

# Club Office Login/Main Menu/Utilities

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# Club Office Login/Main Menu/Utilities

## Logging In

Whether your Club Office installation is a single or multi-user system, Club Office looks and acts virtually the same. Any number of users can use the single-user version -- it's just that only one of them may use it at any one time. Club Office can be licensed for up to ten simultaneous users with an option to add ten more, making the maximum twenty users.

Club Office is primarily menu-driven via the main menu, and accessing the main menu is via a simple login procedure. Login requires typing the user name and corresponding user password, and clicking the LOG IN button:



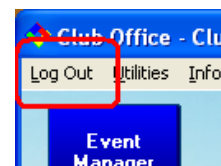
User names are not UPPER/lower case sensitive but passwords **are**. This means that the user named CHERYL is the same as Cheryl to Club Office and therefore, only one user can have that name. Take care to type both the user name and password exactly correctly.

## Logging Out

If one must log *IN* to use Club Office, one must also log *OUT* to stop using it. In this way, users are forced to "close" the Club Office system just as they would any Windows application prior to shutting down the computer. Logging out performs a valuable task: it closes Club Office databases that you were using. When everyone follows the proper logout procedure and closes the databases, it enables the ability of backup software to make a proper data backup because the Windows operating system generally won't allow a backup to be made of files that are "open."

It's important to understand that merely logging out of a Windows session or powering the computer off does not constitute logging out of Club Office itself. In Club Office's case, a user who does not log out properly won't be able to log back in until a global logout procedure has been invoked, returning full access to all users.

Logging out is easy – simply exit any Club Office modules that you're using to get back to the main menu and choose the Log Out option in the upper left corner of the main menu.



## Global Logout and Procedure

A user who periodically receives a message that a global logout is required before that user can have access to the system again is a user who is not operating either Club Office or their computer properly. The Global Logout message is displayed in three situations, any of which indicates a problem has occurred, which then could easily leave a database “open:”

- ┆ The user was previously logged into Club Office but failed to log out via the main menu before he/she powered off the computer (or the computer lost power on its own);
- ┆ Two users are attempting to use a single-user Club Office system simultaneously;
- ┆ The startup parameters for a network workstation are conflicting with those of another user on a multi-user system.

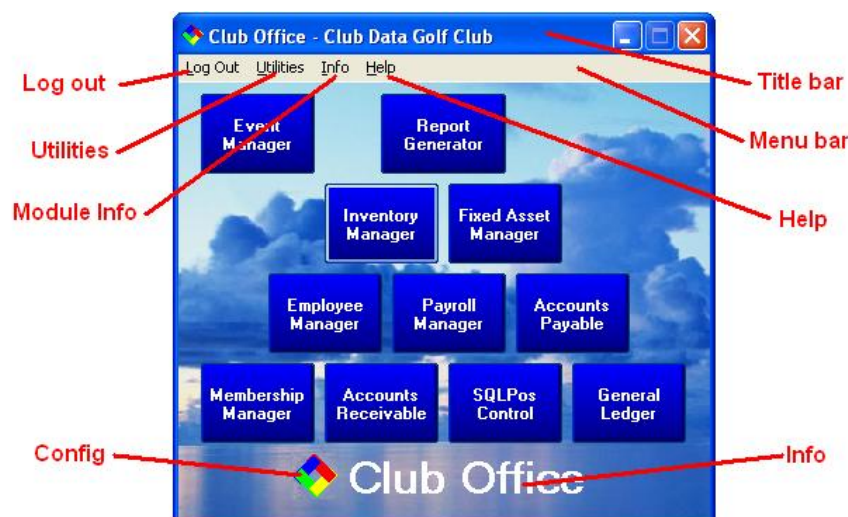
### Procedure

1. Start Club Office and get to the main login screen.
2. Press the ENTER key for the user name (leave the name field blank)
3. Type 911 into the password box and press the ENTER key. A LOGOUT button will appear at the bottom of the login screen.
4. Either click on the LOGOUT button or press the ENTER key again. In a moment or two, the screen will disappear after all users have been “cleared.”
5. Now you may log in normally.

**Issue:** if a user complains that he/she frequently has to use the Global Logout, that user is either not using Club Office correctly, the computer being used is not configured properly or something else is wrong. In the normal course of Club Office use, the global logout should not become necessary; using it frequently indicates that there’s a problem that needs to be addressed. Using it once in a while likely means that someone’s computer locked up or they “forgot” to log out of Club Office. In any event, realize that having to use the global logout means that something out of the ordinary happened; the more frequently it is needed could indicate a real problem is brewing.

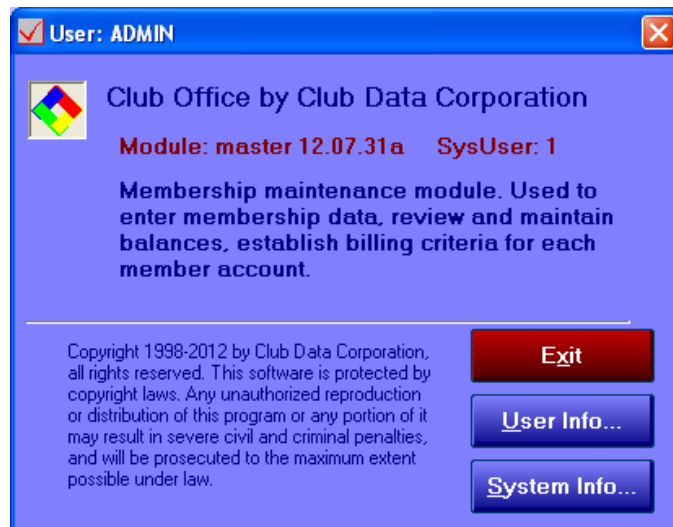
## Main Menu

The main menu provides access to virtually all the modules in the Club Office system. Some users have called this the “pyramid menu” because of the layout of the screen:



The main areas of the main menu are:

- ┆ **Title bar:** the top of every Windows application is called the “title bar.” Club Office uses the title bar to display user names or other pertinent information depending on the module in question.
- ┆ **Menu bar:** every Windows application that has a built-in menu has a “menu bar.” This usually includes a “File” or “Help” selection, and may include more depending on the system’s design.
- ┆ **Logout:** this menu bar option logs the user out of Club Office properly.
- ┆ **Utilities:** this menu bar option displays a sub-menu list of utilities with the option to view a secondary sub-menu of more utilities.
- ┆ **Info:** this menu bar option displays information about the module itself. In the example below, the module name and version is “master 12.07.31a.” The version number is always in YY.MM.DDx format where YY is the year, MM the month and DD the day the module was created. The letter at the end of the version number indicates the revision number on that day; “a” means the first revision that day. If the module were revised four times on the same day, the revision letter would be “d.” Your Club Data tech support representative may periodically ask you to click INFO to find out what version of the software you’re using. It’s also a way for you to know whether your software is up-to-date with what is available for download on the Support Web Site.

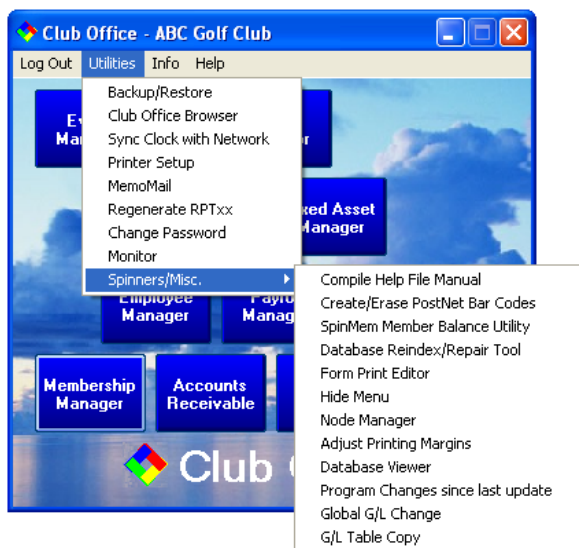


The **SysUser** number is important as it tells which user number this workstation is within Club Office. No two workstations can be the same and if two are configured with the same SysUser, unpredictable and possibly unsupportable issues can occur. If the SysUser number is ever zero, contact your Club Data technical support representative immediately.

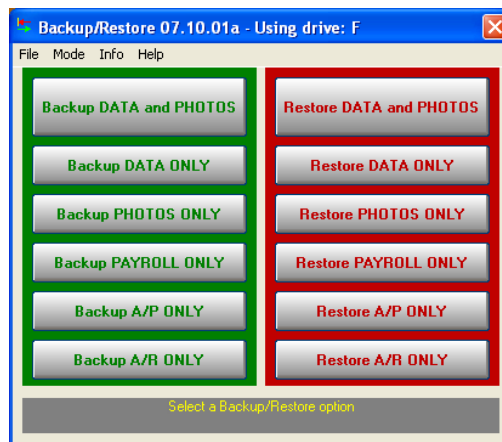
- ┆ **Help:** most modules that have built-in help and you can access it by clicking here.
- ┆ **Config:** double-clicking on the Club Office logo opens the main configuration module.
- ┆ **Club Office:** clicking on the product name displays Club Data contact information -- our mailing, phone, fax, web site and email addresses.
- ┆ **Application buttons:** the other rectangular buttons on the screen start their respective applications in the system. There are other buttons that may appear on the menu screen that only become visible when certain additional components are installed on your Club Office system. Typically these are 3<sup>rd</sup> party POS interfaces or other special applications that we may add to the system from time to time.

## Utilities Menu

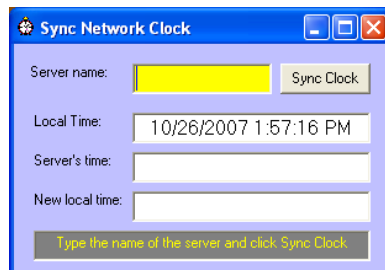
There are many built-in utilities that are accessible from the menu bar:



**Backup/Restore:** Club Office includes a powerful backup/restore option. Of course, if you prefer to use Windows' internal or other backup module, that's fine, too, although you cannot access them from within the Club Office menu; they operate completely outside the Club Office system.

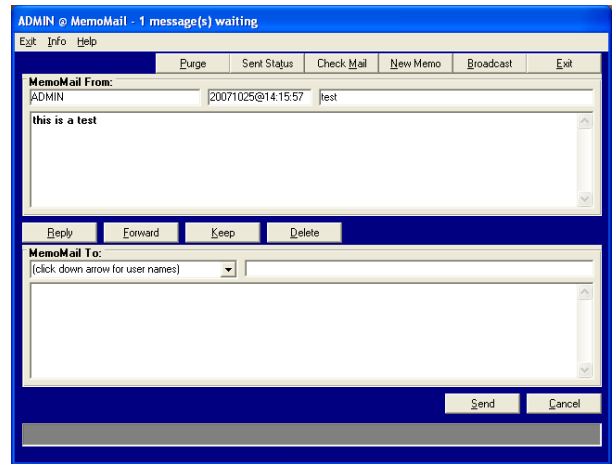


**Sync Clock with Network:** for those who don't already synchronize their computers' internal clocks with a network server, this utility can be very helpful. It's usually helpful if all the computers on your network have the same time setting.



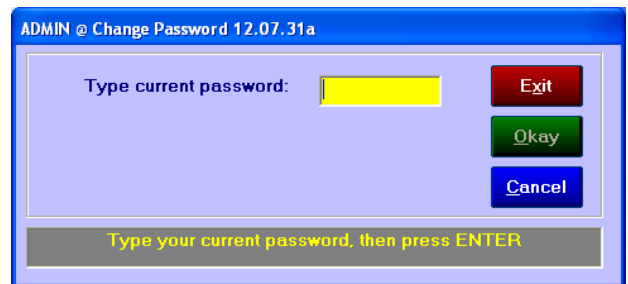
**Printer Setup:** this recalls the standard Windows printer dialog box that allows changing printer setups, changing the default printer, etc. Club Office reports are designed to always use the default Windows printer. If you need to change printers inside an application, you must change them before printing the reports.

**MemoMail:** Club Office includes a miniature, internal email system that's intended for brief messages or reminders between Club Office users. It does not connect to an external email system or allow attachments, embedded photos and the like.

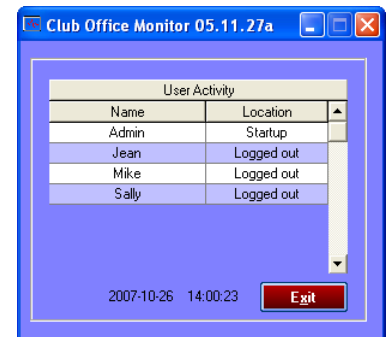


**Regenerate RPTxx:** Each Club Office user has a reserved reporting database for his/her own use. The system generally manages this automatically but it may periodically this database may need to be refreshed or regenerated.

**Change Password:** change the user's password. New users are assigned the default password "1234567890" and should change it to something only they know. Passwords are encrypted for further security.



**Monitor:** displays a screen that shows which users are using which Club Office applications or whether a user is "Logged out." This is a handy tool when users may be spread out all over the clubhouse facility and you want to know is anybody's logged into the system immediately prior to performing database maintenance or backup operations.



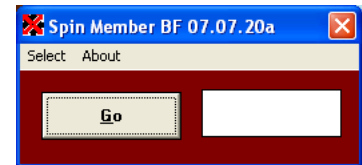
**Spinners/Misc:** this option displays a sub-menu of additional options:

**Compile Help File Manual:** this option gathers all the built-in help files and creates a set of "operation manuals" built of all the embedded help text files. The names of the resulting files are "manual-APPNAME.doc" such as manual-ACCTPAY.doc. The embedded text files are only updated periodically; the PDF version of the manual will always be more up-to-date, although the text-based help files may be useful to some.

**Create/Erase PostNet Bar Codes:** even though there are configuration options to enable the use of PostNet mailing bar codes, this little utility can either populate or cleanse the databases of data that causes the bar code to appear on mailings. The PostNet codes are rarely used by the postal system anymore and have been replaced with another method. Eventually this module may be replaced.

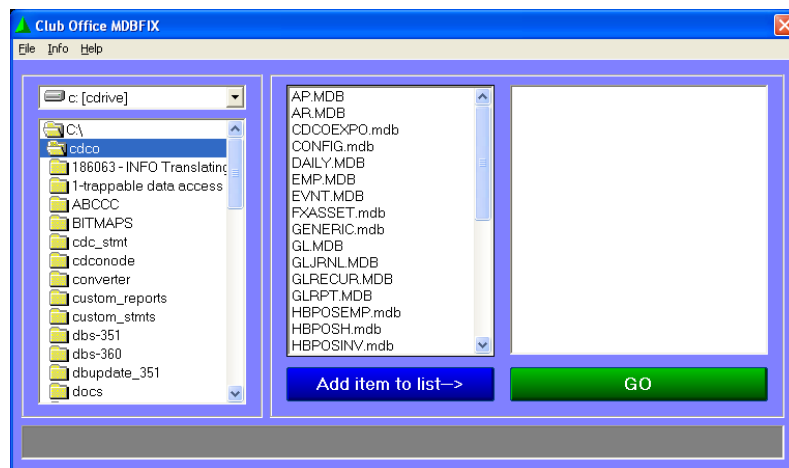


**SpinMem Member Balance Utility:** this can be used to restore a current member balance based on prior transaction information for situations where this administrative function becomes necessary. In practice, actual use of this utility is quite rare.



**Database Reindex/Repair Tool (MDBFIX):** Club Office utilizes the Microsoft Access database engine, and periodically, databases should be reindexed to enable the engine to function at its most efficient level. This tool can also be used to “repair” the indices of databases that have become damaged by computer crashes, power outages, etc. In practice, actual use of this utility is also quite rare. How to use it:

1. **Make sure no users are in Club Office other than you.** Attempting to repair a database that another user has open can result in severe database problems.
2. Start the module; all the databases that make up Club Office appear in the center column.
3. If you need to repair a database in a different directory than the default, use the Drive and Folder boxes on the left side of the screen to locate the MDB file(s) that need attention.
4. Check the box to “Repair Corruption” to fix a database; leave it unchecked if the database is working fine and you only want to make it operate more efficiently.

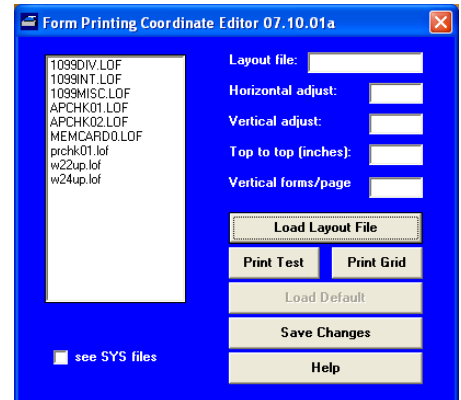


5. Select the name of the database to work on in the center column by clicking on it once. Then click the Add Item to list button at the bottom of the screen. The

database will then appear in the right box as one the module will use. Repeat with as many databases as you wish.

6. When done selecting, click the GO button. A confirmation box will appear; click YES to continue, no to cancel.
7. Depending on the sizes and number of databases affected, the module may run for a few minutes. Allow it continue and do not cancel it until it is finished. A message will appear on the screen when it is complete; click OK to close the message and the module.

**Form Print Editor:** A few of Club Office’s reports are coded for specific X-Y coordinate printing. These are forms such as W-2s, 1099’s, payroll and payables checks and membership ID cards. It’s possible that you may need to adjust the overall printing of these forms so that your text hits the designated boxes properly with the printer you use. In practice, actual use of this utility is also quite rare.



**Hide Menu:** toggling this option causes the main, pyramid menu to “hide” to the taskbar when one of the Club Office applications is launched. After finishing that application, you can restore the menu to the screen by choosing it on your taskbar. This is a toggle menu option: click it a second time to turn it “off.” The setting is not permanent and stays only during the current Club Office session.

**Node Manager:** if you are a networked user, this option provides a way to identify your network node to Club Office. In most cases, Club Office will function properly without having performed this operation, but users of SQLPos and TimeClock may find this utility indispensable.



**Adjust Printing Margins:** Club Office uses the Crystal Reports printing engine when generating its reports. Depending on the kind of printer you normally use, it may be necessary to change the default printing margins so that reports format properly when printed from your computer to your chosen printer. The settings are computer-specific, meaning that the margin settings for computer node #2 may be different from those for computer node #3, etc.

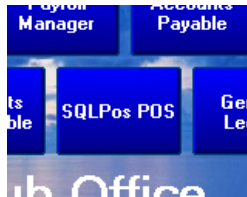




updated your software and soon afterward, restored a file from an earlier backup.

**Fixing this problem is easy:**

- a. Make sure no users are logged into Club Office.
  - b. Rename the **dbupdate.tad** file that's in the CDCO folder of your Club Office system. Change the **tad** to be **dat** so the file name becomes **dbupdate.dat**.
  - c. Restart Club Office – the system will automatically start the database update utility.
  - d. When the update is done, restart Club Office and you should be okay.
4. If the problem continues to occur and the error message is “unrecognized database,” try this:
- a. Run the Database Reindex/Repair tool,
  - b. Click the box named REPAIR; leave the other box as-is.
  - c. Select the database that was named in the error code itself to repair
  - d. Then restart Club Office and try again.
5. If none of the above solutions work and the problem persists, call your Club Data tech support representative.



## User-Defined Menu Button

If you do not have SQLPos Point of Sale, you may redefine the SQLPos POS button to run another application of your choosing, such as your word processor, spreadsheet or other application. Either edit (or create) a file named **USERBUTTON.INI** in the CDCO folder where Club Office resides and put the following two entries in it. You can use Windows Notepad to create it:

**buttontext= (type your text here)**  
**program= (type the path and name of the executable program here)**

Here's an example that would run Windows Notepad. When you type the entries you can use either UPPER or lower case:

**buttontext=Windows Notepad**  
**program=c:\windows\notepad.exe**

## Club Office Reporting with Crystal Reports

Club Office is provided with the Crystal Reports engine, one of the most popular reporting and database export tools available. On a clean computer that has only Windows XP and no other applications installed, the Club Office installer provides the following data export options for any report that is viewable on the screen (file types are in shown in parentheses):

- Adobe Acrobat format (PDF)
- Character-separated values (CHR)
- Comma-separated values (CSV)
- Crystal Reports (RPT)
- Data Interchange format (DIF)
- Excel 2.1, Excel 3.0 and Excel 4.0 (XLS)
- HTML 3.0 - Draft Standard and enhanced for IE and Netscape browsers (HTM)
- Lotus 1-2-3 (WK1, WK3 and WKS formats)
- Record style (columns of values) (REC)
- Report Definition (no data, just definition information about the report itself) (TXT)
- Rich Text (Exact) format (RTF)
- Tab-separated text (TTX)
- Tab-separated values (TSV)
- Text (TXT)
- Word for Windows ver. 2.0 document (DOC)
- XML (XML)

**Note:** The list of available export options and their respective formats may be affected by other manufacturers' software applications that are also installed on your computer. Because of the limitless variability of available software applications, compatibility of exported data from Club Office with your non-Club Data applications cannot be guaranteed.

## Club Office Backup/Restore Utility

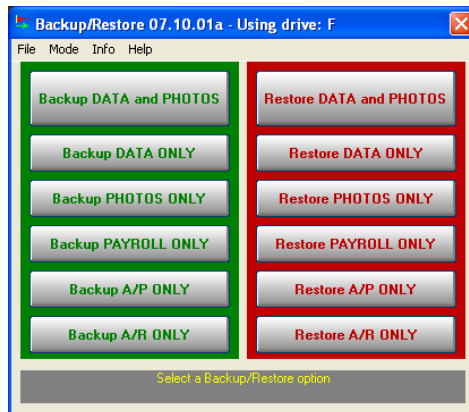
This utility utilizes PKZIP technology, which has been proven to be a safe, effective and inexpensive method to preserve data files to disk or diskette-based media. PKZIP and PKZIP25 are registered trademarks of PKWARE, INC. Club Data is a licensed distributor of PKZIP and PKZIP25 software.

Several backup options are provided; the best option to use is always the Backup ALL option so that all data files are captured as a complete set. For each backup option there is a corresponding restore option. Optionally, it may be convenient to perform only a Payroll or A/P backup at certain times, or a Club Data representative may request a certain type of backup to help solve a problem.

The module also includes the option to add the date and time to the backup file name, opening the door for making multiple, incremental backups onto the same backup media, such as a flash memory stick. This method is suggested for advanced users only, for it also opens the door to restoring the wrong data file accidentally because many data file backup sets could be on the same backup media – choosing the wrong one at the wrong time can be a disastrous action.

Custom backup and restore modes are also available.

**EXTREMELY IMPORTANT:** remember that a restore procedure overwrites existing data files with older files. If you are ever unsure, don't hesitate to make a full backup first and set it aside so that you can return the system to its current status if your "restore" creates a problem.



### Backup Menu Options

- ┌ **FILE - Set Default Backup Drive:** choose this option to assign your backup system to use the same drive letter every time you start it up. You can always change it to a different drive letter later if the need arises.
- ┌ **FILE - Include Date & Time:** This option appends the YYYYMMDD and HHMMSS time stamp to the backup data file when the file is created. Example: cdcobknp20070920@133428.zip where 20070920 is the date and 133428 is the time (13:34:28 is equivalent to 28 seconds after 1:34 pm).The date/time stamp reflects the time when the backup was begun, not when finished.

Using the time stamp allows making multiple backups onto the same media such as a flash memory stick because in all likelihood, it would be quite difficult (but not impossible) to create two different backups that had the same date/time stamp. Clicking the date/time option marks the option as "checked" on the menu and will remain that way until the user "un-

checks" it. Note that when using the date/time option during a RESTORE operation, a file search dialog box appears that displays your default backup drive along with all the files that match the chosen restore type:

- ┆ **Full backup:** the file name begins with the word **cdcoback**
  - ┆ **Data only:** the file name begins with the word **cdcobknp**
  - ┆ **Photos only:** the file name begins with the word **cdcobkph**
  - ┆ **Payroll only:** the file name begins with the word **cdcopkpr**
  - ┆ **A/P only:** the file name begins with the word **cdcobkap**
  - ┆ **A/R only:** the file name begins with the word **cdcobkar**
- ┆ **FILE-EXIT** – Click this option to exit the module, or just click the close box in the upper right corner of the screen.
  - ┆ **MODE** - Three options are available:
    - ┆ **NORMAL:** this is the default where the various normal types of backup options are visible.
    - ┆ **CUSTOM BACKUP:** Choosing this option displays a menu that allows the user to select which individual databases to backup. A Club Data tech support representative may ask that you create a custom backup if he/she needs to review a certain set of data files.
    - ┆ **CUSTOM RESTORE:** Choosing this option displays a menu that allows the user to select which individual databases are to be restored. This is a good option to use if you need to restore only one or two data files out of a complete set.
  - ┆ **INFO:** A version screen will appear that specifies the version of the backup/restore software module.
  - ┆ **HELP:** displays the built-in help file

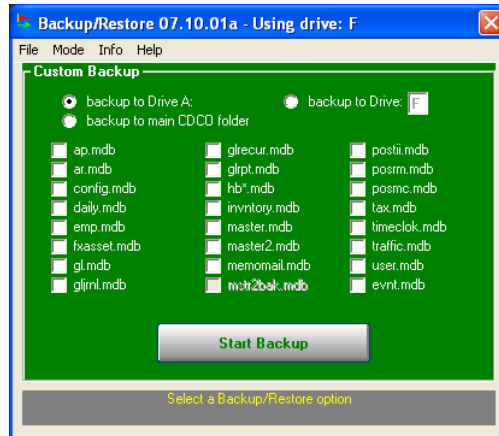
#### What data files each main backup option captures

- ┆ **Backup ALL:** captures all MDB data files, all INI files, and member photos (if any). If you use diskette media and have member photos, consider changing to an alternate backup media that has greater capacity than diskettes such as an external hard disk, ZIP drive or flash memory stick.
- ┆ **Backup DATA only:** essentially the same as the ALL option but specifically excludes photos that are placed in the PHOTOS folder (which resides inside the CDCO folder).
- ┆ **Backup PHOTOS only:** excludes all data files and captures only member photos and any other bitmap-type files that reside in the \CDCO folder or other folders inside \CDCO (such as the PHOTOS folder). Note that the backup does not capture GIF, TIFF, JPEG or any other graphics files; only those marked with the BMP (bitmap) file type.
- ┆ **Backup Payroll Only:** captures the EMP.MDB and CONFIG.MDB databases only. EMP contains employee files, payroll history and job configuration information; CONFIG contains the main payroll configuration data.
- ┆ **Backup A/P Only:** captures the AP.MDB, CONFIG.MDB and GLJRN.LMDB databases only. AP contains invoices, the checkbook and vendors; GLJRN.LMDB contains journal entries made in the system; CONFIG contains the main A/P configuration data.
- ┆ **Backup A/R Only:** captures the AR.MDB, CONFIG.MDB, DAILY.MDB, MASTER2.MDB and MSTR2BAK.MDB file (if it exists). AR contains sales comparison information and the tax and service charge information for your departments; DAILY contains all the "chits" on the system; MASTER2 (and its counterpart MSTR2BAK) contain member balance information; CONFIG contains the main A/R configuration data.

**Important:** note that restore functions only for their corresponding backups. For example, the A/P restore will not restore a PAYROLL backup; it will restore only from an A/P backup.

### Custom Backup Mode

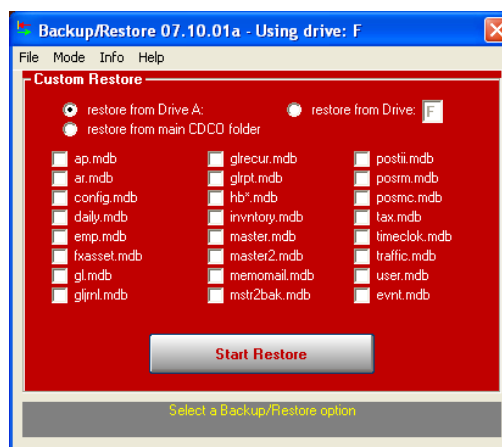
Note: This is for advanced users only and is not meant as a substitute for the other normal options. It is possible that a Club Data tech support representative may request a specific group of database files that the normal backups do not capture; the custom backup mode solves this problem.



1. Click MODE, Custom Backup to display this panel.
2. Click on whether the backup is to be made to the default diskette drive or to the main CDCO folder. There is no option to specify any other drive letter.
3. Then click on the names of the databases you wish to backup. Information on the contents of the databases is found later in this document.
4. Click the START BACKUP button.

### Custom Restore Mode

Caution: custom restore options be used ONLY under the guidance of a Club Data tech support representative. Club Office databases are tightly integrated and synchronized and if the custom restore option is not used carefully, it could be very easy to destroy the inter-database relationships and render your data confusing at best or worse, totally useless.



1. Click MODE, Custom Restore to display this custom restore panel.
2. Click on the option to select the location of the source file having the data to be restored.
3. Check the boxes next to the names of the databases to be restored. Your Club Data representative will assist you in selecting the proper databases.

4. Click the START RESTORE button.

#### **If You Use Member Photos with Club Office**

Member photos are of the .BMP (bitmap) file type and are stored in the `\cdco\photos` directory, one level below all the main Club Office system and data files. A typical bitmap color photo may easily be 50-75k in size which means that hundreds of photos equates to several millions of bytes of data. Users who wish to back up photos should consider using large capacity backup systems such as a CD or DVD burners, ZIP drives, external USB hard disks, flash memory sticks or tape drives. The Backup ALL option in the backup/utility module includes the entire Club Office system, including photos.

##### General Backup/Restore Information

The backup/restore module's file name is `CDCOBKUP.EXE` and it resides inside the `\CDCO` folder on a normal Club Office installation. The utility is normally used as a selection from the main Club Office utility menu. However, it can also be used outside of the software as a standalone module providing it is called along with a command line parameter. The command line parameter is the drive letter to which the backup is to be made: Example: `CDCOBKUP F` to back up to a USB flash memory stick that the computer recognizes as drive F. (Note that the letter alone is used without the traditional colon that usually denotes a drive letter.) Any valid drive letter may be used, including networked drive letters. Upper/lower case is unimportant.

If you use writeable CD or DVD devices, you should use the software provided with those devices to make your backups as Club Office's backup module may not be able to write to them directly. This is a limitation of the CD or DVD drives and their software drivers, not Club Office software. Windows XP also includes built-in CD/DVD writing capability if your drives were not supplied with the required software. Therefore, backups to CD or DVD media must likely be made outside of Club Office software, not from the main menu using the backup/restore utility. Recent advancements in CD/DVD writing software may allow using the Club Office utility and users are encouraged to at least try it to determine whether it will work for you.

**Important:** No user can be actively using a data file when an attempt to back it up is made. This is standard procedure for most backup software because when a file is in use, the Windows operating system itself usually will not allow access to the file for backup purposes and the backup either fails altogether or worse, *it may proceed without the file(s) that were in use at the time of the backup*, leaving you with an incomplete backup. To prevent this from happening, be sure that all users have logged out of Club Office when you begin the backup. The Club Office backup/restore module will verify that all users have logged out of Club Office, but if the method you use to make backups runs *outside* of the Club Office system, the user is left to his/her own devices for determining whether Club Office database files are in use.

There is also the possibility that even though no users are logged into Club Office, Windows itself may not release a file or files to any backup software. This is often caused by a Windows file latency issue. In such cases and if you attempted to make the backup with the Club Office backup/restore module, you should receive a warning message at the end of the attempted backup that warns that the backup was incomplete. You may have to reboot the computer on which the data files reside so that Windows can reload and reset itself, unlocking and releasing all files in the process. **Important:** this file latency issue applies especially to Windows Server computers which maintain an internal tracking mechanism for which files are in use and which users are using them. Normally, Windows Server releases them automatically after a period of time if it determines that it's probably okay to release the leftover "lock" from the previous user. However, in some cases, the only solution is to restart/reboot the server itself.

## Club Office Browser

The browser is your direct link from your Club Office main menu to Club Data's main and technical support web sites. All you need is your ID and Password to access the tech support site. The buttons at the top of the screen provide instant access to the main web site areas.

**REFRESH:** Refresh page tells the browser to reload the currently displayed page. Because the browser users many Microsoft Internet Explorer components, "refresh" reloads the cache just like refresh does in Internet Explorer.

**ARROW BUTTONS:** Click the <-- Back and FWD --> buttons to scroll through pages you've visited.

**STOP:** Click the "stop" button to cancel the loading of a page.

**EXIT:** Closes the browser and returns to the Club Office main menu.

## MemoMail

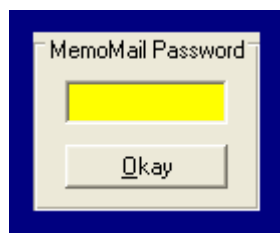
MemoMail is a handy miniature internal e-mail system that Club Office users can use to communicate with one another to aid in their day-to-day productivity. It can also be used to send reminder notes to yourself. MemoMail is only accessible from the main Club Office menu, memos are limited to approximately 400 words (2048 characters), cannot contain pictures or attachments and may be sent to any user identified in the Club Office user file or broadcast to selected or all users. MemoMail does not link to any external e-mail system, nor is MemoMail currently available as a stand-alone application; it may be used only within the confines of Club Office.

To access MemoMail, select the option from the Utility menu of the main Club Office menu screen. Enter the password -- the same password used to log into Club Office -- and the MemoMail program will be displayed. If mail is waiting for you, the main menu will display the MemoMail login in the lower right corner of the menu screen and you can just click it instead:



### How to Send MemoMail

1. Start MemoMail. The top of the MemoMail login display highlights the number of messages waiting, and requests the user password. Type the password (remember, passwords are case-sensitive!) and click OKAY.



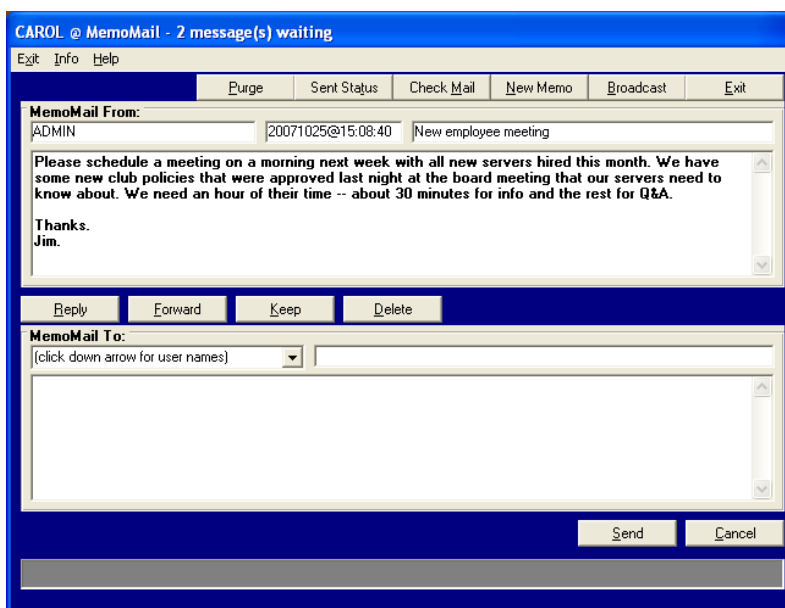
2. The top half of the MemoMail screen displays memos FROM users; the bottom half is for composing messages to be sent.
3. Click NEW MEMO along the top right of the screen. The "MemoMail To:" box will be highlighted in yellow.



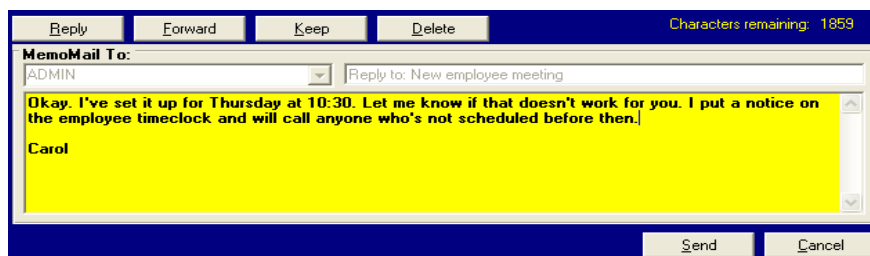
4. Click the DOWN arrow box to display the list of Club Office users; then click on the name of the user to whom you wish to send a memo. (Note: you may also type the user's name, but if typed incorrectly, including UPPER/lower case, the memo cannot be delivered.)
5. The memo title line box highlights in yellow. Type a title line (up to 40 characters) and press the ENTER key.
6. The main text entry box highlights in yellow; type the text of your memo. The number of available characters remaining is displayed in the middle right section of the screen.
7. When done, click SEND.
8. You may click the handy SENT STATUS button to see the status of memos you've sent to others. In the "status" column, memos are marked "S" for sent but not retrieved, "R" for a memo receipt, "K" for a kept message, and "F" for a forwarded message.

### How to Retrieve MemoMail

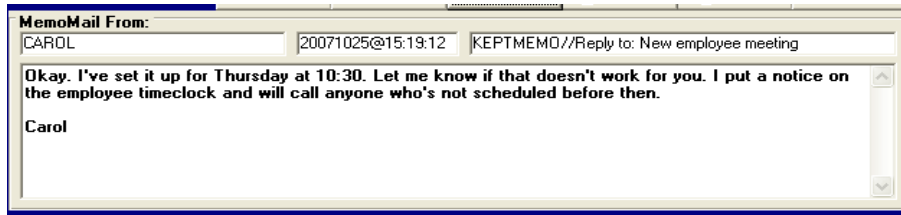
1. Upon logging into MemoMail, the first memo for you (if one exists) is displayed automatically:



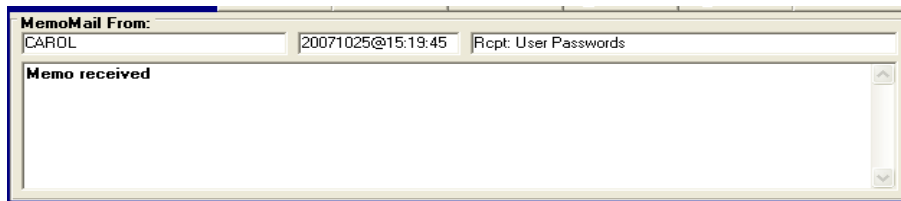
2. To reply, simply click the REPLY button. Then in the yellow box, type your reply. In the center right portion of the screen the number of available remaining characters is displayed (1859 in this example); as your message grows, this number shrinks. When done, click the SEND button:



3. Instead of REPLYing, you may forward, keep or delete the memo just received. When any of these options is chosen, a return message is automatically generated to the original sender that the message was received by you, such as below:

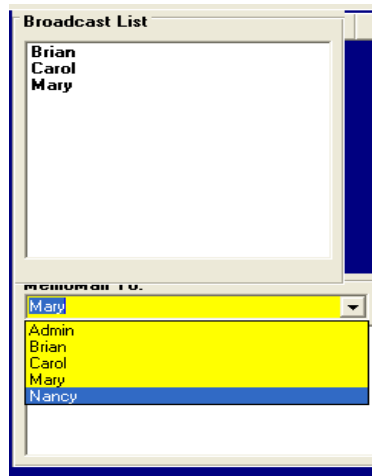


Carol simply deleted this one, but the sender knows that Carol got it:



### **Sending Broadcast MemoMail**

1. Click BROADCAST.
2. Click the down arrow of the MemoMail "To" box, and one at a time, click on the name of the user(s) to be included in your broadcast. When done, click on the Memo Title box.



3. Type the memo title in the box, and press ENTER.
4. Type your memo; click SEND to send it to all the users on your broadcast list.

### **MemoMail Administrator Functions**

Users who have configuration access level 99, the highest level, have the option to "purge" the memo mail box of "orphaned" messages -- messages which are undeliverable because of address spelling errors (if you use the drop-down arrow and select from the list, this will never happen), or memos which are destined for users who may no longer be employed or have access to the system.

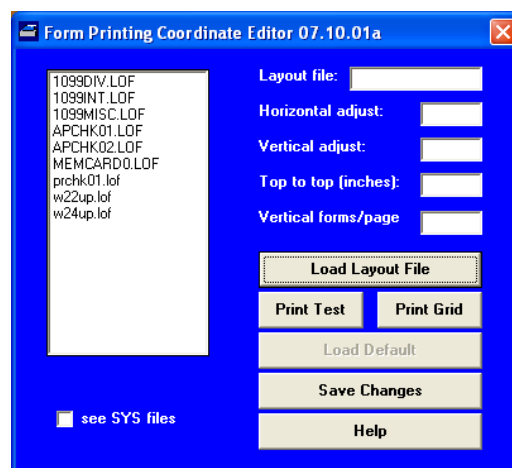
### **MemoMail Security**

MemoMail provides adequate security for inter-office memos between users, but it is not 100% foolproof. There are no functions built in to allow any user to read any other user's memos, nor does the Administrator have direct access to any other user's mail. However, since the administrator can change passwords, he/she could conceivably change a user's password after which that user's MemoMail may be retrieved by the Administrator by logging in as that user. In

this case, the original user would notice his/her password had been changed and would likely suspect that his/her mail had been read.

## 1099/W2 Form Printing Coordinate Editor

Printing onto pre-printed forms such as W-2, 1099 and check forms requires greater control than merely printing to a blank sheet of paper. This module provides a way to adjust the default layouts of W2 and 1099 forms provided by Club Data so that they will print on your printer and hit the boxes on the forms more accurately and consistently. The left side of the screen displays the list of available form layout files (\*.LOF files). The names of the layouts indicate the form name, such as 1099MISC.LOF for the 1099 miscellaneous tax form, or the w22up.lof file for the w-2 form that has two forms on a page.



### General Procedure

1. In the list box on the left, select the layout file that you want to adjust.
2. Click "Load Layout File" to load its settings into the editor.
3. Change the horizontal, vertical, top-to-to- or forms/page setting.
4. Click Save Changes
5. Click Print Test to see the affect the changes have made.

### Load Default

For each LOF file there is a corresponding SYS file. SYS files are system defaults, and Club Data maintains these SYS as form layouts change. The LOF files contain all the same information that the SYS files do except for your personal vertical/horizontal/etc. adjustments. Having the SYS files available provides the facility to reload a default configuration. Reloading a default SYS file is easy:

1. First load the desired LOF file into the editor.
2. Click the Load Default button (which now shows the name of the SYS file it will load)
3. When you click SAVE CHANGES, it will recreate the corresponding LOF file that your system will use when printing (the SYS files are never changed by the editor).

Click the "see SYS files" box at the bottom of the screen to display all the SYSTEM configuration files. Then select the desired SYS file instead of the LOF file and choose "Load Layout File."

Note: Club Office uses various SYS and LOF files for different purposes and different modules and even though they may share similar file type extensions, they are not interchangeable. The module will either display a message or an error code message if you try to load a SYS or LOF file that is not either a 1099 or W2 type. The other LOF and SYS types have their own custom editors that are accessible from within the modules that use them.

### Print Test - Testing the Printing Locations on your Form

If you have extra blank forms you can of course print directly to them to see whether the adjustments are correct for your printer. However, there's a less expensive way. Put blank paper in your printer and click the Print Test button. Afterward, sandwich the test print against an actual form and hold them up against a bright light to see whether the "Xs" on the printed page match up with the form's boxes. If not, you can adjust them vertically and horizontally and keep testing until you're satisfied with the result.

### Print Grid

This fills a page with an 8"x10" grid of dots. Dots are 1/4" apart. This aid can be helpful in designing new LOF files.

### Horizontal adjust

Type the decimal number of inches to move the printing horizontally. A positive value moves printing to the right; a negative value moves it to the left. Normally only very small changes (.01 or .02) are necessary; in rare occasions a .1 or .2 adjustment is warranted. Also bear in mind that many Windows printers (and especially laser printers) do not have "edge-to-edge" printing capability and that it's normal that your printer has a blank "unprintable border" around the perimeter of a page.

### Vertical adjust

Type the decimal number of inches to move the printing vertically. A positive value moves printing downward; a negative value moves it upward. Again, only minute adjustments are required.

### Top to top

Some layouts, such as the w22up form, print both on the top and bottom halves of the page. This value is from the exact starting place of top form to the exact starting place of the bottom form, i.e. the "top" of the top form to the "top" of the bottom form. Be sure to type this in decimal inches. Type a zero if there's only one form on a page.

### Vertical Forms per page

If there are two vertical forms per page, type 2; if three, type 3. Note that 4-up pages that contain four identical forms when you divide the page into quarters really is only 2 vertical forms per page. Typically the following holds true:

┆ W2-forms:	set to 2
┆ W2-4up forms:	set to 2
┆ 1099-MISC forms:	set to 2
┆ 1099-DIV forms:	set to 2
┆ 1099-INT forms:	set to 3

### Save Changes

Click this button to save the new adjustment settings as an LOF type file. If you have loaded a SYS file, it will be automatically converted to its LOF counterpart.

### How to edit a layout file – Advanced Users Only

The layout files have an LOF file extension, making them easy to find inside the CDCO folder.

**Important:** the layouts are closely tied to the Club Office software. Changing them on your own may create problems by printing values in the wrong boxes. For example, it's quite possible to change the W2 layout so that the tax withheld value is printed in the gross wages box on the form, which would obviously create a severe problem when filing the W2 forms.

The file formats are simple comma-delimited text files, and can be loaded into Notepad or any text editor. The first line of the file contains the form name, the horizontal adjustment, the vertical adjustment, the top-to-top setting and the vertical forms/page setting; each piece of information is separated by a comma mark. The second and successive lines contain only the field name, the horizontal position and the vertical position. All measurements are in decimal inches. Example:

```
formname , horizadj , vertadj , toptotop , vfp  
fieldname , x coord , y coord  
fieldname , x coord , y coord  
fieldname , x coord , y coord  
etc.
```

Here's what a sample 1099misc.lof file contains:

```
2005 1099misc, .16, .28 , 5.5 , 2
box1, 3.75 , .25
box2, 3.75 , .75
box3, 3.75 , 1.25
box4, 5.125 , 1.25
box5, 3.75 , 1.75
box6, 5.125 , 1.75
box7, 3.75 , 2.5
box8, 5.125 , 2.5
box9, 4.625 , 3
box10, 5.125 , 3
box13, 3.75 , 3.8125
box14, 5.125 , 3.8125
box15, .25 , 4.1875
box16, 3.75 , 4.1875
box17, 5.125 , 4.1875
box18, 6.5 , 4.1875
payer, .25 , .25
payerfedid, .25 , 1.75
recipid, 2 , 1.75
recipname, .25 , 2.375
addr, .25 , 2.875
csz, .25 , 3.300
optacct, .25 , 3.8125
```

### **SYS and LOF Files – General Information**

SYS files are typically called "system" files and should not be modified by the end user. These files are used by Club Office for various reasons, one of which is to provide a way for a user to return to a "default" setting should a user's own change go awry.

LOF files are "print layout files" and are used by specific "direct printing" modules that need tighter control of exact printing locations on paper forms such as checks and tax forms that have special locations designated for specific data. Most Club Office reports are generated via the Crystal Report engine, which does not provide enough control on exact printing locations and thus, we designed the "direct print" method to overcome Crystal Reports' deficiency. And, because different versions of Windows printer drivers produce different results, the LOF files provide a way to adjust such critical and exact printing to match virtually any computer/printer combination.

As it applies to printing, there is a corresponding LOF file for each SYS file and the LOF is the user's "active" copy of the corresponding SYS file. Users may certainly change LOF files to experiment with their effect in printing. Club Data maintains the SYS version of each file and these are always included in normal software updates. The LOF file is generally NOT included in a software update for it would overwrite a specific user's setting. However, it is always possible to create a new LOF file from the corresponding SYS file, either by loading the SYS file from within the editor and then "saving" it or by simply using Windows to copy the SYS file to be an LOF file.

## Club Office Network Node/Workstation Setup

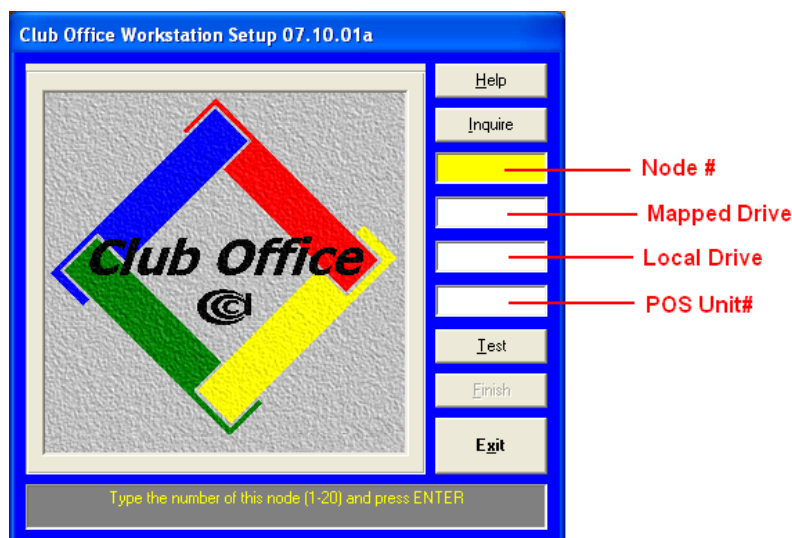
The Network Node/Workstation Setup module (cdconode.exe) creates configuration information that is necessary for SQLPos Point of Sale and TimeClock to communicate properly with Club Office. The module is also used to connect a remote Club Office user to the file server that's hosting the Club Office executable programs and databases.

**Critical note 1:** Through the normal use of Club Office, temporary files are periodically created and/or deleted and sometimes whole temporary directories may be created and used as well. Therefore, the users who will operate Club Office, SQLPos, TimeClock or any other Club Data software must, by definition, have usage privileges for both the computer and network server that allow the creation and deletion of such files. The software will not operate properly if this requirement is not met.

**Critical note 2:** Updating Club Office software requires the replacement of executable (EXE), system (SYS) and sometimes dynamic link library (DLL) files. Antivirus, antispyware, firewall or other protective software, or deficient user privileges can easily prevent the successful installation of a software update. It is suggested that software updates be performed by an individual with administrative privileges to every computer that is to be updated and that he/she possess adequate skills and knowledge to deal with network and other protective-type software issues and/or settings that can and usually do arise.

The node/workstation installation program is also used to restore Windows to proper operation in situations where antivirus, antispyware or other software installations have modified the links inside the Windows registry that allow the Club Office system to function properly. Reinstalling the workstation software corrects the registry links.

The gray help window at the bottom of the display specifies the information to be typed into the highlighted box. Note: Before you can set up a network node, your system administrator must have secured the correct number of user profiles from Club Data, one profile for each computer that will access the Club Office system. Normally the required number of profiles is included in your original installation, but expanding the system is easy to do and more can always be added up to a maximum of twenty.



## Node Number

Type the number (1-20) of the node you're creating and press the ENTER key. The number cannot exceed the number of user profiles provided with your system. Remember that each computer to connect to Club Office must have a different network node number. If you purchased a 10-user package, then you have profiles 1-10 for nodes #1-10. If you add another profile, it would become node #11, etc. (Note: An optional network expansion pack is necessary to add nodes 11-20. Contact your Club Data representative for purchase information.) Write the node number for this workstation down – you may need to refer to it later.

When installed on the same computer, SQLPos Point of Sale and TimeClock share the same node number. The node number is for the *computer* because the node configuration creates a folder on the local computer that is used as a special workspace for various internal data transactions and reporting. The folder name is usually named **c:\cdconode** on the local computer's hard disk and is used by all Club Data modules that connect to Club Office in any way.

- The SQLPos and TimeClock installation modules install the network node manager module directly into the c:\cdconode folder. Program menu options are created on your computer's "Start" menu to access it as well as other functions pertinent to those applications. The SQLPos and TimeClock manuals include more information about this important topic.

## Drive Letter (C-Z) mapped to Club Office

When this field is highlighted in yellow, a standard, Windows dialogue box will appear that will let you "Select Location to CDCO.EXE", which is the main Club Office startup module. Use the "look in" window to change drives and folders until you locate the CDCO.EXE file. It will most likely be in a folder named **CDCO** and likely on a networked drive. The file is marked with the Club Office logo, a 4-color, diamond-shaped icon like this:



Once you locate it, highlight the CDCO.EXE file and click the OPEN button. The correct drive letter will be inserted into the box and more importantly, "other" information about the "network path" to find the Club Office databases.

**Critical note 3:** The "mapped" drive letter is the letter you used when this computer was mapped to the Club Office system on the server computer using standard, Windows networking functions. Valid drive letters in the "mapped drive" box are C through Z. Drive C is the local computer's hard disk, meaning that the installation is local and probably not on a network. If you are a networked user and haven't mapped a drive yet, click EXIT, map the drive and then restart the network node/workstation setup module. Having a valid drive mapped is a prerequisite to setting up a networked connection to Club Office.

## Drive Letter (C-Z) of local hard disk

This is the drive letter on the remote computer (the network node/workstation) where the network node workspace folder will be located. Valid drive letters are C through Z. Drive C indicates that Club Office is installed on the local computer only. If so, you'll get a pair of verification boxes before you can continue.

**Note:** If you installed SQLPos or TimeClock on this computer, the installation has already created a c:\cdconode folder and placed several files inside it. Type the letter C in the box.

## PosUnit

This setting applies to SQLPos Point of Sale only; if SQLPos is NOT installed on this computer, you may skip this section.

For those with SQLPos installed on this computer, an additional box will appear where you should enter the PosUnit# for this computer.

- ┆ Like the Node#, each SQLPos workstation unit must have a different number; no two can share the same number.
- ┆ The PosUnit number may be a different number than the node number but it's a good idea that the Node# and the PosUnit# be the same from a control perspective. (It's easier to understand your network configuration if workstation #7 is also PosUnit #7. It's almost always more confusing for most people when workstation #7 is PosUnit #4, although the software can certainly work that way.)

### **Test**

Click the TEST button to test the validity of your settings. The module will search the mapped network drive for the proper user profile for the node number being created as well as test for your local hard drive. If all is in order, the Finish button will be enabled.

### **Finish**

Click this button to finish the connection of your network node/workstation to Club Office. It takes only a few moments for the process to complete.

- ┆ **SQLPos and TimeClock:** nothing more needs to be done (other than configure those applications, of course). The installations for these applications create the proper startup shortcuts on the Windows Start menu as well as on the desktop for the specific workstation involved.
- ┆ **Club Office Accounting:** If the workstation will be used to access Club Office Accounting, a startup icon to run the software must be created manually on the computer's desktop. This is because Club Office itself was not installed on the computer – only the software that allows the computer to link into Club Office. Creating a desktop shortcut is easy to do.

### **Build a Desktop Startup Icon**

Now that the workstation is connected to Club Office you should create a desktop shortcut to start the software. You will need to know what the Node# of the workstation is.

1. Right-click on your desktop, then click NEW, then SHORTCUT.
2. In the command line box, type the drive letter you used to map the server's Club Office system to your computer, then a colon, and then type \CDCO\CDCO.EXE followed by a blank space and lastly the node number for this workstation. For example, if you mapped the server to drive P and this is node #3, your command line would read as follows:  
**P:\CDCO\CDCO.EXE 3**
3. Click NEXT. If all is correct, your computer will find the CDCO.EXE program module on the server and display a box asking for the NAME of this shortcut.
4. Either type a new name (in this example, **Club Office Node #3**) or leave it as it is and click the FINISH button.
5. To start Club Office, just double-click on the new shortcut; the Club Office logon screen will appear if the settings are correct.

### **Changing a Node's Settings**

The node/workstation setup module (cdconode.exe) can also be used to change existing node settings. This would be necessary, for example, if you have changed the network drive mapping or the network server itself. Simply start the Node Manager, change the settings, click TEST again, and finish the changes by clicking FINISH.



## Best Practices

Here are some practical suggestions that can enhance your experience using Club Office software in your operation, or actually, using software applications in general!

- ┆ **Server Operations:** A computer that is operating as a file server for one or more users utilizes an internal list of “shared files” to know which user has which files “open,” i.e. which files are currently “in-use.” And while this is in no way a treatise in how file servers work, the following is a brief explanation that should prove helpful to networked users.
  - ┆ Each time a user opens a file on a server, the server software puts another “tick” on the “in-use” lock counter for that file. When the user stops using the file, it removes a “tick” from the lock counter, and when the lock count reaches zero, the server knows that the file is no longer in use by any users. The server’s operating system is always aware of the current lock counts and when backup software is used, the software tends to ignore files that have an “in-use” lock count other than zero. Therefore, a backup made when some files are still marked as “in-use” could easily be incomplete and missing those files altogether.
  - ┆ Using the global logout resets the Club Office user database *but it cannot cause a server to release all the locks in its lock counter*. This can only be done by (a) using an administrative utility on the server itself to release the locks manually or (b) rebooting the server which clears the lock counts, but obviously can cause other problems for systems that rely on the server’s resources such as POS systems do.
  - ┆ **You don’t want these problems to happen.** Train your users to log in and log out properly. Train them not to simply shut off their computers or close Windows without first closing all the applications they were using.
- ┆ **Workstation Operations:** A user’s personal computing habits affect the performance of that user’s computer, including other applications that may be running concurrently.
  - ┆ **Use an application and when done with it, even if only for fifteen minutes, close it.** Why? Various Club Office modules open Access databases and while the application is open, its Access databases are open, too. Depending on how your computer is configured, after a long period of inactivity the Access database engine may determine that you’re no longer *actively* using it and it may suspend itself. Later, if you close the application or simply shut down the computer, it can leave the open databases in an unsettled state and cause a database error when an attempt is made to open them later. This commonly is error 3343 “unrecognized database” and unfortunately, it’s an error code that the built-in Club Office database repair tool cannot fix on its own. Contact your Club Data technical support representative if you encounter error 3343. And in the mean time, if you’re not actively using Club Office, close it instead of just leaving it open on your screen all day.
  - ┆ **Reboot often.** Restarting your computer resets a great many things inside the computer, such as Windows’ workspace memory, keyboard, mouse and printer ports. Why is this helpful? Windows gives the appearance that it can do multiple things simultaneously, but it just isn’t true. The computer’s internal chips and the Windows operating system work together to very quickly and almost imperceptibly switch from one thing to another, and it does this with all the foreground and background applications that may be running. The more tasks you have running simultaneously, the more switching it has to do and the less attention each task gets, which makes the PC appear to be running slower. Rebooting the computer can reclaim some of the leftover internal memory pointers from applications that have been opened and closed, essentially giving the computer a breath of fresh air.

- **Microsoft Outlook.** Many people prefer to open Outlook in the morning and leave it open all day, periodically checking for email, etc. This may make sense if you're a securities trader and live your life on-line, but you should understand that there are very few applications that will use up your computer's resources as much as Outlook will. Leaving it running all day is like driving a car with your foot on the brake all the time. Opening Outlook to check email takes only a few seconds (on some of the computers in our office, less than two). Leave it closed if you're not using it.
- **Month-end processing.** It's no secret that the dynamic nature of Club Office's A/R system makes the end-of month process into a highly computer-intensive operation. For a busy club, there are literally millions upon millions of computations that must happen. Our suggestion is that the computer be rebooted and no other applications other than the Club Office software be running prior to starting monthly processing, printing statements or running the "finish monthly" processes because these functions take a lot of computing horsepower.
- **Pay attention.** Throughout the course of using Club Office, various messages can pop up on the screen. Some of them are informational, some are cautionary and others may be system-related and report problems. Whatever the message is, please know that it's there for a reason. Many of the messages are what we call "conditional questions" and require that you answer either "YES" or "NO." While the default you'll get if you just hit the <ENTER> key is almost universally "NO," the choice causes the software to do one thing or another. Sometimes the choice is rather benign such as "Do you want to print this report?" while in other cases, it's extremely important such as "Are you sure you want to delete this member?"
- **Make regular backups.** While Club Office has an automatic internal backup system for various processes, it is not intended that this be your complete safety net. A computer is a machine, and from time to time, machines break. When a computer breaks, it often wreaks havoc with the data that's stored on it. The automated internal backups are stored on the hard disk, right there with your active data. If the computer's hard disk dies, your data – and the internal backups – dies along with it. Get in the habit of making regular backups to removable media such as CDs, DVDs or flash memory drives so that you'll have copies of your data outside of the data stored on the hard disk. And while you're at it, consider uploading a copy of the backup to your private FTP site (See Appendix 3) for an additional layer of safety.

## Appendix 1 - Other Administrative Utilities

Club Office includes several additional utilities that, by design, are used outside of the normal course of operation. Generally speaking, these are used for special situations that cannot be managed otherwise such as purging old data, repairing data in the event of a computer crash, transferring values from a different accounting system, and others. Most of these tools are used only in concert with a Club Data technical support representative and are generally not provided to end-users except in special situations. However, many of them are briefly explained here as warranted and are covered in more detail in subsequent appendices.

**admedit.exe** – Administrative editor. This is used to create, edit or delete data in any of the Club Office databases. It is also used to purge old data from the system. This utility is explained in detail in **Appendix 2**.

**cdconwpk.exe** – Club Office Network Pack. This module generates Club Office user profiles, but has become an obsolete module and is no longer needed.

**gensubs.exe** – Provides quick, automatic generation of member sub-accounts. Used for clients who originally did not create sub accounts for spouses and other dependents but now want to track spending or other functions for other family members. The utility creates generic accounts using the master account name for each and sets both the class code and billing code to zero as well as all special interests ‘off’ so that the accounts cannot be accidentally “billed” for dues, late fees, or other automatic month-end charges.

**inventorydeleter.exe** – quick inventory deletion tool, useful for those who want to start over with a blank inventory database or who want to delete inventory records of inventory items that will no longer be maintained. The module deletes according to a user-input from/to range of inventory item numbers. Note that the module does NOT delete transaction history that relates to deleted inventory items; inventory transaction history is managed via the Administrative Editor.

**membraedit.exe** – provides a way to edit special member balances. Used only when first beginning a new program that requires the entry of a specific balance forward value. Often used to help set up databases for new clients.

**minmaker.exe** – Used to create special, retroactive transactions for the purpose of implementing a multiple month minimum program when there is no historical data present. Minmaker is usually used on a one-time basis to transfer minimum balances to Club Office from a different accounting system.

**myipaddress.exe** – Utility that displays the computer’s IP Address.

**mynetworkinfo.exe** – Utility that displays the computer’s name and IP Address.

**purgehold.exe** – SQLPos register only: utility to purge transactions that remain on “local hold” on a specific register. Typically the module is used after a training session on an off-line register where local hold sales have been created. This removes them so that register and/or server sales totals aren’t affected by practice sales.

**recreatebfact.exe** – Utility to create a valid, historical “balance forward” transaction in the daily.mdb database. This is typically used to reconstruct a database in the event a computer malfunction has caused major damage to the main transaction database. The BALFWD record is used as a starting point for calculating a member balance due value.

Following the use of this module, the user must run the SpinMem Member Balance utility from the main pyramid menu's utility section to update the values with actual transaction data.

**resetdb.exe** – Used to manually realign a database's default values in the event a computer malfunction has created damage to the internal indexing structure of a database. This resets the database to provide correct system default values when no values are specified. The normal database update tool that may be invoked automatically following a Club Office software update performs this feature on its own.

**spincreate1.exe** – Used to recreate member balance records from the most recent balance forward date. This can be used to recreate a valid database if a computer malfunction or procedure has caused the member balance database to become missing.

**spineomchits.exe** – Utility to mark sales transactions that may not have been properly set during an ARFINISH procedure in the event a computer locked-up or a network connection was lost during the procedure.

**spinmem2.exe** – Utility to recalculate the three membership totallers based on a from-to date range. This is typically used to provide a way to recalculate these balance retroactively after starting tracking during the middle of a calendar year.

**taxtableupdates.exe** – displays the current status dates of the payroll tax tables and applies only to users who use Club Office payroll. If payroll taxes are not being calculated correctly, it could be that the tax tables are out of date or, if a database restore has been performed, an old set of tax tables may be in place instead of the current tables. Note that the current set of tax tables is always available on the Technical Support web site as a separate download.

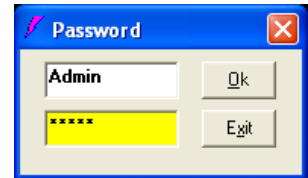
**zerosubs.exe** – used to zero all balances of member sub-accounts which may have inadvertently been created because of an account misconfiguration issue. The module is non-selective and zeros all sub account balances.

Other utilities not highlighted here are support tools intended for Club Data technical support staff use only.

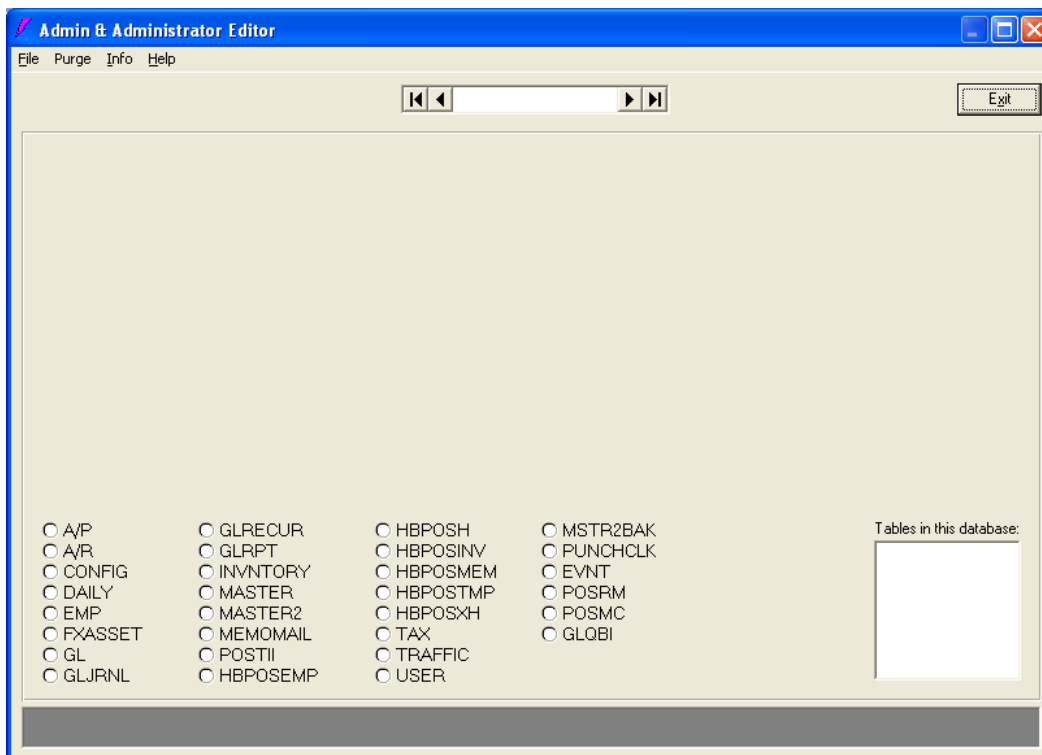
## Appendix 2 – Administrative Editor

The administrative editor was originally created as an aid for Club Data staff for the purpose of entering basic database information for a new client’s system. It was also created to enable an administrator to edit any of the Club Office databases and fix values that cannot be fixed in any other way, including the deletion of practice, training or erroneous data.

The module requires logging in with a user ID and password; the user must have full, level 99 administrative access to all modules in the Club Office system. If any users are currently logged into Club Office, the module will display a suitable message on the screen and will not open.



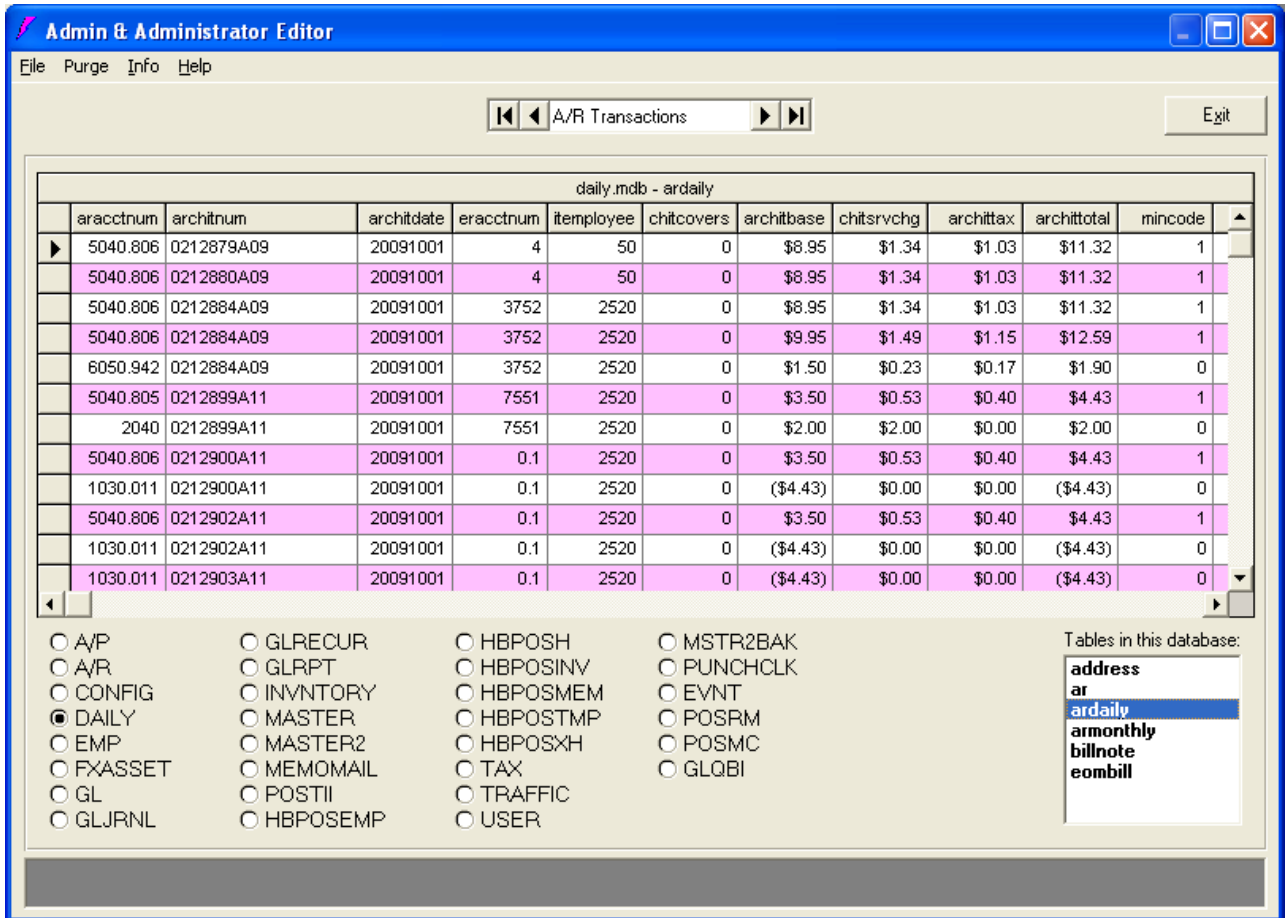
Upon startup, the module display is quite sparse. The names of available databases are displayed as radio buttons in the lower left side of the screen; a “VCR” control is at the top and when a database is in use, can be used to navigate forward/backward through the file or quickly jump to the beginning or end.



1. Select the database to use by clicking one of the database radio button selectors. The white box will populate with the names of the various database tables that reside inside that database. The VCR control at the top of the screen will display a description of the general contents of that database. In this example, the DAILY database was selected:



2. Select the table of data to view by clicking on it in the white box. The screen will then populate with the contents of that table as follows:



3. The raw data is displayed in rows of records and columns including the actual field names in the database at the very top of each column. **IMPORTANT – PLEASE READ!**
  - a. The data is “live” and immediately editable, much like what you would see in a typical spreadsheet application. However, this is a database, not a spreadsheet, so when you make changes, other items are not automatically recalculated such as a formula would do in a spreadsheet. The database contains no formulas or functions for recalculation whatsoever, so **you must be very careful.**
  - b. The currently active row of data is shown by the small, black arrow in the far left column of the display. In the example above, the arrow is on the first row.
  - c. You may move around inside the database records by using the VCR control, or the slider bars to the right and bottom of the display, or by using the keyboard up/down/right/left arrows or page up/page down and tab keys.
  - d. Standard Windows features for selecting data are available (control-C to copy, control-X to delete, etc.) as well as the normal “shift-key” and “ctrl-key” operations for selecting multiple or single rows of data.
  - e. You may make a column wider or narrower by placing the mouse cursor on the small dividing line between column headings, holding the left mouse button down and dragging the column edge either right or left.
  - f. You may “move” a column of data to a different location by placing the mouse cursor on the middle of a column heading, holding the left mouse button down and dragging the entire column either left or right. (This does not change the database – only the display).
  - g. You may reorder (sort) the records in ascending order by a single-click on a column heading. Depending on the volume of data in the system, you may have to wait a

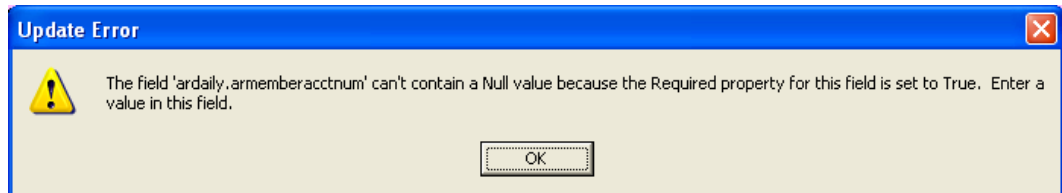
few moments to let the sort complete. As you collect increasingly more data, the time required to complete the sort will also increase.

- h. To restore a display to the system default, simply select a different database radio button, then re-select the original one again, followed by selecting the desired table.
- i. When you click on a field of data, the gray helpwindow at the bottom of the screen will display the kind of data that's supposed to be in that field and any limitations to it. By design the display is quite cryptic, such as this example of clicking on the member number (armemberacctnum) field. Remember that the Administrative Editor tool should always be used only when working with a Club Data technical support representative.

Numerical: Double-precision decimal

#### 4. How to make a change in a data field

- a. Select the desired row and column of data to change. Click on the actual field itself.
- b. Press the DELETE key as many times as are necessary to remove the data. Alternately, you can use the mouse to highlight the entire data in the cell and press the DELETE key to delete it all.
- c. Type the replacement data into the field.
- d. Press either the DOWN or UP arrow on the keyboard, or click on a row either above or below the field you edited. This will cause your changes to be made immediately.
- e. **Important:** Many fields cannot be left blank. If you attempt to leave a field blank that is 'required' a message similar to the following will appear; click OK, enter a proper value and try again.



You may be required to press the ESC key to “reset” the display if you seem to get stuck on a field. General guidelines for field values are as follows:

**Numeric fields:** entering a zero in place of the original value is usually acceptable.

**Text fields:** entering a text value such as a blank space or single dash (-) usually is accepted. The maximum length of the field is usually displayed; keep your enter to the maximum or fewer characters.

**Date fields:** Club Office's date format is YYYYMMDD and should be entered as such. You must enter all eight characters.

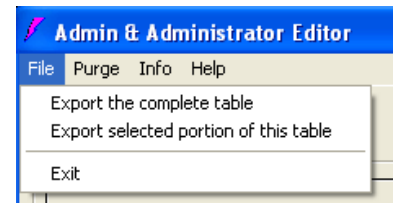
**Currency fields:** enter as a decimal number – you do not need the \$ character.

**Important reminder:** when changing a currency value, be aware that when one is changed, it may require changing others! For example, if you change the “architbase” sale amount of a ticket, the service charge, sales tax and total columns may also require changing! You must calculate the resulting values manually and enter them appropriately. And remember that the TOTAL must equal the base + service charge + tax, otherwise you will create a chimeric ticket. When editing general ledger values, remember that the sign of the number must be correct as well, or the G/L will be thrown out of balance.

#### 5. When done, close the Administrative editor by clicking on the Exit button.

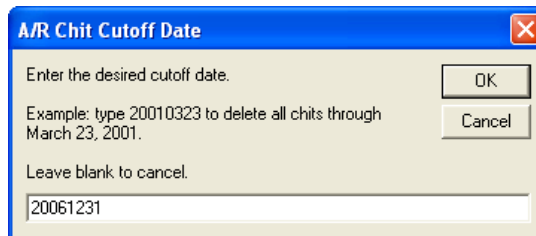
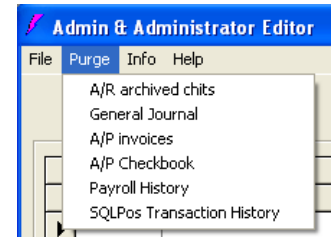
### Administrative Editor File Menu Options

- Export the complete table. This option Exports 100% of the data in the selected table into a comma-delimited format. The name of the file is the name of the table followed by the file extension .CSV and will be located in the CDCO directory alongside all other Club Office program and database files. Note that there will be no warning to overwrite a preexisting file – it will just proceed and do its task. Note that it is possible to create extremely large exported files that are larger than you can realistically import into other applications, spreadsheets, word processors, etc.
- Export selected portion of this table. You may select a specific set of rows of data to export instead of the entire table. This is the generally preferred method because otherwise, the size of the exported data file is usually too large to be useful. Select the desired rows of data using the standard Windows methods and select this option. The export will use exactly the same file naming convention as exporting the complete table.



### Administrative Editor Purge Options

Unless a purge function is used periodically, Club Office databases can grow to enormous sizes and cause processing, reporting and backup delays. Purges are generally chosen by “cut-off” date – the date through which the data should be deleted. In the example below, the user has chosen to purge all sales transactions through December 31, 2006. Any date may be chosen and it is certainly possible to delete all of them including the current ones, so be very careful!



### After purging data...

Be sure to use the Database Reindex/Repair tool that’s available in the utilities section of the main Club Office menu. Be sure to leave the “compact and unlock” box checked and choose all the databases. This will resize your databases after having removed all the dead records and the databases should be more efficient. Remember that no users can be using Club Office when you use the Reindex/Repair tool.



## Appendix 3 – Customizing Club Office

### Screen Displays

#### **CLUBLOGO.BMP (login-screen picture)**

The front login screen can be customized with your club's logo or other picture. The name of the picture file must be **clublogo.bmp** and be placed in the CDCO folder. The picture must also be 275x275 pixels in size to fit in the display window. This is the same as 3.10" square or 7.88cm square. Windows Paint is a very versatile tool and can be used to create such a bitmap picture.

If the system cannot find the clublogo.bmp file in the CDCO folder, it displays the default multicolored diamond Club Office logo instead.

The default color of the screens can be changed from their system defaults to the color of your choice, too. Simply create a file named **practice.dat** using Windows Notepad, type the color you want into the first line and save the file in the CDCO folder. For the example to the right, the color chosen was RED. The system responds to basic colors by words such as red, green, blue, yellow, magenta, cyan and white, as well as to in-between or pastel colors using hexadecimal numbering such as &H00FF0000&. If the practice.dat file contains a word or hexadecimal number it can't understand, it reverts to a plain red background. Deleting the practice.dat file returns the screens to the system default colors. Note that the change is system-wide and affects all screens in the system, sometimes with a colored border only and other times with full-screen displays in the chosen color.

#### **BACKGROUND.JPG (main menu background)**

The main "pyramid menu" background of clouds and water can be changed by replacing the **background.jpg** file. The file must also be named background.jpg, be a JPG file type and be 462 pixels wide x 385 pixels high. This equates to 4.81" wide x 4.01" high or 12.22cm wide x 10.19cm high.



## Backup Utility

The built-in backup/restore utility can be customized to make its backups to a specific destination and also to include a time stamp in the name of the backup file. This was covered fully earlier in this guide. But you should also know that by default, Club Office creates a few secondary internal backups on the hard disk itself. Special secondary backups are made into “ondisk” folders inside the CDCO folder such as ONDISK, ONDISKAR, ONDISKPR, and ONDISKGL depending on which backup option you used or in other cases, which processes you were running. For example, when you “start monthly processing” in the A/R system, an internal ONDISKAR backup is performed to capture a snapshot of your system before the system generated all sorts of transactions and changed balances.

Some users have requested that they be able to turn these “safety” backups off, and there is a way to do that, even though we do not recommend using it. IN any event, here’s how to disable the automatic ondisk backup system:

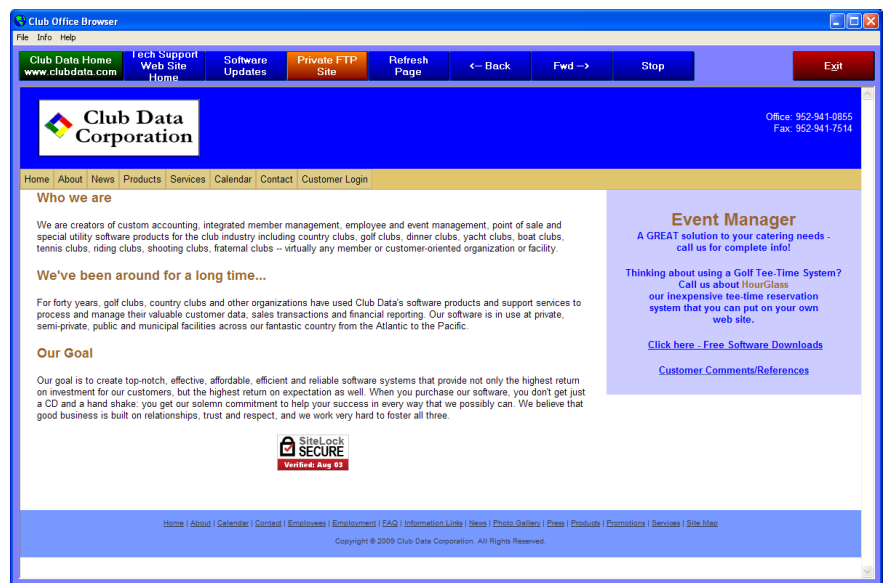
- Using Windows Notepad, create a text file named NOONDISK.DAT. Type anything you like into the first line and save the file. Alternately you can name the file NOONDISK.BAT instead – either one will work.
- When the system invokes the ondisk backup, the existence of the NOONDISK.DAT (or NOONDISK.BAT) file will cause the ondisk backup to cancel itself.

**Important:** The ondisk backup system is there to protect you by providing a secondary set of up-to-date data in the event an unexpected event occurs. Disabling it leaves you running without this safety net, and if you indeed choose to disable the ondisk backups, be absolutely certain that your normal backup system is producing regular, recoverable backups for you. Otherwise, without the ondisk backups, if you should encounter a problem that requires restoring data, your Club Data tech support representative may not be able to provide any assistance.

## Private FTP Site Setup

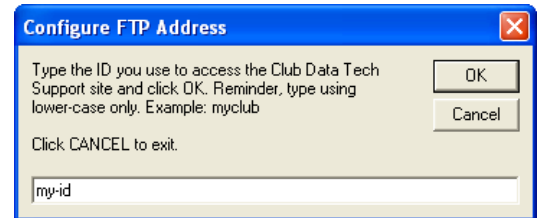
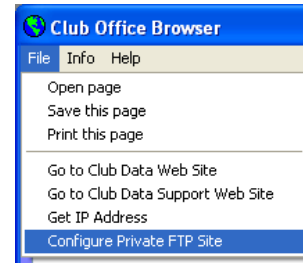
Every Club Data customer that maintains an active support contract also has a private space on Club Data’s web site reserved for storing off-site backups, transferring files, or any other use they may deem appropriate. While the ID and password to the site is assigned and managed by Club Data, the private area is 1GB in size and is available 24 hours/day. The main pyramid menu includes an option to run the Club Office Browser, which takes the user directly to Club Data’s web site and provides simple, one-click access to features of the web site, one of which is the gold button named “Private FTP Site.”

The Club Office Browser makes it very easy to transfer files to/from the FTP site, but first you need to configure it with your FTP ID.

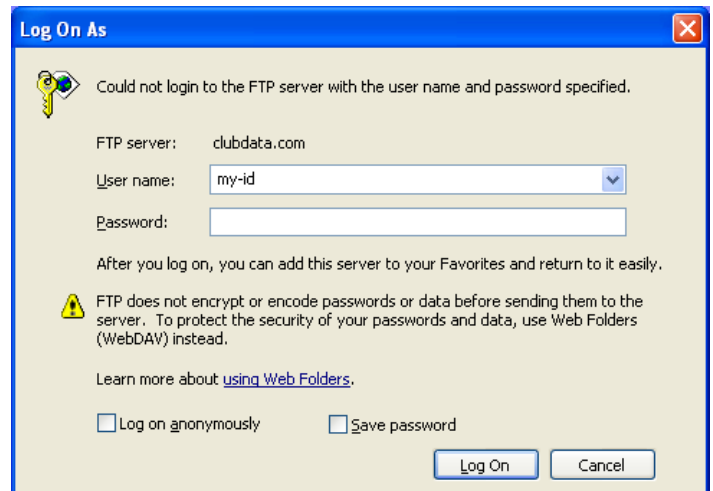


Configuring the browser for the user's private ftp site is easy.

- Select FILE – Configure Private FTP Site:
- Type your assigned ID into the box and click OK. Remember to type the ID in lower-case only, because FTP IDs and passwords are case-sensitive. Click OK to store the ID in a file named **ftpsite.ini** in the main Club Office folder. The password is not stored in the file for security reasons.



- From then on, clicking on the Private FTP Site button will connect to the FTP site and provide a password input box such as the one to the right: Type your assigned password (use lower-case only) and click the Log On button. If you wish, you may check the "Save Password" box.



- When the site opens, you'll likely see a file named .ftpquota already there. This is a system file the FTP site needs and you can ignore it.



- Once the FTP site is open in the browser window, you can simply drag files from your computer into the white browser window to "upload" them to the FTP site, or drag them from the window to your computer to "download" them from the FTP site. To delete a file from the FTP site, simply right-click on it in the browser window and choose delete.
- Closing the Club Office browser will automatically disconnect from the FTP site.