

OurCarClub



OurCarClub

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Getting Started



Introduction

Welcome to OurCarClub, a web-based data management application, custom built for car clubs and the volunteer officials who run them.

OurCarClub is designed to make the task of managing a car club easier for the committee volunteers who do it. The application has been developed by people who have been involved in car clubs for many years, and understand the issues intimately.

Does this sound familiar?

Most clubs have a Membership Secretary, Secretary or Treasurer who is responsible for maintaining "the member list". Usually, this is an Excel spreadsheet on their PC. Occasionally, it's a database on a PC, like Microsoft Access, and sometimes it's an Address Book style program. The whole thing might be constantly emailed around the committee, or put on the club website for people to download. There is always a question over how current the information is. And then there are some clubs that flick through receipt books to track current memberships. Ultimately, there is always one person on the committee who's being asked to supply a list of email addresses, or phone numbers, or mailing addresses and so on. Are you the person who gets the calls asking "*have you got Bob's mobile number?*", or "*Is Fred a paid-up member?*"

OurCarClub

The OurCarClub service provides your club with an on-line database, that requires only a web browser to operate. Being on-line, the database is not the sole responsibility of one committee member: the Treasurer, the Secretary, the Magazine Editor, the Social Co-ordinator can each access the data they need to perform their official duties and obtain absolutely up-to-date member information. But your data is only visible to the people you choose to grant access to.

The system is always available, and can be used anywhere you have internet access, including on your iPhone, iPad or other smart-phone / tablet.

The database is hosted using state of the art facilities, managed, secure and backed up. Because it doesn't reside on one club member's PC, you don't have to worry about what would happen to your club's records if that PC had a disk failure, or a virus. And you can always extract your data to generate a paper copy, or for use in other programs, or for any other purpose.

Features of the OurCarClub Service

The database is designed specifically for Car Clubs, and stores the following information:

- Members, past and present
- Vehicles, current ownership and history
- Committee Members
- Club Events and attendance records
- Day Book recording of club-plate vehicle usage
- Affiliates, Sponsors (eg Newsletter recipients)
- Assets owned by the club
- and more, including customised information tailored to your design

Additionally, OurCarClub provides easy to use communication channels to ensure your members are kept up-to-date with Club news. You can email your members with ease, and send them text messages through the application. There is an audit trail to tell you who made changes, and the facility to grant and revoke access from the system as your committee changes. All data in the system can be exported in a variety of formats to suit other purposes.



New features are added to the system from time to time, and every club that uses OurCarClub automatically receives the ability to use them. It's up to you how much of the system you want to utilise. If you have no use for Club Plates management, or no interest in recording member attendance at events, or use some other method for tracking your assets, you can completely ignore these aspects of OurCarClub.

About this Manual

This manual is not a training course, and does not attempt to exhaustively cover every last page of the system. One of the key features of OurCarClub is the consistency of its interface. Information recorded in the system is organised by the type of "thing" it is, and throughout the system, you have the ability to:

- List a collection of things
- View a particular thing and see how it relates to other things
- Edit a particular thing
- Delete a particular thing
- Search for one or more things that meet a certain criteria

A "thing" could be a person, or an asset, or a vehicle. It could also be a name for a category of things, such as Vehicle Model, or Member Type.

It won't take long before you'll be finding existing information, updating it and adding to it with ease.

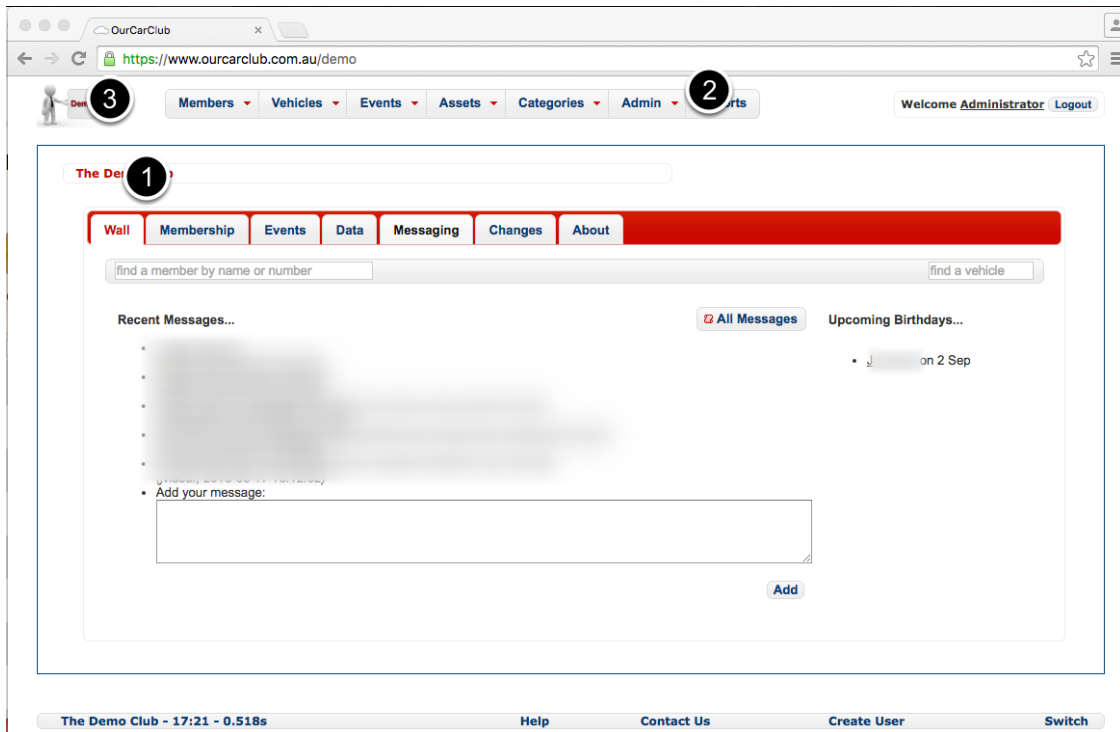
This edition of the manual was last updated for revision 561 of OurCarClub. The current revision number can be found on the home-page of the application under the "Changes" tab.



The Home Page for your Club

The "home-page" of your OurCarClub system.

Finding your way around your OurCarClub system

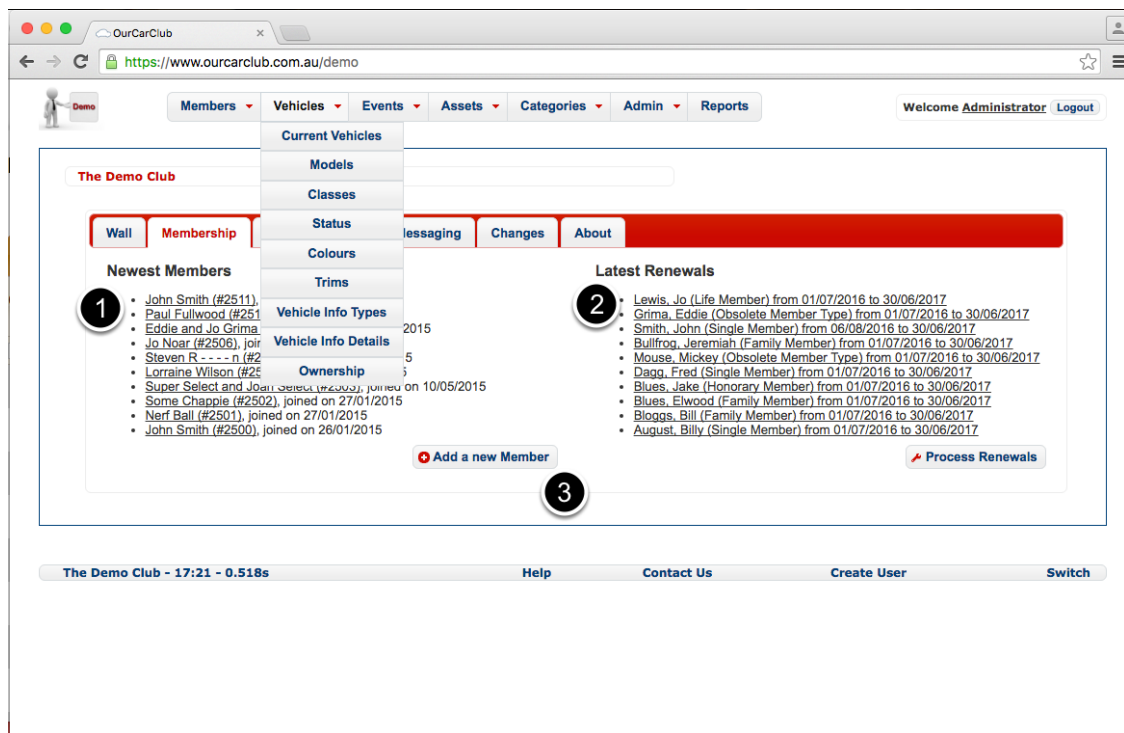


This is the "home-page" of your OurCarClub system. You can navigate to almost anywhere in the application from this page, and you can always return to this page from anywhere in the system by clicking on the club logo icon in the top left corner.

1. The tabs in the main panel give you quick access to the "Wall" - where users can leave messages for each other, quickly find the most recently joined members, most recent renewals, upcoming Club Rego renewals and usage, and most recent and upcoming events.
2. The menu bar quickly takes you to the most important parts of your database: Members, Vehicles, Events, Assets and so on.
3. Click the club logo icon to return to this page from anywhere else in the application.



Finding your way around (continued)



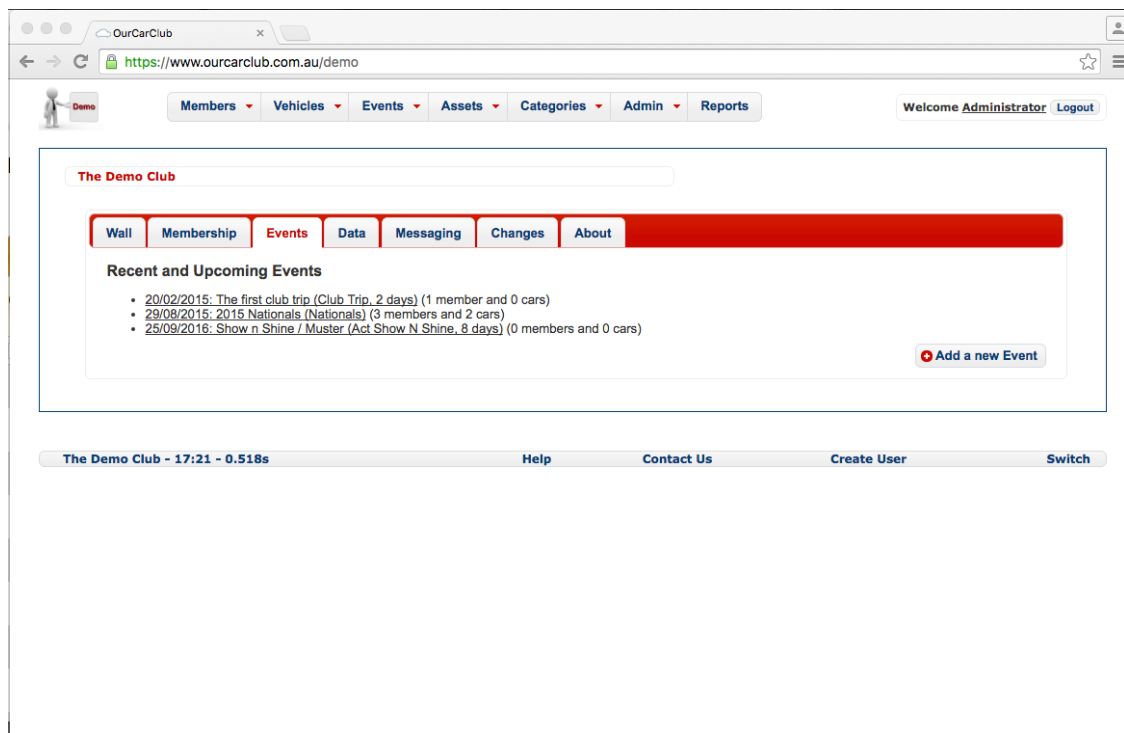
The main menu area has drop-down sub-menus, to easily navigate to its related categories.

Note that the top levels of each menu are also links – so you click "**Members**", "**Vehicles**" and so on to get to the List View of that record type. (Unless you're using a mobile device, in which case the link will appear as the top level item in the drop-down. This is because a touch device doesn't have a distinction between a hover and a click.)

1. The 10 most recently joined members
2. The 10 most recently renewed memberships
3. This button takes you to the page where you can add a new member and their vehicle.



More home page tabs



A lot of information on the Home Page or Dashboard is placed in tabs, to make the information manageable. In this example we've clicked the "Events" tab.



And finally...

The screenshot shows a web browser window with the URL <https://www.ourcarclub.com.au/demo>. The page has a blue theme. At the top, there is a navigation bar with links: Members, Vehicles, Events, Assets, Categories, Admin, and Reports. A user is logged in as 'Administrator'. Below the navigation bar, there is a section titled 'The Demo Club' with tabs for Wall, Membership, Events, Data, Messaging, Changes, and About. The 'Changes' tab is selected, showing a table of recent changes.

Change/Data Type	Record	Edits	By
Update Club	The Demo Club	Theme [2] => [1]	on 29/08/2016
Delete Access	access The Demo Club	User ID was []	
Create Message	Lodgy was ere (celliot, 12/08/2016 12:18)	Message: [Lodgy was ere]	
Update Person	Flintstone, Fred	Chapter [13] => [158]	
Create Chapter	Far North Coast	Memo: [Coffs Harbour], Code: [FNC], Name: [Far North Coast]	
Create Chapter	NOVA	Memo: [Newcastle / Hunter Valley / Central Coast], Code: [NOVA], Name: [NOVA]	
Create Subscription	Lewis, Jo (Life Member) from 01/07/2016 to 30/06/2017	From Date: [2016-07-01], Paid Amount: [60], Paid Date: [2016-08-11], To Date: [2017-06-30], Receipt No: [1234], Person:	

Note the "Blue" theme on this page. You can choose the theme that suits your club logo and colours. You'll find this under the "Categories" link, explained later.

This panel shows the 20 most recent edits that were done, by whom and when.



Lists - Member List

All data in your OurCarClub system can be displayed in a "List" context, that can be sorted, filtered, re-ordered and exported.

Understanding a List Page

The screenshot shows the 'List of Members' page. It includes a navigation bar with tabs for Members, Vehicles, Events, Assets, Categories, Admin, and Reports. A user welcome message 'Welcome Administrator' is visible. The page title is 'List of Members'. Below the title, there are buttons for 'Lock this page', 'Reset List Display', 'Search People', and 'Add a new Person'. A search bar is located below these buttons. The main content is a table with columns: Member No, Status, Surname, First Name, Join Date, and Actions. The table lists 19 members, including Billy August, Bob Fatwallet, Bob Smith, Bruce Wyckoff, Jeff Clarke, John Roseville, Julian expires in July, Master DemoClubData, Michael Rensch, Pat expires in May, Ron Weasley, Samantha expires in June, Sarah Priestley, Ted Morgan, Tre Cool, Walter White, William Bloggs, William Junior Bloggs, and Wilma Flintstone. Each row has 'View', 'Edit', and 'Delete' links in the Actions column. A 'Show / hide columns' button is at the top right of the table. Below the table, there's a 'Process Renewals' button and export options: 'Export as Address Book File', 'Export as Excel', and 'Export as Text'. The footer shows 'The Demo Club - 19:57 - 1.537s', 'Help', 'Contact Us', and 'Switch'.

Note: the "Green" theme is shown on this page.

This particular shot is showing the List of Members, which has a few items peculiar to that type of record. But every collection of records of a certain type (i.e. all Vehicles, all Members, all Types of Assets) can be manipulated in this way.

1. Headers: click to sort by this column, click and drag to re-order columns
2. Click "Show/Hide Columns" to alter the list display. The settings you choose are retained next time you come to this page
3. Type a few characters in the quick-search box to find a particular record or group of records
4. Click on a name to View member details
5. Click Edit or Delete to alter this record
6. By default only current members are shown. Click this button to show ex-member details.
7. Export all records of this type for other uses.
8. Perform more sophisticated Searching
9. If you find you're going back and forth from List to View and back again, it can be more efficient to lock the view page. Once the lock is activated all the links at (4) and (5) automatically open in a new browser window or tab (depending on your browser's settings), leaving this list view in place. The button toggles the state of the lock, and the icon to the right of the title shows the current state.



Views - Member View

Examining a single member's data

View Member

Elwood Blues

1 Member No: 20
Member Type ID: [Member](#)
Status: No Record
Surname: Blues
First Name: Elwood
Partner's Name:
Title: Mr
Home Address: 1060 West Addison
Home Suburb: CHICAGO
Home State: IL
Home Post Code: 2453
Work Name:
Work Address:
Work Suburb:
Work State:
Work Post Code:
Home Phone:
Work Phone:
Mobile Phone:
Home Email:
Work Email:
Also Subscribe Work Email: No
Has Correspondence By Mail: No
User ID:
Birth Date:


2 [Previous](#) [Edit](#) [Delete](#) [Next](#)

3 [Add a new Person](#) [List People](#) [Search People](#) [Help](#)

4 Welcome Administrator [Logout](#)

Vehicles

5 **Current** **Previous**

BDR-529 Dodge Monaco Sedan (Black and White)  [Ownership Details](#) [Add](#)

Subs

6 **Current** **Previous**

Period	Payment Details	Actions
	Not a current member	Add

Committee Positions

7 **Current** **Previous**

Office	Since	Actions
No records		

Events **Notes**

(That's enough fiddling with the themes - back to the original Red & Blue theme).

View Screens follow a standard design: the information about the particular record is on the left, and related information is grouped in boxes to the right and underneath. Related records are generally things we need to track over time, or where there may be none, one or many items linked to the main item (in this case a Member). A member may have many vehicles now, or they may have none. They may have previously owned vehicles that they have since sold. Obviously, if there was only one field in the Member record called "Vehicle", it would severely limit our ability to track this sort of thing.

1. All the standard fields for a member: names, addresses, contact details.
2. Edit / Delete this record.
3. Navigate to the next or previous member (by member-number)
4. Add a New Member, return to the List View, perform a Search, or open the Help Panel.
5. Member's Vehicles, both Current and Previous can be seen in this tab. Click on the description or "Ownership Details" to navigate to the details of the Vehicle
6. Subscription info - current membership info, and previous subscriptions (renewals). So each annual renewal is recorded for posterity.
7. Similarly to Subs, if this member has been or is a Committee Member, details are shown in this panel.

The sharp-eyed reader may have realised "hey, a Member can have move house, or change email address, or phone number! Over time they may have many of these things." And that's true. But we're not really interested in capturing an accurate history of this. It's not relevant to managing your car club. As long as the address in the system is where they live now, where they used to live is not terribly important. We're interested in ensuring any mail we might send today gets to them, not where we might have sent mail a year ago.



The other half of the Member screen

OurCarClub - View Member

www.ourclub.com.au/demo/view/person/134

Work Suburb
Work State
Work Post Code
Home Phone
Work Phone
Mobile Phone
Home Email
Work Email
Also Subscribe Work Email: No
Has Correspondence By Mail: No
User ID
Birth Date
Partner Birth Date
Join Date: 2011-07-27
Follow Up Date
Is Not To Be Contacted: No
Updated: 2011-07-27 19:49:06
Last Update By: admin

Committee Positions

Current Previous

Office	Since	Actions
No records		

[Add](#)

Events

No records

[Add](#)

Notes

No records

[Add](#)

Custom Info

No records

[Add](#)

CRS Usage

No records

[Add](#)

Assets

No records

[Add](#)

OurCarClub Access

No records

Events Attended

Elwood Blues attended Garage Crawl (Official Club Run) with car
Elwood Blues attended Picnic at Hanging Rock (Official Club Run) with car

[Add](#)

The Demo Club - 17:19 - 0.599s

Help

Switch

As mentioned above, all the boxed content shows "related information", where there may be no data, one or many related records for a particular member. In OurCarClub, anything that looks like a link is a link, and it is easy to navigate from individual record to similar records. (See the Vehicle pages for more examples of this.)

1. Clicking on an Attendance Record will take you to a view of that member's attendance in that event. (Attendance contains details of which car they brought to the event, amongst other things.)
2. Virtually every page has a Help link at the bottom to show context-sensitive information about the page you're viewing.
3. If you have access to multiple Car Club's OurCarClub systems – including this "Demo Club", you can use the "Switch" link to access the alternate systems.



List of Vehicles

Let's look at a different List Screen, the records of Vehicles in your club. As you can see, it's quite similar to the Member List.

List of Vehicles

The screenshot shows the 'List of Vehicles' screen in the OurCarClub application. The interface includes a navigation bar with tabs for Home, Members, Vehicles, Events, Daybook, Reports, Assets, Categories, and Admin. A search bar and 'Add a new Vehicle' button are located at the top right. The main table displays a list of vehicles with columns for vehicle details and status. A 'Show / hide columns' button is on the right, and a 'Show 25 entries' button is at the bottom left. Numbered callouts 1, 2, and 3 highlight specific features: 1 points to the 'Show / hide columns' button, 2 points to a vehicle entry, and 3 points to the 'Vehicle Status' column.

As mentioned previously, all List screens share common features: click or drag the headers to sort or re-arrange, filter and export your data.

1. The Show/Hide columns button has been clicked, showing the additional columns available for inclusion in this view. Click any of the check-boxes to show/hide that column, and click the Show/Hide columns button again to dismiss.
2. Click on the "Summary" of any vehicle to go to its "View" screen.
3. All Vehicles have a Status. Click on a Status to show information about that Status, and a list of all Vehicles that match that status. This item to group to item navigation is a key feature of the OurCarClub system. It is extremely easy to navigate around your data.



List Vehicles (continued)

OurCarClub - List of Vehicle: x OurCarClub - List of Membe: x

www.ourcarclub.com.au/demo/list/vehicle

Home Members **Vehicles** Events Daybook Reports Assets Categories Admin

Welcome Administrator Logout

List of Vehicles

Search Vehicles Add a new Vehicle

Copy Save Show / hide columns

	Vehicle Class	Rego	Vehicle Status	Actions
(Summary)				
134 CUD Holden FC Sedan (Dark Green over Light Green)	Authentic	134 CUD	Club Plates	Edit Delete
BB-1965 Holden (Colour Not Recorded)	Restored	BB-1965	Full Rego	Edit Delete
BCA321 Holden FC Sedan (Not Recorded)	Restored	BCA321	Full Rego	Edit Delete
BDR-529 Dodge Monaco Sedan (Black and White)	Authentic	BDR-529	Wrecking	Edit Delete
BF-1971 Buick Riviera (Burgundy)	Authentic	BF-1971	Full Rego	Edit Delete
BLUES-1 Cadillac Series 60 Sedan (Not Recorded)	Authentic	BLUES-1	Full Rego	Edit Delete
ED-SALO Tuza Float (Belgae)	Authentic	ED-SALO	Full Rego	Edit Delete
FE-1957 Holden FE Special Sedan (Blue and White)	Authentic	FE-1957	Full Rego	Edit Delete
GM56FE Holden FE Special Sedan (Colour Not Recorded)	Authentic	GM56FE	Full Rego	Edit Delete
HG-1971 Holden (Colour Not Recorded)	Authentic	HG-1971	Club Plates	Edit Delete
HT-1970 Holden (Colour Not Recorded)	Modified	HT-1970	Full Rego	Edit Delete
JUNKER Ford (Colour Not Recorded)	Modified	JUNKER	Full Rego	Edit Delete
LOD6TR Holden LC XU1 (Blue)	Restored	LOD6TR	Full Rego	Edit Delete
MY56FE Holden (Colour Not Recorded)	Authentic	MY56FE	Full Rego	Edit Delete
no-rego Holden (Colour Not Recorded)	Modified		Unregistered	Edit Delete
RJ-1963 Chevrolet Impala Sedan (White)	Authentic	RJ-1963	Full Rego	Edit Delete
STUTZ Unknown (Colour Not Recorded)	Modified	STUTZ	Full Rego	Edit Delete
WZL-63 Ford (Blue and White)	Authentic	WZL-63	Under Resto/Rebuild	Edit Delete
XU-001 Holden LC XU1 (Colour Not Recorded)	Authentic	XU-001	Wrecking	Edit Delete
YBOTH A Ford (Colour Not Recorded)	Modified	YBOTH A	Full Rego	Edit Delete

Show 25 entries Showing 1 to 20 of 20 entries

Export as CSV Export as Text Export as XML

The Demo Club - 19:13 - 1.081s Help Switch

Here is that same screen with the Vehicle Class and Rego columns added to the view.



Vehicle View

Just as a Member has many attributes and related pieces of information, so too does a vehicle.

Viewing an Individual Vehicle

The screenshot shows the 'View Vehicle' page for a BDR-529 Dodge Monaco Sedan (Black and White). The page layout includes a top navigation bar with links like Home, Members, Vehicles, Events, Daybook, Reports, Assets, Categories, and Admin. A 'View Vehicle' sub-header is present. The main content area is divided into several sections:

- Vehicle Attributes (Left):** A table listing details such as ID (22), Vehicle Model (Dodge Monaco Sedan), Vehicle Class (Authentic), Rego (BDR-529), Rego State (New South Wales (NSW)), Body No., Engine No., Chassis No., VIN, Year of Manufacture (1974), Vehicle Colour (Black and White), Trim (Not Recorded), Vehicle Status (Wrecking), Memo, Updated (2011-07-27 19:49:06), and Last Update By (admin). Callout 1 points to the 'Authentic' link.
- Photo Upload (Center):** A section with a 'Photo' tab, a photo of the car, and buttons for 'Choose File' and 'Upload'. Callout 2 points to the 'Upload' button.
- Related Information (Right):** Three boxes showing related records:
 - Owners:** Lists 'Elwood Blues owns BDR-529 Dodge Monaco Sedan (Black and White)' with an 'Add' button.
 - CRS Usage:** Shows 'No records' with an 'Add' button.
 - Events Attended:** Lists two events where the vehicle was brought to official club runs, each with an 'Add' button. Callout 3 points to this section.
- CRS Regos (Bottom Left):** A box showing 'No records' with an 'Add' button.

All View pages are similar in design: the left hand side has the attributes of the item being viewed, with Edit and Delete buttons. The boxes to the right and underneath show related pieces of information, where there may be none, one or many related records.

1. Attributes of this vehicle. Any fields that are shown as links denote a relationship to a category or item. Clicking on "Authentic", for example, would take you to a page showing all the vehicles thus classified. (More on this later...)
2. You can upload an image of your member's vehicle from this page, or you can provide a URL to an existing image on the web. OurCarClub only supports one image per vehicle at this time.
3. Another example of linked information. This vehicle may have attended many events, and you can navigate to a specific attendance record via the link.



Relationships

One of the most fundamental features of a database (as opposed to a spreadsheet) is the ability to describe relationships between types of information. Simply put, a Vehicle has a Class (ie Authentic, or Modified etc), and any one Class may have none, one or many Vehicles. One of the most powerful aspects of OurCarClub is the ease with which you can navigate from an item to a category, to another item and so on.

Navigating Relationships

The screenshot shows a web browser window with the URL www.ourcarclub.com.au/demo/view/veh_class/6. The page title is "View Vehicle Class". On the left, under the "Authentic" tab, there is a table with the following data:

ID	6
Vehicle Class	Authentic
Updated	2011-07-21 03:07:56
Last Update By	craiga

On the right, under the "Vehicles" tab, there is a list of vehicles with their details and a link to view each vehicle:

- [GM56FE Holden FE Special Sedan \(Colour Not Recorded\)](#)
- [HG-1971 Holden \(Colour Not Recorded\)](#)
- [MY56FE Holden \(Colour Not Recorded\)](#)
- [FE-1957 Holden FE Special Sedan \(Blue and White\)](#)
- [XU-001 Holden LC XU1 \(Colour Not Recorded\)](#)
- [WZL-63 Ford \(Blue and White\)](#)
- [BDR-529 Dodge Monaco Sedan \(Black and White\)](#)
- [BF-1971 Buick Riviera \(Burgundy\)](#)
- [134 CLD Holden FC Sedan \(Dark Green over Light Green\)](#)
- [BLUES-1 Cadillac Series 60 Sedan \(Not Recorded\)](#)
- [ED-SAID Tuza Float \(Beige\)](#)
- [R3-1963 Chevrolet Impala Sedan \(White\)](#)

At the bottom of the page, there is a status bar showing "The Demo Club - 19:25 - 0.311s" and a "Switch" button.

As mentioned on the previous page, by clicking the Vehicle Class link (the word "Authentic" on the View Vehicle page), you are taken to the View page for that Vehicle Class. This shows any attributes related to the class, and a list of all the vehicles with that Class. Any of them can be clicked on to jump on to another "View Vehicle" page. You could also add another Authentic Vehicle from this screen, but the View Person screen has a "Wizard" for this, and would be the recommended approach.



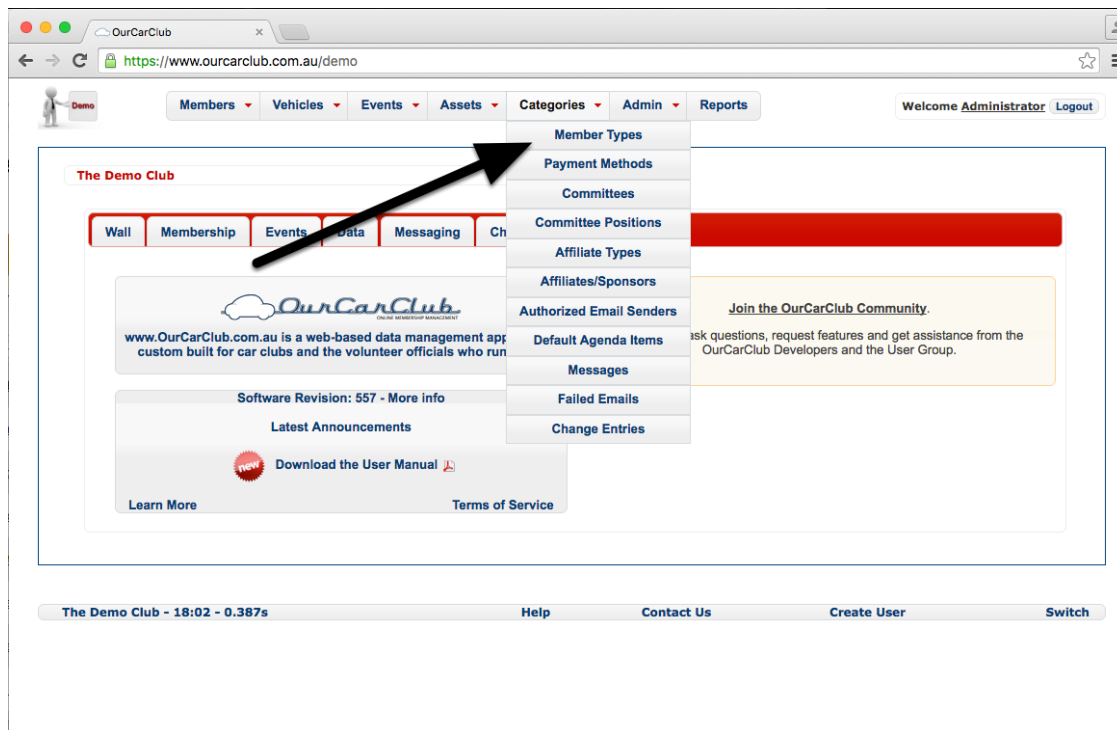
Manipulating your information - finding and making changes.



Adding Information

OurCarClub allows you to view, edit, add or delete information. We've looked so far at navigating around and viewing records. Let's look now at how we might add some new information to the system.

Understanding the different types of information



There are fundamentally two types of information:

- records, which are specific "things", such as Members, Vehicles, Events, Assets and so on.
- categories, which describe how you group your records. Most clubs will have a couple of different Membership Types, Vehicles might be classified as Original, Restored or Modified; Assets might be "Computer Equipment", or "Merchandise". For most categories, you can start with the default, suggested list of values, and adjust them as you see fit.

In this example, we are going to add a Membership Type. We've decided to introduce a "Family Membership" option.

Click on the Member Types link under the Categories menu item.



Start with the List View - What have we got in our system already?

List of Membership Types

Search: Show / Hide Columns

Member Type	Joining Fee	Renewal Fee	Actions
Member	45.00	40.00	View Edit Delete
Honorary Life Member	0.00	0.00	View Edit Delete
Associate Member	25.00	20.00	View Edit Delete

Show 25 entries Showing 1 to 3 of 3 entries

[Export as CSV](#) [Export as Text](#) [Export as XML](#)

The Demo Club - 19:23 - 0.132s Help Contact Us Switch

We're now looking at the existing Membership Types, and whatever columns from the Show/Hide option we've adopted. We currently have "Member", "Associate Member" and "Honorary Life Member". Click on "Add a new Membership Type"

Adding a new Membership Type

Add new Membership Type

[List Membership Types](#) [Help](#)

[Reset](#) [Add](#)

Member Type Family Member

Joining Fee 60

Renewal Fee 50

Member Group Standard

Memberno Min

Memberno Max

[Reset](#) [Add](#)

The Demo Club - 18:05 - 0.196s Help Contact Us Switch

Labels in **Red** signify pieces of information that must be provided for this item to be valid. In this case, we need to provide a short description for the new item.

1. I've typed "Family Member" here, as that is what we call our new Membership Type.
2. This particular category also has optional values for Joining Fee and Renewal Fee, which I've also filled in.
3. To Save this new record, click the "Add" button.



All Add screens function in this way. If any items require a value and one hasn't been supplied, or data of the wrong type is entered (such as text where a date belongs), the fields in question will be flagged in red for correction. It's also important to bear in mind that you cannot have two records for the same thing. If you already had a record labelled "Family Member" and you attempted to create another, you would get an error message alerting you to this fact.

Now, having clicked "Add", we should see...

What did we just do?!

The screenshot shows the 'View Membership Type' screen in the OurCarClub application. At the top, a message bar indicates 'Record added OK: Family Member' (1). Below this, the 'View Membership Type' section shows details for a 'Family Member' (3), including ID, Member Type, Joining Fee, Renewal Fee, Updated date, and Last Update By. To the right, a 'Members' section shows 'No records' and an 'Add' button (2). The navigation bar at the top includes links for Members, Vehicles, Events, Daybook, Assets, Reports, Categories, and Admin. The footer shows 'The Demo Club - 19:41 - 0.170s' and links for Help, Contact Us, and Switch.

... the result, which is our freshly minted Membership Type. A few things to note about this screen:

1. A message appears beneath the menu bar reminding you that a new record was added.
2. Obviously, having just created this record, it has no related records. But once we create a new member and assign them Family Membership, this view screen will show that Person, as we looked at in the section on Navigation. NB: although you can create a new Member from here, it's not the recommended, easiest way of doing that. See the next chapter.
3. Click on the "Add a new Membership Type" button again to add another record if required, or "List Membership Types" to show our new, slightly longer list of types.



Adding a New Member

There's a lot of information that can be captured when adding a new member to your database.

Understanding the Add Screen

Although this is a very busy screen, it has everything required to add a new member into the system in a very short space of time, which means it can be done at a club meeting, if you have a computer (laptop, tablet etc) with internet access. Your new member can confirm for you that the details are correct, so you don't have to try and decipher their handwriting a day or two later!

1. The next Member Number in sequence is automatically suggested.
2. Bold Red labels show attributes which are required, plain black labels are optional information.
3. Home and Workplace Suburb/State/Postcode are automatically suggested for you
4. Record this new member's initial fees info, method of payment and receipt number.
5. Include their vehicle data. Again, Make/Model/Bodystyle are suggested for you from your Categories info, but can be overridden. Similarly, Vehicle Colour & Trim are suggested from your existing data once you type a couple of characters. (You can choose to record all the official Colour Codes and Descriptions for the model vehicles your club is dedicated to, if you wish. You can just enter "Blue", or you can leave it as Not Recorded if you're not interested in recording this information.



Adding a New Member (continued)

1. An example of the Make/Model/Body suggested text to describe the Vehicle
2. All Date fields have a Calendar control "widget" to select dates (and times, where appropriate).
3. When you're finished, click Add. Any essential columns that are empty or invalid will be highlighted for correction, or you'll go straight to the Member View page for this newly created record.



Adding a New Member (continued) Correcting Missing Info

Work Suburb
Work State
Work Post Code
Home Phone
Work Phone
Mobile Phone
Home Email
Work Email
Also Subscribe Work Email ☐
Has Correspondence By Mail ☐
User ID
Birth Date
Partner Birth Date
Join Date 2012-02-05
Memo
Follow Up Date
Is Not To Be Contacted ☐

Create this Vehicle? ☒
Vehicle Make Holden
Vehicle Model FC
Vehicle Body Sedan
Vehicle Colour
Vehicle Trim
Vehicle Class ☒ Authentic
Modified
Restored
Rego **Rego State** New South Wales (NSW)
Body No.
Engine No.
Chassis No.
VIN
Year of Manufacture
Vehicle Status
Memo
From Date
To Date

Reset Add

The Demo Club - 17:57 - 1.024s Help Switch

Note the highlighted text-boxes showing fields that require information that has not been provided.



Ongoing Membership Management



Membership Type and Membership Status

An area that does cause some confusion with new users of OurCarClub is the difference between **Membership Type** and Membership **Status**.

Membership Status

View Member

Ron Weasley

[Previous](#) [Edit](#) [Delete](#) [Next](#)

Member No	19
Member Type ID	Member
Status	Expiring
Surname	Weasley
First Name	Ron
Partner's Name	
Partner's Surname	
Title	Mr
Home Address	Room 12, Gryffindor, Hogwarts
Home Suburb	CASTLE ROCK
Home State	NSW
Home Post Code	2333
Work Name	
Work Address	
Work Suburb	
Work State	
Work Post Code	
Home Phone	
Work Phone	
Mobile Phone	
Home Email	Weaselboy@hogwarts.com.au
Work Email	
Also Subscribe Work Email	No
Has Correspondence By Mail	No

Vehicles

[Current](#) [Previous](#)

WZL-63 Ford (Blue and White)		Ownership Details
------------------------------	--	-----------------------------------

[Add](#)

Subs

[Current](#) [Previous](#)

Period	Payment Details	Actions
24/07/2011 - 31/07/2012	Cash \$45 24/07/2011	View Edit Delete
In "Grace Period" - not yet renewed		Add

Committee Positions

[Current](#) [Previous](#)

Office	Since	Actions
No records		

Regardless of the type of membership, each member has to pay their fees or risk having their membership lapse. (Unless they're a Life Member, of course.) The OurCarClub system keeps a history of annual renewals, known as "**Subs**", or Subscriptions.

As a result, Membership Status is a derived value - you cannot enter it directly, it is determined from the currency of the member's most recent Subscription. It is displayed in the Member List and Member View pages to make your life easier, but you cannot directly edit it.

- Once the end-date of a member's most recent renewal has passed, their Status will change from **Current** to **Expiring**.
- Once the end-date is more than your club's "grace period" days ago, the Status will change from **Expiring** to **Lapsed**.

See the section on New Sub End Date and Grace Period for more information.

NB: When loading historical data (records of past, not current members) into your OurCarClub system, an "Historical Data" membership-type can be created for you if you wish. However, it isn't really necessary, unless there are no records of what kind of Membership these historical members had.



Membership Type

View Membership Type

Member

ID	6
Member Type	Member
Joining Fee	45.00
Renewal Fee	40.00
Updated	2011-01-01 13:46
Last Update By	demo

Members

- John Smith
- Fred Flintstone
- Barney Rubble
- Bill Bogs
- George Jetson
- Jane Jetson
- Darrin Stephens
- Abner Kravitz
- Wilbur Post
- Oliver Douglas
- Jed Clampett
- Fred Jackson
- Dot Cloud
- Milburn Drysdale
- Bob Smith
- Ron Weasley
- Elwood Blues
- Elvis Presley
- Jeremiah Bullfrog
- Ellie-May Clampett
- Ed Equine
- Robert Johnson
- Wilton Knight

An example of Membership Type

Each club can define their own list of Membership Types, and/or load the default set. Typical examples of Membership Types are:

- Full Member
- Social Member
- Family Membership
- Associate Member
- Honorary Life Member

1. The Membership Type must be unique - you cannot have two Membership Types both called "Member".
2. Each type will have a Joining Fee (the amount charged on initially joining the club) and a Renewal Fee (the amount charged on renewing. These are entered as numbers - don't try to include a '\$' sign. If there's no difference between Joining and Renewal Fee in your club, just put the same amount in both fields.
3. As with many pages that show a category item, a list of People in that category is shown to the right.

Generally speaking, although a member could change their membership type from one renewal to the next, it is something that only happens occasionally, e.g. Social Member becomes Full Member, or Full Member receives Honorary Life Membership. Notice that "Lapsed" or "ex-Member" do not appear in this list. This is by design. You should not create Membership Types for this purpose.

Showing Lapsed Members

By default, the Members List is limited to only Current Members. However, information about lapsed members is still in the database, and you can toggle whether you want to display lapsed members or not using the button with the spanner, as pictured.



This setting remains in force until you change it back, or you log out.

The ability to access lapsed members is useful if they subsequently rejoin, or if you have need to contact them. It also provides an auditable history of membership.

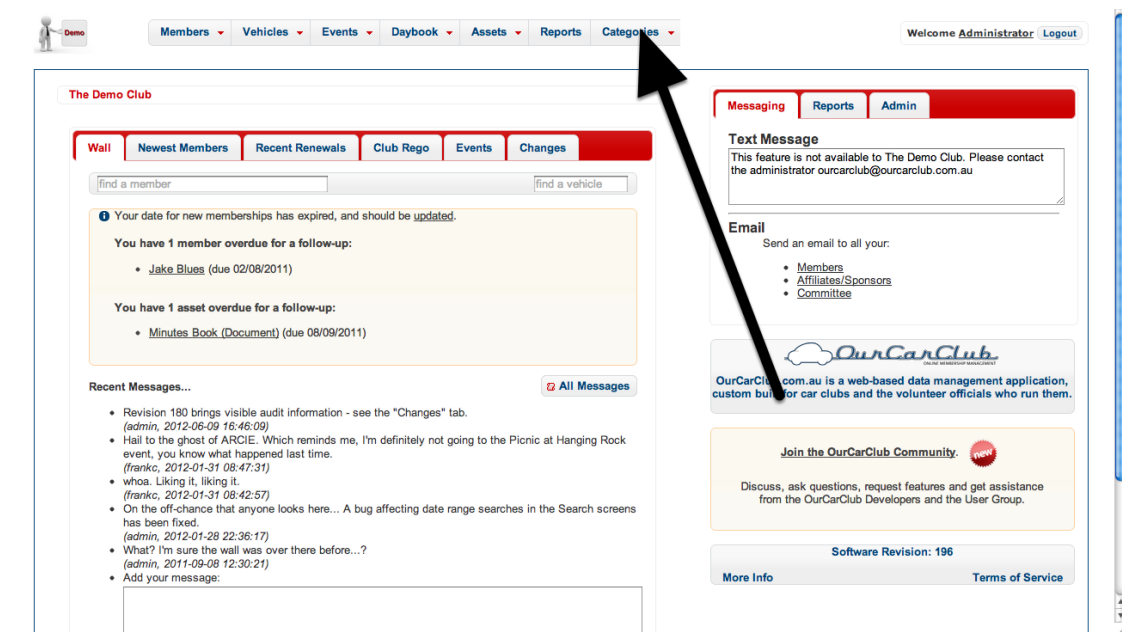


Understanding New Sub End Date and Grace Period

Almost all clubs have a set date on which all memberships expire. This may be the end of the year, June 30, the date of the Annual General Meeting, or some other arbitrary date.

In the master record for your Club (the "Categories" link in the menu, known as the "View Club" page), there are two fields which are used to manage how your club's memberships will expire.

Finding where these values are stored



From the home page or any page, click on the **"Categories"** heading in the menu.




View Current Settings

View Club

The Demo Club [Edit](#)

Acronym	demo
Name	The Demo Club
New Sub End Date	2012-07-31
Grace Period	60
Address	
Suburb	
State	New South Wales (NSW)
Postcode	
Timezone	Australia/Sydney
Has Daybook	Yes
Logo	/pub/uploads/club-3.png
Theme	Red & Blue
Label for Member Custom Field	
Email Updated	2011-09-15 09:00:36
Lists Updated	
Official Email	
Can Any Member Email	No
Facebook Email	
Updated	2012-07-30 16:56:34
Last Update By	admin

Club Icon

 [Choose File](#) No file chosen [Upload](#)

Functions

Update All Membership Status Info [Update](#)

Person **Vehicle** **Event** **Asset** **System**

Affiliates **Member Types** **Payment Methods**

No records

New Sub End Date

Unsurprisingly, this is the date on which any new members' memberships and existing members' renewals will expire. You will need to update this field from time to time, most likely annually.


Grace Period

This is a value in days, such as 14, 60 or 90. For this number of days beyond the latest subscription end-date, that member will continue to be treated as "Current". (Their Membership Status will be shown as "Expiring"). The member will be considered "struck off" and their status will show "Lapsed" once Grace Period days have passed from their last renewal.

Click Edit to adjust these club-wide settings.



Change New Sub End Date and Grace Period Settings

 Demo [Members](#) [Vehicles](#) [Events](#) [Assets](#) [Categories](#) [Admin](#) [Reports](#) Welcome [Administrator](#) [Logout](#)

Edit Club

[Add a new Club](#) [Help](#)

The Demo Club

[View](#)

Acronym	demo
Name	The Demo Club
New Sub End Date	2012-09-30
Grace Period	<div><div>1</div><div>Sep</div><div>2012</div><div>2</div></div>
Address	
Suburb	
State	
Postcode	
Timezone	
Country	
Has Daybook	30
Logo	/pub/uploads/club-3.png
Theme	Red & Blue
Label for Member Custom Field	Person Type
Show MemberNo in Address Block	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A
Official Email	demo@retco.com.au
Can Any Member Email	<input type="checkbox"/>
Facebook Email	

[Reset](#) [Save](#)

Membership Fees and Membership Expiry Management.

From our experience with Car Clubs, there are three typical models for managing when new memberships will expire and how much new members are charged: Extended Membership, Discounted Rate or by Anniversary. You will have entered the standard Joining Fee and Renewal Fee for each Membership Type in the Membership Types table previously. When creating a New Member, you can over-ride this amount if you wish.

1. Extended Membership Model.

New memberships are given more than 12 month's initial membership, so that they get good value for money from their initial joining fee. A club that uses this model and expires all memberships on June 30 might allow a member that joins in March to get 15 months' worth of membership in their initial subscription, rather than be expected to renew after 3 months.

This club would update New Sub End Date at the beginning of March to be June 30 of next year.

2. Discounted Rate Model.

A club for whom all memberships expire on June 30 might allow members who join after Jan 1 to pay half the normal Joining Fee. Perhaps members who join from March 1 pay one quarter.

This club would update New Sub End Date to end of June next year at the end of June. Additionally, they could choose to adjust the Joining Fee in the Membership Types table on Jan 1 and March 1, or just amend how much a new member pays when they create the new membership directly.

3. Anniversary Model.

Every membership expires on the anniversary of the date that member joined, in the manner of car rego or home insurance. This is a massive administrative burden, suitable only for very small or very large clubs that need to consider cash-flow.



This club would either ignore New Sub End Date entirely, or update it to this day next year before adding a large number of members.

Remember that you can always override the end-date when creating a new member or renewal if need be.

Life Membership

Your club may have some form of Honorary Life Membership, where certain members are not required to pay renewals and are effectively members forever. The simplest way to manage this is to set the Subs End Date for any Life Member to sometime far, far in the future, such as 2099-12-31. Such a membership will never expire. Should that member pass away, or resign from the club, you could choose to set the "Is Not To Be Contacted" checkbox to stop further correspondence, and update the Subs End Date to reflect the real end of their Membership.



Annual Renewal Time

Most clubs have a date when all members' renewals fall due. Usually, the club meeting at this time is very busy for the Treasurer, processing many members' payments. Similarly, there may be lots of direct deposits on the bank statement to be entered into the system.

OurCarClub has a specialised version of the Member List page to handle this, for small to medium sized clubs. More instructions for large clubs can be found at the end of this article.

Processing Bulk Renewals

The screenshot shows the 'List of Members' page in the OurCarClub software. At the top, there are navigation tabs: Members, Vehicles, Events, Daybook, Assets, Reports, Categories, and Admin. A 'Welcome Administrator' message and a 'Logout' link are on the right. Below the tabs, there's a 'List of Members' heading and a search bar. A table of members is displayed with columns: Member No, Status, Join Date, and Actions. The table lists 24 members, all with 'Expiring' status. At the bottom of the table, there's a 'Process Renewals' button, which is highlighted by a large black arrow. Other buttons at the bottom include 'Export as Address Book File', 'Export as CSV', and 'Export as Text'.

Member No	Status	Join Date	Actions
11	Expiring	2011-07-13	Edit Delete
6	Expiring	2011-07-13	Edit Delete
5	Expiring	2011-07-11	Edit Delete
18	Expiring	2011-07-21	Edit Delete
10	Expiring	2011-07-13	Edit Delete
16	Expiring	2011-07-17	Edit Delete
25	Expiring	2011-08-25	Edit Delete
24	Expiring	2011-08-12	Edit Delete
9	Expiring	2011-07-13	Edit Delete
21	Expiring	2011-07-30	Edit Delete
2	Expiring	2011-07-08	Edit Delete
15	Expiring	2011-07-16	Edit Delete
7	Expiring	2011-07-13	Edit Delete
22	Expiring	2011-08-05	Edit Delete
5	Expiring	2011-07-13	Edit Delete
14	Expiring	2011-07-15	Edit Delete
1	Expiring	2011-07-05	Edit Delete
17	Expiring	2011-07-20	Edit Delete
13	Expiring	2011-07-15	Edit Delete
4	Expiring	2011-07-09	Edit Delete
26	Expiring	2011-09-15	Edit Delete
19	Expiring	2011-07-24	Edit Delete
12	Expiring	2011-07-14	Edit Delete
27	Expiring	2012-06-09	Edit Delete

At the bottom of the Member List is a button labelled "**Process Renewals**". Click that to continue.



Processing Bulk Renewals (continued.)

Members Vehicles Events Daybook Assets Reports Categories Admin

Welcome Administrator Logout

Showing only current members of the club.

Membership Renewal Management

Search: Show / hide columns

(Summary)	Member No	Status	Join Date	Payment Method	Amount	Date Paid	Receipt No	Trans ID	Actions
Abner Kravitz	11	Expiring	2011-07-13	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Bam-Bam Rubble	6	Expiring	2011-07-13	Select	20.00	2012-08-05	number	optional	Save Edit Delete
Bill Boggis	5	Expiring	2011-07-11	Select	40.00	2012-08-05	by email	optional	Save Edit Delete
Bob Smith	18	Expiring	2011-07-21	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Darrin Stephens	10	Expiring	2011-07-13	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Dot Cloud	16	Expiring	2011-07-17	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Ed Equine	25	Expiring	2011-08-25	Select	40.00	2012-08-05	by email	optional	Save Edit Delete
Ellie-May Clampett	24	Expiring	2011-08-12	Cash	40.00	2012-08-05	12345	optional	Save Edit Delete
Elroy Jetson	9	Expiring	2011-07-13	Select	20.00	2012-08-05	number	optional	Save Edit Delete
Elvis Presley	21	Expiring	2011-07-30	Select	40.00	2012-08-05	by email	optional	Save Edit Delete
Fred Flintstone	2	Expiring	2011-07-08	Select	20.00	2012-08-05	by email	optional	Save Edit Delete
Fred Jackson	15	Expiring	2011-07-16	Select	20.00	2012-08-05	number	optional	Save Edit Delete
George Jetson	7	Expiring	2011-07-13	Select	20.00	2012-08-05	number	optional	Save Edit Delete
Jake Blues	22	Expiring	2011-08-05	Select	20.00	2012-08-05	number	optional	Save Edit Delete
Jane Jetson	8	Expiring	2011-07-13	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Jed Clampett	14	Expiring	2011-07-15	Select	40.00	2012-08-05	number	optional	Save Edit Delete
John Smith	1	Expiring	2011-07-05	Select	40.00	2012-08-05	by email	optional	Save Edit Delete
Milburn Drysdale	17	Expiring	2011-07-20	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Oliver Douglas	13	Expiring	2011-07-15	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Pebbles Flintstone	4	Expiring	2011-07-09	Select	20.00	2012-08-05	by email	optional	Save Edit Delete
Robert Johnson	26	Expiring	2011-09-15	Select	40.00	2012-08-05	number	optional	Save Edit Delete
Ron Weasley	19	Expiring	2011-07-24	Select	40.00	2012-08-05	by email	optional	Save Edit Delete

The usual features of a list screen are available - you can use the Search and sort functions to quickly find a particular individual. Note that only members with Expiring Status appear on this version of the page. You may also notice that the save button is disabled on all rows initially. This is to ensure that we don't accidentally process the wrong record.

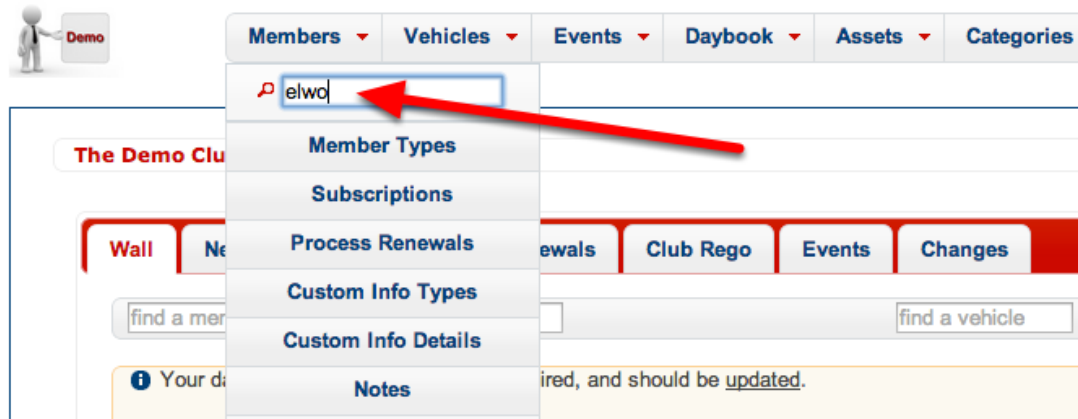
In this example we're going to renew Ellie-May Clampett's membership.

1. Choose the payment method from the drop-down. This selection triggers the enabling of the Save button at the right, since all the other fields are optional.
2. The amount field defaults to the Renewal Amount for this Member's Membership Type. It can be overridden if necessary.
3. The payment date defaults to today.
4. If you issue a paper receipt from a receipt book, you can record the number here
5. This checkbox is enabled if this member has an email address listed. In that case a receipt for this payment will be automatically emailed to the member. If the member does not have an email address, you can still check this box, in which case the receipt will be emailed to you, allowing you to print and post it if necessary.
6. For processing direct deposit or credit card payments, and transaction ID associated with the payment can be recorded here.
7. Once the payment type has been selected at (1), the Save button is enabled. Click it, and the renewal process will commence in the background. You can continue to process the next member.

When a renewal process completes, the "Payment Method" dropdown is replaced by a short message to alert you to the result.



Bulk Renewals for Large Clubs, and handling Individual Renewals




Because the customised List View shown above presents all expiring members on a single page, for very large clubs this can lead to very long lists, and responsiveness of the page can decline as a result. An alternative is to use the Quick Search feature under the Member menu item to quickly locate the relevant member (or ex-member), and be taken to their Member View page.



Quick Renewal for a Single Member

Vehicles

Current **Previous**

BDR-529 Dodge Monaco Sedan (Black and White)[Own](#)[Detail](#)

Subs

Renewal **Current** **Previous**

Payment Method **Amount** **Date Paid**
Receipt No
Trans ID
Email Receipt to yourself

-- Select --
40.00
2013-08-22

☐

Submit

The "Subs" panel has a tab labelled "Renewal" that provides quick access to entering details of the renewal.

1. If the member is in "Expiring" or "Lapsed" status, the Renewal Tab will be front-most. If they are a current member, it will be behind the "Current" and "Previous" tabs.
2. Choose the type of payment from the drop-down list. The pre-populated amount is based on the "Renewal Fee" setting for this member's Membership Type. You can override it if required. Similarly, the date paid field is prepopulated with today's date, but can be changed.
3. The Receipt Number and Transaction ID fields can be entered if they're relevant. For example, you might want to record a Cheque Number, Postal Order Number or other identifying information to cross reference this payment against other information. Both of these fields are optional.
4. An emailed receipt can be automatically generated and sent to the member. If the member has an email address recorded, this checkbox will be checked by default. If (as is the case in this example) the member does not have an email address, the prompt will read "Email Receipt to yourself", and will NOT be checked by default. This allows you to receive the receipt email to print and post it.



When you've completed this renewal, click on the Members quick-search to locate the next renewing member.



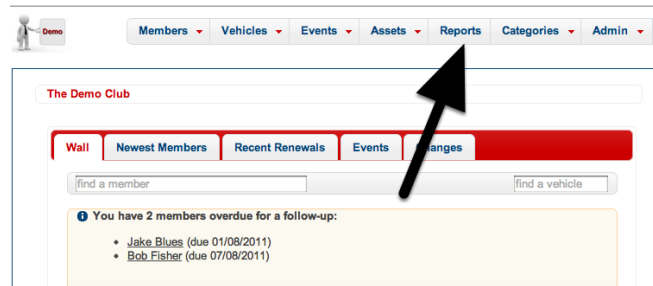
Reports



Reports

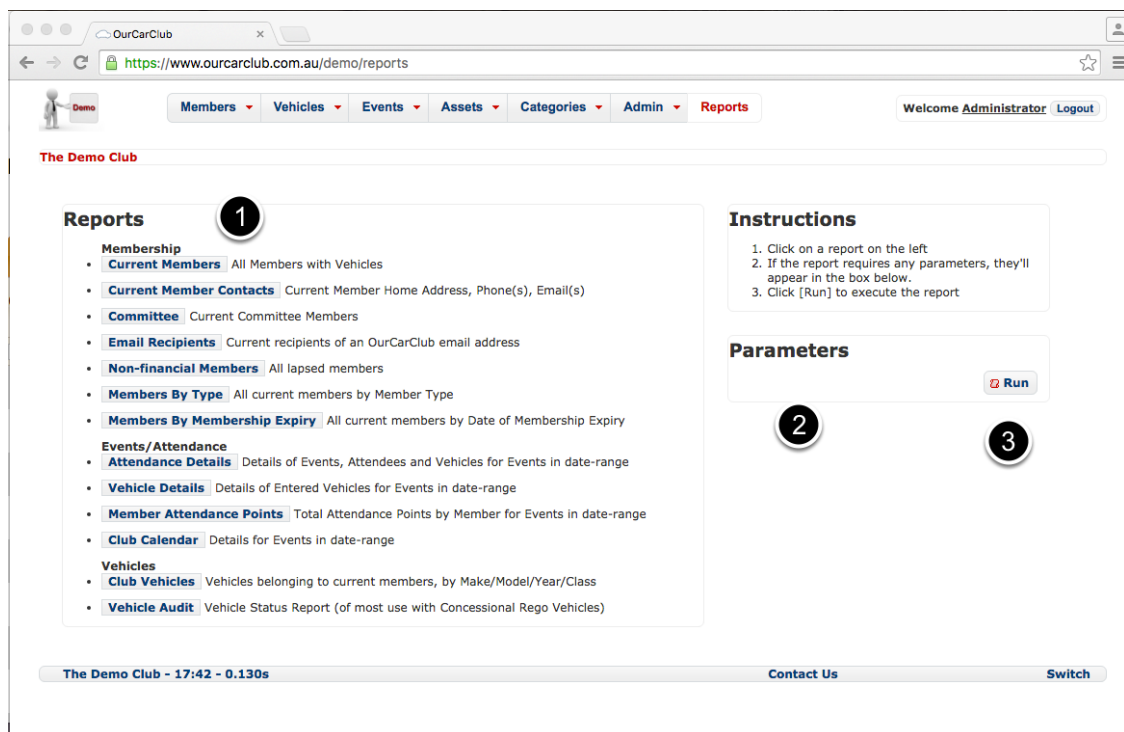
In addition to the ability to export data, OurCarClub comes with a series of "Standard" reports. In this chapter we will look at how to choose a report, provide parameters to it, and run it.

The Reports Menu



From any page, you can find the list of predefined reports from the main menu.

Standard Reports



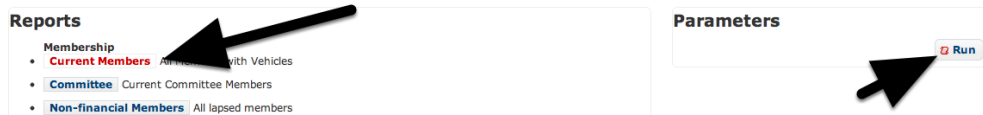
1. The Standard Reports are presented as a list, organised by type - Membership related, Attendance related, Vehicle related and so on.
2. You will notice the "Parameters" area is empty: once a particular report is selected, the parameters required to












run it (if any) will appear. Some reports, such as Current Members and Committee do not require any parameters. Member Attendance requires date parameters.

3. Clicking the Run button will execute the report.

Running a Simple Report



Click "Current Members" and it is highlighted. As mentioned previously, this report requires no parameters. Clicking Run will generate the report.

No.	Name	Member Since	Suburb	Vehicle(s)	Show/Hide Vehicle Images
1	John Smith	2011	HABERFIELD	 Holden FE Special Sedan GM56FE Stock / Original	
2	Fred Flintstone	2011	Bedrock	 Ford YBOTH A Modified	
3	Barney Rubble	2011	Yabbadabbadoo Heights		
4	Pebbles Flintstone	2011	Yabbadabbadoo		
5	Bill Bloggs	2011	Maintown	 Holden HG-1971 Stock / Original	 Holden HT-1970 Modified
6	Bam-Bam Rubble	2011	ASHFIELD		
7	George Jetson	2011	NORTH CURL CURL		
8	Jane Jetson	2011	MANLY		
9	Elroy Jetson	2011	MANLY	 Oldsmobile Rocket Sedan JET-001 Modified	
10	Darrin Stephens	2011	MULGOA		
11	Abner Kravitz	2011	MULGOA	 Holden FE Special Sedan Modified	
12	Wilbur Post	2011	HORSESHOE CREEK		
13	Oliver Douglas	2011	GREENACRE	 Ford JUNKER Modified	
14	Jed Clampett	2011	BEVERLY HILLS	 Unknown STUTZ Modified	
15	Fred Jackson	2011	JACKSON NORTH	 Holden FE Special Sedan MY56FE Stock / Original	

The resulting report can easily be printed on paper or as a PDF. Some reports have additional interactivity - this one has an option to hide the vehicle images to reduce the size of it.



Standard Report with Parameters

Reports

- Membership**
 - Current Members** All Members with Vehicles
 - Committee** Current Committee Members
 - Non-financial Members** All lapsed members
 - Members By Type** All current members by Member Type
- Events/Attendance**
 - Attendance Details** Details of Events, Attendees and Vehicles for Events in date-range
 - Member Attendance Points** Total Attendance Points by Member for Events in date-range
- Vehicles**
 - TODO

Parameters

From Date: 2011-08-24 To Date: 2012-08-24

August 2011

Run

The Demo Club - 22:55 - 0.081s

Contact Us Switch

Some reports require parameters before executing. For example, Attendance Details and Member Attendance Points both require a range of dates (pictured). In both cases, From Date and To Date default to *a year ago from today* and *today*, respectively.

Attendance Points
For the period 24 Aug 2011 to 24 Aug 2012

No.	Name	Total Points	Attendance Records
19	Elwood Blues	40	<ul style="list-style-type: none">All Holden Day (Official Club Run) with vehicle [10 points]State Titles (Official Club Run) with vehicle [10 points]Picnic at Hanging Rock (Official Club Run) with vehicle [10 points]Shannons Eastern Creek Classic (Official Club Run) with vehicle [10 points]
22	Bob Fisher	30	<ul style="list-style-type: none">All Holden Day (Official Club Run) with vehicle [10 points]Picnic at Hanging Rock (Official Club Run) with vehicle [10 points]Shannons Eastern Creek Classic (Official Club Run) with vehicle [10 points]
20	Jake Blues	15	<ul style="list-style-type: none">All Holden Day (Official Club Run) [5 points]Picnic at Hanging Rock (Official Club Run) [5 points]Shannons Eastern Creek Classic (Official Club Run) [5 points]
5	Bill Bloggs	10	<ul style="list-style-type: none">State Titles (Official Club Run) with vehicle [10 points]
24	Buffy Summers	5	<ul style="list-style-type: none">Picnic at Hanging Rock (Official Club Run) [5 points]
7	George Jetson	5	<ul style="list-style-type: none">State Titles (Official Club Run) [5 points]
18	Arky Malarkey	5	<ul style="list-style-type: none">Picnic at Hanging Rock (Official Club Run) [5 points]
10	Darrin Stephens	5	<ul style="list-style-type: none">State Titles (Official Club Run) [5 points]
28	Yogi Bear	5	<ul style="list-style-type: none">Picnic at Hanging Rock (Official Club Run) [5 points]
14	Jed Clampett	0	
11	Abner Kravitz	0	
9	Elroy Jetson	0	
6	Barn-Barn Rubble	0	
46	Bob Dylan	0	
27	Sheldon Cooper	0	
23	Robert Johnson	0	

An example of the Member Attendance Points Report output.



Mailing Lists and SMS



Mailing Lists

One of the most important features of OurCarClub is its ability to send emails to all or some of your current members for you.

Even if your club runs a Mailing List Manager (like Mailman), you still need to manually maintain the list of members subscribed to the list, adding new members and removing lapsed ones. If you're not on top of this, you run the risk that new members are getting no correspondence, and non-members are still getting club benefits.

If you manually address email messages to 50 individual addresses, you already know how messy it is to keep such a list up to date.

OurCarClub makes Emailing your Current Members Painless.

If you send a message to

```
<yourclub>-members@ourcarclub.com.au  
[or]  
<yourclub>-members@ourcarclub.info
```

it will be propagated to all your current members. It's that simple.

It won't relay any old thing that it's sent though, the sender has to be at least a committee member of the club (recorded in the system), or a user of the OurCarClub system. You can choose to allow all current members to send messages if you wish, there's a setting for that on the "Categories" page. The sender will of course receive a copy of the email once it's been routed through the system, and there's also a Wall post added to your OurCarClub home page along the lines of:

```
Email from Fred Nurk <elprez at someclub.org.au> entitled 'We're using OurCarClub  
and we love it!!!' sent  
to 82 addresses (emailer, 2011-12-30 19:16:28)
```

If a message is sent that isn't from an authorised user, it gets relayed to the OurCarClub system users for that club (the committee), along with a notification email explaining what it is and what they should do with it. So you can vet any mails that come in from non committee members or non members.

Furthermore, you can choose to personalise your emails. If you put:

```
Dear {{recipient_fname}},
```

in the email, at the time it is sent to each member that token will be replaced by their real first name, so Bob's email says Dear Bob, Fred's email says Dear Fred, and so on. The tokens available for personalisation in this manner are:

```
{{recipient}}           which produces Fred Nurk elprez@someclub.org.au  
{{recipient_fname}}     which produces Fred  
{{recipient_lname}}     which produces Nurk  
{{recipient_email}}     which produces elprez@someclub.org.au
```

For even more email personalisation, see the advanced topic on **Email Merge**.



There are no limits on the number of emails you can send. The maximum size of any email (including attachments) is 15MB, but bear in mind that individual recipients' ISPs may refuse to accept messages that are larger than what they permit, or if the recipient's mailbox is full. Consider breaking messages that big up into several emails, or better still, upload these large documents on your website and send your members a link to download them. Your members with dial-up or slower mobile broadband will appreciate it.

Finally, the address:

`<yourclub>@ourcarclub.com.au`

is an alias for the address above, but we recommend using the tag "members" in the address because it is more explicit, and to be consistent with the other options shown next.

Emailing a Specific Chapter

View Chapter

Greater Western Sydney

Edit Delete

ID	113
Club ID	The Demo Club
Name	Greater Western Sydney
Code	gws
Memo	All members in the GWS area
Updated	2016-08-29 16:54:01
Updateby	admin

More

Show all Members for Greater Western Sydney

Functions

To send an email to *current* members of the Greater Western Sydney chapter, address it to: demo-gws@ourcarclub.com.au Who would receive this?

Chapters are often used by large clubs that cover a significant geographical area, and have need to send messages just to members in particular "Zones". If your club uses this feature, each member will have been assigned to one of these Chapters. Each chapter record has a "code", which forms part of the email address. It must be lower-case letters and numbers only, no other punctuation marks are permitted.

1. The code field. This forms part of the email address
2. The email address. In this case it is `<yourclub>-gws@ourcarclub.com.au`
3. This is an example of a link described in a few pages, under **"That's a lot of email address options! How can I know who will receive what?"**

Emailing your Affiliates

OurCarClub supports the recording of your club's 'affiliates' - other car clubs you correspond with, sponsors, advertisers and so on. You can email all your affiliates or sponsors directly from the system.

To send a message to all your affiliates or sponsors with an email address recorded, just address the email to

`<yourclub>-affiliates@ourcarclub.com.au`

You can address a message to both regular members and affiliates by simply including `<yourclub>-members@ourcarclub.com.au` and `<yourclub>-affiliates@ourcarclub.com.au` as recipients of the



message.

Each individual Affiliate Type can also be targeted for a specific email. See the topic "**Advanced Email Options**" for more information. NB For this situation, you would find the email address to use on the Affiliate Type View page.

Emailing the Committee

If you just want to send an email to all the committee members, you can address a message to

`<yourclub>-committee@ourcarclub.com.au`

and it will go only to those members who are recorded as current committee members in your OurCarClub system. If you create additional committees, each committee will have its own email address, which can be found on the "View" page for that Committee. Note that emails sent to committee addresses do not go through the validation discussed earlier, so anyone can send a message to the committee. Although OCC will catch as much spam as possible, publishing your OCC committee email address on your public web-page is likely to see it harvested by spambots. Best practice is to use a "Contact Us" form on your website that does not expose the email address directly.

There are links in the Messaging tab on your club's OurCarClub home-page to each of these options. To recap, they are:

`<yourclub>-members@ourcarclub.com.au`
`<yourclub>-affiliates@ourcarclub.com.au`
`<yourclub>-committee@ourcarclub.com.au`

Emailing Lapsed Members, Members Falling Due and those about to Expire

Finally, there are a couple of other sub-group options; an email to:

`<yourclub>-expiring@ourcarclub.com.au`

will be sent onto only those members who haven't renewed their membership and are in 'Expiring' status. Handy for that final reminder that they're about to be 'struck off'!

Before they reach that stage, you can also address a message to members whose renewal is about to fall due by sending it to:

`<yourclub>-dueNN@ourcarclub.com.au`

where NN represents the maximum number of days remaining before they will move from "Current" to "Expiring". This is particularly useful for clubs that do not have an single anniversary model for renewals, but have members renewing throughout the year on an individual cycle, as well as those that offer multi-year membership, or don't wish to send renewal notices to Honorary Life Members. For example, if your club's renewals fall due on 30 June, then you might send a renewal message to all members sometime in May, addressed to

`<yourclub>-due60@ourcarclub.com.au`



You can also contact just the members that have expired recently using a similar email address. A message sent to:

<yourclub>-lapsed180@ourcarclub.com.au

would only be received by those members whose membership lapsed in the last 6 months, and not every lapsed member since forever.

That's a lot of email address options! How can I know who will receive what?

OurCarClub provides a method to see what email addresses will receive a message sent to a particular OCC email address. This is available on the Messaging tab of the home page, as a Report on the Reports menu, and as a feature wherever custom email addresses are shown in the application. For either of the first two options above, you simply enter the address you plan on sending your message to, and the output will be a report showing the recipients. Where the option appears on a specific email address link, it will obviously show recipients of that email address.

NB: The appearance of an address in this list does not guarantee successful delivery to that address. Messages that are too big or that look like spam may still get bounced by your member's ISP.



Advanced Email Options

Beyond simply emailing all members, OurCarClub allows you to send targeted messages to specific groups of members. Furthermore, you can choose to allow your members, your affiliates and others to send messages to your club members.

Allowing All Club Members to Email the Club

Edit Club

The Demo Club

View

Acronym	demo
Name	The Demo Club
New Sub End Date	2014-12-31
Grace Period	60
Address	1713 Quail Run Dr
Suburb	Oshawa
State	NSW
Postcode	L1K 0L8
Timezone	Australia/Sydney
Country	Canada
Has Daybook	<input type="checkbox"/>
Logo	/pub/uploads/club-3.png
Theme	Red & Blue
Label for Member Custom Field	
Max Auto MemberNo	
Show MemberNo in Address Block	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A
Has Member Groups	<input type="checkbox"/>
Add Acronym to Subject	<input type="checkbox"/>
Official Email	pmittler@gmail.com
Can Any Member Email	<input type="checkbox"/>

Reset

Save

If you choose to enable this feature, it means your <yourclub>@ourcarclub.info address operates as a Mailing List, and all participants can send a message to all others. It is disabled by default, since it reduces control over what messages are sent.

To enable this feature, click on the "**Categories**" menu item, and check the "Can Any Member Email" checkbox.



Emailing Member Subsets

View Membership Type

Life Member [Add a new Membership Type](#) [List Membership Types](#) [Search Membership Types](#) [Help](#)

[Edit](#) [Delete](#)

ID	49
Member Type	Life Member
Joining Fee	0.00
Renewal Fee	0.00
Member Group	Standard
Updated	2013-02-02 07:08:23
Last Update By	pmittler

Members

[John Roseneville](#)

[Add](#)

Functions

To send an email to *current* Life Members, address it to:
demo-mtype49@ourcarclub.com.au

To send an email to *ALL* Life Members, (including *lapsed members*) address it to:
demo-mtype49all@ourcarclub.com.au

The Demo Club - 19:13 - 0.098s [Help](#) [Contact Us](#) [Switch](#)

Many category style lists - Vehicle Model, Member Type, Event and so on, provide an email address by which you can send an email to just the members who meet that criteria. The address that should be used can be found in the "**Functions**" box on the "**View**" page for any data type that supports the feature. In each case there are two variations - an email address for all current members (the default), and another for members current and expired. The example image above shows the email address to use to email just the Life Members of the Demo Club.

This feature can also be used to email just the participants in a specific event - future or past. The email address can be found on the Event view page.

Some of the categories that support email subsets are:

- Membership Type
- Member Group (where enabled)
- Custom Info Type
- Vehicle Model
- Vehicle Class
- Vehicle Status
- Club Vehicle Info (Vehicle Custom Info Type)
- Event



Allowing Affiliates to email your members

View Affiliate

[Add a new Affiliate](#)

Bob's Country Bunker

[Edit](#) [Delete](#)

ID	173
Club ID	The Demo Club
Affiliate Type	Sponsor
Name	Bob's Country Bunker
Address	Off the interstate
Address 2	
Suburb	CHICAGO
State	IL
Postcode	14224
Country	
Surname	Bunk
First Name	Bob
Title	Mr
Email	bob@bobscountrybunker.com
Phone	
Mobile Phone	
From Date	07/01/2013
To Date	
Has Correspondence By Mail	No
Can Email Members	Yes
Follow Up Date	
Is Not To Be Contacted	No
Reason For No Contact	
Updated	2014-07-10 20:15:00

Status

This affiliate *is* active.

Bob's Country Bunker will be included in any email message sent to demo-affiliates@ourcarclub.com.au

Affiliates can be flagged as permitted to send messages to your club members by checking the box shown above. An affiliate that is not considered "current" will not be allowed to send messages to the group regardless of the setting of this box.



Allowing other email addresses

Add new Authorized Email Sender

Add a new Authorized Email Sender

Sender Name	Club Secretary
Sender Email	secretary@yourclub.com
Sender Note	Club email address

[Reset](#) [Add](#)

The Demo Club - 20:23 - 0.096s [Help](#)

If you have additional email addresses beyond those that belong to committee members or affiliates, you can add them to the Authorized Email Senders list. Any email sent to a club address from an address in that list will be accepted and forwarded.

This feature is useful for recording email addresses that belong to the club, such as secretary@<yourclub.com>, where it is impractical to record it against a club member.

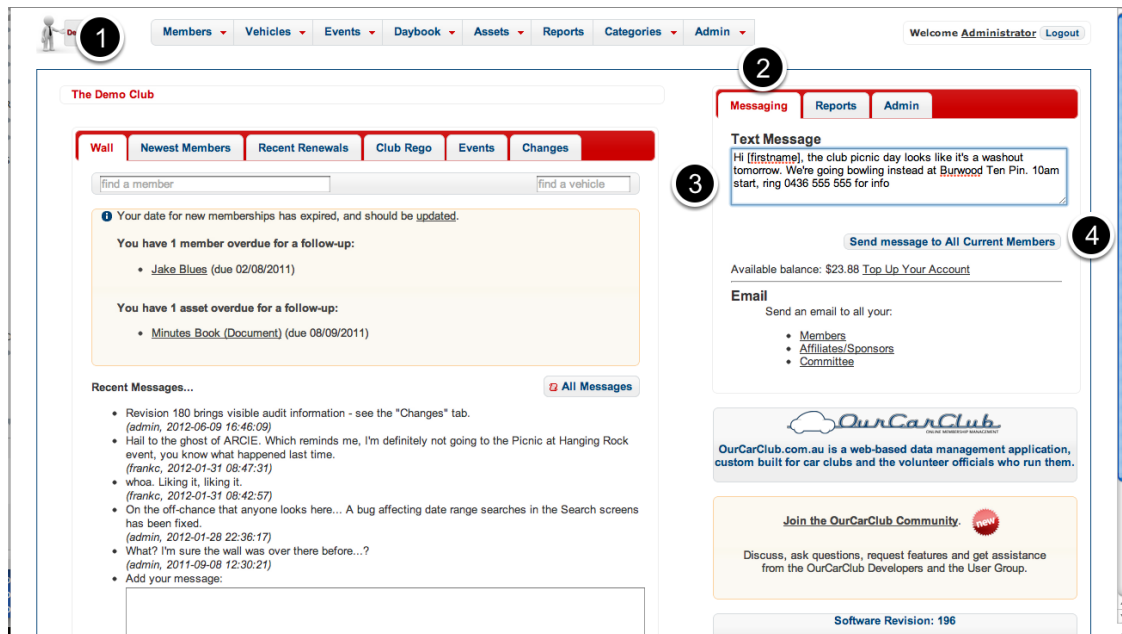
1. Authorized Email Senders can be found under the Categories drop-down
2. Record the approved email address
3. A note regarding who the address belongs to and why it is permitted can be added here.



Text Messages (SMS)

Even more immediate than email is SMS, straight to your members' mobile phones. You can make sure everyone knows about a late change to an event (such as a wet weather venue) via SMS. You may also find SMS reminders a good way to increase participation in events, by reminding people of club runs a day or two before.

Sending SMS to All Current Members



You have the option of sending a message to all current club members, or to an individual. Text messages are limited to 160 characters.

To send to all:

1. Click on the club icon at the top left of the app to return to the "home page".
2. Click on the Messaging tab on the right.
3. Enter your message. If your OurCarClub user has been linked to your Member record, you'll have the option of selecting whether the message will appear to come from you, or from 'the club'. *NB Messages from 'the club' cannot be replied to.*
4. Click 'Send' to trigger the SMS.

You'll see a banner across the top of the page which will report the success or failure of the message send process. You'll also see there is a link in the SMS panel that takes you to the SMS portal to top up your account. (More on this below.)

Advanced Usage:

You can personalise messages if you wish. Use the token [firstname] and/or [lastname] in the message, and they'll be replaced with the member's name details when the message arrives. Just remember to allow for long names if your message is close to 160 characters long.



This feature is not available...

If you see this message, you won't be able to send SMS messages. SMS is not available for clubs that are trialling OurCarClub, nor can SMS messages be sent from the Demo Club. You'll need to upgrade to a full OurCarClub account.

Sending SMS to a Specific Member

Member View for Jake

Member Details:

Member No	22
Member Type ID	Associate Member
Status	Expiring
Surname	Blues
First Name	Jake
Partner's Name	
Partner's Surname	
Title	Mr
Home Address	Cell Block #9, Joliet Penitentiary
Home Suburb	CHICAGO
Home State	IL
Home Post Code	3674
Work Name	
Work Address	
Work Suburb	
Work State	
Work Post Code	
Home Phone	
Work Phone	
Mobile Phone	0442 555 555
Home Email	
Work Email	
Also Subscribe Work Email	No
Has Correspondence By Mail	No
User ID	
Custom1	
Birth Date	
Partner Birth Date	
Join Date	2011-08-05
Follow Up Date	2011-08-02
Is Not To Be Contacted	No

Subscriptions:

Period	Payment Details	Actions
05/08/2011 - 31/07/2012	Cash \$25	View Edit
In "Grace Period" - not yet renewed	05/08/2011	Delete Add

Committee Positions:

Office	Since	Actions
No records		

Send an SMS:

Hey Jake, your own brother's going to pick you up in a Police Car.

[Send message to this Member](#)

Available balance: \$23.88
[Top Up Your Account](#)

Notes:

Jake is due for parole. Is someone going to collect him from Joliet? (admin on 2011-08-05 07:10:08)

[Add](#)

Sending to a single member is virtually the same process. Navigate to the Member View page for the individual you want to send the message to, and you'll find the SMS option amongst the various panels, immediately after 'Committee Positions'. Then just follow steps 3 and 4 above.

NB: The last message sent is 'sticky', in the sense that the system remembers it for your session. This can be useful if you want to send the same message to three or four members. You won't have to copy and paste it, the system will pre-populate the box for you with the contents of the last message you sent. Obviously you can overwrite it.

This feature is not available...

You'll see this message when the member you are looking at does not have a mobile number listed. Obviously it is not possible to send a text to a member without a mobile phone!



Using the SMS Portal

OurCarClub
THE REAL WORLD'S MOST FUN

Email Address
committee@yourclub.org.au

Password

LOGIN [Lost your Password?](#)

[Terms of Use](#) [Spam Policy](#) [Privacy Policy](#) [Contact Us](#) [Help](#) [FAQ](#)

You'll have a username (email address) and a password to log in, which OurCarClub will have provided you when you first set up your system. You can change either of these should you need to. Typically, the email address will be the club's 'official' email address.

The main reason you will log into the portal is to top up your account with more funds to send messages to your members. However, there are some other features and benefits available there that you may choose to take advantage of if you wish.

Using the SMS Portal (continued.)

MESSAGING NUMBERS SETTINGS BILLING API THE DEMO CLUB LOGOUT BALANCE: \$3.77 ADD CREDIT

OurCarClub

NEW CONTACT LIST **SEARCH**

Contact List Name	Contacts	Opt-outs	Campaigns	Messages	Actions
Global Opt-Out List Enabled	0				View Upload Contacts Disable
Members	3	0	0	0	View Upload Contacts Delete

Displaying 1 to 2 of 2 - displaying 10 items per page

CONTACT

ACTIVITY

CONTACTS

SEND SMS

KEYWORDS

EMAIL SMS

INSTALL SMS BOOKMARKLET

Send SMS from your browser toolbar in seconds. No need to login.

[Terms of Use](#) [Spam Policy](#) [Privacy Policy](#) [Pricing](#) [Contact Us](#) [Help](#) [FAQ](#)

You'll have a username (email address) and a password to log in, which OurCarClub will have provided you when you first set up your system. You can change either of these should you need to. Typically, the email address will be the club's 'official' email address.



The main reason you will log into the portal is to top up your account with more funds to send messages to your members. However, there are some other features and benefits available there that you may choose to take advantage of if you wish.

Lists

The list entitled Members is automatically synchronised with your Current Members in OurCarClub. Although you can edit this list, you shouldn't. Any changes you make will disappear after the next sync process anyway.

However, you can create more lists if you wish. From the portal, you are able to send an SMS to one of these lists (and indeed to any individual). Some suggestions:

Create a "Committee" list, which would make it easy to send a message out to your officials.

Create a list of members (and others - you can add any mobile number you wish) who are attending a particular run - say a big, interstate event - so you can message them all with ease.

This area of OurCarClub may be expanded in future releases to support creating and sending messages to custom lists.

Topping Up Your Account

The screenshot shows the 'ADD CREDIT' form in the OurCarClub portal. The form is a dark grey overlay with white text and fields. It has four numbered steps: 1. Select credit amount (\$20 Credit + \$1.00 Card Fee), 2. Enter cardholder details (Name, Address, Postcode, City, Country), 3. Enter card details (Card Type, Number, Expiry Date, CVV), and 4. Click 'ADD CREDIT'. The background shows a transaction history table with columns for Date, Transaction, Amount, and Balance. The current balance is \$3.77.

Date	Transaction	Amount	Balance
08/03/12 7:34:am	API Quickse		\$3.770
05/03/12 7:15:pm	API	-\$0.123	\$3.893
05/03/12 6:49:pm	API Quickse	-\$0.123	\$4.016
05/03/12 2:18:pm	API Quickse	-\$0.123	\$4.139
05/03/12 7:30:am	API	-\$0.123	\$4.262
04/03/12 8:16:pm	API	-\$0.123	\$4.385
04/03/12 7:20:pm	API	-\$0.123	\$4.508
04/03/12 7:19:pm	API	-\$0.123	\$4.631
04/03/12 7:10:pm	API	-\$0.123	\$4.754
04/03/12 7:06:pm	API	-\$0.123	\$4.877

Clicking on the Add Credit link shown on the previous page brings up this screen. Just enter the required details and and click the "Add Credit" button.

1. Select an option for how much credit to add
2. Enter details for the card-holder
3. Enter the card details
4. Click "Add Credit"

Auto-renewal



The facility is there to arrange for the system to automatically debit a card when the balance drops below a certain amount. It's entirely up to each club whether that is suitable for them or not.



Advanced Topics



Events Management

Managing Club Events - Where and When, and Who Participated

Viewing a List of Events

The screenshot displays the 'List of Events' interface. At the top, there's a navigation bar with tabs: Home, Members, Vehicles, **Events**, Daybook, Reports, Assets, Categories, and Admin. A user greeting 'Welcome Administrator' and a 'Logout' link are on the right. Below the navigation bar, the title 'List of Events' is followed by 'Search Events' and 'Add a new Event' buttons. A search bar and 'Show / hide columns' link are also present. The main content area contains a table with the following data:

(Summary)		Actions
09/08/2011: August Meeting (Meeting)		Edit Delete
24/07/2011: Garage Crawl (Official Club Run)		Edit Delete
28/08/2011: Picnic at Hanging Rock (Official Club Run)		Edit Delete

Below the table, it says 'Showing 1 to 3 of 3 entries'. At the bottom, there are 'Export as CSV', 'Export as Text', and 'Export as XML' buttons. A footer bar shows 'The Demo Club - 12:08 - 0.287s', a 'Help' link, and a 'Switch' button.

The List of Events view is identical in layout to all other Lists. The Show/Hide columns button allows you to view additional general information about an Event. Click Add a new Event to start recording details of an event, either one already held, or one coming up.



Adding a New Event

The screenshot shows the 'Add new Event' form in the OurCarClub application. The form is titled 'Add a new Event' and includes a 'List Events' link and a 'Help' link. The form fields are: Club ID (The Demo Club), Event Type (Select), Event Title (2), Event Date (5), Coordinator (blue label, Select), Duration (1), Event Memo (3), Points Per Person, and Points Per Vehicle (4). A 'Reset' button and an 'Add' button are at the bottom left. A status bar at the bottom shows 'The Demo Club - 15:46 - 0.480s' and links for 'Help', 'Contact Us', and 'Switch'.

Adding an Event is also similar to creation of most other types of records in OurCarClub. Mandatory fields have red titles, and categorisation can be done using drop-down lists.

1. Select an Event Type. The default values are Meeting, Official Club Run and Sanctioned Event, but you can customise this list to suit your circumstances.
2. Give the event a name, such as "February Meeting", or "All Holden Day". A Date for the event is also required.
3. The Event Memo field allows you to record other details about the event. For example, the address, or convoy details, or in the case of an event that's already occurred, perhaps a record of the food supplied by the club for members (30kg sausages, 8 loaves bread etc.) It could be useful to record such information if this is an event you hold every year. Use the field however you see fit.
4. If you wish to track attendance points, you can override the default values for Points per Person and per Vehicle set for the Event Type. However, this would typically be left blank.
5. Co-ordinator and Duration: you can optionally record the name of the Member who is co-ordinating the event, if required. Note this field has a blue label, which means it is not a required piece of information. The Duration records the number of days over which an event was held, and defaults to 1.



Recording Event Attendance

View Event

09/08/2011: August Meeting (Meeting)

[Edit](#) [Delete](#)

ID	2
Event Type	Meeting
Event Title	August Meeting
Event Date	2011-08-09
Coordinator	John Smith
Duration	1
Event Memo	
Points Per Person	3
Points Per Vehicle	3
Updated	2011-08-26 23:15:52
Updateby	craiga

Event Attendees

Member	Vehicle(s)	Actions
<input type="text"/>	...	Add
Barney Rubble		
Fred Flintstone	YBOTH A Ford	

Functions

Attendance Report for this Event [Run](#)

When viewing your event, you can quickly log details of attendees, and what vehicle (if any) they attended with.

1. As with all View screens, the details of the main item can be viewed on the left. Click Edit or Delete to make changes. (NB: You cannot delete a record that has attendees attached to it.)
2. Type a few letters of the member's name and choose them from the drop-down list that appears. See over for more detail.
3. Click the "Run" button to view an attendance report for this event.

Recording Event Attendance (continued)

Event Attendees

Member	Vehicle(s)	Actions
<input type="text"/>	<input checked="" type="checkbox"/> BDR-529 Dodge Monaco Sedan	Add
Barney Rubble		
Fred Flintstone	YBOTH A Ford	

Functions

As shown on the previous page, type a few letters of the attendee's name and pick them from the list. In this case I typed **blu**, and had the options of either Jake or Elwood. Typing **elw** would also have found Elwood.

1. On selecting the attendee, their current vehicle(s) appear under the Vehicles heading. If they have only one, it is automatically checked. If they have multiple vehicles, check the vehicle(s) they brought. If no vehicles are shown because none have been recorded for this person, you can add the attendee now, and add



the vehicle later on by simply repeating the steps shown above. Multiple attendance records for the same person are silently merged together.

2. Click Add to save the record. You'll return to the same screen, and start entering another attendee.
3. Clicking on the name of an already entered attendee takes you to the Person Attendance record. There are fields there to record additional information about the person's attendance, if required.



Managing Club Assets

Most clubs own a variety of assets that are used to promote the club, or for members' benefit. There are obvious items like computers or printers, club banners and perhaps a club trailer or barbecue. Beyond that, here are many other things a club might own: perpetual trophies, record books, documents and of course merchandise: shirts, stickers, badges, even reproduction parts for vehicles.

The OurCarClub system allows you track your assets, quantity on hand, who has custody of them and so on.

Asset Types

1. Under the Assets option on the Menu, choose Asset Types to see the Asset Type List.
2. Notice this message on the wall that there is an asset overdue for a follow-up - we'll come back to that later.

Asset Types List

Here is an example of a list of Asset Types. Other possible types could include:

- Trophy
- Document/Record



You can add whatever suits your club. Let's add a new type to cover the club's flag, banner and similar items. Click "Add a new Asset Type"

Add a new Asset Type

Add a new Asset Type

Description: Promotional Material (1)

Is Merchandise: ☐ (2)

Reset Add (3)

The Demo Club - 14:20 - 0.164s Help Contact Us

1. Let's call this type of item "Promotional Material".
2. Note the checkbox. This should be checked if this type of Asset is something you sell, and/or need to keep inventory of. Obviously that's not the case for the club banner.
3. Click Add or hit Return to save the Asset Type.

View the new Asset Type

View Asset Type

Record added OK: Promotional Material (1)

Add a new Asset Type List Asset Types

Promotional Material

Edit Delete

ID	17
Description	Promotional Material
Is Merchandise	No
Updated	2013-04-13 14:25:16
Updateby	admin

Assets

No records (2)

Add


The Demo Club - 14:25 - 0.119s Help Contact Us

We're now viewing Asset Type, which presents the information we just entered.

1. The banner across the top notifies you that the new record was successfully added.
2. Because this is a brand new Asset Type, there are not yet any Assets of this type. Press "Add" to create one.




Add a new Asset

 **Members** ▾ **Vehicles** ▾ **Events** ▾ **Assets** ▾ **Categories** ▾ **Admin** ▾ **Reports** Welcome Administrat

Asset Type: Add entry to Assets

Promotional Material

ID	17
Description	Promotional Material
Is Merchandise	No
Updated	2013-04-13 14:25:16
Updateby	admin

 **View**

Asset Type: Add entry to Assets

Model Brand	<input type="text" value="Upright Banner"/>
ID Num	<input type="text"/>
Person Responsible	<input type="text" value="Emmett Brown"/>
Price	<input type="text" value="300"/>
Stock On Hand	<input type="text"/>
Memo	<div><input type="text" value="purchased from Banners R Us"/></div>
Acquired Date	<input type="text" value="2013-04-02"/>
Disposal Date	<input type="text"/>
Follow Up Date	<input type="text"/>

Add

Existing Assets for: Promotional Material

Enter the relevant details here:

1. Give the item a suitable name. If it has a model name (IT Equipment is a good example of this) then it's a good idea to include it. Similarly, if it has an ID or Serial Number, that can also be recorded.
2. Enter the name of the member who has custody of or is responsible for the item.
3. You can record the price of the item should you choose. This is usually more relevant for Merchandise items, as is the Stock on Hand column.
4. A memo field is provided to make a note about the item.
5. A series of dates to record when the item was acquired, disposed of, or needs to be followed up. All three fields are optional, but if the Follow Up Date is in the past, then this Asset will appear on the Wall (as we saw in an earlier screenshot). An example of how you might use this: imagine the asset was a perpetual trophy, given out at the Christmas Party. You might record a follow-up date of Nov. 1, to remind you to get it back from the current holder.
6. Click "Add" to save this Asset.



View Asset Type (again)

View Asset Type

Promotional Material

ID	17
Description	Promotional Material
Is Merchandise	No
Updated	2013-04-13 14:25:16
Updateby	admin

Assets

- [Emmett Brown has Upright Banner](#)


The Demo Club - 14:52 - 0.135s [Help](#) [Contact Us](#)

Repeat the exercise to record other promotional material if you wish.

1. You can see and search all Assets in the Asset List, by clicking this item on the menu.
2. To see details of the Asset, click this link.



View Asset

 Demo [Members](#) ▾ [Vehicles](#) ▾ [Events](#) ▾ [Assets](#) ▾ [Categories](#) ▾ [Admin](#) ▾ [Reports](#) Welcome [Administrators](#)

View Asset

[Add a new Asset](#) [List Assets](#) [Search Assets](#)

Upright Banner (Promotional Material)

2 → [Edit](#) [Delete](#)

Asset Type	Promotional Material
Model Brand	Upright Banner
ID Num	
Person Responsible	Emmett Brown
Price	300.00
Stock On Hand	
Memo	purchased from Banners R Us
Acquired Date	2013-04-02
Disposal Date	
Follow Up Date	
Updated	2013-04-13 14:52:51
Updateby	admin

Asset Notes

No records **1** [Add](#)

The Demo Club - 14:54 - 0.221s [Help](#) [Contact Us](#)

1. Beyond the simple "Memo" field, you can also record a history of Notes regarding this asset if you choose. A Note is also automatically created when custody of an Asset changes.
2. Click Edit to record a change of custody.



Change Asset Details

Edit Asset

[Add a new Asset](#) [List Assets](#)

Upright Banner (Promotional Material) [View](#) [Delete](#)

Asset Type	Promotional Material
Model Brand	Upright Banner
ID Num	-- Select --
Person Responsible	<div>Emmett Brown ✓ Emmett Brown Jake Blues Joe Rockhead</div>
Price	
Memo	<div>purchased from Banners R Us</div>
Acquired Date	2013-04-02
Disposal Date	
Follow Up Date	

⚠ Changing this record will change the description of all Asset Notes that are classified *Upright Banner (Promotional Material)*. If you only want to change the Asset for a single Asset Note, you should instead edit that record, and select the appropriate asset there.

If the Asset record you need doesn't yet exist, click the "Add" button above to create it.

[Reset](#) [Save](#)

In this example, custody of the banner has passed from Emmett to Joe. Click Save to record the change.

Asset Custody History

Demo

[Members](#) [Vehicles](#) [Events](#) [Assets](#) [Categories](#) [Admin](#) [Reports](#)

Welcome [Administrator](#)

Record updated OK: Upright Banner (Promotional Material)

View Asset [Add a new Asset](#) [List Assets](#) [Search Assets](#)

Upright Banner (Promotional Material) [Edit](#) [Delete](#)

Asset Type	Promotional Material
Model Brand	Upright Banner
ID Num	
Person Responsible	Joe Rockhead
Price	300.00
Stock On Hand	
Memo	purchased from Banners R Us
Acquired Date	2013-04-02
Disposal Date	
Follow Up Date	
Updated	2013-04-13 15:03:09
Updateby	admin

Asset Notes

Responsibility transferred from Emmett Brown to Joe Rockhead (admin on 2013-04-13 15:03:09)

[Add](#)

The Demo Club - 15:03 - 0.180s

[Help](#) [Contact Us](#)

Note the auto-generated Note recording the date on which custody was transferred.



Managing Merchandise

List of Assets

Search: Show / hi

(Summary)	Price	Stock On Hand	Actions
(Summary)	Price	Stock On Hand	
Apple MacBook (IT Equipment)			View Edit Delete
Canon Projector (IT Equipment)			View Edit Delete
T-Shirts [XXL] (Clothing)	15.00	31	View Edit Delete
Upright Banner (Promotional Material)	300.00		View Edit Delete

Show 25 entries Showing 1 to 4 of 4 entries

Export as Excel Export

The Demo Club - 15:08 - 0.317s Help Contact Us

Merchandise such as club shirts needs to be kept inventoried and tracked. OurCarClub does not attempt to be a full book-keeping system, but provides a means to track inventory with ease.

1. In this List View, we have enabled displaying the Price and Stock on Hand fields.
2. Click on the T-Shirts link to view detail for this item.

Recording Merchandise Inventory Changes

View Asset

T-Shirts [XXL] (Clothing)

Merchandise Sales

☒ Sales Deduct

Refund/Re-Stock

Asset Notes

Responsibility transferred from Oliver Douglas to Jake Blues (admin on 2013-04-13 15:06:42)

Sold 12 tshirts at state titles (demo on 2012-05-29 21:17:51)

Add

1. When an Asset is recorded as being of a Type marked as "Is Merchandise", the additional box show above appears.
2. To record sale of an item, enter the quantity and click "Deduct". Change the drop-down to



"Refund/Re-Stock" to record a refund or a purchase by the club of more stock. (The "Deduct" button changes to "Add" when you do this.)

3. To update Stock on Hand to reflect a Stocktake/Audit, simply Edit the Asset record and change the Stock on Hand field.

Once you're comfortable with this, you'll have control over your club's assets in no time!



Granting access to other members, and resetting passwords

OurCarClub users with sufficient privileges have the ability to grant access to other members.

Granting Access

The screenshot shows the 'View Member' page for a user named 'demo'. The page includes various tabs like 'Current', 'Previous', 'Office', 'Since', and 'Actions'. The 'OurCarClub Access' panel at the bottom right contains the following fields:

- Username:** ronweasley (with a callout 1)
- Password:** (with a callout 2)
- Confirm Password:** (with a callout 3)
- ☐ Delegate Authority?
- ☐ Checking this will give Ron authority to grant access to others. Use with care.
- Add** button

You can grant existing members access to your OurCarClub system easily. At the bottom of the regular "View Member" page you will find the following panel.

1. A suggested username is provided, but you have the option to change it. Username must be between 3 and 11 characters in length, and it will warn you if the name you've chosen is not available.
2. Enter a starting password, and confirm it.
3. You have the option to delegate authority - meaning that this user will also be able to grant access to others, reset passwords and so on.

When you click Add, an email will automatically be sent to the member to let them know their login details. If they don't have an email address, you'll have to let them know yourself.



Access Granted

The screenshot shows a web browser at www.ourcarclub.com.au/demo/view/person/130. The navigation bar includes a 'Demo' button and tabs for 'Members', 'Vehicles', 'Events', and 'Daybook'. A message box displays three status messages: 'Created OurCarClub User Ron Weasley (ronweasley)', 'Granted access to The Demo Club', and 'Email sent to Weaselboy@hogwarts.com.au'. Below this, the 'View Member' section shows a box titled 'OurCarClub Access' containing the text 'Ron Weasley (ronweasley) can access The Demo Club'. A black arrow points to this text.

After clicking the Add button, the following messages are displayed, and the Access box shows that the user can access this system. Click on that link to edit or delete this access, or to reset the user's password.

Resetting Passwords

The screenshot shows the 'View Access' page for user Ron Weasley. The page title is 'View Access'. A message box at the top states 'Ron Weasley (ronweasley) can access The Demo Club'. Below this, there are 'Edit' and 'Delete' buttons. A table lists user details: Acc ID (69), User ID (Ron Weasley (ronweasley)), Related Person (Ron Weasley), Is Admin (No), Updated (2012-02-19 16:56:30), and Last Update By (admin). To the right, a 'Functions' box contains a 'Reset Password for this User' button with a 'Reset' link. A black arrow points to the 'Reset' link. The page footer shows 'The Demo Club - 17:08 - 0.259s' and a 'Switch' button.

1. The usual Edit and Delete buttons allow you to manage this access (i.e. upgrade to Administrator or remove Administrative privilege)
2. The Reset button will generate a new password and email it directly to the user.



Tips



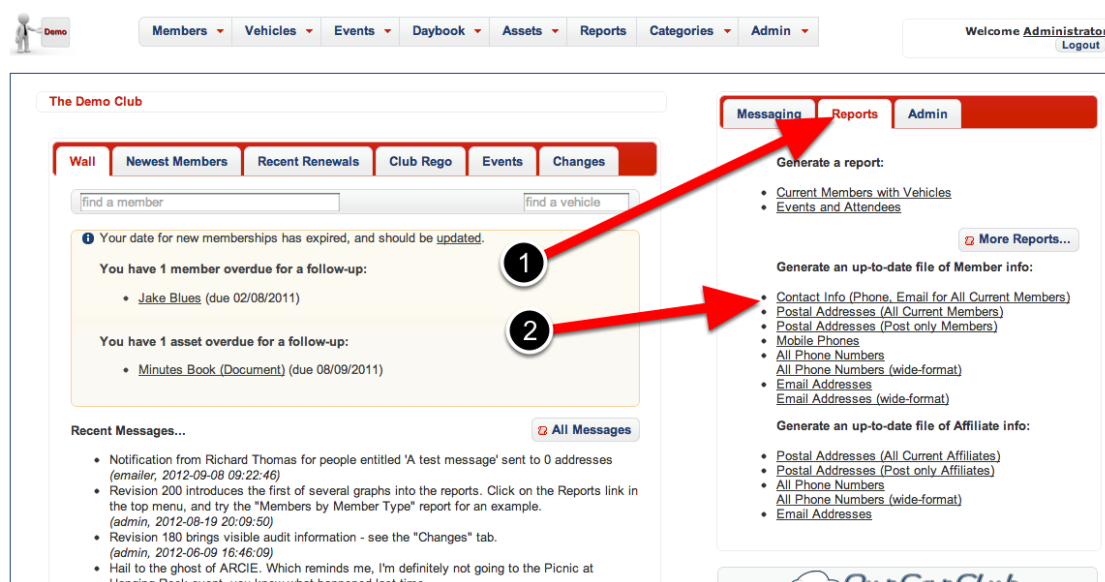
Extract Member Contact Info

If you need to produce a list of current members and their contact details, there are a few different ways to do it:

- Quick Download
- Onscreen Report
- Customised List Presentation

Simply choose the method you find most convenient for your intended purpose, and the device you're using at the time. Some options are geared to use with smart-phones, whilst others may not suit smart-phones and tablets at all.

Method 1 - Quick Download to Excel etc



This option generates a report in a fixed format as a download.

1. From the home-page, click on the Quick Reports pane.
2. Click on "Contact Info", or one of the other lists if only phone numbers, or email addresses are required.

You'll be prompted to save a file to your local computer, which you can then open with Microsoft Excel, OpenOffice or similar program.

Note: this method may not be suitable when using OurCarClub on a smart-phone or tablet device, as downloads may not be permitted.



Method 2 - Onscreen Report

The screenshot shows the OurCarClub web application interface. At the top, there is a navigation menu with links: Members, Vehicles, Events, Daybook, Assets, Reports, Categories, and Admin. The Reports link is highlighted. Below the navigation menu, there is a sidebar with a list of reports under the heading 'Reports'. The 'Current Member Contacts' report is selected and highlighted. To the right of the sidebar, there is a 'Parameters' section with a 'Run' button. Red arrows and numbers indicate the steps to generate the report: 1. Click the Reports link in the top menu, 2. Click the 'Current Member Contacts' report in the sidebar, and 3. Click the 'Run' button in the Parameters section.

This option also produces a standard format report, which can be displayed on-screen or printed.

1. Click the Top Menu Reports link from any page to bring up the Reports page.
2. Choose "Current Member Contacts" by clicking on the label - note it's highlighted once clicked on.
3. This report has no parameters, so just click Run to display it.

Method 2 - Onscreen Report (cont.)

The screenshot shows the 'Current Member Contacts' report displayed on the screen. The report is a table with the following columns: No., Name, Address, Email, Phone, and User ID. The table contains 17 rows of member data.

No.	Name	Address	Email	Phone	User ID
1	John and Jill Smith	1 Somewhere Street HABERFIELD NSW 2045	• Home: jnsmith@email.com.au	• Home: 0232331331 • Work: 0232456345	
2	Fred and Wilma Flintstone	15 Triceratops Terrace Bedrock NSW 2580	• Home: wilma@bambam.com.au	• Home: 0236671339	
4	Pebbles Flintstone	46 Somewhere Street Yabbadabbadoo NSW 2580	• Home: pebbles@rocks.com		
5	Bill Bloggs	18 Main Street Maintown NSW 2550	• Home: bbloggs@something.com	• Mob: 0419 443 334	
6	Bam-Bam Rubble	46 Somewhere Street ASHFIELD NSW 2131			
7	George Jetson	58 Rocket Street MANLY NSW 2095			
8	Jane Jetson	58 Rocket Street MANLY NSW 2095			
9	Elroy Jetson	58 Rocket Street MANLY NSW 2095			
11	Abner and Gladys Kravitz	1145 Morning Glory Circle MULGOA NSW 2745			
12	Wilbur and Carol Post	112 Palomino Circuit HORSESHOE CREEK NSW 2474			
13	Oliver and Lisa Douglas	60 Bush Lane GREENACRE NSW 2190			
14	Jed Clampett	1265 Rodeo Drive BEVERLY HILLS NSW 2209			
15	Fred Jackson	25 Karen Street JACKSON NORTH QLD 4426			
16	Dot Cloud	35 Cloud Street CLOUDS CREEK NSW 2453			
17	Milburn and Margaret Drysdale	46 Sunset Boulevard BEVERLY HILLS NSW 2209			

You will be presented with an onscreen report, which is also suitable for printing should you prefer.

1. Click on a member's name to view that member's details. *Pro-tip: right-click (PC) or control-click (Mac) to*



open this page in a new window or tab, allowing you to retain this report output in the current window.

2. Click on an email address to open a new email addressed to this person
3. On a smart-phone, click on the phone number to call the member.

Method 3 - Customised List Presentation

List of Members

Showing just current members. [Show all people \(including lapsed members\)](#)

[Search People](#) [Add a new Person](#)

Search: [Show / hide columns](#)

(Summary)	Member No	Status	Join Date	Actions
Abner Kravitz	11	Expiring	2011-07-13	Edit Delete
Bam-Bam Rubble	6	Expiring	2011-07-13	Edit Delete
Bill Boggs	5	Expiring	2011-07-11	Edit Delete
Bob Smith	18	Expiring	2011-07-21	Edit Delete
Dot Cloud	16	Expiring	2011-07-17	Edit Delete
Ed Equine	25	Expiring	2011-08-25	Edit Delete
Elle-May Clampett	24	Expiring	2011-08-12	Edit Delete
Elovy Jetson	9	Expiring	2011-07-13	Edit Delete
Fred Flintstone	2	Expiring	2011-07-08	Edit Delete
Fred Jackson	15	Expiring	2011-07-16	Edit Delete
George Jetson	7	Expiring	2011-07-13	Edit Delete
Jake Blues	22	Expiring	2011-08-05	Edit Delete
Jane Jetson	8	Expiring	2011-07-13	Edit Delete
Jed Clampett	14	Expiring	2011-07-15	Edit Delete
John Smith	1	Expiring	2011-07-05	Edit Delete
Milburn Drysdale	17	Expiring	2011-07-20	Edit Delete
Oliver Douglas	13	Expiring	2011-07-15	Edit Delete
Pebbles Flintstone	4	Expiring	2011-07-09	Edit Delete
Robert Johnson	26	Expiring	2011-09-15	Edit Delete
Ron Weasley	19	Expiring	2011-07-24	Edit Delete
Wilbur Post	23	Expiring	2011-07-14	Edit Delete
Wilton Knight	27	Expiring	2012-06-09	Edit Delete

Show 25 entries Showing 1 to 22 of 22 entries

This approach is the most flexible, and allows you to create the exact view of members you desire. It can also be printed.

1. Click on "Members" in the top menu, to bring up this Member List.
2. (Optional) If required, click this to include lapsed members in the output as well as current members.
3. Click on "Show/Hide Columns" to display all possible options.
4. If required, increase the length of the display.



Method 3 - Customised List Presentation (cont)

The screenshot shows the 'List of Members' page. At the top, there are navigation tabs: Members, Vehicles, Events, Daybook, Assets, Reports, Categories, and Admin. A 'Welcome Administrator' message is in the top right. Below the tabs, there's a search bar and a 'Show / hide columns' button. The table below has columns: Member No, Member Type ID, Surname, First Name, Home Suburb, Home Phone, Mobile Phone, and Join Date. A 'Show / hide columns' menu is open on the right, showing checkboxes for (Summary), Member No, Member Type ID, Status, Surname, First Name, Partner's Name, Partner's Surname, Title, Home Address, Home Suburb, Home State, and Home Post Code. Red arrows point to the menu and the table.

Member No	Member Type ID	Surname	First Name	Home Suburb	Home Phone	Mobile Phone	Join Date
11	Member	Kravitz	Abner	MULGOA			2011-07-13
6	Associate Member	Rubble	Bam-Bam	ASHFIELD			2011-07-13
5	Member	Bloggs	Bill	Maintown		0419 443 334	2011-07-13
18	Member	Smith	Bob	NORTHMEAD			2011-07-13
16	Member	Cloud	Dot	CLOUDS CREEK			2011-07-13
25	Member	Equine	Ed	HORSESHOE CREEK	029367895		2011-08-25
24	Member	Clampett	Ellie-May	Hollywood			2011-08-12
9	Associate Member	Jetson	Elroy	MANLY			2011-07-13
2	Member	Flintstone	Fred	Bedrock	0236671339		2011-07-08
15	Member	Jackson	Fred	JACKSON NORTH			2011-07-16
7	Member	Jetson	George	MANLY			2011-07-13
22	Associate Member	Blues	Jake	CHICAGO		0442 555 555	2011-08-05
8	Member	Jetson	Jane	MANLY			2011-07-13
14	Member	Clampett	Jed	BEVERLY HILLS			2011-07-15
1	Member	Smith	John	HABERFIELD	0232331331		2011-07-05
17	Member	Drysdale	Milburn	BEVERLY HILLS			2011-07-20
13	Member	Douglas	Oliver	GREENACRE			2011-07-15
4	Associate Member	Flintstone	Pebbles	Yabbadabbadoo			2011-07-09
26	Member	Johnson	Robert	LIVERPOOL			2011-09-15
19	Member	Weasley	Ron	CASTLE ROCK			2011-07-24
12	Member	Post	Wilbur	HORSESHOE CREEK			2011-07-14
27	Member	Knight	Wilton	FLAGGY CREEK			2012-06-09

1. Modify the displayed columns by checking and unchecking the boxes against their names. The list is instantly updated. In this example we have removed the *Summary* column to instead show separate *Surname* and *First Name*, replaced *Status* with *Member Type*, and added suburb and phone number fields.
2. Click anywhere on the main page to dismiss the Show/Hide column list.

Method 3 - Customised List Presentation (cont)

The screenshot shows the 'List of Members' page. At the top, there are navigation tabs: Members, Vehicles, Events, Daybook, Assets, Reports, Categories, and Admin. A 'Welcome Administrator' message is in the top right. Below the tabs, there's a search bar and a 'Show / hide columns' button. The table below has columns: Member No, Member Type ID, Surname, First Name, Home Suburb, Home Phone, Mobile Phone, and Join Date. A 'Show / hide columns' menu is open on the right, showing checkboxes for (Summary), Member No, Member Type ID, Status, Surname, First Name, Partner's Name, Partner's Surname, Title, Home Address, Home Suburb, Home State, and Home Post Code. Red arrows point to the menu and the table.

Member No	Member Type ID	Surname	First Name	Home Suburb	Home Phone	Mobile Phone	Join Date	Actions
1	Member	Smith	John	HABERFIELD	0232331331		2011-07-05	Edit Delete
2	Member	Flintstone	Fred	Bedrock	0236671339		2011-07-08	Edit Delete
4	Associate Member	Flintstone	Pebbles	Yabbadabbadoo			2011-07-09	Edit Delete
5	Member	Bloggs	Bill	Maintown		0419 443 334	2011-07-11	Edit Delete
6	Associate Member	Rubble	Bam-Bam	ASHFIELD			2011-07-13	Edit Delete
7	Member	Jetson	George	MANLY			2011-07-13	Edit Delete
8	Member	Jetson	Jane	MANLY			2011-07-13	Edit Delete
9	Associate Member	Jetson	Elroy	MANLY			2011-07-13	Edit Delete
11	Member	Kravitz	Abner	MULGOA			2011-07-13	Edit Delete
12	Member	Post	Wilbur	HORSESHOE CREEK			2011-07-14	Edit Delete
13	Member	Douglas	Oliver	GREENACRE			2011-07-15	Edit Delete
14	Member	Clampett	Jed	BEVERLY HILLS			2011-07-15	Edit Delete
15	Member	Jackson	Fred	JACKSON NORTH			2011-07-16	Edit Delete
16	Member	Cloud	Dot	CLOUDS CREEK			2011-07-17	Edit Delete
17	Member	Drysdale	Milburn	BEVERLY HILLS			2011-07-20	Edit Delete
18	Member	Smith	Bob	NORTHMEAD			2011-07-21	Edit Delete
19	Member	Weasley	Ron	CASTLE ROCK			2011-07-24	Edit Delete
22	Associate Member	Blues	Jake	CHICAGO		0442 555 555	2011-08-05	Edit Delete
24	Member	Clampett	Ellie-May	Hollywood			2011-08-12	Edit Delete
25	Member	Equine	Ed	HORSESHOE CREEK	029367895		2011-08-25	Edit Delete
26	Member	Johnson	Robert	LIVERPOOL			2011-09-15	Edit Delete
27	Member	Knight	Wilton	FLAGGY CREEK			2012-06-09	Edit Delete

You can rearrange the columns to suit your preferred layout.

1. Click on a column header to sort by that item. In this example the data is sorted by Member Number.
2. Click and drag a column header to rearrange the layout. Notice *Member Type* is being dragged across



towards the right. *(NB this is not supported on all smart-phones and tablets.)*

Pro tip: Settings for both Shown and Hidden columns, as well as sort order and column order will be remembered for whenever you return to this page.



Integration with Excel and other Desktop Applications

OurCarClub offers a few different ways to access your data and use it in other applications. The most common purpose for this facility is to manipulate the data in Microsoft Excel, to generate special purpose lists, or to perform analysis of the data, such as charting or pivot tables.

The two basic methods of extracting data involve taking a copy of the data that will be static, and the third, more advanced option creates a live link to the data in OurCarClub, that can stay up-to-date with subsequent changes made. Each of these can be accessed from any List page.

Option 1 - Export as CSV

The screenshot shows the OurCarClub interface. At the top, there are tabs for 'Categories' and 'Reports'. A welcome message for 'Demonstration User' is visible. Below this, a yellow banner indicates 'Showing just current members.' with a link to 'Show all people (including lapsed members)'. There are buttons for 'Reset List Display', 'Search People', and 'Add a new Person'. A search bar is present with a 'Show / hide columns' link. The main table lists members with columns for 'Name', 'First Name', 'Join Date', and 'Actions'. The 'Actions' column contains links for 'View', 'Edit', and 'Delete'. A red arrow points to the 'Export as Excel' button at the bottom of the interface.

Name	First Name	Join Date	Actions
Antstone	Wilma	12/01/2013	View Edit Delete
nith	Nancy	12/01/2013	View Edit Delete
yckoff	Bruce	12/01/2013	View Edit Delete
bble	Barney	07/09/2011	View Edit Delete
nith	Bob	07/21/2011	View Edit Delete
asley	Ron	07/24/2011	View Edit Delete
illfrog	Jeremiah	08/10/2011	View Edit Delete
seneville	John	03/29/2013	View Edit Delete
moClubData	Master	04/13/2013	View Edit Delete
bruary	Don	04/13/2013	View Edit Delete
bruary	Sally expires in	04/13/2013	View Edit Delete
ay	Pat expires in	04/13/2013	View Edit Delete
ne	Samantha expires in	04/13/2013	View Edit Delete
ly	Julian expires in	04/14/2013	View Edit Delete
gust	Billy	04/14/2013	View Edit Delete
rgess	Tony	04/14/2013	View Edit Delete
ol	Tre	10/12/2013	View Edit Delete
gCorp	Bob Fatwallet	10/14/2013	View Edit Delete
oggs	William	10/14/2013	View Edit Delete
oggs	William Junior	10/14/2013	View Edit Delete
rgan	Ted	10/30/2013	View Edit Delete
arke	Jeff	11/16/2013	View Edit Delete

Showing 1 to 22 of 22 entries

[Export as Address Book File](#) [Export as Excel](#) [Export as Text](#) [More...](#)

When this button is clicked, a dialog box will prompt you to save the file. It will be in CSV (or "Comma Separated Values") format, which can be opened directly in Excel. The file will be named for the list being viewed, i.e. persons.csv or vehicles.csv



Option 2 - Copy and Paste to Excel

Categories ▾ Reports

Welcome **Demonstration User** Logout

Showing just current members. Show all people (including lapsed members)

Reset List Display Search People Add a new Person

Search: Show / hide columns

name	First Name	Join Date	Actions
ame	First Name		
ntstone	Wilma	12/01/2013	View Edit Delete
nith	Nancy	12/01/2013	View Edit Delete
ckoff	Bruce	12/01/2013	View Edit Delete
bble	Barney	07/09/2011	View Edit Delete
nith	Bob	07/21/2011	View Edit Delete
asley	Ron	07/24/2011	View Edit Delete
llfrog	Jeremiah	08/10/2011	View Edit Delete
seneville	John	03/29/2013	View Edit Delete
moClubData	Master	04/13/2013	View Edit Delete
nuary	Don	04/13/2013	View Edit Delete
bruary	Sally expires in	04/13/2013	View Edit Delete
y	Pat expires in	04/13/2013	View Edit Delete
ne	Samantha expires in	04/13/2013	View Edit Delete
ly	Julian expires in	04/14/2013	View Edit Delete
gust	Billy	04/14/2013	View Edit Delete
rgess	Tony	04/14/2013	View Edit Delete
ol	Tre	10/12/2013	View Edit Delete
gCorp	Bob Fatwallet	10/14/2013	View Edit Delete
oggs	William	10/14/2013	View Edit Delete
oggs	William Junior	10/14/2013	View Edit Delete
rgan	Ted	10/30/2013	View Edit Delete
arke	Jeff	11/26/2013	View Edit Delete

Showing 1 to 22 of 22 entries

Export as Address Book File Export as Excel Export as Text More...

Under the link labelled "More..." are some less commonly used Export features.



Categories ▾ Reports

Welcome **Demonstration User** Logout

Showing just current members. Show all people (including lapsed members)

Reset List Display Search People Add a new Person

Search: Show / hide columns

name	First Name	Join Date	Actions
Flintstone	Wilma	12/01/2013	View Edit Delete
Smith	Nancy	12/01/2013	View Edit Delete
Wyckoff	Bruce	12/01/2013	View Edit Delete
Rubble	Barney	07/09/2011	View Edit Delete
Smith	Bob	07/21/2011	View Edit Delete
Weasley	Ron	07/24/2011	View Edit Delete
Bullfrog	Jeremiah	08/10/2011	View Edit Delete
Roseneville	John	03/29/2013	View Edit Delete
OurCarClubData	Master	04/13/2013	View Edit Delete
January	Don	04/13/2013	View Edit Delete
February	Sally expires in	04/13/2013	View Edit Delete
May	Pat expires in	04/13/2013	View Edit Delete
June	Samantha expires in	04/13/2013	View Edit Delete
July	Julian expires in	04/14/2013	View Edit Delete
August	Billy	04/14/2013	View Edit Delete
Burgess	Tony	04/14/2013	View Edit Delete
Pol	Tre	10/12/2013	View Edit Delete
gCorp	Bob Fatwallet	10/14/2013	View Edit Delete
oggs	William	10/14/2013	View Edit Delete
oggs	William Junior	10/14/2013	View Edit Delete
organ	Ted	10/30/2013	View Edit Delete
arke	Jeff	11/26/2013	View Edit Delete

Showing 1 to 22 of 22 entries

Export as Address Book File Export as Excel Export as Text Show as Plain HTML Export as XML

In this instance, the "Show as Plain HTML" is what is required. This will re-display the current list, but in a very basic format.

ID	Member No	Member Type	Mbshp Status	Status	Is Organisation	Surname	First Name	Partner's Name	Partner's Surname	Title	Home Address	Home Address 2	Home Suburb	Home State	Home Post Code	Home Country	Alternate Name	Alternate Address
7453		Event Guest	1	Current	0	Wyckoff	Bruce											
7450	-2	Partner	1	Current	0	Flintstone	Wilma											
7449	-1	Partner	1	Current	0	Smith	Nancy											
96	3	Full Member	1	Current	0	Rubble	Barney	Betty		Mr & Mrs	67 Rockway Place		Yabbadabbadoo Heights	NSW	2581			
128	18	Full Member	1	Current	0	Smith	Bob			Mr	90 Something Street		NORTHMEAD	NSW	2152			
130	19	Full Member	1	Current	0	Weasley	Ron			Mr	Room 12, Gryffindor, Hogwarts		CASTLE ROCK	NSW	2333			
158	23	Full Member	1	Current	0	Bullfrog	Jeremiah	Jenny		Mr	89 Toad Lane		FROGS HOLLOW	NSW	2550			
1078	263	Life Member	1	Current	0	Roseneville	John											

In your browser, under the "Edit" menu, choose "Select All", then "Copy". Switch to Excel, and "Paste" into a Worksheet.

Note that this method is probably not well suited to lists that are likely to generate thousands of entries.



Option 3 - Access live OurCarClub data from Excel using a "Web Query"

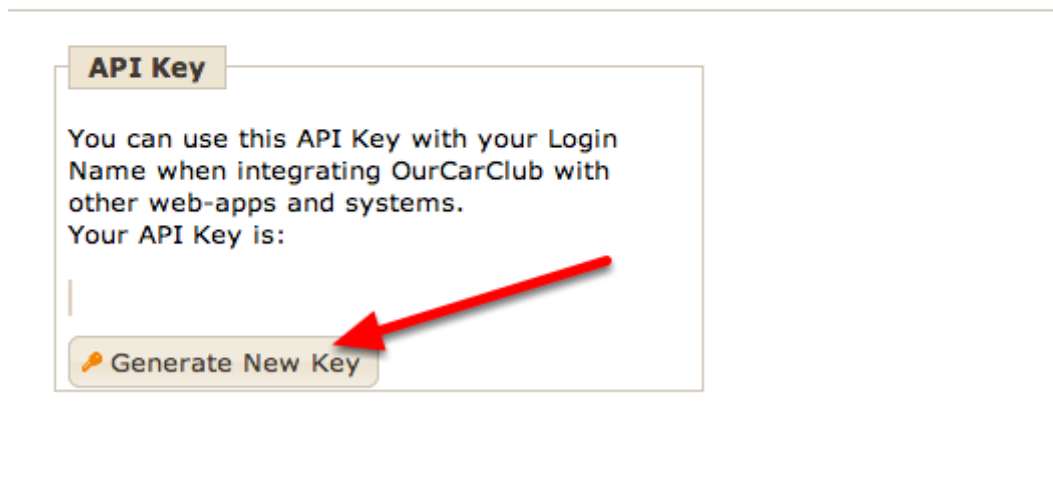
OurCarClub provides a method for integrating with other web-apps or applications. By using this feature, you can create a link to live data that can be refreshed at any time, bringing the latest Member or Vehicle data into your spreadsheets whenever you open them.

This feature requires that you generate an API Key. API Keys are not generated by default for all OurCarClub users, as they are an advanced feature. An API Key should be treated like your username and password, and not shared with others.

To create an API Key, click on your username in the top right corner of the application.

Generating an API Key

Welcome [Demonstration User](#) [Logout](#)



On the page with your details, there is a box labelled API Key, and a button to Generate a new API Key. This is used to create an initial key, or to regenerate it.

NB: If you regenerate your API Key, the old one is no longer valid, and anything that uses it will need to be updated.




Welcome Demonstration User [Logout](#)

API Key

You can use this API Key with your Login Name when integrating OurCarClub with other web-apps and systems.
Your API Key is:

C97C2F6

 [Generate New Key](#)

The key is a long string of letters and numbers. For the current purpose (creating an Excel Web Query) it is not necessary to make a note of it or copy it anywhere else.



Create a Web Query File

Categories ▾ Reports

Welcome **Demonstration User** Logout

Showing just current members. Show all people (including lapsed members)

Reset List Display Search People Add a new Person

Search: Show / hide columns

name	First Name	Join Date	Actions
name	First Name		
itstone	Wilma	12/01/2013	View Edit Delete
ith	Nancy	12/01/2013	View Edit Delete
ckoff	Bruce	12/01/2013	View Edit Delete
oble	Barney	07/09/2011	View Edit Delete
ith	Bob	07/21/2011	View Edit Delete
asley	Ron	07/24/2011	View Edit Delete
lfrog	Jeremiah	08/10/2011	View Edit Delete
seneville	John	03/29/2013	View Edit Delete
moClubData	Master	04/13/2013	View Edit Delete
uary	Don	04/13/2013	View Edit Delete
bruary	Sally expires in	04/13/2013	View Edit Delete
y	Pat expires in	04/13/2013	View Edit Delete
ie	Samantha expires in	04/13/2013	View Edit Delete
y	Julian expires in	04/14/2013	View Edit Delete
gust	Billy	04/14/2013	View Edit Delete
rgess	Tony	04/14/2013	View Edit Delete
ol	Tre	10/12/2013	View Edit Delete
Corp	Bob Fatwallet	10/14/2013	View Edit Delete
ggs	William	10/14/2013	View Edit Delete
ggs	William Junior	10/14/2013	View Edit Delete
rgan	Ted	10/30/2013	View Edit Delete
rke	Jeff	11/26/2013	View Edit Delete

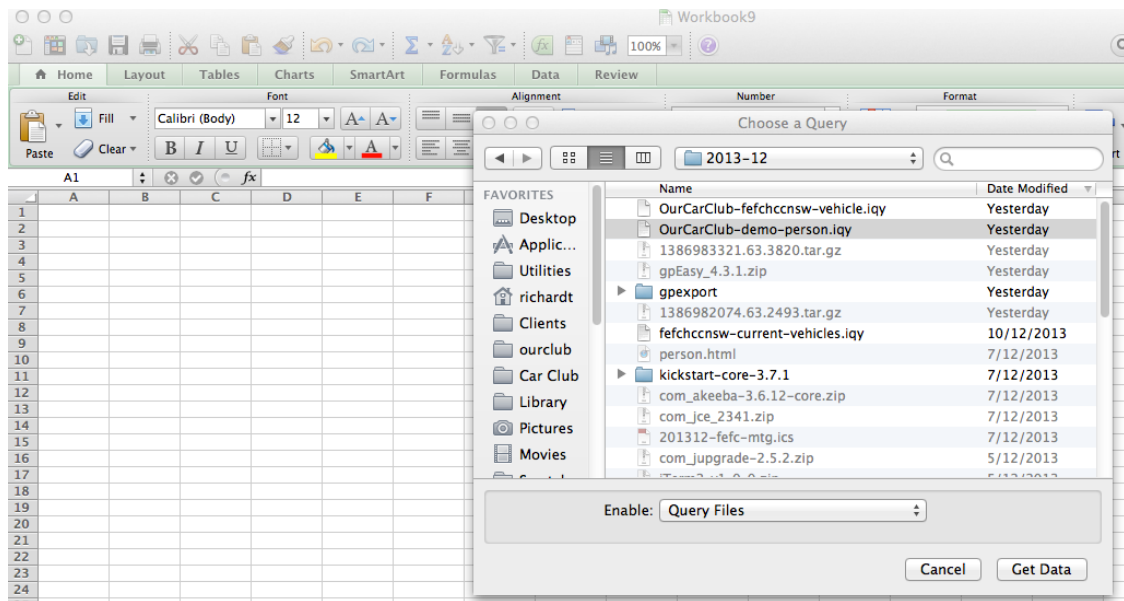
Showing 1 to 22 of 22 entries

Export as Excel Export as Text Show as Plain HTML Save as Excel Web Query Export as XML

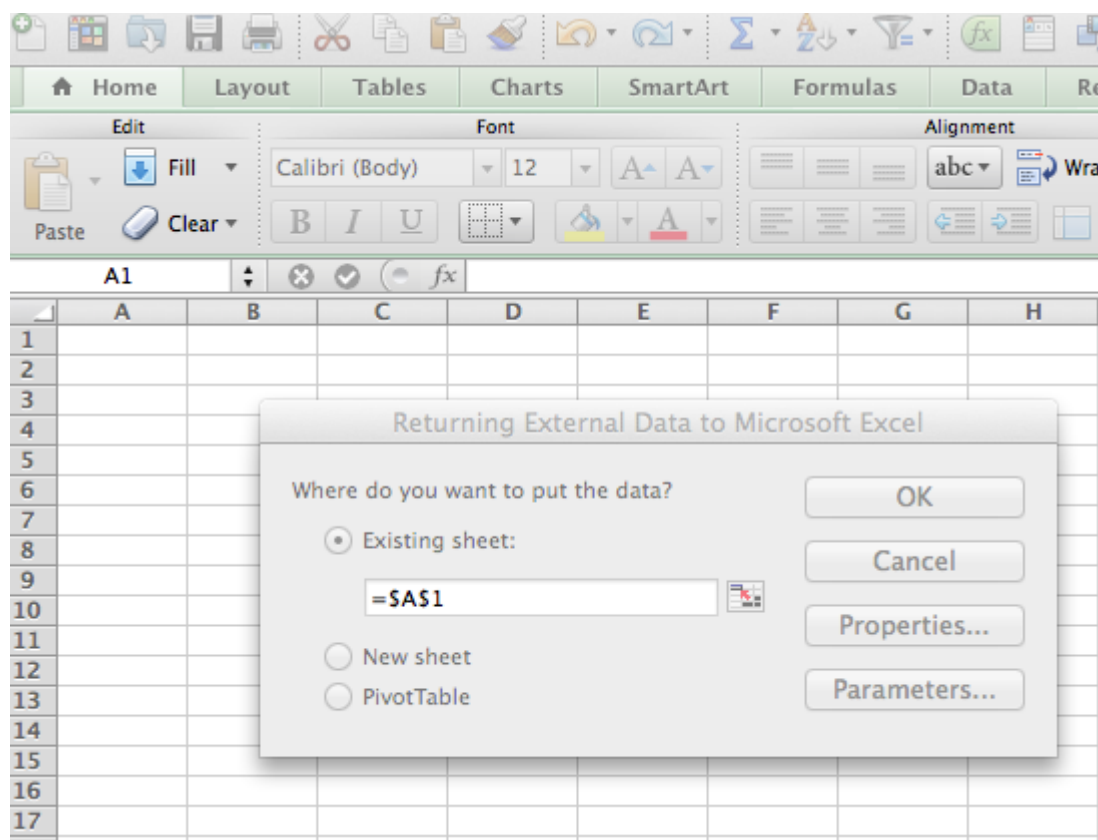
Once again, back to the List view. Now, under the "More..." export options, there is an additional "Save as Excel Web Query" option. Clicking this will result in a "Save As" dialog box appearing, for saving the file on your hard drive. By default, it will be called "OurCarClub-<club>-<list-type>.iqy", but you can of course change this to call it anything you choose. The "iqy" extension should be retained, especially on a Windows PC.



Using the Web Query in Excel



All reasonably modern versions of Microsoft Excel have the option to "Get External Data", and this is usually located under a "Data" menu item. You will want to locate the "Use Saved Query" option, and then navigate to the Web Query file you just saved. You will then be prompted for where you want the data to be placed in the spreadsheet (usually cell \$A\$1 in the active sheet).





OurCarClub data live in Excel

ID	Status	Is Organisation	Surname	First Name	Partner's Name	Partner's Surname	Title	Home Address
1	Expiring	0	Flintstone	Fred	Wilma		Mr & Mrs	15 Triceratops Ter
2	Expiring	0	Jetson	Jane				58 Rocket Street
3	Expiring	0	Clampett	Jed			Mr	1265 Rodeo Drive
4	Expiring	0	Jackson	Fred			Mr	25 Karen Street
5	Expiring	0	Lebowski	Jeff			Mr	5 Carpet Court
6	Current	0	Cogburn	Rooster			Mr	Behind the Chooks
7	Current	0	Blues	Elwood			Mr	1060 West Addison
8	Expiring	0	Blues	Jake			Mr	Cell Block #9, Jolie
9	Expiring	0	Summers	Dawn			Ms	1234 Pacific Drive
10	Current	0	Wayne	Bruce			Mr	The Batcave
11	Expiring	0	Brown	Emmett			Dr	150 Gloop St
12	Expiring	0	Rockhead	Joe	Betty		Mr & Mrs	40 Stoney Creek Rd
13	Expiring	0	Bar	Baz	Foo	Quux		12 Perl Bay Road
14	Current	0	Blow	Joe	Flo			12 Snow Street
15	Current	0	Last	John				15 John St
16	Current	1	Smith and Sons	Fred Smith				10 Argo St
17	Current	0	Bloggs	William				The Bloggery

Once you click OK, Excel will request the data from OurCarClub, and return it as a table of data. You are then free to create graphs, pivot charts or other information from this data. At any time in the future, you can simply refresh the data from the Data menu, and obtain the latest information from OurCarClub.