yes <input type="radio"/> No
The facility is:	<input checked="" type="radio"/> Leased <input type="radio"/> Owned <input type="radio"/> None
<input type="button" value="Next &gt;"/>	

Figure 81: Club Affiliation – Club Information

The Second Step of the Club Affiliation is the Club Contacts information. The Club will need the names, numbers and email addresses for the Club President, Club Treasurer and Club Secretary. During the process, you are able to add any additional contacts, but the three major offices are required. Once the contact information has been added, click on the Next button to move to the third step of the Club Affiliation Process.

Home Logout Help

Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
View Members  
Pending Memberships  
Adhoc Queries  
**Club Affiliation**  
Import Members

Note that fields in **bold** are required. Step 2 of 4

**Club President First Name:** Neal  
**Club President Last Name:** Gale  
**Club President Phone Number:** 9787 3711  
Club President Mobile Number:  
Club President Email Address:  
My Tennis ID: 61700011774

Email Notifications  SMS Notifications  Email and SMS Notifications  
*(SMS only available if Clubs are registered for SMS service. Otherwise, Notifications will default to email)*

**Club Treasurer First Name:**  
**Club Treasurer Last Name:**  
**Club Treasurer Phone Number:**  
Club Treasurer Mobile Number:  
Club Treasurer Email Address:  
My Tennis ID:

Email Notifications  SMS Notifications  Email and SMS Notifications  
*(SMS only available if Clubs are registered for SMS service. Otherwise, Notifications will default to email)*

**Club Secretary First Name:** Tony  
**Club Secretary Last Name:** Evans  
**Club Secretary Phone Number:** 9787 6212  
Club Secretary Mobile Number:  
Club Secretary Email Address:  
My Tennis ID: 61700011839

Email Notifications  SMS Notifications  Email and SMS Notifications  
*(SMS only available if Clubs are registered for SMS service. Otherwise, Notifications will default to email)*

Add Additional Contacts

< Back Next >

**Figure 82: Club Affiliation – Contact Information**

The Third Step of the Club Affiliation is the Club Contacts information. The system calculates the number of members you have in the previous membership year. This step also includes your Facility Information. This is broken down into two sections; the first section is about your court information.

Enter the Number of Courts in the row with the surface type. After the Total Count Number, there are specific criteria about those courts. Make sure these are defined for your courts, including when the courts were last resurfaced.

The second section is other features your facility offers. Check the features that are pertinent to your club.

Once the facility information has been added, click on the Next button to move to the fourth step of the Club Affiliation Process.

**Number of club members:**   
**How many total Courts do you have?**   
 Court for hire?  Yes  No **Phone Number:**

Surface Type	Total Count	Lighted Cnt	Indoor Cnt	Outdoor Cnt	Last Resurfaced		
Clay	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>
Grass	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>
Cushioned Hard Court	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>
Non-Cushioned Hard Court	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>
Other	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>
Synthetic Grass	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Day <input type="text"/>	Month <input type="text"/>	Year <input type="text"/>

- Your Facility Features:**
- Bar
  - Barbeque Facilities
  - Cafe
  - Change Rooms
  - Club House
  - Crèche Facility
  - Gym
  - Kiosk
  - Meeting Room
  - Pro Shop
  - Sauna
  - Showers
  - TV

**Figure 83: Club Affiliation – Courts Information**

The fourth step is the payment information. You will have an option to pay by credit/debit card or Pay by Cheque.

Enter the necessary information. If Paying by Cheque, the status of your club will be 'Pending' until the Club receives the payment.

Select '**Click Once to Complete Application**'. The receipt page is displayed on screen and emailed to the club's email address.

Note that fields in **bold** are required. Step 4 of 4

### Payment Information

Affiliation Fee for Membership 2009 - 2010: **\$175.00 AUD**  
(Fee is based on 120 Members in Membership Year 2009 - 2010)

**Club Name:** IPC Test Club 2

Pay by Cheque  Pay by Credit Card

**Card Holder's Name:**

**Credit Card Number:**

**Card Type:** Visa

**Expiry Date:** Jun  2009

**Verification Code:**  (need help finding this verification code?)

### Billing Address

**Billing Address:** 123 Street

Address Line 2:

**Suburb:** Dallas

**State:** TX

**Post Code:** 75000

**Country:** US

**Card Holder's email:** sgao@infoproc.com

Back

Click Once to Complete Application

Pay by Cheque  Pay by Credit Card

Please Mail Your Cheque to:  
Victoria  
Olympic Park Administration Building, Level 1  
Melbourne  
VIC  
3000  
You will receive a tax invoice via email once the check has been received. Please note that if your payment is not received in 60 days, your club will be disaffiliated.

Back

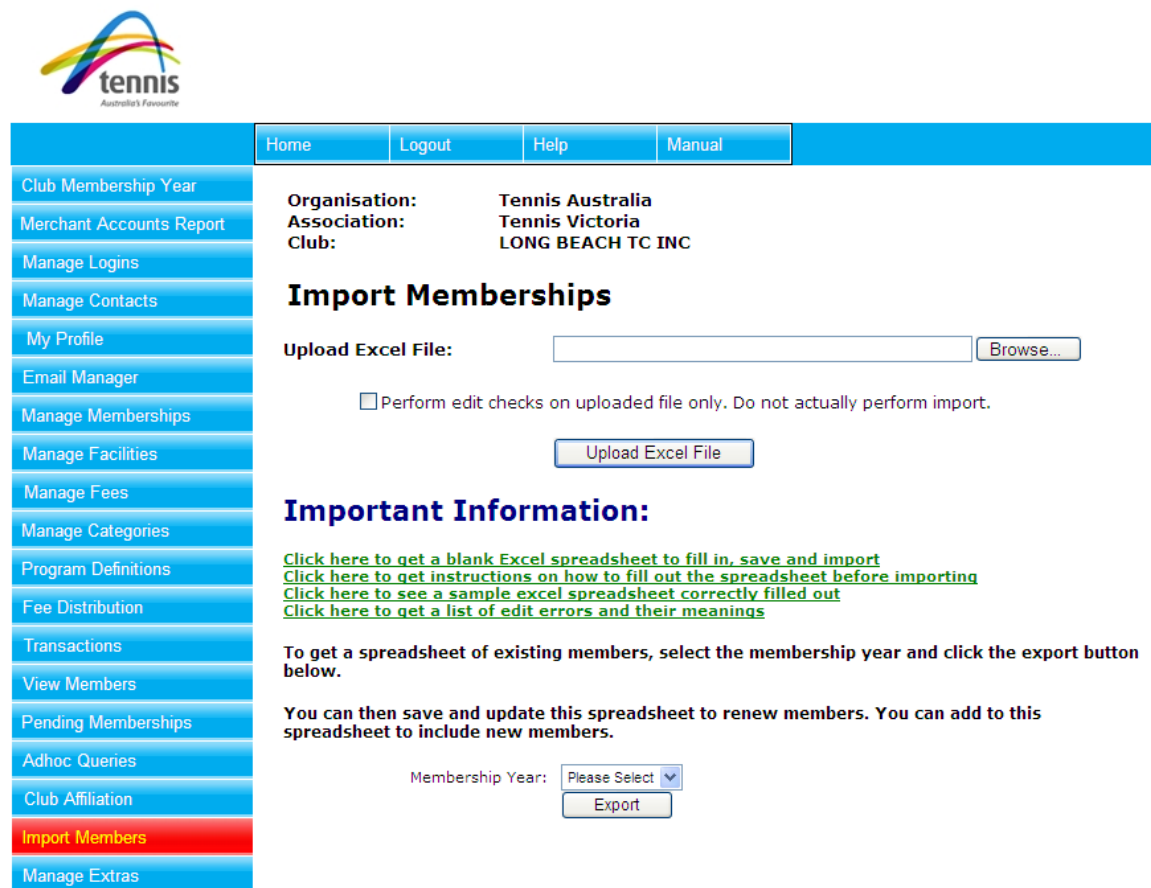
Click Once to Complete Application

Figure 84: Club Affiliation – Payment Information

## Import Members

The Import Members function will allow the club administrator to import member from an excel sheet. The format of this spread sheet must follow the guidelines set forth in the instructions referenced from the Import Members page. A blank excel spread sheet formatted correctly is available and a correctly formatted spread sheet with current members can be created.

On selecting the Import Members Menu Option, the Import Memberships page will be displayed.



Home Logout Help Manual

Club Membership Year  
Merchant Accounts Report  
Manage Logins  
Manage Contacts  
My Profile  
Email Manager  
Manage Memberships  
Manage Facilities  
Manage Fees  
Manage Categories  
Program Definitions  
Fee Distribution  
Transactions  
View Members  
Pending Memberships  
Adhoc Queries  
Club Affiliation  
**Import Members**  
Manage Extras

Organisation: Tennis Australia  
Association: Tennis Victoria  
Club: LONG BEACH TC INC

### Import Memberships

Upload Excel File:

Perform edit checks on uploaded file only. Do not actually perform import.

### Important Information:

[Click here to get a blank Excel spreadsheet to fill in, save and import](#)  
[Click here to get instructions on how to fill out the spreadsheet before importing](#)  
[Click here to see a sample excel spreadsheet correctly filled out](#)  
[Click here to get a list of edit errors and their meanings](#)

To get a spreadsheet of existing members, select the membership year and click the export button below.

You can then save and update this spreadsheet to renew members. You can add to this spreadsheet to include new members.

Membership Year:

Figure 85: Import Members

You can upload the excel file that is present in your computer by clicking the **Browse** button and navigating to the directory where the file is present.

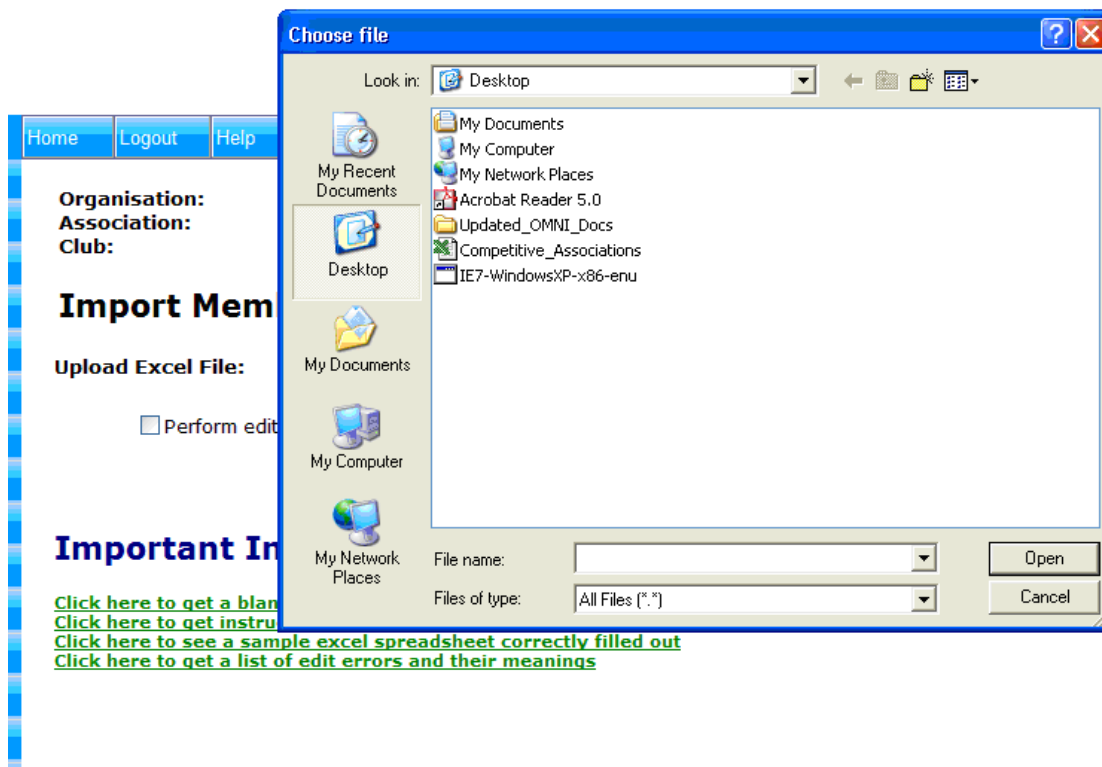


Figure 86: Import Members – Browse and Save

Select the **Upload Excel File** button to upload it. Use the tick box to control if the software will perform edit checks only or if the file will be uploaded if edit checks find no errors.

For the empty excel sheet, instructions, sample filled sheet, or error code definitions click the appropriate link on the Import Memberships screen.

For a list of the existing members of the club with all the necessary information for the upload process, select the membership year from the **Membership Year** drop down field, and then select **Export**. Save this file on your computer. When you open the file, it will contain all the members from the selected year. Add additional members as 'New' at the bottom of the excel spreadsheet. You also can remove any members that are not renewing. Make any necessary changes to the State and Club fees, along with membership types/ categories. Once this excel spreadsheet has been modified to your satisfaction, you will be able to save it on your computer and Upload the File using the Import Members Process.

## Manage Extras

The Manage Extras process will allow you define additional items to purchase during the registration process. The items can range from locker keys to t-shirts or tennis equipment. The Manage Extras screen also has the functionality to help the club audit the orders and mark the orders as fulfilled once the order has been satisfied. To access the screens to define and fulfill the extra orders, select **Manage Extras**.



The screenshot shows the 'Manage Extras' main screen. On the left is a vertical navigation menu with 'Manage Extras' highlighted in red. The main content area includes a navigation bar with 'Home', 'Logout', 'Help', and 'Manual'. Below this, it displays the user's organization details: Tennis Australia, Tennis Victoria, and LONG BEACH TC INC. A 'Manage Extras' section contains a table with two items: 'Decal' and 'key deposit'. Below the table is an 'Add' button.

Name	Size	Color	Price	Update	Manage Fulfillment
Decal	N/A	N/A	\$3.00	<a href="#">Update</a>	<a href="#">Fulfillment</a>
key deposit	n/a	n/a	\$25.00	<a href="#">Update</a>	<a href="#">Fulfillment</a>

**Figure 87: Manage Extras – Main Screen**

The information displayed includes:

- Name
- Size
- Color
- Price

The grid also includes an Update option and a Management Fulfillment option.

To Add an Extra, follow these steps:

1. Select the **Add** button. The following screen is displayed.

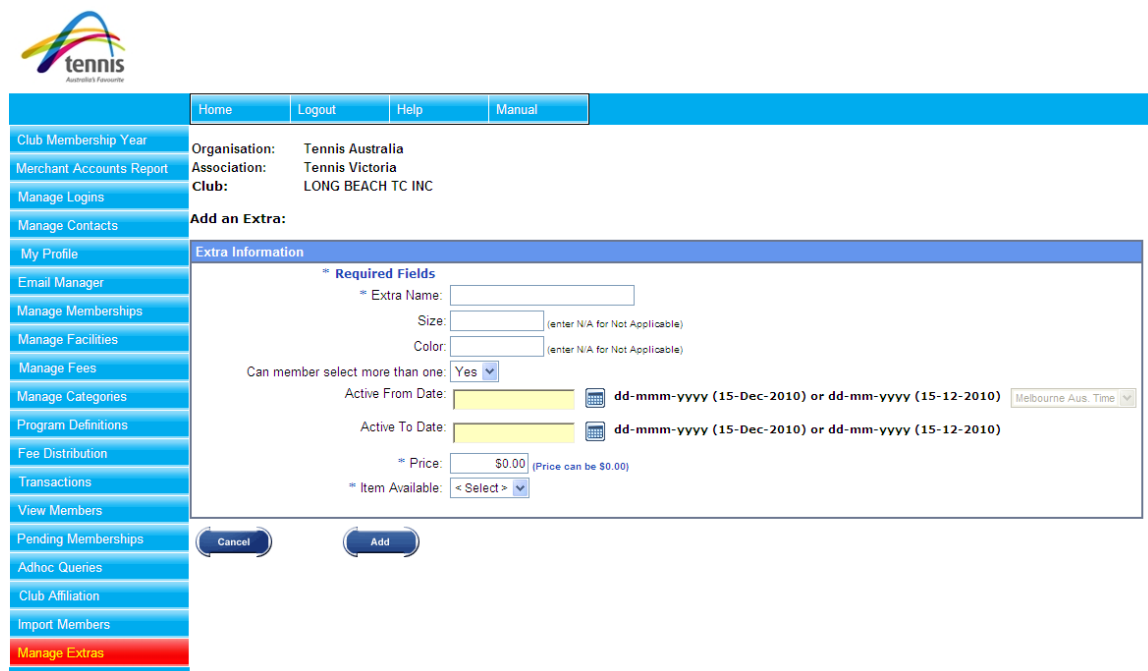
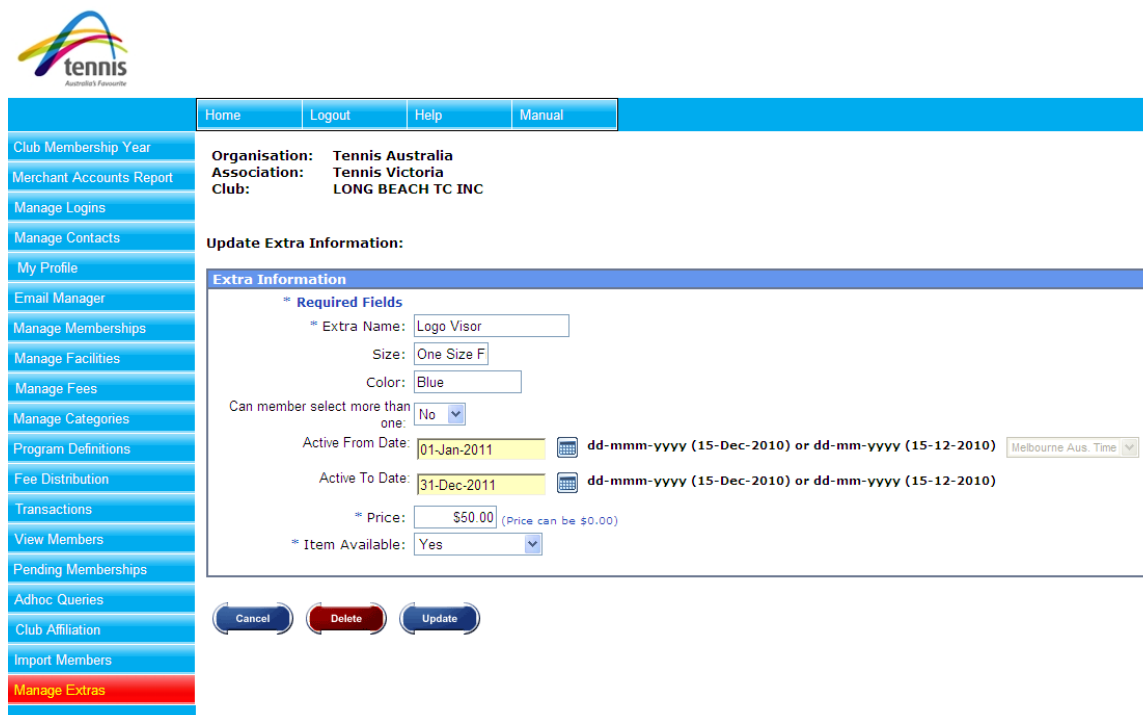


Figure 88: Manage Extras – Add Extra

2. In the **Extra Name** field, enter the Name of the extra. Examples of extra names would be T-Shirt, or Locker Key. This is required field.
3. In the **Size** field, enter size of extra. An example of size would be Small, Medium or Large. Enter N/A if size is not relevant for the extra item.
4. In the **Color** field, enter the Color of the item. Enter N/A if color is not relevant for the extra item.
5. Can a member select more than one of these items when registering? If the member can order more than one, select **Yes**. If the member can only order one of the items during registration, select **No**.
6. In the **Active From Date** field, define the date of when the item can be purchased. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is required field.
7. In the **Active to Date** field, define the date of when the item can no longer be purchased. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is required field.
8. In the **Price** field, enter the price of the item. The price can be \$0. This is a required field.
9. In the **Item Available** field, enter either Yes or No. Is the item available for purchase? If no is selected, members will not be able to select the item when they register.
10. Select **Add** to save the extra item to the database. The new item will display on the Manage Extras data grid and an Added Successfully message will confirm the item added.

To Update an Extra, follow these steps:

1. Select Update in the appropriate row of the item to be updated. The following screen is displayed.



**Organisation:** Tennis Australia  
**Association:** Tennis Victoria  
**Club:** LONG BEACH TC INC

**Update Extra Information:**

**Extra Information**

\* Required Fields

\* Extra Name:

Size:

Color:

Can member select more than one:

Active From Date:   dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

Active To Date:   dd-mmm-yyyy (15-Dec-2010) or dd-mm-yyyy (15-12-2010)

\* Price:  (Price can be \$0.00)

\* Item Available:

**Figure 89: Manage Extras – Update Extra**

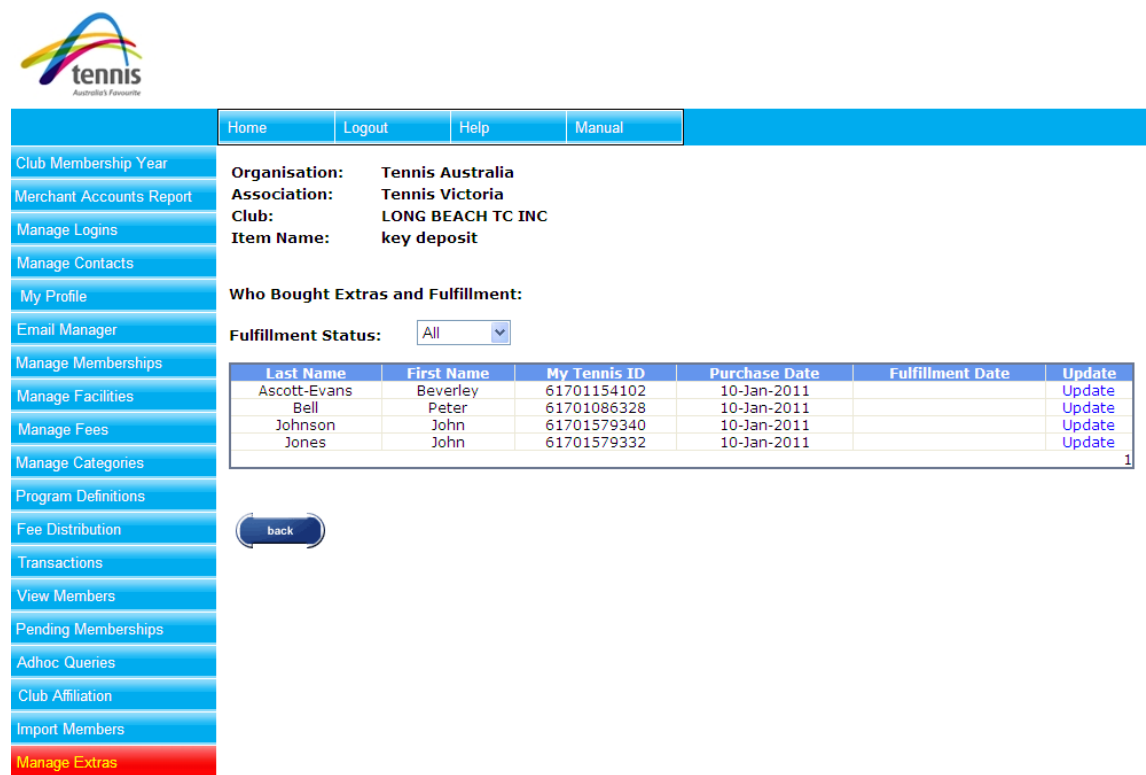
2. In the **Extra Name** field, optionally change the Name of the extra. This is required field.
3. In the **Size** field, optionally change the size of extra. Enter N/A if size is not relevant for the extra item.
4. In the **Color** field, optionally change the Color of the item. Enter N/A if color is not relevant for the extra item.
5. Can a member select more than one of these items when registering? If the member can order more than one, select **Yes**. If the member can only order one of the items during registration, select **No**.
6. In the **Active From Date** field, optionally change the date of when the item can be purchased. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is required field.
7. In the **Active to Date** field, optionally change the date of when the item can no longer be purchased. Dates can be entered using the text box in the formats shown or by using the calendar popup to pick each date. This is required field.
8. In the **Price** field, optionally change the price of the item. The price can be \$0. This is a required field.
9. In the Item **Available** field, enter either Yes or No. Is the item available for purchase? If no is selected, members will not be able to select the item when they register.

10. Select **Update** to over-write information that was previously entered on the database. The updated item will display on the Manage Extras data grid and an Updated Successfully message will confirm the item updated.

To **Delete** an extra item, select the **Update** link for the defined Extra Item. Select the **Delete** button at the bottom of the Update Extra Information Screen. A screen displays asking the user to confirm the delete request by selecting the **Delete** button again. Doing this will delete the Extra Item, show a Delete Successful message and display the remaining Extra Items.

To stop the delete select the **Cancel** button.

The Manage Fulfillment option allows the club administrator to identify who has purchased an item and record when the item has been delivered. Select Fulfillment for the defined Extra Item. The following screen showing a table of all members who have purchased the item will be displayed.



The screenshot shows the 'Manage Extras' interface. On the left is a navigation menu with 'Manage Extras' highlighted. The main content area includes a navigation bar (Home, Logout, Help, Manual), organization details (Tennis Australia, Tennis Victoria, LONG BEACH TC INC, key deposit), and a 'Who Bought Extras and Fulfillment' section. This section features a 'Fulfillment Status' dropdown set to 'All' and a table of purchase records.

Last Name	First Name	My Tennis ID	Purchase Date	Fulfillment Date	Update
Ascott-Evans	Beverley	61701154102	10-Jan-2011		<a href="#">Update</a>
Bell	Peter	61701086328	10-Jan-2011		<a href="#">Update</a>
Johnson	John	61701579340	10-Jan-2011		<a href="#">Update</a>
Jones	John	61701579332	10-Jan-2011		<a href="#">Update</a>

**Figure 90: Manage Extras – Fulfillment Summary**

1. Select **Update** link on the appropriate row to update that member's Extra item fulfillment information. The following screen will be displayed.



Home	Logout	Help	Manual
Club Membership Year	Organisation: Tennis Australia		
Merchant Accounts Report	Association: Tennis Victoria		
Manage Logins	Item Name: key deposit		
Manage Contacts			
My Profile	<b>Details of Who Bought Extras and Fulfillment:</b>		
Email Manager	Participant Name: Peter Bell		
Manage Memberships	Member ID: 61701086328		
Manage Facilities	Item Name: key deposit		
Manage Fees	Price Paid: \$25.00		
Manage Categories	Purchase Date: 10-Jan-2011		
Program Definitions	Quantity: 5		
Fee Distribution	Order Fulfilled: Yes <input type="button" value="v"/>		
Transactions	Fulfillment Date: <input type="text"/> <input type="button" value="Pick"/> *		
View Members	Fulfilled By: <input type="text"/>		
Pending Memberships	Fulfillment Comments: <input type="text"/>		
Adhoc Queries	(Maximum 500 characters)		
Club Affiliation			
Import Members			
Manage Extras	<input type="button" value="Update"/> <input type="button" value="Cancel"/>		

Figure 91: Manage Extras – Fulfillment

2. In the **Order Fulfilled** field, select Yes or No.
3. In the Fulfillment Date field, enter the date by selecting the Pick button. A calendar will display. Always select Month and Year, prior to selecting the day.
4. In the **Fulfilled By** field enter your name or the person who is fulfilling this order,
5. in the **Fulfillment Comments** field enter any necessary comments (i.e. item was mailed to member or item was hand delivered to member)
6. Select Update. The information is added to the database. The updated fulfillment status will display on the Who Bought Extras and Fulfillment data grid.
7. A record of the purchased items and when they are fulfilled will be visible for each player in the “Notes” section at view members

Please Note: Extras are available for purchase from the state association and club. When a member purchases an extra item that is being sold by the state association the club takes the payment, the state association will then invoice the club for payment. The state association will fulfill the order directly with the member.

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