

Documentation of Clubdata V2

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1 Overview

Clubdata V2 is a software to manage club members. It is a complete redesign of Clubdata which was developed because I was unsatisfied with the MS ACCESS solution my wife used to manage the member of an economical club in Bavaria. Since then I added a lot of new features.

It is based on Apache and MySQL. In fact it is developed and tested using a classical LAMP system (Linux, Apache, MySQL, PHP), but several users run Clubdata V2 also on a Windows system.

One goal was flexibility. So nearly all parameters are stored in the database and can be edited by the administrator of Clubdata V2.

Clubdata V2 is published under GPL (see COPYING at the end of the documentation)

1.1 Features

The following features are implemented at the moment:

1. Managing of club members, with multiple addresses (up to 9 different addresses in Clubdata V2)
2. Different membership types (you can create your own ones) with different membership fees.
3. Several membership features, like "infos per email welcome", "agree to give address to other members", "agree to publish data via WWW", etc (Have a look at "Member information")
4. Freely definable attributes (e.g. board member) can be assigned to each member
5. Managing of membership fees (also "special agreements") and payments.
6. Sending mass emails via SMTP
7. Create Excel-Sheets for further processing (like mass letters, etc)
8. Create an address list to use with the German Infopost Manager.
9. A large number of selection criteria for searching members
10. An authentication system with the possibility to give access on a per screen basis (e.g. Private data, firm data, member information.) with either read, update, insert and/or delete access.
11. To be able to work with providers who are running PHP as CGI script. Clubdata V2 is not depending on the authentication mechanism of PHP.
12. Variable salutations, also for different languages (e.g. for members in other countries)
13. Support for different languages (English, German and French for the moment)
14. A large possibility for configuration. E.g. the standard columns shown as a search result can be defined by the administrator (but can be overwritten for each search by the user)
15. A "user" and a "member" interface. The "user" interface is used by the club officials to administrate their members. The "member" interface gives each member a limited possibility to change his data (such as E-mail address, etc.) and to look for information about other members [see 3.) "agree to publish data via WWW"].
16. Export of member lists as PDF or Excel. The member can decide, which data should be published (Either only private, or firm or both data)
17. Conference management. A rudimentary conference management is implemented to manage subscriptions to conferences.
18. Accounting functionality, like unbalanced accounts, mass update of payments, etc

19. Easy Update mechanism. When installing a new version of Clubdata V2, the database is automatically updated to the needed version.

New in Clubdata V2:

20. Modernized web design, with use of tool tips, etc.

21. Support for up to 9 addresses per member.

22. Individual mailing types, as “Invitation”, “Information”, “Invoice”, ...

These mailing types can be assigned to one or more addresses

23. Support for individual user configuration (at the moment tool tips can be switched on or off)

2 Concepts

This chapter describes the basic concepts of Clubdata V2. You should read it to have an idea how Clubdata V2 works and why it does things like it does:

2.1 MemberID

Clubdata V2 uses a number, called MemberID to identify a member. The MemberID also defines the definition of what is the first member (the member with the lowest MemberID), the previous member (the member with the largest MemberID smaller than the actual MemberID), the next member (the member with the smallest MemberID larger than the actual MemberID) and the last member (the member with the highest MemberID). This is necessary, as MemberID's might not be continuous and may have wholes between numbers (i.e. a canceled membership leaves a whole). The MemberID is unique and will not be reassigned to another member. There is one exception to this: If the highest MemberID is deleted, it will be reassigned to a new member. This behavior helps you to delete accidentally created users.

2.2 User versus Member

Clubdata V2 distinguishes between Users and Members:

Users are (normally) employees of the club. Their duty is to administrate members. A typically member is a secretary or the treasurer. They must be able to have a look on all members (not necessarily all data of each member). A user account must be created by the administrator using the administration menu. The administrator also defines the rights of a user. A user logs in via its user name (created by the administrator) and a password. The initial password is also generated by the administrator.

Members are members of the club. They are allowed to see their personal data and modify some of them. They also can see public available data of other members. But they neither can't see any private data of other members nor can't they modify any data of other members. A member can use Clubdata V2 if a user has assigned a password to this member (See Tab: Memberinfos for more details). A member logs in using its MemberID and the password given by a user (the member may change the password later)

2.3 Membership types

Each membership is associated to a type of membership. Membership types can be freely created by the administrator using the administration menu (Administration → Database → Membertype). A membership type defines the following (default) parameter for a member:

- Name of membership type
- The member fee to pay. This may be overwritten on a per member basis to support “special agreements”.
- If the member is selected by default.
This parameter is used when searching members, as per default only these members are selected. This behavior may be overwritten on a per search basis
- If the membership type defines a canceled membership.
If this parameter is set to YES, members of this membership type will not be taken into account for any selection (like mass-mailing, invoices or publishing of member data).
- The dependency of the membership type.
There are 3 different dependencies of a membership type:
 - **Individual:** This membership type has no relation to any other membership type
 - **Main:** This membership type defines a master membership. Typically a member of this type pay a firm wide fee and other members may join the club for free. If such a member cancels its membership, the associated members are no longer entitled to be a (free) member of the club. They have to change their membership type also.
 - **Associate:** This membership type defines associated members, which depends on a main member.

2.4 Attributes

Each member may have one or more attributes assigned. Attributes are defined by the administrator (see Administration → Database → Attributes). An attribute may be set or not for each user.

Table 1: Default attributes for members shows the available attributes of the standard installation.

<i>ID of attribute</i>	<i>Name of attribute</i>	<i>Description</i>
1	Direct Debit	The member pays its fee by direct debit. A payment will be automatically inserted by the End of the year batch run
2	Invoice	The member wishes to receive an invoice
3	Infos per E-Mail	The member prefers to receive informations and invitation by email. If a mailing is actually sent by email depends also on the mailing type, (e.g. invoices will not)
4	Canceled by end of year	The membership of this member ends by the end of the year. The “End of the Year”-Batch job will automatically set the membership of this member to “Canceled”.

Table 1: Default attributes for members

2.5 Fees and Payments

Clubdata V2 only supports annual member fees at the moment. Membership fees are based on the membership type a user has. As there are sometime “special agreements” for some members, the actual membership fee is stored in the members data on an annual basis and can so be adjusted individually. To simplify the task of initializing the membership fee each year to each member, a batch job does set the membership fees to their initial value (See Accounting → End of Year Updates)

Members pay their fees in several ways. These are supported by Clubdata V2. In fact either they will remit money, or the payment is made by direct debit. Members who remit their fee will hopefully, they will pay the whole amount in one sum, but sometimes they won't.

Clubdata V2 will help you to simplify the handling of both types of payments. Payments via direct debits can be set via a batch job (See Accounting → End of Year Updates) on an annual basis. Remits can be assigned to a member as they come on your bank account. There, you can add the way and the amount which was transferred and associate it to a fee.

Later, when you create the payment reminder list, all payments which do not exactly match the corresponding fee (no payment, not enough, to much) will be listed.

2.6 Address tabs

You can define up to 9 different address tabulators. Each of them may have a different set of address fields (see Administration → Database → Addresstype). A list of available fields is shown in Table 2 Available fields for addresses on page s8

Please note, that the names displayed may differ from the names of the database columns. When selecting fields for new addresstypes, you have to use the column names not the names displayed at the tabulators !

<i>Column</i>	<i>Description</i>
Salutation_ref	A reference field for salutations (see Administration → Database → Salutation)
Title	Title of the person
Firstname	Firstname of the person
Lastname	Lastname of the person
Firmname_ml	Name of the enterprise, may have multiple lines
FirmDepartment	Name of department
Address	Street or Postbox of the address
ZipCode	Zipcode of the address
Town	Name of the town
Country_ref	A reference field for county name (see Administration → Database → Country)
Telephone	Telephone number of the person
Fax	Fax number of the person
Email	Email address of the person
mobile	Mobile phone number of the person
chat	Chat address of the person
Html	Address of the web site of the person
Logo_link	This field enables you to store a logo for this address

Table 2 Available fields for addresses

There are 3 addresses predefined:

1. Private address
2. Firm address
3. Invoice address

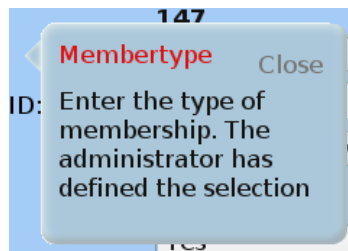
2.6.1 Mailingtypes

Mailings may be of different types (e.g. invitations, invoices, etc.). It often does not make much sense to send an invitation to the book keeping and an invoice to the member. This is where mailing types are used. Mailing types are defined by the administrator via Administration → Database → Mailingtypes. Each address may have one or more mailing types assigned to it. When sending emails or letters you must define a mailing type. Only those addresses which have this mailing type assigned will be used for this mailing.

As you can assign a mailing type to multiple addresses of a member, you can e.g. send greeting cards to both the member and the book keeping staff.

2.7 Context sensitive help

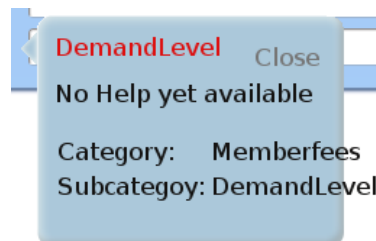
When you move the cursor over a label, you often get a context sensitive help displayed as a tool tip.



Picture 1: Tooltip

A user can switch tool tips on or off (see Settings → Personal settings). When you click on a label, you always will get a context sensitive help in a new window displayed.

The administrator can modify the text displayed and add new help texts for those entries, which do not have a help text for the moment. To simplify the creation of new help texts, the category and subcategory is displayed for those entries. See 5.3.9 Help on page 37 how to edit help texts



Picture 2: Tooltip not available

3 Installation

3.1 Prerequisites

The following environment is needed by Clubdata V2:

On the server side

- A Web server which supports PHP (I am testing under Apache 2.2.15 on Linux)
- PHP (5.3.x, I'm testing under 5.3.3 at the moment)
- MySQL (I am testing under 5.x)

On the client side:

- Mozilla Firefox (>=3.5) (and perhaps Internet Explorer (>=7), which is not tested yet)
- JavaScript and Cookies must be enabled

3.2 Installing Clubdata V2

1. Extract tar-file to \$DOCUMENT_ROOT/Clubdata2
2. Make sure you have a mysql user configured which has the permission to create databases and add tables. This can be the root user.
3. Make also sure that this user has a password assigned !!

4. Call `http://yourhost/Clubdata2/Installation/install.php` with your browser (firefox preferred)
5. Select the appropriate values for your installation and click on “SAVE AND NEXT” to proceed to the next step (SAVE will just save the current values and will stay in the current step)
6. When you have successfully created the database and loaded the initial datas, copy the file
Installation/configuration.sample.php
to
include/configuration.php
7. Now, the database contains a test member and some users to play with
User: Admin, Password: admin, Function: (guess...)
User: AllUser, Password: AllUser, Function: User who may edit all tables
User: test, Password: test, Function: Is not allowed to do anything at the moment, but is used to test authentication
Member: 147, Password: mitglied, Function: The member uses the "member" interface as described in
8. 7. Create a directory named “small” under `DEST_HTTP_DIR` (set in section 'Upload' during setup), if you didn't use the default value during setup
9. Change the permission of the following directories to be writable by the http server (Normally `wwwrun`) (e.g. `chown wwwrun <Directory>`):
 - `style/newstyle/templates_c/`
 - `style/newstyle/cache/`
 - the directory defined by `$DEST_HTTP_DIR`
 - `$DEST_HTTP_DIR/small` (as created in Step 9)
10. Connect to `http://yourhost/Clubdata2/index.php`. Login as Admin, AllUser or test.
You must have Javascript enabled !!
If you changed `INDEX_PHP` to `index.php5`, you have to connect to
`http://yourhost/Clubdata2/index.php5`
11. Have fun, add members, etc.
12. If you find any errors (and you will for the moment) send me an email to `franz.domes@gmx.de`.
Any suggestions and bugfixes are also very welcome.

4 Usage

4.1 Login

When you start Clubdata V2, the main screen will be displayed.

The screen is divided into 3 parts:

1. The **Navigator**: On the left side, you can select the tasks. The tasks shown depends on the rights of the user (or member) logged in.
2. The **Top Bar**: On the top of the right side, information about the actual state will be displayed
3. The **Main Window**: In the middle of the right side is the main window.

In the navigator area, you have the possibility to log in. Please enter your username and password.



Picture 3: Main screen before log in

For a new installation the following users are available:

<i>Login</i>	<i>Password</i>	<i>Function</i>
admin	admin	Administrator, is allowed to do everything
AllUser	AllUser	May edit all member data, but does not see the administration menu. This means, this user cannot change the behavior of Clubdata V2
test	test	This user is not allowed to do anything
147	mitglied	This login is a member account. This account has only limited rights to change the own data and to see public available data of other members

Table 3: Logins and passwords of demo system

4.2 Main menu

After you have successfully logged in, you will see your navigator menu on the left side. The items shown will depend on the access rights you have been granted.

By clicking on a menu entry, submenus will be displayed.

<i>Menu</i>	<i>Task</i>
Home	General information as Copyright and Impressum
Member	Administration of members, as creating new members, modifying or delete existing members.
Communication	Functions to send emails and letters to your members.
Queries	Several statistical queries
Accounting	Accounting functions, as searching for payments and fees and end of year procedures

Picture 4: Main screen after login

Conferences	Managing of conferences, like creating new ones and editing existing ones.
Settings	Administration of personal settings
Administration	Administration of Clubdata V2

Table 4: Table of menus

4.3 Member menu

The member menu contains all procedures to administer members of the club. In the main window, you see several tabulators to manipulate existing members.

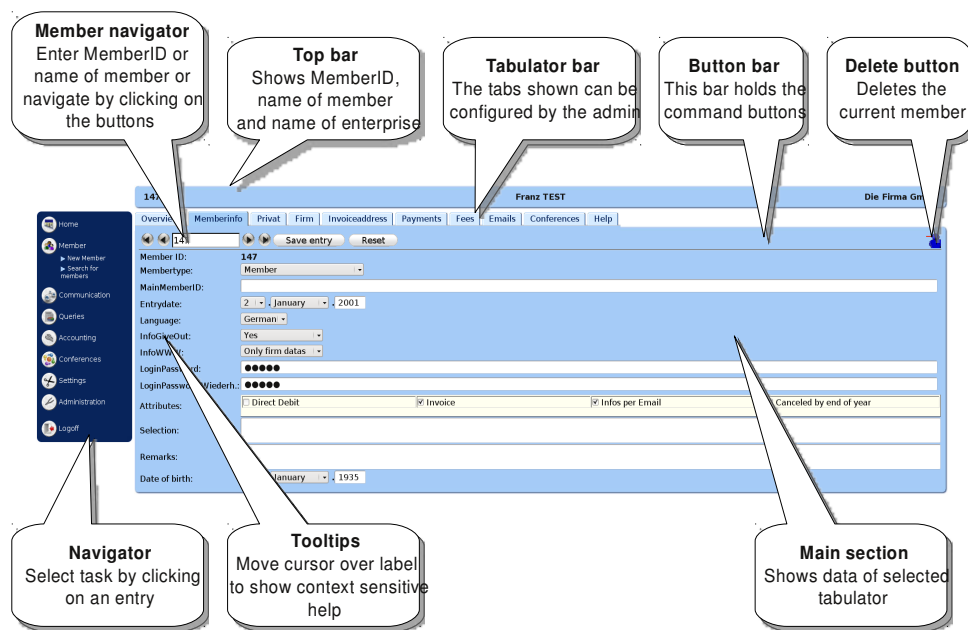
TIP:

You can move the mouse over a field description and you will get a tool tip (if enabled) or click on the field description of an editable field to get a context sensitive help on this field

The submenus in the navigator bar will allow you to

- Create a new member
- Search for a member

The page displayed is divided into several sections as you can see in Picture 5: Sections of member screen on page 13



Picture 5: Sections of member screen

To navigate between members, several possibilities exists.





	Goto first member (i.e. the member with the lowest MemberID)
	Go back one member. . If the active member is already the first member, this button does nothing
<div><input type="text" value="147"/></div>	<ol style="list-style-type: none"> 1. Enter a MemberID directly: If a MemberID (i.e. only numbers) is entered, directly goto to this member 2. Quick search a member: If an alphanumerical text is entered, this text is looked up in the fields Lastname, Firstname and Firm. If one match is found, the member is directly selected; if more than one match is found, a list of found members is shown
	Go forward one member. If the active member is already the last member, this button does nothing
	Goto last member (i.e. the member with the highest MemberID)

Table 5: The member navigator elements

4.3.1 Tab: Overview

The Overview tab show all member information on one tab. It gives you a fast view to all relevant informations. No data can be edited on this page. For a description of the fields shown, please refer to the associated tab (Private, Firm, Memberinfo).

The screenshot shows a web application interface for managing members. On the left is a dark blue sidebar with icons and labels for 'Home', 'Member' (with sub-links 'New Member' and 'Search for members'), 'Communication', 'Queries', 'Accounting', 'Settings', and 'Administration'. The main content area has a light blue header with the member ID '147', the name 'Franz TEST', and the company 'Die Firma GmbH'. Below the header is a tabbed interface with 'Memberinfo' selected. The 'Memberinfo' tab contains several input fields: 'Member ID' (147), 'Membership type' (Member), 'MainMemberID' (0), 'Entrydate' (calendar), 'Language' (German), 'InfoGiveOut_ref' (Yes), 'InfoWWW_ref' (Only firm datas), 'LoginPassword_pw' (masked), 'Attributes' (checkboxes for Direct Debit, Invoice, Infos per Email, Canceled by end of year), 'Selection_ml', 'Remarks_ml', and 'Date of birth' (calendar). There are 'Save entry' and 'Reset' buttons at the top of the form.

Picture 7: Member tabulation Memberinfo

4.3.2 Tab: Memberinfo

This Tab contains all information about a member. You can edit the following data on this tab:

<i>Field</i>	<i>Description</i>
MemberID	The id of this member. The MemberID is set automatically and cannot be changed.
Type of membership	Defines the type of the membership. The types available can be customized by the administrator via the administration menu. The type of membership defines by default the membership fee, if the member is selected by default and if the membership is canceled. The type of membership defines also, if the member is a full member or an associated member
since	The date since when the member has the selected type of membership. This date changes automatically, whenever the type of membership is changed
ID of full member	This fields holds the MemberID of the full member for associated members. For all other members, this field remains empty. (See Fehler: Referenz nicht gefunden Fehler: Referenz nicht gefunden on page Fehler: Referenz nicht gefunden)
Entrance	The date of entrance to the club. This date may vary from the date above, as the type of membership may have changed in the meanwhile.
Preferred language	This field defines the language, the member would like to have. This field is used when the member logs in to show the menu in its preferred language

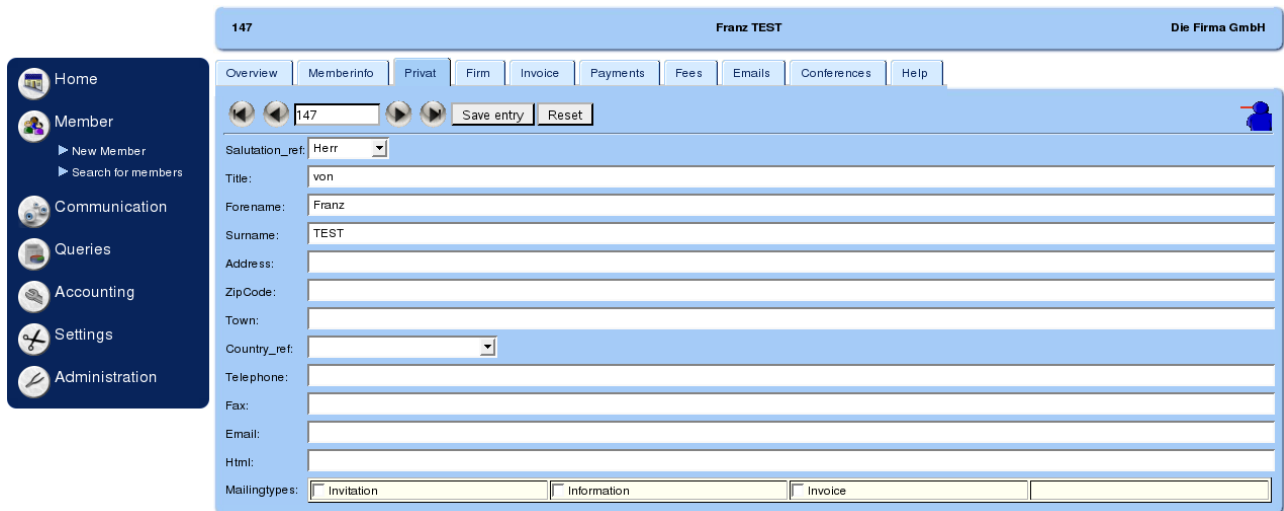
<i>Field</i>	<i>Description</i>
Information sharing	<p>Select if the user has given permission to give his data to other members. The following values are possible:</p> <p>Not Mentioned The member has not yet said anything</p> <p>No The member has prohibited to share any data</p> <p>Yes The member has given permission to share any data</p> <p>Only firm data The member has given permission to share firm data only</p> <p>Only private data The member has given permission to share private data only</p>
Information in WWW	<p>Select if the member allows to public its data in the World Wide Web to show them to other members. The following values are possible:</p> <p>Not Mentioned The member has not yet said anything</p> <p>No The member has prohibited the publishing of any data</p> <p>Yes The member has given permission to publish any data</p> <p>Only firm data The member has given permission to publish firm data only</p> <p>Only private data The member has given permission to publish private data only</p>
Password	<p>Enter the initial password for the member to log in. Repeat the same password in the line Password repeat !</p> <p>The member uses its MemberID and this password to log in (It may change it later).</p> <p>If the member should not be able to log in, let the password empty.</p>
Attributes	<p>A list of attributes, defined by the administrator.</p> <p>(See 2.4 Attributes on page 6 for a list of standard attributes)</p>
Selection	<p>This field may be used to mark several members for later selection. (e.g. type GALA2003 for all members who participate at the gala event 2003)</p>
Remarks	<p>Type any remarks for the member</p>

TIP:

Don't forget to click on the save button to make the changes permanent.

4.3.3 Tab: Private

The Privat-Tab is an adresstab. The fields displayed may be changed by the administrator. (See 2.6 Address tabs on page 7)



Picture 8: Private address tabulator

The Private tab collects all private data of a member. You can edit the following data on this tab:

<i>Field</i>	<i>Description</i>
Salutation	Select the salutation for this member. Salutations can be customized by the administrator via the administration menu. The salutation defines the texts shown in addresses and at the beginning of letters
Title	The title of the member
Forename	The first name of the member
Surname	The last name of the member
Address	The private address of the member (i.e. street, etc)
Zipcode	The zip code of the private address of the member
Town	The town of the private address of the member
Country	The country code of the private address of the member. The country codes can be customized by the administrator via the administration menu.
Telephone	The private phone number of the member
Fax	The private fax number of the member
Email	The private email address of the member
Html	Web-site of the member

TIP:

Don't forget to click on the save button to make the changes permanent.

4.3.4 Tab: Firm

The Firm-Tab is an adresstab. The fields displayed may be changed by the administrator. (See 2.6 Address tabs on page 7)

147 Franz TEST Die Firma GmbH

Overview Memberinfo Privat Firm Invoice Payments Fees Emails Conferences Help

147 Save entry Reset

Salutation_ref: Herr

Title: von

Forename: Franz

Surname: TEST

Address:

ZipCode:

Town:

Country_ref:

Telephone:

Fax:

Email:

HTML:

Mailingtypes: ☐ Invitation ☐ Information ☐ Invoice

The Firm tab collects all firm data of a member. You can edit the following data on this tab:

<i>Field</i>	<i>Description</i>
FirmName	The name of the firm
FirmDepartment	The name of the department
Address	The address of the firm (i.e. street, etc)
Zipcode	The zip code of the firm address
Town	The town of the firm address
Country	The country code of the firm address. The country codes can be customized by the administrator via the administration menu.
Telephone	The business phone number of the member
Fax	The business fax number of the member
Email	The business email address of the member
HTML	The Internet address of the firm. A link to this address will be shown in the public available data (if authorized by the member)
Logo	The logo of the firm. This logo will be shown in the public available data (if authorized by the member)

TIP:

Don't forget to click on the save button to make the changes permanent.

4.3.5 Tab: Invoiceaddress

The Invoiceaddress-Tab is the third adresstab. The fields displayed may be changed by the administrator. (See 2.6 Address tabs on page 7)

Picture 9: Invoiceaddress tabulator

The Invoice tab collects all data of the recipient of an invoice for the member. Especially in enterprises, this often is different from the member itself. You can edit the following data on this tab:

<i>Field</i>	<i>Description</i>
Salutation	Select the salutation for this member. Salutations can be customized by the administrator via the administration menu. The salutation defines the texts shown in addresses and at the beginning of letters
Title	The title of the member
Forename	The first name of the member
Surname	The last name of the member
FirmName	The name of the firm
FirmDepartment	The name of the department
Address	The private address of the member (i.e. street, etc)
Zipcode	The zip code of the private address of the member
Town	The town of the private address of the member
Country	The country code of the private address of the member. The country codes can be customized by the administrator via the administration menu.
Telephone	The private phone number of the member
Fax	The private fax number of the member
Email	The private email address of the member
Html	Web-site of the member
Logo	The logo of the firm. This logo will be shown in the public available data (if authorized by the member)

4.3.6 Tab: Payments

#	Del	Edit	Id	InvoiceNumber	Paytype	Period	Amount	Paydate	Method of payment	Checknumber	Remarks
1			1		Membership fee	1999	306.77	19.03.1999	Debit entry		
2			2		Membership fee	2001	76.44	01.01.2001	Unknown		Automatisch Eingefügt. Die Zahlung wurde nicht so getätigt !!
3			6	1234	Membership fee	2001	0.00	01.01.2001	Transfer	1234-AAA	Automatisch Eingefügt. Die Zahlung wurde nicht so getätigt !!
4			7	1234	Membership fee	2001	0.00	01.01.2001	Transfer	1234-AAA	Automatisch Eingefügt. Die Zahlung wurde nicht so getätigt !!
5			3		Membership fee	2002	75.00	01.01.2002	Unknown		Einzug per DirectDebit
6			4	1234	Membership fee	2009	250.00	01.01.2009	Transfer	1234-AAA	Testzahlung

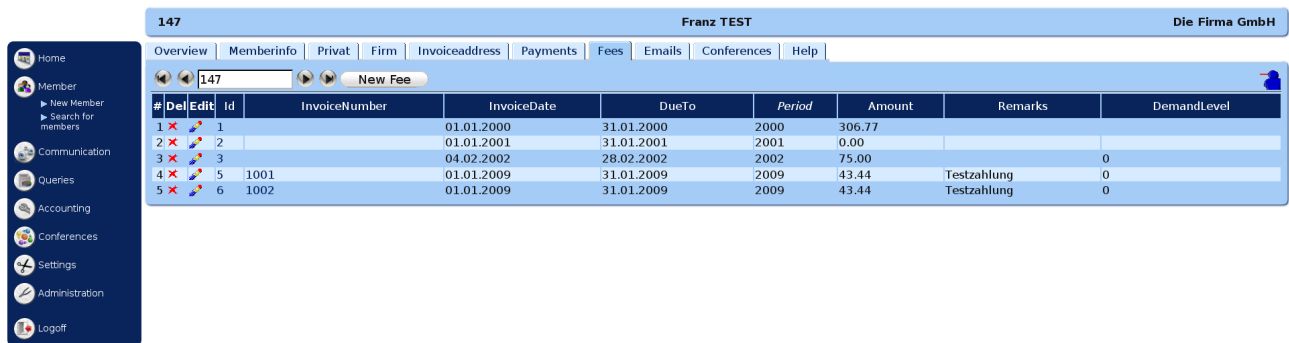
This tab shows a list of all payments made by the member. This tab is related to the tab Fees. Each line describes one payment. You can

- delete a payment by clicking on
- modify an entry by clicking on
- view the details by clicking on the id
- add a new entry by clicking on in the button bar

The following fields are shown and can be edited (except the first 4 one):

<i>Field</i>	<i>Description</i>
#	The line number
	The delete button. Deletes this payment
	The edit button. Edits this payment
Id	The id of the payment. Each payment is identified by an id. The id is unique
Invoice Number	An Invoice Number. See Tab: Fees
Paytype	The type of the payment. I.e. the reason, why the payment was done. The list of the type of payments can be customized by the administrator via the administration menu.
Period	In case of a membership fee, this field indicates the year of the membership, the payment was made for
Amount	The amount of the payment
Date of payment	The date the payment was done
Paymode	How the payment was done. (e.g. by cheque, by direct debit, etc). The list of the pay modes can be customized by the administrator via the administration menu.
Cheque No.	The number of the cheque, if payed by cheque
Remarks	Any remarks

4.3.7 Tab: Fees



#	Del	Edit	Id	InvoiceNumber	InvoiceDate	DueTo	Period	Amount	Remarks	DemandLevel
1	✖	✎	1		01.01.2000	31.01.2000	2000	306.77		
2	✖	✎	2		01.01.2001	31.01.2001	2001	0.00		
3	✖	✎	3		04.02.2002	28.02.2002	2002	75.00		
4	✖	✎	5	1001	01.01.2009	31.01.2009	2009	43.44	Testzahlung	0
5	✖	✎	6	1002	01.01.2009	31.01.2009	2009	43.44	Testzahlung	0

This tab shows a list of all fees for the member. This tab is related to the tab Payments. Each line describes one fee. You can

- delete a fee by clicking on ✖
- modify an entry by clicking on ✎
- view the details by clicking on the id
- add a new entry by clicking on **New Fee** in the button bar

The following fields are shown and can be edited (except the first 4 one):

<i>Field</i>	<i>Description</i>
#	The line number
✖	The delete button. Deletes this fee
✎	The edit button. Edits this fee
id	The id of the fee. Each fee is identified by an id. The id is unique
Invoice Number	An Invoice Number. The Invoice Number should be an unique identifier of this invoice. It differ from the id, by the format. The format of an Invoice number may be defined by the administrator via the configuration menu. <div>TIP: By clicking on the Invoice Number, you will jump to the payment made for this fee, if any</div>
Invoice date	The date of the invoice.
DueTo	The date the invoice is due to pay
Period	The period of the membership fee. This is only relevant, if the invoice is for a membership fee
Amount	The Amount of the invoice
Remarks	Any remarks

<i>Field</i>	<i>Description</i>
Demand level	The actual demand level. The demand level is initialized with 0 and may be incremented via the accounting menu.

4.3.8 Tab: Emails



This tab shows a list of all emails sent to this member. By clicking on the id, you can see the whole email and even resend it to this user.

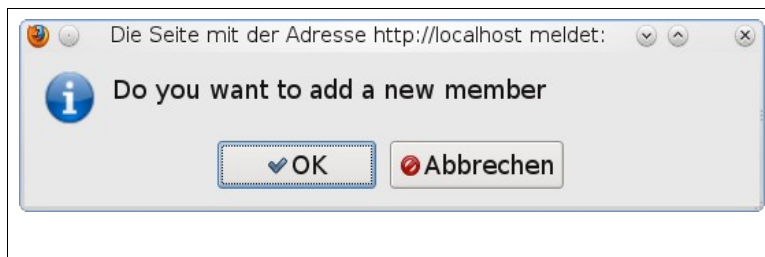
4.3.9 Tab: Conferences

TBD

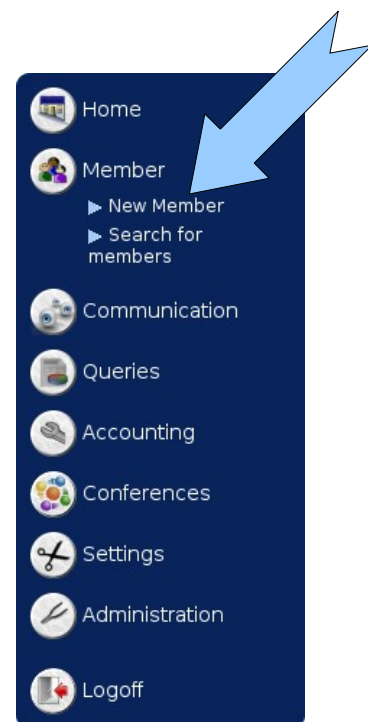
4.3.10 Inserting a new member

The Create Member task allows to add new members to Clubdata V2. In fact, an empty member is created and you have to fill in all relevant data.

At first, you are asked, if you really want to create a new member.



If you say OK, a new member will be created. The ID of this member is displayed on the first page of the memberinfo tab as you can see in Picture 10: New Member with MemberID shown on page 22:



Picture 10: New Member with MemberID shown

Then an additional alert windows informs you to fill in all relevant datas.

TIP:

Don't forget to click on the save button on **each** tabulator **before** proceeding to a new one. If you don't do it, all data will be lost !

4.3.11 Search for members

When clicking on the navigator entry “Search for members”, you will get a screen to enter search parameters. Two versions are available:

1. a simple search, with a limited number of fields
2. an advanced search, with the full search functionality.

Both modes have the same look and feel, so it will be described in this chapter. Differences between the two modes will be described later.

The search windows consists of multiple lines. Each line defines one criteria to search for. The criteria are only taken into account, if the text (or selection) fields are filled in. Empty fields are not taken into account. If more than one field is filled in, the fields are ANDed. So the results match always ALL criteria.

Each line consist of at least three fields:

1. The field description
2. The search function

The search function is generated automatically, depending on the type of the correspondent database field. There are

<i>Field type</i>	<i>Search Name</i>	<i>Description</i>
Alphanumeric text	Contains (a=A)	The search string may occur anywhere in the field. Case-insensitive

<i>Field type</i>	<i>Search Name</i>	<i>Description</i>
	Begins with (a=A)	The search string must appear at the beginning of the field Case insensitive
	Ends with (a=A)	The search string must appear at the end of the field Case-insensitive
	Exact (a=A)	The search string must exactly match the field Case insensitive
	Selection	The search string must be a comma separated list of values. The field must match exactly at least one of the values.
	Is Empty	The field contains no value. The search value entry is ignored.
	Is Not Empty	The field contains any value. The search value entry is ignored.
Numerical text	=	The value of the field is equal to the search string
	>	The value of the field is greater than the search string
	<	The value of the field is smaller than the search string
	>=	The value of the field is greater or equal than the search string
	<=	The value of the field is smaller or equal than the search string
	<>	The value of the field is not equal to the search string
	Selection	The search string must be a comma separated list of numerical values. The field must be equal to least one of the values.
	Between(a;b)	The value of the field must be between the values of a and b. a and b are given as two semicolon separated numbers.
	Is Empty	The field contains no value. The search value entry is ignored.
	Is Not Empty	The field contains any value. The search value entry is ignored.
Multiple selection field	Selection	The field must match a selected entry

<i>Field type</i>	<i>Search Name</i>	<i>Description</i>
	Not Selection	The field must not match a selected entry
Single selection field	=	The field must match the selected value
	<>	The field must not match the selected value

Table 6 Search functions for different search fields

3. The search value. This field can be a text field or a selection

The fields are generated automatically, depending on the type of the correspondent database field. There are 4 types of fields:

Alphanumerical text field	Just enter any text
Numerical text field	Enter a number
Multiple selection field	<p>Select one or more entries shown as search value. Two addition buttons are available to select all entries or select no entries.</p> <div style="border: 1px solid red; padding: 10px; margin: 10px 0;"> <p>TIP:</p> <p>To select multiple entries you may have to hold down the CTRL key on your keyboard, while clicking on an entry</p> </div>
Single selection field	Select the appropriate answer.

Table 7 Types of search values

TIP:

You can start the search by either pressing the search button on the bottom bar or by pressing the ENTER key.

4.3.11.1 Simple search

Picture 11: Simple search

In addition to these standard fields, all fields are shown which are preset by Clubdata V2. E.g. when selecting “Infoletter to members”, you will see in addition to the standard fields the field “Contact by email” which is preset to “No” (Normally you would like to send mailings only to members who don't get their information by emails).

4.3.11.2 Advanced Search

The screenshot shows a web application interface for searching members. On the left is a sidebar menu with icons and labels: Home, Member (with sub-items New Member and Search for members), Communication, Queries, Accounting, Conferences, Settings, Administration, and Logoff. The main area is titled 'Search for member' and contains a search form. At the top of the form are buttons for 'Start search for Member', 'Reset', and 'Simple search'. The form is organized into sections: 'cd_Members' with a 'Member ID' field; 'Addresses_1' with fields for Salutation (a dropdown menu showing 'Herr', 'Frau', 'Monsieur', 'Madame' and buttons for 'Select ALL' and 'Deselect ALL'), Title, Forename, Surname, Address, ZipCode, and Town, all using 'Contains (a=A)' search logic; 'Country' with a dropdown menu showing 'Switzerland', 'Germany incl. West Germany', and 'France' and buttons for 'Select ALL' and 'Deselect ALL'; Telephone, Fax, Email, and Html, all using 'Contains (a=A)' search logic; 'cd_Addresses_Mailingtypes_1' with a 'Mailingtypes' dropdown menu showing 'Invitation', 'Information', and 'Invoice' and buttons for 'Select ALL' and 'Deselect ALL'; and 'Addresses_2' with 'FirmName' and 'FirmDepartment' fields, both using 'Contains (a=A)' search logic.

Picture 12: Advanced search (detail)

By clicking on the button **Advanced search** on the button bar, you get access to all possible search fields. The search fields include the following fields:

MemberID	Forename	Surname	Membership type	Title
Address*	Zipcode*	Town*	Country*	Telephone*
Fax*	Firm name*	Firm Department*	Logo*	HTML*
Email*	Mailingtypes		Date of birth	Entrydate
Remarks	Attributes**	Membershiptype since	Selection	Language
MemberMainID	Salutation	InfoGiveOut	InfoWWW	

* The available search parameters for addresses depend on the available fields for each address. i.e. you can only search for fields which may be set for this type of address.

** The available attributes depend on the configuration of your administrator. In the standard database, these are “Direct Debit”, “Invoice”, “Infos per Email”, “Canceled by end of year”

4.3.11.3 The search result

#	X	Member ID	Privat Forename	Privat Surname	Firm FirmName
1	<input checked="" type="checkbox"/>	147	Franz	TEST	Die Firma GmbH
2	<input checked="" type="checkbox"/>	148	Max	Muster	My Enterprise
3	<input checked="" type="checkbox"/>	150	Mufline	Legrand	

If the result of a search contains more than one member, or additional functions can be executed, a list of members is displayed.

TIP:

If only one member matches the search, no list will be displayed, but the member will be displayed directly.

TIP:

The search result pane is also used by several other tasks (like Mail to Members,...). The only differences are the buttons available in the button bar.

The columns displayed can be configured by the user (see 4.4.1.1 Selecting columns on page 28)

Clicking on the MemberID shows the detail pane of this member.

If more than 20 (this number can be configured by the administrator, see Administration → Configuration → Entry 28 (maxRowsPerPage)) members should be displayed, the list is divided into pages. The page navigation is between the button bar and the member list.

4.3.11.4 Selection of members

You can select or unselect members by either click on the checkbox in front of one member or by clicking on the buttons **Select all** or **Deselect all**.

If multiple pages are shown, these two buttons (de)select all entries on all pages.

All tasks, like export or email delivery, will only affect the selected entries.

4.3.11.5 Export to Excel

The result pane can be exported to Excel. In nearly all cases the columns shown are exported to Excel.

4.3.11.6 Export to PDF

This button creates a PDF sheet showing the selected members. The format of the PDF file is fixed and doesn't depend on the selected columns.

TIP:

Depending on your hardware and the numbers of members to process, the creation of a PDF file can take some time

4.4 The Tasks

4.4.1 Mail to Members

This task is used to send E-Mails to members.

The first screen shows the search mask as described in Chapter 4.3.11 Search for members on page 22.

For your convinience, the field “Contact by email” is already selected to “Yes, firm email” and “Yes, privat email”.

To proceed, click on “Start search for Member”.

4.4.1.1 Selecting columns

The columns shown by default can be customized by the administrator using the administration menu. You can overwrite this selection for each search by selecting the button “Select Columns” on the bottom bar. You will see a list of all available columns, where the preselected columns are already selected. You may add/suppress columns as you like by selecting/deselecting the appropriate fields.

TIP:

Do NOT deselect the MemberID, as you need it to select a individual member.

5 Administration

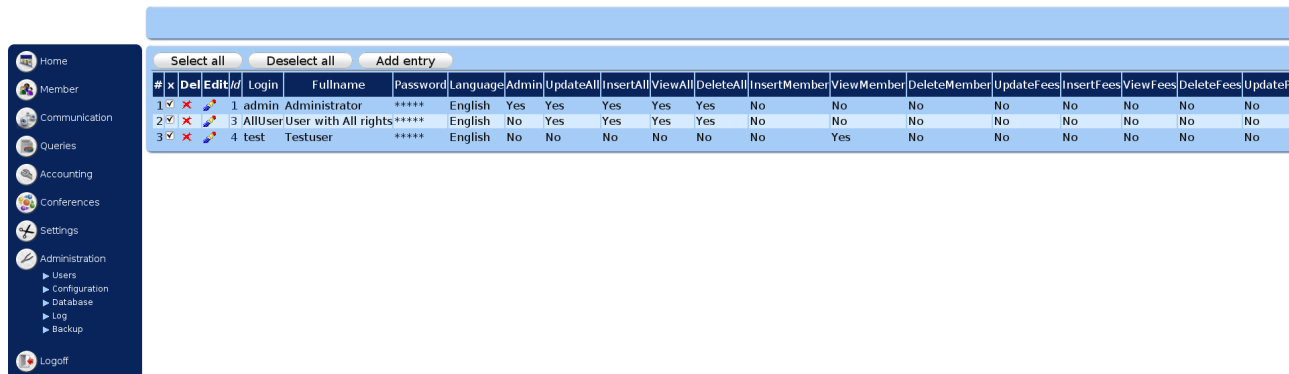
This section describes the administration of Clubdata V2, especially the Administration menu.



Picture 13: Administration main menu



To have access to this menu, you must have administrator privileges.

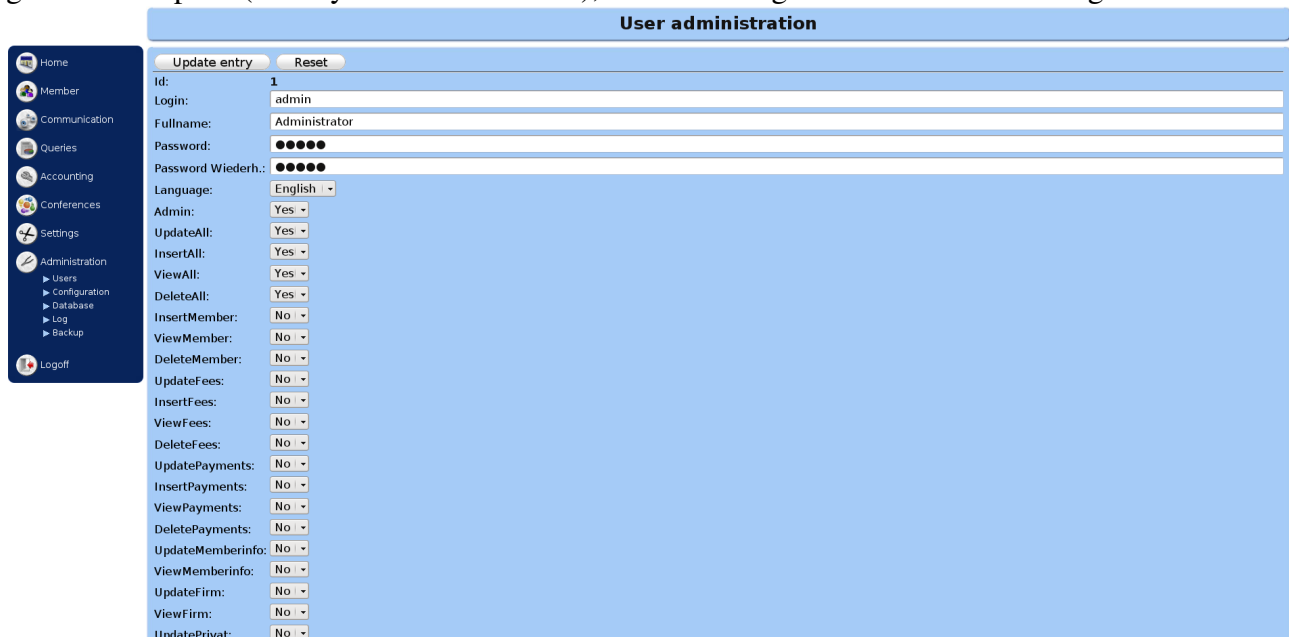
5.1 User administration



Picture 14: Administration of users (detail)

In this menu, you can create, change or delete users of Clubdata V2.

To add a new user, click on . You will get a pane to enter all relevant data. You will get the same pane (already with filled in data), when clicking on  to edit an existing user



<i>Column</i>	<i>Description</i>
Id	The user id. It cannot be changed
Login	The login name of the user. It must be unique
Fullname	The fullname of the user.
Password	The password for the user to log in
Language	The language, Clubdata V2 should display for this user
Admin	Set to YES, if the user should have administrator right. This right overwrites all other rights
UpdateAll	Set to YES, if the user is allowed to update data in all menus (except administration). This overwrites all special rights below
InsertAll	Set to YES, if the user is allowed to insert data in all menus (except administration) This overwrites all special rights below
ViewAll	Set to YES, if the user is allowed to view data in all menus (except administration) This overwrites all special rights below
DeleteAll	Set to YES, if the user is allowed to delete data in all menus (except administration) This overwrites all special rights below
InsertMember	Set to YES, if the user is allowed to insert new members.
ViewMember	Set to YES, if the user is allowed to view general statistics about members.
DeleteMember	Set to YES, if the user is allowed to delete members
UpdateFees	Set to YES, if the user is allowed to update fees
InsertFees	Set to YES, if the user is allowed to insert fees
ViewFees	Set to YES, if the user is allowed to view fees
DeleteFees	Set to YES, if the user is allowed to delete fees
UpdateFees	Set to YES, if the user is allowed to update fees
InsertFees	Set to YES, if the user is allowed to insert fees
ViewFees	Set to YES, if the user is allowed to view fees
DeleteFees	Set to YES, if the user is allowed to delete fees
UpdatePayments	Set to YES, if the user is allowed to update payments
InsertPayments	Set to YES, if the user is allowed to insert payments
ViewPayments	Set to YES, if the user is allowed to view payments
DeletePayments	Set to YES, if the user is allowed to delete payments
UpdateMemberinfo	Set to YES, if the user is allowed to update data on the memberinfo tab
ViewMemberinfo	Set to YES, if the user is allowed to view the memberinfo tab

<i>Column</i>	<i>Description</i>
UpdateFirm	Set to YES, if the user is allowed to update data on the firm tab
ViewFirm	Set to YES, if the user is allowed to view the firm tab
UpdatePrivat	Set to YES, if the user is allowed to update data on the privat tab
ViewPrivat	Set to YES, if the user is allowed to view the privat tab
ViewOverview	Set to YES, if the user is allowed to view the overview tab
ViewLists	NOT USED AT THE MOMENT
UpdateEmail	Set to YES, if the user is allowed to update email
CreateEmail	Set to YES, if the user is allowed to create new emails
ViewEmail	Set to YES, if the user is allowed to view emails
DeleteEmail	Set to YES, if the user is allowed to delete emails
UpdateInfoletter	Set to YES, if the user is allowed to update infoletters
CreateInfoletter	Set to YES, if the user is allowed to create new infoletters
VsviewInfoletter	Set to YES, if the user is allowed to view Infoletters
DeleteInfoletter	Set to YES, if the user is allowed to delete Infoletters
UpdateConferences	Set to YES, if the user is allowed to update conferences
InsertConferences	Set to YES, if the user is allowed to create new conferences
ViewConferences	Set to YES, if the user is allowed to view the conferences tab
DeleteConferences	Set to YES, if the user is allowed to delete conferences
PersonalSettings	This shows the database representation of your personal settings. Normally you should never edit it directly, but via Settings → PersonalSettings

Please note, that not all combinations of access rights make sense. E.g to be able to delete a fee, but not to view it will not be very usefull.

5.2 Configuration settings

Configuration					
Select all Deselect all Add entry					
#	Del	Edit	Name	Value	Description UK
1	✓	✗	1 Firmname	Französischer Wirtschaftsclub in Bayern e.V.	Name of the club
2	✓	✗	2 Address	MeineStrasse. 1	Address of the club
3	✓	✗	3 City	München	Town of the club
4	✓	✗	4 Zipcode	88888	Zipcode of the club
5	✓	✗	5 Country	Deutschland	Country of the club
6	✓	✗	6 Telefon	(089) 12345678	Telephone of the club
7	✓	✗	7 Fax	(089) 12345679	fax number of the club
8	✓	✗	8 Email	franz.domes@gmx.de	E-Mail address of the club
9	✓	✗	9 Emailname	Wirtschaftsclub e.V.	Full text email name of the club
10	✓	✗	10 Mailhost	mail.gmx.de	Address of the SMTP mail host
11	✓	✗	11 SMTPAuthorizing	1	SMTP Authorizing: 0 or 1. If 1 SMTPUsername and SMTPPassword must be set. SMTP Auto
12	✓	✗	12 SMTPUsername	834048	User id, if SMTPAuthorizing is set to 1.
13	✓	✗	13 SMTPPassword	cdj456kk	Password, if SMTPAuthorizing is set to 1
14	✓	✗	14 ReplyTo	franz.domes@gmx.de	Reply-To for emails
15	✓	✗	15 CheckedCheckboxes	1	If 1, all checkboxes will be selected by default.
16	✓	✗	16 DefaultCols	Addresses_1.Firstname, Addresses_1.Lastname, Addresses_2.FirmName_ml	Columns of the table Members, which will be shown by default.
17	✓	✗	17 EasySearch	Addresses_1.Firstname, Addresses_1.Lastname, Addresses_2.FirmName_ml	Columns of the table Members, which will be shown for easy search
18	✓	✗	18 Countrycode	D	Countrycode of the Club
19	✓	✗	19 TabsShown	Overview;Memberinfo;Addresses;Payments;Fees;Emails;Conferences	Tabs shown on Member Navigator; Defines also Order of Tabs
20	✓	✗	20 Style	newstyle	Style used to display

In this pane, you can set basic settings for your Clubdata V2.

<i>ID</i>	<i>Name</i>	<i>Description</i>
1	Firmname	The official name of your club
2	Address	The official address '(street, PO-Box) of your club
3	City	The town where your club resides
4	Zipcode	The zipcode of your club
5	Country	The country of your club
6	Telefon	The telephone number of your club
7	Fax	The fax number of your club
8	Email	The email address of your club. This will be the sender address of your emails
11	Emailname	The full name of your club as it should appear as the sender of your email. The full sender will be “emailname” <email>
12	Mailhost	The mail host for sending emails. It must accept emails via SMTP
13	SMTPAuthorizing	Set to 1 if Mailhost need a user/password to log in before it can send emails
14	SMTPUsername	Name of the user to authenticate at the mailhost
15	SMTPPassword	Password of the user to authenticate at the mailhost
16	ReplyTo	Reply-To mail address. If this parameter is not set, the email address of the club (Parameter 8) will be used as reply to address
17	CheckedCheckoxes	If set to 1 all checkboxes in lists will be checked by default.
18	DefaultCols	Columns of the table Members, which will be shown by default in search results. This parameter may be overwritten by Settings → Select Columns
19	EasySearch	Columns which will be shown when doing “simple search” (see 4.3.11.1 Simple search on page 24)
20	CountryCode	The code of the country of your club (see also Parameter 5)
21	TabsShown	List of tabulators which will be shown on the member pane. This parameter defines also the order of the tabs.
22	Style	The display skin. At the moment only “newstyle” is supported
23	EmailAsHTML	If set to 1, a HTML editor is displayed to create emails to the members. Otherwise a simple textfield is used.
24	InvoiceNumber	The number of the current invoice. This parameter should normaly not be modified, as it is automatically increased when a new invoice is inserted.
25	InvoiceNumberFormat	The format of the invoice number. %d will insert the InvoiceNumber (see parameter 24). E.g. “CLUB-%d” will generate invoice number of the style CLUB-1, CLUB-2, and so on.

<i>ID</i>	<i>Name</i>	<i>Description</i>
26	EmailSendType	The type of sending mass emails: BCC (one email for all users, listed as BCC; no personlisation possible), INDIV (each user gets an individual email, personalisation is possible) NB: INDIV is not tested as of Clubdata V2 2.03 beta 6
27	Startpage	First page shown in main window after a user logged in NB: Does not work as of Clubdata V2 2.03 beta 6
28	MaxRowsPerPage	Number of rows displayed per page in list outputs.
29	ReplyToName	The full name of your club where the replay emails should be send to. (See also Parameter 16) The full sender will be “ReplyToName” <ReplyTo>
99	Clubdata_Version_DB	Version of Clubdata Database, DO NOT EDIT!

5.3 Database table administration

The screenshot shows the 'Database' administration interface. On the left is a sidebar menu with icons and labels for various system functions. The main content area is titled 'Database' and displays a grid of table management options. Each option consists of a header bar with the table name and a content area with a description of the available actions (Insert, Edit, Delete).



Database		
Salutation Insert/Edit/Delete salutations	Membertype Insert/Edit/Delete types of memberships	Method of payment Insert/Edit/Delete modes of payments
Paytype Insert/Edit/Delete types of payments, like membership fees or conference fees	Country Insert/Edit/Delete country codes	Attributes Insert/Edit/Delete attributes which may be assigned to members
Addresstype Insert/Edit/Delete types of addresses, like privat or firm adresses	Language Insert/Edit/Delete languages, which can be selected by a user. If you add a new language here, you have also to update other tables and create a new file in the subdirectory Language to be able to see Clubdata translated to this language	Help Edit help texts and translate it to new languages
Mailingtypes Insert/Edit/Delete types of mailings, like invitation, invoice, etc.		

This menu helps you to administer the most important database tables. You can view/insert/update and delete entries in

- Salutations
- Membertypes
- Methods of payment
- Paytypes
- Countries
- Attributes
- Addresstypes
- Languages
- Help
- Mailingtypes

All database administration panes follow the same rules. When clicking on the header line of the box, a list window with all entries of this table will be displayed (long tables will be displayed on multiple pages).

You can

- delete a fee by clicking on 
- modify an entry by clicking on
- view the details by clicking on the id
- add a new entry by clicking on  in the button bar

The tables, their columns and their meanings will be described in the following chapters.

5.3.1 Table Salutations

<i>Column</i>	<i>Description</i>
Description	The name of the Salutation. This column is displayed when you select a salutation. Choose a unique, meaningful name
BriefkopfSalutation	This Salutations will be inserted in the address field of a letter
BrieftextSalutation	This text will be inserted at the beginning of the letter text.

Note, that, in contrast to other tables, language dependence is not made via columns, but via lines. So you have to define for each language a new entry. This is done by concept, as neither in addresses nor at the beginning of the text, the salutations can be translated directly from one language to another.

5.3.2 Table Membertype

<i>Column</i>	<i>Description</i>
Kuerzel (Token)	This token should be unique to the member type.
Description UK/DE/FR	The description of this membertype in english, german, french (and any other languages). This should be a short, but meaningful description as this column is shown when selecting a membertype. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.
Amount	Amount, member of this type have to pay as member fee. The fee is on an annual basis.
SelectByDefault	If set to yes, this membetypes are selected by default in search operations. So, by default, only this members are included in the search result. This is to avoid canceled users to also appear in this results
IsCanceled	If set to yes, this membertype is not taken into account for any tasks.

<i>Column</i>	<i>Description</i>
TypeDependencies	<p>TypeDependencies describes how membership types depends on each other.</p> <p>-1 means, that this membership type is an individual member type and cannot have any associate membership types</p> <p>0 means, that this membership type may have associated membership types</p> <p>>0 means, that this membership type is associated to the membership type with the id given as parameter. (e.g. a 3 means that this membership type is associated with the membership type 3). If the membership type is associated to more than one other membership type, you can join multiple numbers by comma (e.g. 3,4,5 means, that this membership type is associated to membership types 3, 4 or 5).</p> <p>See also 2.3 Membership types on page 5</p>

5.3.3 Method of payments

The “Method of payments” table defines the available entries in the payment tab, when a payment is inserted. This is a mostly informational entry, which is though searchable.

<i>Column</i>	<i>Description</i>
Description UK/DE/FR	<p>The description of the method of payment in english, german, french (and any other languages). This should be a short, but meaningfull description as this column is shown when selecting a method of payment. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.</p>

5.3.4 Paytype

The paytype is the “reason” for the payment. Basically, there are two paytypes supported in Clubdata V2, membership fee and conference fee, but you can configure other paytypes.

<i>Column</i>	<i>Description</i>
Description UK/DE/FR	<p>The description of this paytype in english, german, french (and any other languages). This should be a short, but meaningfull description as this column is shown when selecting a paytype. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.</p>

5.3.5 Country

The country table defines all available countries. It is filled by default with a public available database of all countries and their codes respectively.

<i>Column</i>	<i>Description</i>
Id	The international code of the country
Description UK/DE/FR	The name of the country in english, german, french (and any other languages). The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.
DialCode	The international dial code for this country
Show	If yes, this country is shown in selections, if no, it is not shown. Here you can limit the number of available countries to those needed by your club.

5.3.6 Attributes

This table defines the attributes available in the memberinfo tab (see 4.3.2 Tab: Memberinfo on page 14)

<i>Column</i>	<i>Description</i>
Description UK/DE/FR	The description of this attribute in english, german, french (and any other languages). This should be a short, but meaningful description as this column is shown in the memberinfo tab. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.

5.3.7 Addresstype

This table defines the available address types and the columns shown. Each entry in this table generate a new tab in the member view

<i>Column</i>	<i>Description</i>
Description UK/DE/FR	The name of the addresstype in english, german, french (and any other languages). This should be a short, but meaningful description as this column is shown as the name of the address tab. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.
FieldList	A comma separated list of fields, that should be shown on the address tab of this type. For the available fieldnames, see Table 2 Available fields for addresses on page 8

5.3.8 Language

This table defines the languages available for users and members.

Please note, that when you add a new language, you also have to add the corresponding translation to Clubdata V2.

<i>Column</i>	<i>Description</i>
Description UK/DE/FR	The name of the language in english, german, french (and any other languages). This should be a short, but meaningful description as this column is shown when selecting languages for users and members. The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.

5.3.9 Help

This table defines the help text for the context sensitive help.

<i>Column</i>	<i>Description</i>
Category	Category of the context sensitive help. In general, this is correlated to the menu displayed. A * means, that this entry is valid for all categories.
Subcategory	Subcategory of the context sensitive help. In general, this is the entry itself.
Description UK/DE/FR	The help text in english, german, french (and any other languages). The language chosen depends on the selected user language. If the entry in this language is empty, UK is used. So please always fill in an english description.