



Getting Started Mail Merge & Membership Export

Version 5.3



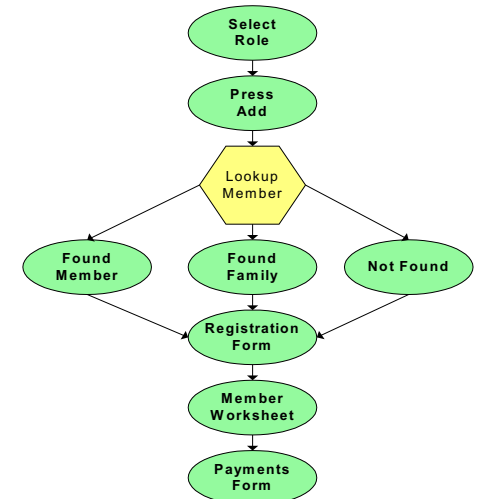
Installation

☐ = Additional step with a Central Office

- ☑ Install Clublink and upgrade to the most current version.
- ☑ Run the Clublink Application Launcher.
- ☑ Choose the top item “Clublink”.
- ☑ Enter your registration information.
If you're installing Clublink from scratch, put a check in the box to delete all sample data.
Do not delete all data if you are upgrading Clublink.
- ☐ Change your club number to the number provided by your Central Office.
Opening Screen | Club
- ☐ Accept your Central Office Setup Disk.
Opening Screen | Options | Receive Central Office Setup Disk
- ☐ Import Club Data.
Opening Screen | Options | Import Club Data
- ☑ Configure Member Level.
Opening Screen | Members
- ☑ Set default area code and province/state.
Setup | Data Field Options
- ☑ Configure Clublink to only show the data fields that correspond to your registration form.
Setup | Data Field Options
For each of the 5 roles, remove the checkmark for each data field that you do not want to display.
(Note: grayed out boxes are required by your Central Office and cannot be hidden)
- ☑ Define your registration categories and fees.
Lists | Linked Registration Options
- ☑ Define your additional custom drop down lists. (Ex: How they found your club)
Lists | Custom Drop Boxes
(Note: these lists are unique to each role and are titled in Setup | Data Field Options)

Adding/Updating Members

1. Select the **Role**.
2. Press **Add**.
3. Lookup the member.
 - a. If you find the member, press **Select**.
 - b. If you do not find the member but find a family member, press **Select**.
 - c. If you did not find the member or a family member, press **Ignore**.
 - d. If you found the member and are asked to add again, choose **No**, as this will create a second instance of the member in the role.
4. Enter / Update the member information on the **Registration Form**
5. Select **OK** to “Press OK to show the member worksheet”.
(Note: failing to process the member worksheet will result in the member not being assigned a membership card number.)
6. Press **OK**.
7. If you have a payment to be made or additional fees to assess, press **Yes** to “Would you like to see the fees window”, otherwise you're done.
8. Press **Payments** to make a payment, access the “Fee Assessment Details” tabbed page to add/modify fee assessments.



Mail Merge with Microsoft® Word

1. Open Word.
2. Create a form letter (optional, can be created later).
3. Select (Tools | Mail Merge) from the Word main menu.
4. Press the **Create** button.
5. Select **Form Letters**.
6. Press **Active window** if the form letter is in the active window otherwise press **New Main Document**.
7. Press the **Get Data** button.
8. Select **Open Data Source...**
9. In the **Files of type** list box, select **dBase files** (see your Word documentation if dBase does not appear in the list).
10. Go to folder **Clublink\Athlete**.
11. Select file **TempMain.dbf**
12. From any Clublink **Drop Button**, select **File | Create TempMain.dbf for Export** to generate an export file of the current drop button list.
13. Confirm the data source as **dBase files via ODBC (*.dbf)**.
14. Select **Edit Main Document** to insert merge fields into your document.
15. Press **Insert Merge Fields** from the Word toolbar and select the appropriate field to merge.
16. When your document is ready, select (Tools | Mail Merge), press the **Merge** button and follow the instructions to merge the data.



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Exporting Membership

- Go to **Member Level**.
- Open the **Registration Drop Button**.
- Press **Clear All**.
- Select **Export Club Data**.
- Press **Start** to launch the **Export Wizard**.
- Press **OK** to the **Wizard**

The Wizard should have chosen the correct members. If it did not, make the necessary selections to ensure the correct members are being exported.

(Note: exporting a member more than once will not result in duplicate registration fees)

- Press **Show** to see the **Error Report**.
- Close the **Error Report**.
- Press **Create Files**.
- Select your preferred **Export Option**
 - a. Upload files to the Internet. This will require an Internet connection and confirmation via our Internet upload page.
 - b. If you are using Microsoft Outlook® (not Outlook® Express), this option is the easiest. It will automatically attach the file to an e-mail.
 - c. Open the folder containing your export file. You will be required to attach this file to an e-mail yourself. Usually you can right-click the file, select **Send to**, and then select **e-mail recipient**.

After you have exported your data to your Central Office, you should expect a confirmation within 24 hours. The confirmation is processed from **Options | Import Club Data** and will change the registration status of your members to Registered.



Not Registered

Pending

Registered

Mail Merge & Report Examples

TWISTERS GYMNASTICS & TRAMPOLINE CLUB			
275 Alder Street, Orangeville, ON, L9W 1K1			
519-942-2477			
PARTICIPANT CONSENT & MEDICAL DATA RECORD			
Morris	Michael	MALE <input checked="" type="checkbox"/>	FEMALE <input type="checkbox"/>
SURNAME OF PARTICIPANT FIRST NAME			
BIRTHDATE (Y-M-D)			
259 Marsh Ave			
ADDRESS (STREET/PO BOX)			
Pointe-Claire	QC	H9R 5Y2	(514)398-0766
CITY/TOWN	PROVINCE	POSTAL CODE	TELEPHONE NO.
NAME OF PARENT/GUARDIAN		RELATIONSHIP	EMAIL ADDRESS
EMERGENCY CONTACT		RELATIONSHIP	PHONE NO.
DOES THE PARTICIPANT HAVE ANY PHYSICAL, MENTAL OR MEDICAL CONDITIONS THAT, FOR SAFETY REASONS SHOULD BE DISCLOSED?			
NO. YES. EXPLAIN:			
HAS THE PARTICIPANT EVER HAD AN INJURY OR ACCIDENT REQUIRING ONGOING MEDICAL ATTENTION?			
NO. YES. EXPLAIN:			
HAS THE PARTICIPANT EVER HAD SURGERY?			
NO. YES. EXPLAIN:			
67776767676	Doc Adams		(250)111-2222
HEALTH CARD NO.	NAME OF FAMILY PHYSICIAN	PHONE NO. OF PHYSICIAN	
PARENT/GUARDIAN CONSENT OF PARTICIPATION AND WAIVER			
By submitting and signing this form I acknowledge that I am aware that there are risks with gymnastics. I warrant that the participant named on this information form, is physically fit to participate in gymnastics. I declare that I have accurately disclosed all information regarding physical, mental or medical conditions affecting the named participant and acknowledge that this information will be used for the club's use in the delivery of a gymnastics program. I acknowledge that there is a potential risk for injury involved in training and competition in any sport. I understand that the Gymnastics Ontario has tried to create a safe and controlled environment for participation and that the club established rules for participation on and about the gymnastics area that must be followed by the participant at all times. I understand that failure to comply to any of the policies and rules of the club and/or GO may result in the termination of membership and waive the rights of the participant to damages or other costs in the event injury is caused due to participation in gymnastics or other involvement with the Federation.			
I hereby give permission for emergency medical treatment to be administered to my son/daughter, as may be determined in the reasonable discretion of the Coach/Supervising Coach. It is understood that whenever reasonably possible, Emergency Contact person or Parent will be contacted and informed of the problem and required medical treatment.			
I understand that it is my responsibility to ensure that the information on this form is kept current and I will notify the Club of any changes immediately.			
SIGNATURE OF PARENT	DATE (M/D/Y)	CLASS	DAY
CHEQUE NO.	CASH	M/C	TIME

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and Integrated Sports Systems (ISS) Inc. are proud to award this Certificate of Achievement to

Michael Morris

this 9th day of January 2005

In recognition of their dedication to running their club more efficiently.

My Membership Card

Name
MICHAEL MORRIS

Memb # **6134**

Detail