

Tutorial for Club Assistant's Registrar Interface Web Application

This is a brief tutorial on how to use the Registrar's Interface for the Club Assistant software web based application, It was last updated on **November 9th, 2007**. Primary updates include how to add and modify donations amounts once a swimmer has been registered, as well as providing a brief table of contents on the first page.

The screen shots in this document were taken during the beta test and some have been changed to reflect the most current screen shots. The nomenclature for clicking a link from the page shown will be a [blue underlined text](#), and the name of the page will be in **bold text**. Any screen shots with dates of birth will be overwritten for privacy since this document resides on a public web site. Figure names and numbers will be referred to in most of the text and the screens shots will not be duplicated to reduce the number of pages. The figures are unique to North Carolina's registration system which has one club and many work out groups. Some screen shots will be just parts of a screen and may have yellow highlighted fields that I have added for emphasis (like figure 0 below).

With this system, you have immediate access to all of US Masters Swimming data, it is confidential data, and everyone is expected to honor the confidential statement you verified when you first logged on, and you are not to share your log on ID with others. Also, when you finish processing your registrations for the day, please [Logout](#) of the system. Figure 0 below appears at the top most pages and reports, and you can click [Home](#) to take you back to the **Main Screen** page shown in figure 1



Figure 0

Topic	Page
LMSC Settings	3
Adding LMSC fee and LMSC Donations	4
Registering Clubs	5
Registering Swimmers	6
Selecting Clubs and Workout Groups	10
Printing Cards	11
Adding Workout Groups	15
Optional Fields for LMSC specific questions	16
Adding or Changing a Donation	19

Once you have logged on, you will see a screen that is the **Main Screen** (Figure 1), and is the screen that if you hit the **home** button you will be returned to it. At the bottom of the Main Screen and upper right hand side of the screen, [New Registrations](#) and [New Online Registrations](#) refer to the registrations that will come from the swimmer interface application where the swimmer inputs his registration directly and pays via credit card (not yet available)

Club Assistant
LMSC For North Carolina & George Simon [Logout](#)
Last Refreshed: Nov 9 8:46 AM PT

Members
[Create Report](#)
[Compose Email](#)
[New Online Registrations](#)
 will open new window

USMS
[LMSC settings](#)
[NC Clubs](#)
[Workout Groups](#)
[Membership Cards](#)
[Registration](#)
[Registration Summary](#) work in progress

Accounting [Money Received](#)

The site is LIVE.
The LMSC, LMSC Officers, and merchandise were kept.
The Swimmers, Clubs, and Workout Groups were replaced.
The Payments, Invoices, and Invoice Details were deleted.

[Home](#) || [Members](#) | [New Registrations](#) | [Settings](#)
[Change your Password](#) | [FAQs](#)
Updates ... [More](#)

Club Assistant © 2001-2007 [Contact Us](#) | [Privacy Policy](#)
Page execution time: 15 ms

Main Screen Figure 1

LMSC Settings

To get started, click on [LMSC settings](#) in the upper left **Main Screen** (figure 1) and enter your unique LMSC settings unless they were pre-populated for you. Some of the LMSC setting choices are shown below:

URL	<input type="text" value="http://www.ncmasters.org/"/> http://www.ncmasters.org/
Reg Info URL	<input type="text" value="http://www.ncmasters.org/regforms.html"/> http://www.ncmasters.org/regforms.html
Reg PDF URL	<input type="text" value="http://www.ncmasters.org/forms/nc-regform.p"/> http://www.ncmasters.org/forms/nc-regform.pdf
Zone Name (ID)	Dixie (2)
LMSC Officers	George Simon Registrar Leo Letendre Add Officers

USMS LMSC Screen, figure 2a

You can click [Add Officers](#) for your LMSC's key positions.

Add/Edit Default LMSC Charges	
Add/Edit User-Defined LMSC Fields	
LMSC Settings	
Club Fees	<input type="checkbox"/> Yes, clubs in this LMSC have club fees
LMSC Registrar Defaults	
City	<input type="text"/>
State	<input type="text" value="NC"/> i.e. CA
ZIP	<input type="text"/> i.e. 92660
Area Code	<input type="text"/> i.e. 310
Club Number	<input type="text" value="001"/> UNAT

USMS LMSC Screen, Figure 2b

If you only have one club in your LMSC, I suggest you put that club number in the field since it is the club that will be defaulted when you register a new swimmer, likewise for the State. Unless you only have a single Area Code in your state, I would not recommend using the most prevalent one as the software fills in the default and retyping the phone number is a pain. You will see this later when you enter a new swimmer, for example, if you type 9198432423 the software creates (919) 846-2423.

If you have clubs that charge a club fee, make sure you check **Yes, clubs in this LMSC have club fees**, to add those fees to the **Payment Information** screen which is shown later in Figure 9. Your LMSC treasurer will have to distribute the club fees monthly to the clubs from the funds you receive from your and credit card collections

Adding LMSC fee and LMSC Donations

To add your LMSC fees or any donations or other fees for your LMSC, using the **USMS LMSC** screen in figure 2b, click [Add/Edit Default LMSC Charges](#) from the above screen which looks like

Merchandise				
Name	Price	Shown on Online Registration form?	Sort Order	Hidden?
LMSC Fee	\$10.00	Y	<input type="text" value="1"/>	
Donate to NCMS	\$0.00	Y	<input type="text" value="2"/>	

[Add New Merchandise](#)

Merchandise screen, Figure 3

I have shown my entry already which was made by clicking the [Add New Merchandise](#) link, and the link takes you to the **Merchandise Form** page (figure 4) where you can see what I entered. Just make sure you push **Update** button when you have finished the entry you need for your LMSC. Notice that the **Show on Online Registration Form** is checked so that both the registrar interface and Swimmer Interface applications include the field (in my case a donation to our club).

Merchandise Form	
Merchandise Donate to NCMS (MID=1423) Delete Merchandise?	
Created: 4:11 PM Sun, 10/28/07 by George Simon Updated: never	
Merchandise Name	<input type="text" value="Donate to NCMS"/>
Description	<input type="text" value="Donate to NCMS"/> (will be displayed on Online Registration Form)
Show on Online Registration Form	<input checked="" type="checkbox"/> (must be checked to show up on Online Registration Form)
Quantity	<input type="text" value="1"/> How many events will this payment cover?
Price	<input type="text" value="\$0.00"/> * required
Colors	<input type="text"/>
Sizes	<input type="text"/>
Options	<input type="text"/>
Code	<input type="text"/>
Hide?	<input type="checkbox"/> (hidden on main merchandise page and compose email)
<input type="button" value="Update"/>	

Merchandise Form screen, Figure 4

Registering Clubs

To register clubs for 2008, from the **Main** screen (Figure 1) Select [LMSC Clubs](#) which in my case is [NC Clubs](#) , then a screen with the preloaded 2007 and same 2008 clubs will show up,

USMS Clubs					
3 USMS Clubs with LMSC "LMSC For North Carolina"					
Click on the column title to sort by that column. Click on the "Club's Abbr" to edit the club's information. If you do not see a club, click here to " Add a New Club ". Click on the "Club's List" to view/add/edit members in that club.					
		Last Year Registered	2007	2008	
Abbr	Name	Club Info	Members	Club Info	Members
NCMS	North Carolina Masters Swimming	2007	List	View	List
USCG	U S Coast Guard	2007	List	Register Now	List
XMEN	XMEN	2003		Register Now	List
UNAT	UNAT		List		List

USMS Clubs screen Figure 5

When you click [Register Now](#) for the year, it will take you to a registration screen, which is where you register your club for 2008. You can add a new club by [Add a New Club](#) link above.

Part of the club information screen will show the correspondent field, just move those fields over, and for now don't worry about adding the additional officers.

USMS Club: North Carolina Masters Swimming			
2008 USMS Club Form			
Created: 9:53 AM Sun, 10/14/07 by George Simon Updated: 8:52 AM Mon, 10/29/07 by Julie Austin			
Home Back to Clubs List			
<input type="button" value="Save"/>			
	2007		2008
Club Name	North Carolina Masters Swimming		North Carolina Masters Swimming
Club Abbreviation	NCMS		NCMS
Club Number	1		1
LMSC	North Carolina		NC
LMSC ID	13		13
Mail Correspondence To:		copy all	
Name	Joseph D Gosha	copy-> <input type="text"/>	

USMS Club screen, Figure 6

When you push the Save button, your club is registered.

Registering Swimmers

There are a couple of ways to register swimmers, and I will start with renewing your LMSC swimmers from 2007, the easiest way since all previous data is filled in for you. Click on your [LMSC Club](#) link from the upper left box on the **Main** Screen (figure 1)

USMS Clubs

3 clubs with LMSC "LMSC For North Carolina"

Click on the column title to sort by that column.
 Click on the "Club's Abbr" to edit the club's information.
 If you do not see a club, click here to ["Add a New Club"](#).
 Click on the "Club's List" to view/add/edit members in that club.

		2007		2008	
Abbr	Name	Club Info	Members	Club Info	Members
NCMS	North Carolina Masters Swimming	View	List	View	List

USMS Clubs screen, Figure 7

Click on List (highlighted in yellow above) and you will get a screen from your Club's registration as shown for a few swimmers below (Many browsers have a **find in this page** will allow you to search the browser screen for the name you are looking for.

2007 USMS Members

Club Information: NCMS
 785 Registered Members
 Members that registered last year, but not this year
[Add Member](#) [Back to Clubs List](#)

First Name	Last Name	Phone	Address	Email	Birth Date	USMS Number	Workout Group	
Dan	Aber	(919) 832-9401	1424 Moredecai Dr Raleigh, NC, 27604-1320	bearrph@ncr.com	10/15/54	137J-02336	RAM	Edi.
Scott	Acheson	(704) 366-7056	800 Lorida Ln Charlotte, NC 28211-2035	sacheson@bellsouth.net	7/20/54	137X-023ZR	HARY	Edi.

2007 USMS Members screen Figure 8

I have shown a small part of the list, and if you click on Edit in the right hand column the system will bring up a screen filled in with Dan Aber's information (sorry, full screen, so it is on the next page as figure 9.

If everything is OK, or if not, you can make changes, you can add the donation amounts, but you will notice the yellow highlighting for the 2008 button, **it is very important that you click the 2008 button to register the person for 2008, otherwise the person will not be registered.**

Then you must push the **Done** button at the top of the page (figure 9)and you will be taken back to the search screen.

Figure 9a on page 9 shows the search screen and feedback indicating you have registered the swimmer, the swimmer's name, 2008 number, and sequence number .

Dan Aber Status: Reg Number: 137J-02336 Sequence Number: 205 Reg Date: Sat, 11/25/06 [Home](#) [Done](#) [Abort](#)

Name First Middle Initial Last Suffix (Jr., III, etc)

Address Street bad address
 City State ZIP Country

Phones Home * Work * Cell * * enter full number i.e. (212) 555-1212 x104
 Fax * Pager * Other *

Birth Date (mm/dd/yyyy) Age Gender (M/F) Sequence Number: 205 Print Card: Yes

USMS Current Club: NCMS Club Workout Group:

Email

	Primary	Description (i.e. secondary, work)	Bad email	Exclude email	
<input type="text" value="bearrph@nc.rr.com"/>	<input checked="" type="radio"/>	<input type="text" value="Primary"/>	<input type="checkbox"/>	<input type="checkbox"/>	bearrph@nc.rr.com Compose Email
<input type="text"/>	<input type="radio"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fill out this row to add another email

exclude all emails exclude National emails exclude Sponsor emails
 exclude LMSC emails exclude Club emails exclude USMS Swimmer Magazine

Groups Certified Official Coach

If you practice with RAM, enter practice location: Newsletter E email, P postal, B both, N none

This section is only displayed if the member has not registered for 2007 or 2008.
Only fill in the fields below if you have received payment for annual dues.

Payment Information

[Add/change price](#)
[Use Reduced \(End of year\) Price](#)

NC Fee	\$	<input type="text" value="10"/>	Registration Year	<input checked="" type="radio"/> Not Registering <input checked="" type="radio"/> 2008
USMS Fee	\$	<input type="text" value="25"/>	Date of Registration	<input type="text" value="11/09/07"/> i.e. 11/09/07
Donate to NCMS	\$	<input type="text" value="0"/>	Date Payment Received	<input type="text" value="11/09/07"/> i.e. 11/09/07
USMS Donation	\$	<input type="text" value="0"/>	Payment Method	<input type="text" value="Check"/>
ISHOF Donation	\$	<input type="text" value="0"/>	Check Number	<input type="text"/>
Total	\$	<input type="text" value="35"/>	Check Memo	<input type="text"/>

Member Form Figure 9

If everything is OK, or if not you can make changes, fill in the fields for donation amounts, but you will notice the yellow highlighting for the **2008** button, *it is very important that you click the 2008 button to register the person for 2008, otherwise the swimmer will not be registered.*

Then you must click on the **Done** button at the top of the page (figure 9) and you will be taken back to the **USMS Members** search page with information showing the 10 most recent registrations that you have registered in your LMSC including the swimmer's name, registration number, sequence number, and the date you registered the swimmer (figure 9a).

Another method for registering a new or renewing swimmer, and the most common method, is from the **Main** screen (figure 1) left hand box, click the [Registration](#) link which will display the **USMS Members** screen (figure 10). The default decision to search all of the USMS database was made since Leoware the same function exists. Note in figure 10 the **Registering for Current year (2008)** button is checked, and I have entered Mike Smith as a new swimmer.

USMS Members

Search

USMS ID (last 5 digits)

Any part of first or last name

Last

First

Email

LMSC only (default is all of USMS)

Registering for Current year (2008)

Registering for Previous year (2007)

Doing Updates

Transfers (coming soon)

One time events (coming soon)

Last 10 members added/updated

Member form	Ronald Teare	138K-024AP	Seq Num: 9	Reg Date: Fri, 11/9/07
Member form	Kerry-Ann Da Costa	1387-022ZF	Seq Num: 5	Reg Date: Wed, 11/7/07
Member form	Kim Cole	138W-053KT	Seq Num: 8	Reg Date: Wed, 11/7/07
Member form	Robert Cole	138X-053KS	Seq Num: 7	Reg Date: Wed, 11/7/07
Member form	Tom Grizzle	138Z-0230G	Seq Num: 6	Reg Date: Wed, 11/7/07
Member form	Stephanie Strider	138P-0247G	Seq Num: 4	Reg Date: Wed, 11/7/07

USMS Members Screen, showing last entered swimmers, this is real data so names do not match the document's text – Figure 9a

USMS Members

Search

USMS ID (last 5 digits)

Any part of first or last name

Last

First

Email

LMSC only (default is all of USMS)

Registering for Current year (2008)

Registering for Previous year (2007)

Doing Updates

USMS Members search Screen Figure 10

clicking on the **Search** button yields the following results

Search Results

Mike* *Smith

[Add Member](#)

[Back to Search](#)

2 Unique Results

Select column titles to sort. Select ID number to show details. Select to open member record in new window.

#	Name		Membership Status	Club	LMSC	Reg Yr	USMS Number	Birth Date
	Preferred Last							
1	Go to member's form	Mike Smith		UNAT	33	2005	335R-03E59	
2	Go to member's form	Mike J Smith		CATM	14	2006	146K-02U5R	

If the search did not return the name you were looking for, try generalizing your searching by just searching for part of the first or last name.

Search Results screen, figure 11

If neither of the swimmers in the results are the swimmer you want to register, you can register the swimmer by selecting [Add Member](#) at the top of the **Search Results** page (figure 11), and you will get a new **Members Form** (figure 12) where you already have the members name from the search form already filled in and you can add the other date, fill in the donations if any, the check number, and click **Done** to

register this new swimmer.

[Home](#) [Abort](#)

Name First Middle Initial Last Suffix (Jr., III, etc)

Address Street bad address
 City State ZIP Country

Phones Home * Work * Cell * * enter full number i.e. (212) 555-1212 x104
 Fax * Pager * Other *

Birth Date (mm/dd/yyyy) Gender (M/F)

USMS Current Club: Club Workout Group:

The swimmer was registered in a different LMSC, LMSC .

Email

	Primary	Description (i.e. secondary, work)	Bad email	Exclude email	
<input type="text"/>	<input checked="" type="radio"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fill out this row to add another email

exclude all emails
 exclude National emails
 exclude Sponsor emails
 exclude LMSC emails
 exclude Club emails
 exclude USMS Swimmer Magazine
 member has no email

Groups Certified Official Coach

If you practice with RAM, enter practice location: Newsletter E email, P postal, B both, N none

This section is only displayed if the member has not registered for 2007 or 2008.
Only fill in the fields below if you have received payment for annual dues.

Payment Information

Add/change price	Registration Year	<input type="radio"/> Not Registering <input type="radio"/> 2007 <input checked="" type="radio"/> 2008
Use Reduced (End of year) Price	Date of Registration	<input type="text" value="11/09/07"/> i.e. 11/09/07
NC Fee \$ <input type="text" value="10"/>	Date Payment Received	<input type="text" value="11/09/07"/> i.e. 11/09/07
USMS Fee \$ <input type="text" value="25"/>	Payment Method	<input type="text" value="Check"/>
Donate to NCMS \$ <input type="text" value="0"/>	Check Number	<input type="text"/>
USMS Donation \$ <input type="text" value="0"/>	Check Memo	<input type="text"/>
ISHOF Donation \$ <input type="text" value="0"/>		
Total \$ <input type="text" value="35"/>		

Members Form, data from search screen already filled in, Figure 12


Likewise searching on a name not in the entire database, you will get a screen with no results and you click [Add Member](#) as shown in figure 14 and the name will be filled in to the register member form as shown in figure 12.

Search Results
John* *Szymanski

[Add Member](#)

[Back to Search](#)

0 Unique Results

Select column titles to sort. Select ID number to show details. Select  to open member record in new window.

#	Name	Membership
	Preferred Last	Status Club LMSC Reg Yr USMS Number Birth Date

If the search did not return the name you were looking for, try generalizing your searching by just searching for part of the first or last name.
 You can also [Show All Member Names](#).

Figure 14

The **Member Form** has some what I call type-amatic features, such as phone number entry and birth date entry. For phone number, enter the entire number like 9198462423 and it will display as (919) 846-2423, and the date of birth as 012842 will display as 01/28/42 and once entered it will display as 01/28/1942 – **do not enter the slashes** or the date will not enter correctly. See Figure 15.

Selecting Clubs and Workout Groups

[Home](#) [Done](#) [Abort](#)

Name First Middle Last Suffix (Jr., III, etc)

Address Street Street 2 bad address
 City State ZIP

Phones Home * Work * Cell * * enter full number i.e. (212) 555-1212 x104
 Fax * Pager * Other *

Birth Date (mm/dd/yyyy) Gender (M/F)

USMS Club Workout Group:

Email

	Primary	Description (i.e. secondary, work)	Bad email	Exclude email	
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fill out this row to add another email

exclude all emails
 exclude National emails
 exclude Sponsor emails
 exclude LMSC emails
 exclude Club emails
 exclude USMS Swimmer Magazine
 member has no email
 Certified Official
 Coach

Figure 15

If you are an LMSC that has multiple clubs, there are drop down menus for the club, likewise for those LMSCs that have clubs with **Workout Groups** there is a drop down menu for those groups as well. Once the data including the payment information (shown in figure 9 is entered) and the **2008 button** is checked and the **Done** button pushed, the swimmer is registered.

Printing Cards

To print the cards, you will have to have already specified the number of cards to be printed per page when you went to the [LMSC Settings](#) link from the **Main** page (figure 17 on the next page), Notice also that in the printed right hand side of the page information I have added the [WORKOUT GROUP] field and wording I use when I print North Carolina's cards. Since you are viewing this document with Adobe Acrobat Reader, your browser should print cards directly when you go to the [Membership Cards](#) link from the **Main** Page.

USMS Member Cards

Registrars

When the system is launched on Wednesday, November 1st, 2007, only Registrars will be able to print membership cards. The Registrar's print preview will not display the background image because the Registrars will be printing on the USMS Membership card stock. This system will create a PDF that will control the location of the printing precisely. If you need to adjust the alignment of the page, go to the [Settings Page](#). Creation of the PDF will take a few seconds. When printing be sure page scaling is set to "None". If you have any problems printing the PDF, make sure you have the latest version of [Adobe Reader](#). As of October 24th, 2007, the most recent version of Adobe Reader is 8.1.1.

Last Registered in

2007	2008
No Cards	5 cards
	Clear Cards

To select from a list of all USMS Members in LMSC For North Carolina [Last Registered in 2007](#) or [Last Registered in 2008](#)

Figure 16

USMS LMSC

Name (Abbr) North Carolina (NC)
Borders The state of North Carolina.
Email Alias Prefix NC
LMSCID 13
Text ID 13
URL
<http://www.ncmasters.org/>
Reg Info URL
<http://www.ncmasters.org/regforms.html>
Reg PDF URL
<http://www.ncmasters.org/forms/nc-regform.pdf>
Zone Name (ID) Dixie (2)
LMSC Officers [George Simon](#) Registrar
[Leo Letendre](#)
[Add Officers](#)

[Add/Edit Default LMSC Charges](#)

[Add/Edit User-Defined LMSC Fields](#)

LMSC Settings

Club Fees Yes, clubs in this LMSC have club fees

LMSC Registrar Defaults

City
State i.e. CA
ZIP i.e. 92660
Area Code i.e. 310
Club Number [UNAT](#)

USMS Member Card Printing Defaults

Card Printing Order ▾

Cards Per Page ▾

Printer Offsets Shift Down inches i.e. 0.05

Shift Right inches i.e. 0.50

Your Local Registrar Is
George S. Simon
10229 Boxelder Dr
Raleigh, NC 27613-6139
(919) 846-2423
EMAIL: registrar@ncmasters.org
At NC meets, you swim for

Figure 17

Click the number of cards you want to print from the **USMS Member Cards** screen (figure 16). This will bring up a pdf view of the cards that you need to print. There is a key piece of information shown on it that may be easily overlooked. Once you have selected the print button from your screen (I am using Firefox as my browser, others may have a slightly different look)

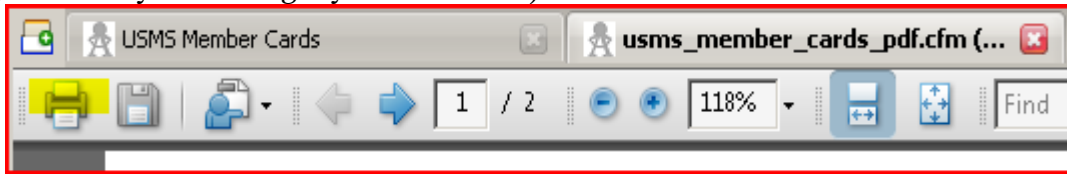


Figure 18

And you select your printer, you will get a screen that looks similar to Figure 19, make sure you select the **Page Scaling:** to **None** , remove check from **Auto-Rotate and Center**, and check the **Choose Paper Source by PDF page size**

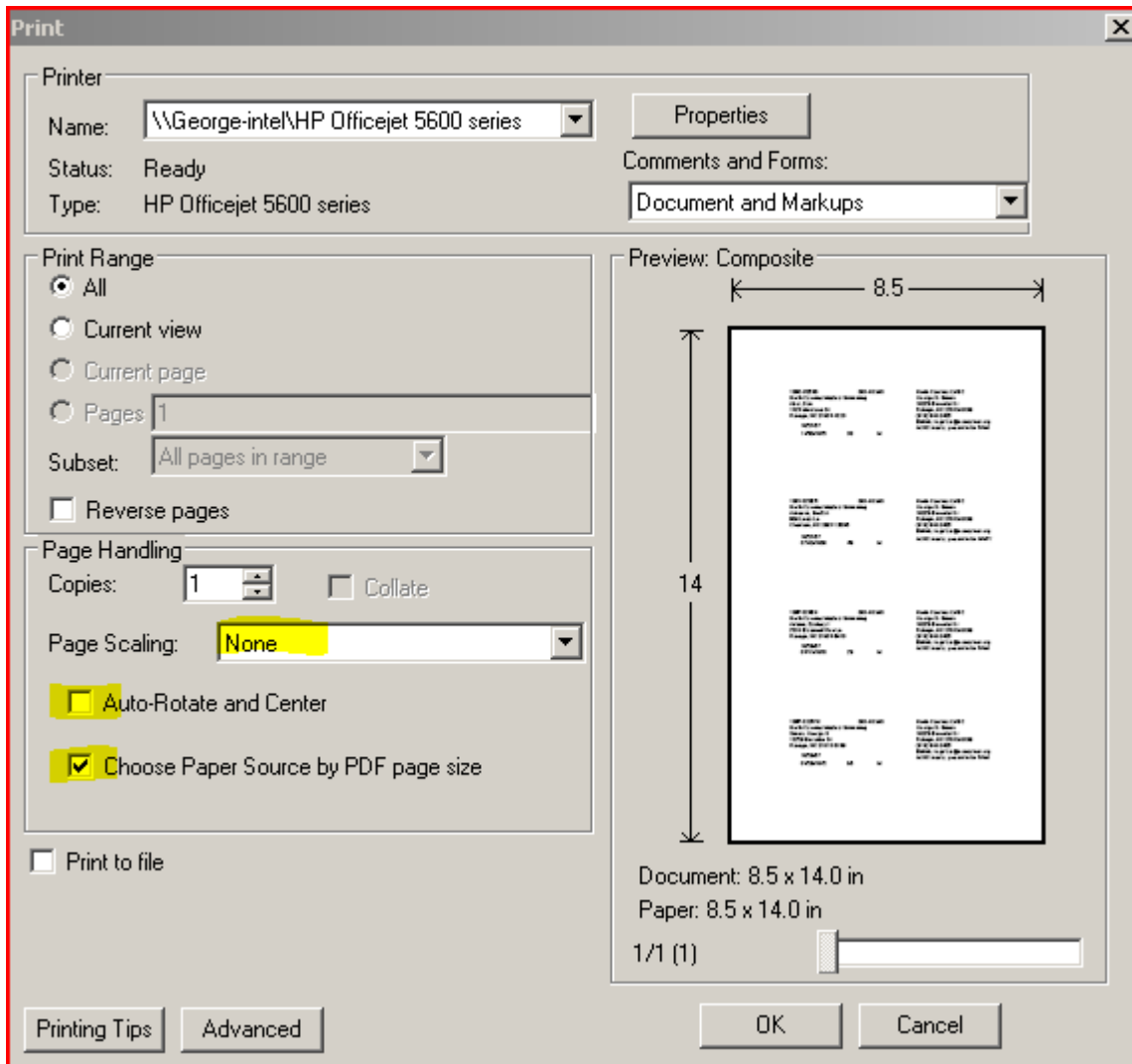


Figure 19

Once you are happy with the printing, you must click **Clear Cards** on the **USMS Member Cards** screen (figure 16)

Workout Groups

Workout Groups are used by many of the LMSCs, and can easily be added to a club. Using the main screen (figure 1) click [Workout Groups](#) and you will be taken to a screen (figure 20) with your groups already populated or no groups at all (I've been testing for awhile and mine were already populated.

USMS Workout Groups			
Add a New Workout Group			
There are 32 Workout Groups in the LMSC For North Carolina LMSC			
Click on the column title to sort by that column.			
Abbr	Name	Club	Members
AMS	Asheville Masters Swimming	NCMS	List
BUMS	Burke/Unifour Masters Swimming - Valdese NC	NCMS	List
CFAC	Cape Fear Aquatic Club Masters - Wilmington NC	NCMS	List

Figure 20

Create a new group and use the drop down menu to pick the club that the group will be associated and click the **Add** button as shown in Figure 21

Workout Groups Form	
Workout Group Name	<input type="text" value="Beach Rescue Swimmers"/>
Abbreviation	<input type="text" value="BRS"/>
Club	<input type="text" value="U.S. Coast Guard (USCG)"/>
<input type="button" value="Add"/>	

Figure 21

And you can see in figure 22 that it was added associated with the Coast Guard club. When you register a swimmer on the registration page, BRS will be a choice in the drop down for Workout Group (figure 15)

USMS Workout Groups			
Add a New Workout Group			
There are 33 Workout Groups in the LMSC For North Carolina LMSC			
Click on the column title to sort by that column.			
Abbr	Name	Club	Members
AMS	Asheville Masters Swimming	NCMS	List
BRS	Beach Rescue Swimmers	USCG	List
BUMS	Burke/Unifour Masters Swimming - Valdese NC	NCMS	List
CFAC	Cape Fear Aquatic Club Masters - Wilmington NC	NCMS	List

Figure 22

If you want to delete a Workout group, click on the abbreviation for the workout group **BRS** group and you can click the link [Delete Workout Group?](#) and you will be given a “**Are You Sure**” note and you can click the **Yes** button

Optional Fields for LMSC specific questions

When you click on from the main page, [LMSC Settings](#) you will be taken to the USMS LMSC settings, half way down the page you will see your name (figure 21) you will be taken to the the **USER FORM** page where you can enter data about yourself as well as granting **USER AUTHORITY** half way down the page (figure 22)

Zone Name (ID)	Dixie (2)
LMSC Officers	George Simon Registrar Leo Letendre Add Officers
Add/Edit Default LMSC Charges	
Add/Edit User-Defined LMSC Fields	

Figure 21

You may see this screen figure 22 when you add officers to your LMSC, at this time, we ask that you do **NOT** add officers and then provide authority to use the system during this trial period. **Sorry, it is out of place in this the flow of this document – it will be fixed later.**

User Authority	
<input checked="" type="checkbox"/>	Accounting (ability to see <i>Accounting</i> module on Main page)
<input checked="" type="checkbox"/>	Admin (ability to change authorities for each user)
<input type="checkbox"/>	(disabled) Announcement (ability to post announcements)
<input type="checkbox"/>	(disabled) Billing/Payments (ability to see <i>Billing</i> module on Main page , <i>Payment Information</i> on Member Form , and bill Event attendees)
<input type="checkbox"/>	(disabled) Events (ability to see <i>Events</i> module on Main page)
<input type="checkbox"/>	(disabled) Coach (ability to see <i>Coach</i> module on Main page)
<input type="checkbox"/>	(disabled) Credit Card Number (ability to see full <i>Credit Card Number</i> on Member Form)
<input type="checkbox"/>	Email (ability to send emails to club members)
<input type="checkbox"/>	(disabled) Schedule (ability to post PDFs)
<input type="checkbox"/>	Settings (ability to see Club Settings page)
Member Form Defaults	
<input type="checkbox"/>	Minimize <i>Membership and Billing</i> (check to minimize on Member Form)
<input type="checkbox"/>	Minimize <i>Payments</i> (check to minimize on Member Form)
<input type="checkbox"/>	(disabled) Minimize <i>Events</i> (check to minimize on Member Form)
<input type="checkbox"/>	Minimize <i>Accounts</i> (check to minimize on Member Form)
<input type="checkbox"/>	Minimize <i>Additional Info</i> (check to minimize on Member Form)
<input type="checkbox"/>	Minimize <i>Swimming</i> (check to minimize on Member Form)

Figure 22

User defined fields are a feature that was in Leoware, and that feature is also in Club Assistant. I am showing an example from NC's LMSC with a picture from Leoware and the couple of User fields. If you went to Leoware and went to **LMSC** then **Fields**, you could have selected fields that were important to you

as a registrar. The field name were entered a shown below in figure 23 and displayed in the main screen as figure 24. To get to the same function, it is suggested you use the same positioning of field names, i.e., the field number for **Newsletter** is Field 2.

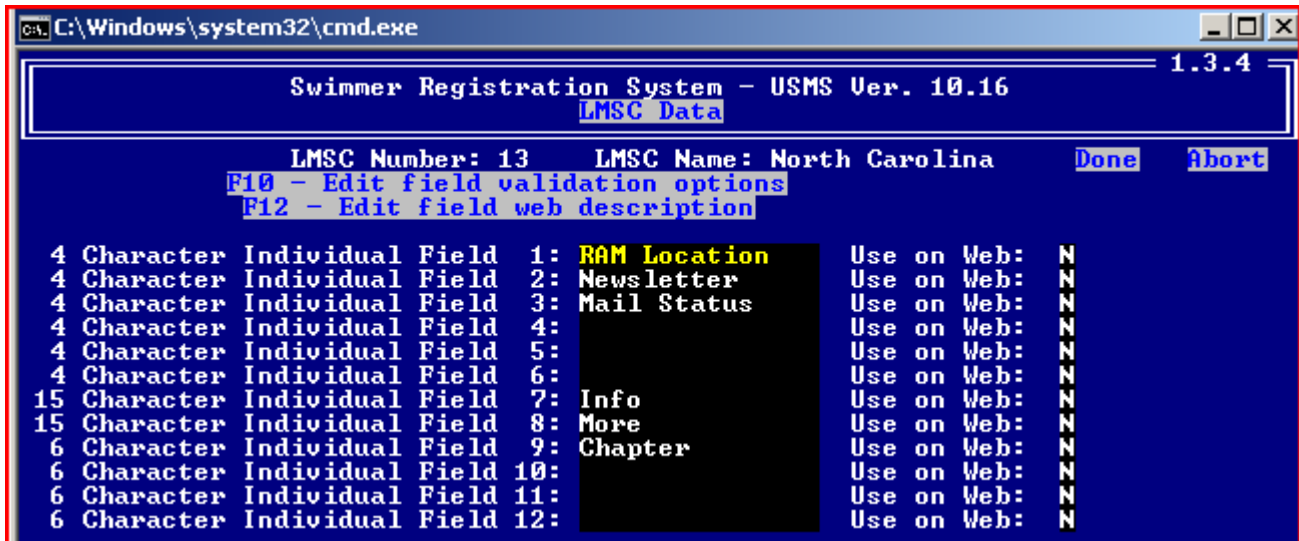


Figure 23

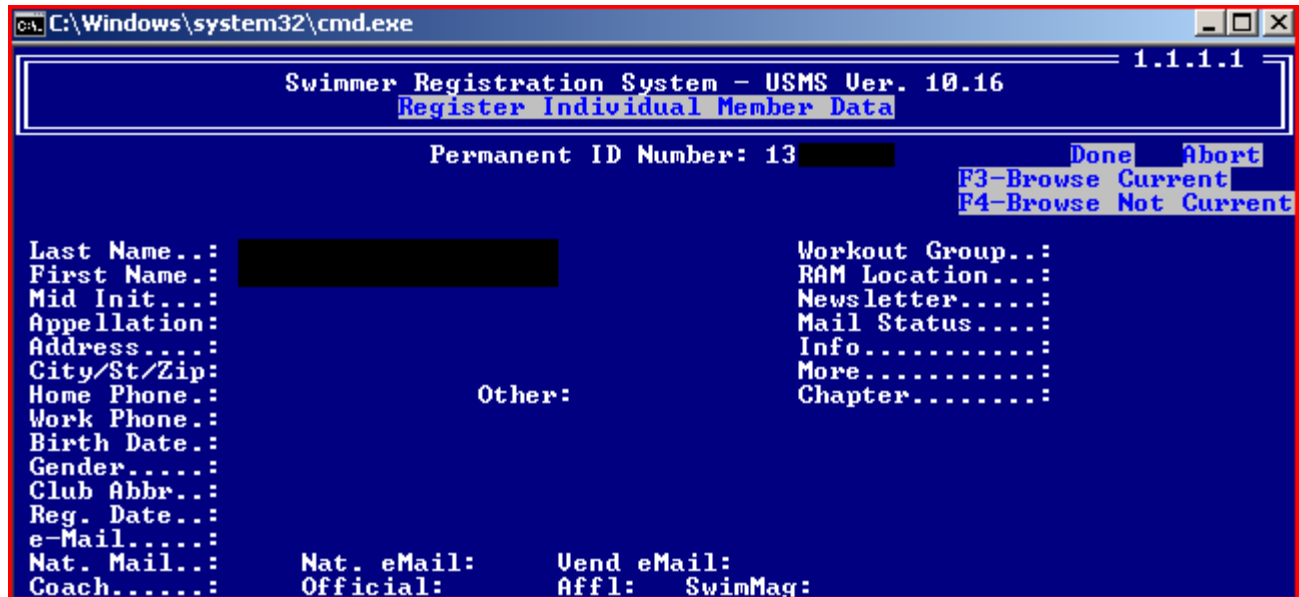


Figure 24

To input user defined fields with the Club Assistant Application, from the main screen (figure 1), select **LMSC Settings** then senect **Add/Edit User-Defined LMSC Fields** (figure 17) and you will be taken to the **Additional Information** page (figure 25) and can enter your fields with a meaningful set of questions that will be on your screens and once the Club Assitant Swimmer Application is created, it will be on their screens as well. For the questions to be on the On Line form, you must check the first box shown on figure 25 highlighted in yellow, **Show on Online Form/Member Login?**

Then for each additional question that you want on your for, check for each one. From the questions shown below in figure 25, the result will be shown in figure 26. Since the member registration page has so many fields, at this time the fields are wrapped for the registrars entry page, they may not be wrapped on the Individual Swimmer Registration Application.

Contact Settings Instructions <ul style="list-style-type: none"> • Currently • Marketing Types (general) • Marketing Sources (specific) • Background • Goals • Results Info Request Form Settings 	Additional Information	
	Question 1	Show on Online Form/Member Login? <input checked="" type="checkbox"/>
	Explanation	If you practice with RAM, enter practice location: <input type="text"/> Show on Online Form/Member Login? <input checked="" type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer
	Question 2	Show on Online Form/Member Login? <input checked="" type="checkbox"/>
	Explanation	Newsletter E email, P postal, B both, N none <input type="text"/> Show on Online Form/Member Login? <input checked="" type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer
	Question 3	Show on Online Form/Member Login? <input type="checkbox"/>
Explanation	<input type="text"/> <input type="text"/> Show on Online Form/Member Login? <input type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer	
Question 4	Show on Online Form/Member Login? <input type="checkbox"/>	
Explanation	<input type="text"/> <input type="text"/> Show on Online Form/Member Login? <input type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer	
Question 5	Show on Online Form/Member Login? <input type="checkbox"/>	
Explanation	<input type="text"/> <input type="text"/> Show on Online Form/Member Login? <input type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer	
Question 6	Show on Online Form/Member Login? <input type="checkbox"/>	
Explanation	<input type="text"/> <input type="text"/> Show on Online Form/Member Login? <input type="checkbox"/> Validation Type: * <input checked="" type="radio"/> none <input type="radio"/> yes/no <input type="radio"/> date <input type="radio"/> integer	

Figur 25

If you practice with RAM, enter practice location: <input type="text" value="OP"/> Newsletter E email, P postal, B both, N none <input type="text" value="E"/>
This section is only displayed if the member has not registered for 2008. Only fill in the fields below if you have received payment for annual dues. Payment Information

Figure 26

When I chose to enter the LMSC newsletter request on my registration form, I gave the options of entering E for Email delivery only, P for postal, B for both, and N for no notification. If you want just registrar specific fields, you can put in a question and don't check the **Show on Online Form/Member Login?** Block, and put in a blank in the explanation field.

Adding or Changing a Donation

If you overlooked a donation when you registered your swimmer, you can through a series of steps go in and add or correct that donation. Here are the steps and screen shots:

From the Main screen (figure 1), on the right hand side, click the [Accounting Money Received](#) link. You will be taken to a selection screen, make sure you enter the Date Start and/or Date End so you don't have so many registrations to search.

Accounting Money Received

Merchandise (default is all) [check all](#) [uncheck all](#)

- NC Fee
- USMS Fee
- Club Fee
- Donate to NCMS
- USMS Donation
- ISHOF Donation
- Transfer Fee

Programs (default is all) [hide](#)

- default

Date Start (mm/dd/yy) [11/1/07](#), [11/9/07](#)


Date End (mm/dd/yy) [end of start month](#), [add 1 month](#), [add 1 year](#)

Additional fields include description include comments

File Type Excel

Accounting Money Received selection screen, Figure 27

Payment Summary

25 payments, Click column title to sort by that column. Select  to open record in new window.

PID	Member	Cost	Qty	Date	Item	Payment Method	Charged By
 159330 	Nikki Noble	\$1.00	1	11/7/07	USMS Donation	Check	George Simon
 159330 	Nikki Noble	\$1.00	1	11/7/07	ISHOF Donation	Check	George Simon
 159330 	Nikki Noble	\$1.00	1	11/7/07	Donate to NCMS	Check	George Simon
 159330 	Nikki Noble	\$10.00	1	11/7/07	LMSC Fee	Check	George Simon
 159330 	Nikki Noble	\$25.00	1	11/7/07	USMS Fee	Check	George Simon
 159331 	Edward Weiss	\$5.00	1	11/7/07	USMS Donation	Check	George Simon
 159331 	Edward Weiss	\$5.00	1	11/7/07	ISHOF Donation	Check	George Simon
 159331 	Edward Weiss	\$5.00	1	11/7/07	Donate to NCMS	Check	George Simon
 159331 	Edward Weiss	\$10.00	1	11/7/07	LMSC Fee	Check	George Simon
 159331 	Edward Weiss	\$25.00	1	11/7/07	USMS Fee	Check	George Simon
 159332 	Stephanie Strider	\$10.00	1	11/7/07	LMSC Fee	Check	George Simon
 159332 	Stephanie Strider	\$25.00	1	11/7/07	USMS Fee	Check	George Simon
 159334 	Kerry-Ann Da Costa	\$10.00	1	11/7/07	LMSC Fee	Check	George Simon
 159334 	Kerry-Ann Da Costa	\$25.00	1	11/7/07	USMS Fee	Check	George Simon

Accounting Money Received results screen, figure 28.

For this example, I am showing adding a USMS donation Stephanie Stride, click on the PID number highlighted in yellow as shown above.

(PID=159332) [Delete Payment](#)

Item Invoice [23542768](#)

IDID	Qty	Date	Description	Amount
45483	1	11/7/07	LMSC Fee	\$10.00
45484	1	11/7/07	USMS Fee	\$25.00

Date Amount \$ [Use Invoice Amount - \\$35.00](#)

Amount \$35.00

Payment Method

Check Check Number Memo

Check ADW

Cash Received By

Comp

Problem Yes Comments (for office use only)

If you have problems with processing payments or any billing questions, please email billing@clubassistant.com

Payments

Payments Summary

PID	Amount	Date	Item	Invoice	Payment Method	Move
159332	\$35.00	11/7/07	LMSC Fee USMS Fee	23542768	Check #389	159332
Total	\$35.00					

Payment Form, figure 29

At the bottom of the screen, there is an invoice number, in this example [2354768](#), click that link

Invoice Form

(IID=42768) [Delete Invoice?](#)

Created: 7:25 AM Wed, 11/7/07 by George Simon | Updated: 7:25 AM Wed, 11/7/07 by George Simon

Instructions Creating invoices is a two-step process.
Step 1 - **Create Invoice**, add information, click "Add" button
Step 2 - **Create Invoice Details**, click on "Add Line Items" (bottom left of form)

Invoice Date Normally would be today's date, but can be backdated

Invoice Number

Purchase Order Usually left blank, only used when invoicing large companies

Total \$35.00

Payment [Received](#)

Notes Usually left blank, only used if invoice is unusual

Status Marking either of the boxes below locks the invoice details

- Invoice Finalized**
(cannot add/edit Invoice Details)
- Invoice Sent (emailed/mailed/printed)

Invoice [23542768](#)

IDID	Qty	Date	Description	Amount
45483	1	11/7/07	LMSC Fee	\$10.00
45484	1	11/7/07	USMS Fee	\$25.00

[Printable Invoice](#)



[Compose Email with Invoice Attached](#)

Invoice Form screen, figure 30

Remove the check mark from Invoice Finalized highlighted in yellow above and click **Update**

Invoice Form

(IID=42768) [Delete Invoice?](#)

Created: 7:25 AM Wed, 11/7/07 by George Simon | Updated: 1:30 PM Fri, 11/9/07 by George Simon

Instructions Creating invoices is a two-step process.
Step 1 - **Create Invoice**, add information, click "Add" button
Step 2 - **Create Invoice Details**, click on "Add Line Items" (bottom left of form)

Invoice Date Normally would be today's date, but can be backdated

Invoice Number

Purchase Order Usually left blank, only used when invoicing large companies

Total \$35.00

Payment [Received](#)

Notes Usually left blank, only used if invoice is unusual

Status Marking either of the boxes below locks the invoice details

- Invoice Finalized
(cannot add/edit Invoice Details)
- Invoice Sent (emailed/mailed/printed)

Invoice [23542768](#)

IDID	Qty	Date	Description	Amount
45483	1	11/7/07	LMSC Fee	\$10.00
45484	1	11/7/07	USMS Fee	\$25.00

[Add Line Items](#)

[Printable Invoice](#)



[Compose Email with Invoice Attached](#)

Invoice Form screen results after hitting Update, figure 31

Now click on the link highlighted above to [Add Line Items](#)

Invoice Detail Form

Strider Date: 11/7/07

Invoice 23542768

Date Work  [11/9/07](#)

Item **USMS Donation** ▼

Event N/A

Quantity (req'd)

Amount Amount \$ (req'd)

Duration Start Date [11/1/07](#), [11/9/07](#)

End Date [end of start month](#), [add 1 month](#), [add 1 year](#))

Description (also included on invoice) [What should go here?](#)

Sort Order

Payment [Received](#)

Add

Invoice [23542768](#)

IDID	Qty	Date	Description	Amount
45483	1	11/7/07	LMSC Fee	\$10.00
45484	1	11/7/07	USMS Fee	\$25.00

Invoice Detail screen, figure 32

Click the drop down box for the type highlighted above and showing USMS Donatio, and add the donation amount shown above as \$ 1, hit the **Add** button and the correction has been made.

(PID=159330) [Delete Payment](#)

Item Invoice [23542766](#)

IDID	Qty	Date	Description	Amount
45473	1	11/7/07	LMSC Fee	\$10.00
45474	1	11/7/07	USMS Fee	\$25.00
45475	1	11/7/07	Donate to NCMS	\$1.00
45476	1	11/7/07	USMS Donation	\$1.00
45477	1	11/7/07	ISHOF Donation	\$1.00

Date Amount \$ [Use Invoice Amount - \\$38.00](#)

Amount \$38.00

Payment Method

- Check** Check Number Memo
- Check ADW**
- Cash** Received By
- Comp**

Problem Yes Comments (for office use only)

If you have problems with processing payments or any billing questions, please email billing@clubassistant.com

Payments

Payments Summary

PID	Amount	Date	Item	Invoice	Payment Method	Move
159330	\$38.00	11/7/07	Donate to NCMS ISHOF Donation LMSC Fee USMS Donation USMS Fee	23542766	Check #2041	159330
Total	\$38.00					

Invoice Detail Payment Form screen, figure 33

Making a correction is a little easier, in this example I used Nikki Noble's entry by clicking on the [159330](#) PID link link in figure 28. To change the USMS Donation amount, click on the [45476](#) IDD in the left hand column above in figure 33 and you will get an Invoice Detail screen already filled in where you can modify the amount as shown in figure 34

Invoice Detail Form

(IDID=45476) [Delete Invoice Detail?](#)

Created: 7:13 AM Wed, 11/7/07 by George Simon | Updated: never

Noble Date: 11/7/07

Invoice 23542766

Date Work [11/9/07](#)

Item

Event N/A

Quantity (req'd)

Amount Amount \$ (req'd)

Duration Start Date [11/1/07](#), [11/9/07](#)

End Date [end of start month](#), [add 1 month](#), [add 1 year](#))

Description (also included on invoice) [What should go here?](#)

Sort Order

Payment [Received](#)

Invoice [23542766](#)

IDID	Qty	Date	Description	Amount
45473	1	11/7/07	LMSC Fee	\$10.00
45474	1	11/7/07	USMS Fee	\$25.00
45475	1	11/7/07	Donate to NCMS	\$1.00
45476	1	11/7/07	USMS Donation	\$1.00
45477	1	11/7/07	ISHOF Donation	\$1.00

Invoice Detail Form, updating an amount, figure 34

Hit the **Update** button after modifying the amount and the donation will be changed.