

MYCLUB PROCEDURE INFORMATION

Welcome to **MYCLUB**.

The purpose of this procedure explanation is to provide an easy to follow resource that will ensure Clubs optimise the benefits of **MYCLUB** and indicate a contact for assistance, when needed.

Go to Yachting Victoria's website - www.yachtingvictoria.com.au

Click on the **MyClub** menu option at the left-hand side of the screen. This will take you to the 'What is MyClub' page.

Click on **Click here** to access **MyClub**

Enter your **ID Number**, which is your **Yachting Australia Number** and your **password**, which you would have arranged with Yachting Victoria.

You should now be within **MyClub**, you will see the following menu on the left-hand side of the screen and some items across the top of the page in the tool bar :

Home

SMS

List

Update

Add/Remove

Club Teams

Asset Management

Boat Info

Check

Club Extra

Club Invoice

Club Details

E-mail

Onboard

Utilities

Log off

Club Dev

LIST

Gives you a list of all the members of your club. An option is given at the bottom of the screen to export the list across to Excel. To scroll down you can increase the number of records per page at the top (100 is the maximum recommended) When you see a "Y" in the Card column it means that you have updated this person during the current month and a card will be sent in the next card run. If the member has paid their national affiliation fee, then the date that their membership is current to is shown in green. When it says S-Nov04 it means that it was sent in November.

Next to the current fields are 6 hyperlinks, these being

- Ed for Edit – click on this to edit the members personal details
- C to enter your membership club number
- B for Boat Details – enter boat name, sail no. and class. Also IRC Handicaps
- S for Safety Information – Enter next of Kin and offshore safety information
- X for Extra Information – enter additional club information.
- A to click on adding to Address contacts

UPDATE (Please follow carefully)

When a member has paid his YA Fees click on **UPDATE PAID** menu option

Choose the appropriate membership category for each member by selecting the membership category from the drop down list (click on the arrow next to the category to display all options).

If a person is a member of two clubs or more and pays another club their YA Membership fees and they have advised you this you can make them a Secondary member by clicking on Secondary in the category drop down list. This means that they appear on your page as a financial member of your club and a paid up YA member at another club.

Click on the small square under the "**Paid**" Column next to the person's name.

Repeat this for all members who are financial or secondary.

Member's name, address and other contact details can also be altered from this screen by choosing the Edit button, next to the member's name.

Once you have finished updating the members **PAID** status on **EACH PAGE** you **MUST** click on **Update Database** at the bottom of that page. (You will need to scroll to your right to see the Update button)

You will be taken to a screen that will confirm the members you wish to update. Click **Update Database** button again to confirm changes.

Once confirmed, you will return to the page listing member details. You will see the green boxes opposite the people's names have now been updated. A green box indicates that the membership is current and will show the member as paid to 30/09/05.

After each displayed page is completed you must click **on Update Database** before going on to the next page

When you have finished the process for all your pages, you can view the details as to members entered and fees payable, by clicking on the **Summary** button at the bottom of the page.

Print this and file if you wish (select the Print button from the top right hand side of screen).

IMPORTANT

Please ensure updates are completed by the **last day of each month** if you require the membership card to be included in the next card production run. These cards will usually be posted to your members at the start of the second week of each month.

At the beginning of each month, Yachting Victoria will send your club an invoice for all the members you have marked as paid with a list of names to verify your list.

Yachting Australia sends membership information to the mailing house on the first day of the month.

If a mistake has been made and there is still a “Y” next to your member you can change it yourself. Other wise if you need to change a card there will be a \$5.00 charge for a replacement card and you need to e-mail Sam at Yachting Victoria on swatson@yachtingvictoria.com.au with details.

ADD/REMOVE

Use this screen to **Edit/Add/Remove** members.

To Edit current members

To change a member's details ie. addresses, phone, e-mail, click on the **Edit** Button to the right of the person's name. This will bring up the person's details, change what you need to change, then click **Update Database** - this will bring you back to the member's screen but WILL NOT SHOW THE CHANGES ON SCREEN JUST YET unless you refresh at the top right hand of the screen.

To Add new members to the club.

New members can be of two types: those who have never belonged to a yacht club or those who are changing clubs or joining another.

Members transferring from another club

For members who are already on the YA database, as a member of another club, you will need to locate their previous membership details so the member can be transferred to your club. If this member has already paid the other club, they become a secondary member of your club. In the drop down box in Update Paid there is a category called **Secondary Member** which you can tick off and this will bring up a Nil figure as they have paid elsewhere. (MyClub is a tool to allow Clubs to tick off who has paid at **THEIR** club, not who has paid at any Club)

In the text box at the top of the **Edit/Add/Remove** screen, enter the members existing YA number if known in the **ADD** box. If you don't know their number, you can search by their surname. Select the member from the search list that is displayed and press the **ADD** button next to the name on this list. You need to go back to **UPDATE PAID** and tick on this member now, if they have paid you. Or if you know they are new click

on **Add New Member** – in this box you can tick on whether they have paid or not. If you tick the paid then you don't need to go into Update Paid it is automatically processed. It is always best to first go to check, just in case the member is on the database, this is to save duplicating memberships.

To remove members

Find the name(s) you wish to remove and press the **DELETE** button that corresponds with that name. Once you have finished that page click on the **REFRESH icon** button at the top of the screen, (next to the house icon) **the deleted members will then be removed from your Club's database.**

Club Teams

Use this screen to setup squads and teams within the club. You can use this to group your members into any sort of team, it doesn't necessarily have to be a sailing team list, it maybe volunteers, canteen list etc.

Add team name and update

Add surname of team members and select. Once completed you have an option of printing this team list, exporting it to excel so you can merge and send by mail any information, e-mail to all team members or send a sms to them.

ASSET MANAGEMENT

Designed to allow clubs to track club assets, like life jackets, club boats etc.

Step one - input the club assets.

Step 2 assign each asset to a person.

BOAT INFO

This is an option for clubs to record members boat details and boat safety information. Click on these buttons to input your information. Each member can also access this when they go into "My Sailor ". It may be worth letting your members know of this for their own updating.

CHECK

This enables you to search the database by YA member number or Surname.

Club Extra

This is for additional information.

CLUB INVOICE

The purpose of this part of the system is to allow you, as the club membership manager, to manage your own clubs membership. Up until now, MyClub only allows you to manage the membership to the national body – now you can manage your own clubs membership.

The menu options in this part of the system allow you to setup your membership fees, invoice each member for their club membership fees and then manage the collection of those same fees.

Sub menu items:

- Back
- Year End Date
- GST Registered
- Membership types
- Setup Extras
- Add/Remove members
- Send Invoices
- Receive payment

In detail, these items are

What is your clubs 'Year to Year' date? By default, it has been set as 31st August. However, you may change this to any date. Do this change first – once you have marked people off as having paid their memberships – DO NOT change this value.

GST Registered

Is your club registered to pay GST? If so, what is the clubs ABN. If you are registered for GST then the fees shown on the invoice will show the Club amount and the GST separately. Eg A club membership fee of \$100 would show \$90.90 and GST of \$9.10 if you are GST registered and \$100 if not.

Membership Types

Setup and edit the club membership levels. Each club membership type must correspond to an equivalent YA membership type.

CLUB DETAILS

Click on **CLUB DETAILS** for:

Club Contacts and Opening Hours

Make changes and click on relevant **Update** Button.

Update Clubs Office Bearers

To change Commodore or Secretary click on **EDIT** and change YA Number to the relevant new person.

To add a new office bearer click on the pull down arrow and select the position and put in their YA Number, then click on **ADD NEW OFFICIAL**.

If you don't know the YA Number simply put in the Surname and click on Find YA Number then click on the persons name, this will bring the YA Number in the correct box and then select the official title from the drop down list.

Club Facilities

Please tick the appropriate boxes for your club.
Ensure that you click the **Update** button to save your changes.

Classes Sailed

Please tick the appropriate boxes for your club.
Ensure that you click the **Update** button to save your changes.

E-MAIL

One of the best features on MyClub is the ability to send an e-mail to all your club members. This method of sending e-mails is different to your standard Outlook or Outlook express method in that the e-mail is generated on the web server and sent directly from there. What this means to you is that if you have say 300 members in your club, then you only send one e-mail – to the web server.

Use the filtering options from the first screen when sending e-mails. If you only want to send an e-mail to financial members, make sure that "Financial only" option is selected in the first screen. Then click on "Compose the e-mail message" and compose the e-mail.

It is recommended that if you are going to send HTML e-mails, use a program like Microsoft FrontPage to generate the HTML and then cut and paste the HTML source code into the text box.

It is recommended that you first test your e-mail before sending to all members by selecting the test option and testing the email.

ONBOARD

This is only accessible for the Onboard clubs and Trusted Club Officials for Onboard. For more information please send an e-mail to michelle@yachtingvictoria.com.au

UTILITIES

Club Officials

This is to see who in your club hold's a YA qualification.

Export

Need to send something to every club in Australia or to every other club in your state: This enables you to export a list of all clubs in Australia and all Classes. This will bring up Postal Address, e-mail and website. If you want only Victoria save to excel and sort postcodes.

Change Login and Password

If you don't like your given password you can change it in here.

CLUB DEVELOPMENT

This has information on Risk Management, Private Policies and Ausport Club Development.

LOG OFF

Please ensure that you click on Log Off when finishing

**ANY QUERIES PLEASE CONTACT SAM AT YACHTING VICTORIA ON
9597 0066 OR swatson@yachtingvictoria.com.au**