

Car Club Register Database

Operating Instructions

Contents

Car Club Register Database	1
Document/Software Version:	3
Introduction:	4
Installation – Software Updates	5
Installation – Single User	6
Installation – Using Dropbox or Google Drive to Share the Database With Others Via the Internet	6
Loading Data into the Database	7
Using Car Club Register	7
Using the Menu	8
Maintaining Member Details	8
Search Forms	15
Mailing Choices	17
Reports	21
Extracts	22
Database Maintenance	23
Menu Favourites	27
Member Location Maps	28
Appendix A - Installation for a Single User	29
Step 1: Install MS Access	29
Step 2: Create a "Trusted" Network Folder	29
Step 3: Install Car Club database	30
Step 4: Configure Car Club Register	31
Club Master Data Maintenance	32
Appendix B - Installation Using Dropbox or Google Drive to Share the Database With Others Via the Internet	40
Step1: Create Dropbox or Google Drive accounts for all users	40
Step 2: Determine who the "owner" of the database is	41
Step 3: Install Car Club database in the Owners shared folder	41
Step 4: Configure Car Club database	41
Step 5 Configure the Shortcut to open the Database	41
Step 6: Populate the Database	41
Step 7: Share the folder with other users	41
Appendix C - Preparing MEMBER Data to Load into the Database	45
Appendix D - Preparing VEHICLE Data to Load into the Database	48
Appendix E - Importing Data into the Database	50
Appendix F - Register Summary Report Formulas	55
Appendix G - Other Useful Functionality	59
Mail Merge - Custom	59
Third Party Mailing Lists for Sending Campaigns	60
MailChimp Audience List	60
Brevo (formerly SendInBlue) Contacts List	64
Printing & Emailing Reports as PDF documents	68
Database History Logs	69
Online Support	69
Published Club Register	69
Appendix H - Software Update Special Instructions	71
Update Releases 2016	71
Update Releases 2017	77
Update Releases 2018	77
Update Releases 2019	79
Update Releases 2020	79
Update Releases 2021	82
Update Release 25/2/2022	85
Update Release 15/10/2022	85
Update Release 1/3/2023	87

Update Release 1/9/2023.....	88
Update Release 25/9/2024.....	88
Appendix I - RENAME ME Custom Reports Database.....	90
Appendix J - Configuration to Send Emails.....	92
SMTP Relay Services.....	93
Appendix k – Menu Favourites.....	95

Document/Software Version:

- Operating Instructions first issued 26/10/2014
- Updates prior to 2021 are not reported here
- Update 10/1/2021 to enhance the management and reporting functionality of Additional Family Members and Skills/Interests
- Updated 26/2/2021 to comply with Australia Post Print Mail sort codes as of 26/2/21, and added functionality to enable magazines coversheets to be printed separately for members and non-members, if required, and updated email password management for users who use this database for multiple clubs. Also added menu options to view members ready to expire (past grace period) and expired members ready to archive
- Updated 13/3/2021 with minor changes to the Mail Merge extract to enable sorting by family name
- Updated 21/3/2021 to enable integration with an existing MailChimp mailing audience/list. This synchronizes changes to members details to add, update or archive contact details in the nominated MailChimp audience/list
- Updated 27/8/2021 to comply with Australia Post Print Mail sort codes as of 27/8/21, and added functionality to enable Renewal Notices to be sent to already renewed members for confirmation of db details, to enable member birthday fields to be hidden from forms and reports if not used/required, to enable a custom attachment to be sent with emailed renewal notices and final reminders
- Updated 25/2/2022 to comply with Australia Post Print Mail sort codes as of 25/2/22, and added a MailChimp status report, added the ability to search current, archived and disposed vehicles simultaneously to investigate prior ownership, Updated Renewal Notice format for Non-Members, and fix to selection for printing of renewal notices after renewals have commenced when using non-variable renewal dates (fix to 27/8/21 update)
- Updated 15/10/2022 to comply with Australia Post Print Mail sort codes as of 26/8/22. And added warnings and search capability for duplicate engine and body Nos
- Updated 1/3/2023 to comply with Australia Post Print Mail sort codes as of 24/2/23, and to introduce new multi-user locking logic (REQUIRED for Clubs sharing the database via online file shares where any user has upgraded to Windows 11 – requires START.CMD and Custom Reports db changes as well), and removed support for the use of personal email addresses when sending emails from the db. Only SMTP Relay Services eg MailGun and Brevo (formerly SendInBlue), are now recommended. Added Integration to Brevo (formerly SendInBlue) contacts (as an alternative to MailChimp)
- Updated 3/7/2023 to apply a new software download redirect URL, fixed some bugs with the Google Map extract, the member search form and a data validation error. Changes were also made to apply the name change of SendInBlue to Brevo
- Updated 1/8/2023 to add automatic backup functionality. And minor bug fixes
- Updated 25/9/2024 to add recording of renewal receipt history, and an option to record a URL link to an online vehicle photo, folder or document, and additional email configuration options.

Introduction:

- This database records Car Club member and vehicle details which in turn are used to generate various Club management reports/outputs.
- Details recorded included: names and contact details, including details required to manage obligations of the Incorporations Act where applicable, and vehicles owned, including details required to manage obligations of the Victorian Club Permit Scheme. It records the financial status of members and whether they receive communications by email or by post.
 - *NB: In Victoria, vehicles older than 25 years can be permitted on the road, without registration, using a permit issued under the Club Permit Scheme (CPS) which is administered by the state transportation authority VICROADS. Permit holders must be financial members of an approved club and clubs are required to participate in the permit process to verify the financial status of the owner, and keep details of the vehicles involved. This database supports the data requirement of the CPS, but may also be used for other similar state/territory permit schemes*
- The database was originally designed to accommodate the needs of the Chrysler Restorers Club of Australia Victoria Inc, but has been modified to allow it to be adapted to a wider range of Club needs, including options for different membership types and options to more easily customize the reports
- The database supports any requirements to mail merge with custom Microsoft Word documents, but also includes sample documents that can be used for generating magazine address sheets for clubs with an Australia Post "Print Post" account
- Reports include magazine postal addresses, membership renewal forms, plus membership and vehicle registers and other summary reports to learn more about members and their cars.
- Individual reports per member can also be delivered using automated email generation (conditions apply)
- This centralized database can be maintained by multiple users by logging in via an internet connection using private Dropbox or Google Drive accounts, so that both data and database maintenance can be shared between those users.
- Simple user security can be set up to allow full update capability or to restrict certain users to "readonly" status, or to deny access where required
- The database can be used with a free runtime version of MS Access 2007 or 2010, ensuring that users do not need expensive MS Access licenses, and the Word 2007 or 2010 documents can be used on most versions of Word if a suitable Office Compatibility pack is installed
- These instructions include how to
 - customize it to a specific car club requirements
 - maintain member and vehicle data
 - generate reports
 - set up the database for sharing on the internet

The database requires a PC with the following specifications:

- Windows XP, Windows 7, 8, or 10 operating systems
- MS Office 2007 or 2010 (or the free Runtime or extension versions of these programs)
- The screen resolution must be a MINIMUM of 1024*768 pixels
- Broadband internet connection

The database was designed by Mark Fenton, Chrysler Restorers Club of Australia (Vic) inc and has been in use by that Club since 2005. In 2013 it was made available, via the AOMC, for use by any car club needing a purpose built database to update their membership recording systems.

The general release version was designed for easy use by any car club without the need for customization by an experienced MS Access/VBA programmer. Updates may be provided from time to time to fix or add new functionality that is deemed suited to the general car club movement. It is offered free of charge, as is, with no guarantee of ongoing support. Car Clubs using the database must therefore confirm that it is suitable for their own purposes, and accept all responsibility for its use, including any ongoing maintenance that may be required from time to time.

The database may be modified if required by any Club with suitable expertise however, in such cases, no support or upgrade compatibility is guaranteed should new updates be made available.

Installation – Software Updates

On opening the database it checks via the internet whether it is the latest available version, and if not then it displays a form similar to the following

Check for Updates

Car Club Register
Checking for Updates

Your current version is 20190801
while the latest version available is 20190917

20190917 - Updated Australia Post Sort Codes to match Aus Post changes effective 1/9/2019. Mandatory for all users of Print Post functionality

Other recent updates include:

1-Mar-19 - Updated Australia Post Sort Codes to match Aus Post changes effective 1/3/2019. Mandatory for all users of Print Post functionality

31-Dec-18 - Added the Extra Mailing Address Line to Unlisted/Alternate Addresses (it never made sense for it not to be there). Optional new feature
NB: If using mail merge, be sure to select "Address0" instead of "Extra" to get the correct address line

2-Dec-18 - Added automated capture of member and vehicle counts when magazines or renewals are printed, and when members are expired (for historical tracking of member/vehicle growth) Optional new feature

4-Nov-18 - Improved data validation on data entry to avoid occasional incorrect reports and extracts. Fixes a specific error affecting some vehicle data. Recommended for more accurate vehicle and member reports. Enables vehicles to be moved to another member instead of just archiving. Also enables choice of whether or not to automatically convert some (most) fields to UPPERCASE (Although UPPERCASE is highly recommended).

3-Nov-18 - Correction to Print Post Codes for VIC addresses (Aus Post 1/9/18 Rev 1) and another QLD correction. Mandatory for all users

Do you want to close this database and download the latest version of Car Club Database now?

Dont ask me again until the next update is released

NB: If you have already installed the database and it is in use with current data, then you must take care to preserve the current data in the backend database tables (ie Car Club Register_be.accdb and Car Club Register Archive_be.accdb). To be safe, please backup these files before extracting any updated files from the downloaded ZIP file.

1) STAGE 1

- a) The database will automatically notify when updates are available. You can choose to download the updates or update later. The database will continue to remind you until the update is done, unless you select the options to remind you after the next update.
 - i) The updated features are displayed, and you can determine how essential it is to do the update, but it is recommended wherever possible that these updates should always be taken. These updates should only be installed by the Club's database administrator, not read-only users
 - ii) NB: Refer to Appendix H for special instructions for each software update before proceeding
 - iii) There is an option to UPDATE LATER (in which case you will be reminded again the next time the database is opened), but you can also select the option to stop being reminded until the following update is available.
 - iv) To take the update, click on the button to CLOSE THE DATABASE AND DOWNLOAD UPDATES.
 - v) You will be taken to a registration page. Fill this out.
- b) This will then take you to the Checksum Dropbox folder which contains the latest version. Ignore and close the pop-up to create an account (it is a marketing ploy by Dropbox, but is not necessary to download these publically shared files).
- c) Click Download, DIRECT DOWNLOAD (top right-hand corner). This prompts to download the zip file.
- d) Another Pop-up dialogue box will appear. Select SAVE AS and choose a location on your computer.
 - i) Do not save it in the live Car Club Register Folder
 - ii) Alternatively your PC may automatically save the file to a default downloads folder
- e) Close the dialogue box once the download is complete.
 - i) Then follow the instructions provided to download the latest software ZIP file and then extract/replace ONLY the required files into the desired location. DO NOT accidentally extract/replace the backend files containing valuable current data.
 - ii) NB: the sample data files have now been moved to the sample data folder to minimize the risk of inadvertently overriding the existing data during an upgrade/Zip extract
- f) Go to the folder where you saved the latest zip file.
- g) Double click on the zip file.

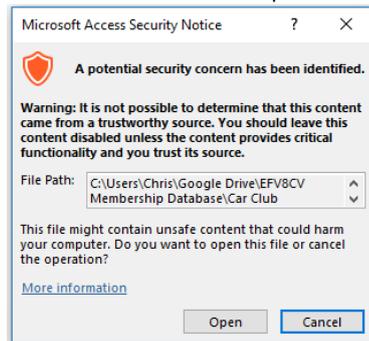
- h) You can use freeware Express Zip (NHC) to open the zip file if there is not Windows default program.
- i) Extract the files to your chosen location (usually defaults to the same folder the ZIP file is in)

2) STAGE 2

- a) Open File Explorer
- b) Select the usual 2 files which are updated. (DO NOT UPDATE ANY OTHER FILES AS THIS MAY DESTROY CLUB DATA. You can check files for updating by referring to the file date.)
 - i) Car Club Register
 - ii) Instructions - Car Club Register Database
- c) Use Copy & Paste to copy the updated files onto the Membership database folder
- d) Wait for files to upload & synchronise.

3) STAGE 3

- a) Use the normal shortcut link to OPEN the database.
- b) Agree to all the multiple prompts. OPEN/YES/OK, until it is completed whereupon it will recommend to close the database and reopen



Refer to Appendix H for special instructions for each software update

Installation – Single User

MS Access databases can be used on their own by a single user, or can share access via a network. It is assumed that most car club users will NOT be sharing Car Club Register on a home or business network, but using it on a standalone PC for a single user. **Appendix A** describes installation for a single user on a single PC.

If shared access is required then consider sharing via the internet using Dropbox accounts for each user (see next section). Another time when Dropbox file sharing is useful is when the same user wants to access the files from two different computers, eg at home or at work. In this case use the same Dropbox account to synchronize the databases on both computers

Installation – Using Dropbox or Google Drive to Share the Database With Others Via the Internet

Multiple filesharing options exist that can be used to enable the database to be shared with other users, including Dropbox and Google Drive. Both options can be recommended, depending on your circumstances.

Dropbox is a free file sharing website that has many useful features. See more details at <https://www.dropbox.com/tour>. Dropbox was the first option recommended for use with this database, however, depending on your usage of Dropbox (personally and for the car club, you may find the allocated/available disk space is too limiting, although it can be boosted by inviting other users to sign up to Dropbox as well. As of 16/10/2016 the default space available at no cost is 2Gb

In our case, each user who needs to share access to the database signs up for their own Dropbox account which enables them to automatically synchronise files on their PC (in a nominated folder) with the storage system at dropbox.com. The folder containing the database on PC#1 (the “owner’s” PC) can then be shared with other user accounts using PC#2, PC#3 etc which enables any changes made on one PC to auto synchronise with dropbox.com, which in turn then updates all other PCs sharing that folder. If a PC is off-line or turned off then it synchronises automatically next time it is turned on. Even a single user can access the Dropbox folder on multiple PC’s (eg at home or at work) by using the same account on both PCs.

The setup instructions are almost the same as the instructions for a single user except for some additional steps for using DROPBOX. Refer to **Appendix B**

Google Drive is also a suitable file sharing option, if the desktop version of Google Drive is installed on your Windows PC. As of 16/10/2016 Google Drive offer 15Gb of free storage (shared with your other Google services, like Gmail), and this may be preferred to Dropbox due to the greater free storage and the integration with other Google products such as Gmail, Google Apps, G-Suite etc.

To use Google drive, each user should have a Google Account (or if using G-Suite then a Club account is applicable. Using the same method as for Dropbox, a nominated user (eg club webmaster?) would set up the folder to save the database files and then share them with specific users with Google Accounts, and with the Google Drive desktop application installed. The file synchronization between users is automatic

NB: If the database is to be shared via the internet then ALL users must have permanent broadband access to the internet. Dialup connections do not allow automatic synchronization unless an internet connection exists while the database is in use. The START command scripts required for Dropbox or Google Drive operation blocks access to the database if an active internet connection to dropbox.com is not found.

NB: The START.cmd script supplied is written to check it is online by connecting (pinging) the dropbox.com website. If you are using Google Drive then disable the line for Dropbox and enable the line for Google Drive, as follows, using a text editor like Notepad or Notepad++ to make the change.

```
rem ping -n 1 dropbox.com | find "TTL"  
ping -n 1 drive.google.com | find "TTL"
```

Loading Data into the Database

For some clubs it may be easiest to load the data manually using the standard input forms used for new members, however for other clubs it may be easier to mass upload the data by importing data from an existing register that has previously been maintained in Excel (or exported to Excel from another MS Access or FoxPro database). If the data already exists in an excel spreadsheet, try these instructions to load some, if not all, of the data.

It is likely that most car clubs would not have all the data that can be input to this Car Club Register database, but even a partial load of member's names and addresses, and possibly cars would be beneficial, followed by manual entry to complete the entry of other data.

NB: These instructions assume that Excel (any version) is installed on the PC, and the user has a reasonable understanding of how to maintain data in a spreadsheet, as well as how to navigate their way around MS Access.

In principle, data in the correct format can be imported into the tables of an MS Access database, in bulk, as long as:

- the sequence of columns in the spreadsheet matches the sequence of columns in the database table
- the data type is compatible (dates in date fields, numbers in number fields, text in text fields etc)
- the data does not violate the table key (eg Membership No is a primary key in the table called tbl_MEMBERS so, unlike Excel, only one record can be loaded for each membership No or a duplicate key error will occur)

In most cases only two tables would be eligible for mass upload: tbl_MEMBERS and tbl_VEHICLES.

It is suggested that all other data, including tbl_Extra_Birthdays and tbl_Help, if required, is manually uploaded using the data entry form to maintain the records already loaded, while tbl_MEMBERS_ARCHIVE and tbl_VEHICLE_ARCHIVE are populated after loading the data into the tbl_MEMBERS and tbl_VEHICLES tables and running the job to archive members that have actually expired, but for which you want to retain some records for historical purposes.

Refer to **Appendix C** for instructions on how to prepare data in an excel spreadsheet for mass upload to the MS Access table called tbl_MEMBERS

Refer to **Appendix D** for instructions on how to prepare data in an excel spreadsheet for mass upload to the MS Access table called tbl_VEHICLES

Once the spreadsheet data has been prepared for loading into the database it can be imported using the instructions in **Appendix E**. This also includes instructions on how to run the table validation "fixit jobs" that will reformat some data (eg convert to upper case), and update the data not available in your upload data (eg PRINT POST mail sort codes which is based on the postcode), and reports to highlight potential integrity problems. It also includes instructions on how to delete all the data in order to start the upload again, if required.

Using Car Club Register

The database is made up of the following components:

- tables - usually hidden from the user, and contain the raw data for members as well as vehicles, plus other lookup lists to choose values from
- queries - usually hidden from the user, and are used to select and or reformat data for various reports, eg to select and display only financial members from the full set of member data
- queries can also be used to select and reformat data to display like a table that can be exported into excel spreadsheets if required. In this database these are called “Extracts”
- forms - used for data input by the user, displaying either one record at a time or many records at a time
- reports - used to display selected data and formatted for printing. In this database all reports prompt to display in print preview mode, which can then be printed if required. With a suitable PDF writer program installed, or using the inbuilt MS Access 2010 functionality to save as PDF files, these reports can be saved as PDF files for distribution to others via email.
- modules - usually hidden from users, and contain programming code, written using the language called Visual Basic for Applications (VBA). This programming is used to carry automated tasks that perform complex tasks or just make the database more user friendly
- macros - another method of writing automation tasks. They are not used in this database
- the menu switchboard is actually a type of form that can be used to open various forms, run reports, display data extracts, run maintenance tasks, or simply jump to other sub-menus

Using the Menu

The menu switchboard is pretty simple in this database. It is displayed automatically when the database is opened. Click a button to run the relevant task or to jump to the relevant submenu. In most case the user does not need to use the standard MS Access menu bar at the top of the screen, except when performing MS Access configuration, or to print a report that is displayed in print preview mode, or to export data from a query extract to excel. Any “action tasks” that, say, delete records always prompt to confirm the action before continuing

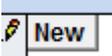
If you are familiar with MS Access you may notice that the object panel (on the LHS) has been hidden by default, so the various tables, queries, forms, reports etc cannot be tampered with easily.

The Menu Switchboard may include an “Instructions” button. If the instruction manual called “Instructions - Car Club Register Database.pdf” exists in the current database folder, then the button is visible and can be used to open this PDF document



Maintaining Member Details

Select the menu task called **Maintain Member Register** to display the following form

To **ADD** a new entrant: click on “new” button  or the “New (blank) Record” button in the record selectors at the bottom of the form



Tab through the fields one by one (using the Tab key, rather than a mouse click), and update the data required.

To add multiple **Vehicles** entries for a particular member just add the new records on the last line of the relevant grid display

To **FIND** and **CHANGE** an existing member

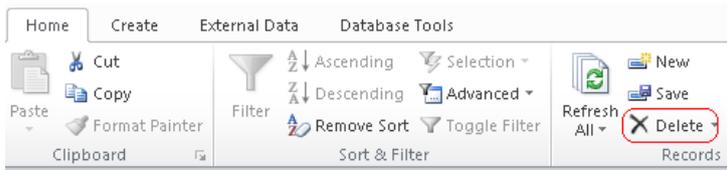
Find Method 1: In the **Name Search** box, in the top left corner, start typing the Members name till it is auto suggested, or use the dropdown list to select the member’s record

Find Method 2: In the **Member No Search** box, in the top left corner, start typing the Members No till it is auto suggested, or use the dropdown list to select the member’s record

Find Method 3: In the **Email Search** box, in the top left corner, start typing the email address till it is auto suggested, or use the dropdown list to select the member’s record

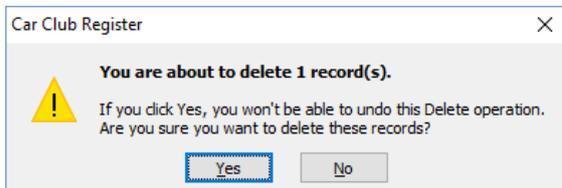
To **FIND** and **DELETE** an existing member (not recommended - preferably you should expire and archive the member instead)

Find the record as described above, then select the record by clicking on the record selector on the left hand side. When the whole record is selected, this record selector will display as black. Then press the DELETE button on the keyboard or click the DELETE icon on the Home tab of the menu ribbon



When prompted, confirm that you want to delete 1 record





When deleting a member, the deleted membership number is NOT available for reuse

To delete AND archive a vehicle so that the vehicles is removed from the members (eg it was sold) but records are retained of previous ownership, select the record and click the delete button in the subform header, as follows



These archived vehicle records can be viewed later by following the menus for archiving

To permanently delete a vehicle, (not recommended unless it was entered in error - preferably archive the vehicle record to keep the records as "once owned by") select the appropriate record selector so it is displayed as a black bar, then delete using the keyboard or the DELETE icon on the Home tab of the menu ribbon as described above

Year	Make / Model / E
1934	PLYMOUTH SEI
*	

To **SAVE** a record, or changes to a record. Because this is a database, not a spreadsheet or similar type of file, all changes are saved automatically when you leave the record or close the form or the database, however you can also save the record and stay on the same form to see all the final data, including the assigned member No, but clicking the save button 

Note that most fields have "Tool Tips" that display when you hover over the field with the mouse cursor. It describes what the field is and in some cases special functionality such as how to automatically update a field with a double click (such as for the Expiry Date where double clicking automatically sets the expiry date equal to the end of the previous membership year (fixed renewal dates) or the current date (variable renewal dates).)

Note that the form has various sections and tabs to record:

- **membership details**, including names, dates, membership types etc
- **mailing addresses**, including unlisted details that are not permitted to be published in the Member Register
- **Vehicles**, including Club Permit Scheme (CPS) details
- **Additional Members**, (optional) for recording associate/non-voting members or to record the birthdays of additional family members/children, which may be useful for printing in the Club magazine
- **Skills/Interests**, (optional) to record special skills that members may wish to be known, and could be included in the Club magazine or published in the Club Register

The **membership** data fields include the following

- Surname - family surname
- First Name #1 - First name of the first member (required).
- First Name #2 - First name of the second member (optional).
 - These 2nd member fields will be hidden if the database is configured for "SINGLE MEMBERS ONLY" in the Master config. They should be hidden if only one person per membership is a full member with voting rights, so that the Member Register correctly reports only actual Club members. All other family members may be recorded in the Additional Member tab
 - NB: If a second name is included here, it is assumed that this name is being recorded as a member with the same rights as the first member. For example if your club has a "Family Membership" type that allows up to two named members with full voting rights then these

names should be recorded as #1 and #2. Both names will then appear in the Member Register.

- If the second name does NOT have the same membership rights as Name #1, then leave Name #2 blank and record the names of partners, children or other associate members in the "Additional Members" tab. These names do NOT appear on the Member Register. This ensures that the Member Register only includes FULL Members, eg those with FULL voting rights, even though all names recorded may be considered financial (eg for the CPS scheme), depending on your Club Rules/Constitution
- Birth Date - (optional) enter the birthday of the member #1 and #2. Enter either the full date (dd/mm/yy) or enter the date with the year = 1900 if it is not known. This will enable annual birthdays to be recorded without revealing the year of birth (for those who are less revealing!). Use the calendar to select dates if required.
 - NB: If birthday details are not required then they can be hidden from this form and renewal notices by selecting the Hide Birthdays option in the Master Configuration
- Salutation - Add the member's initials or change to MR & MRS A. etc. It is used as a polite alternative in the mailing addresses, such as when generating mailing addresses/labels for posting
- Member type - Select either Member, Life member, Non-Member or Associate member
 - Life members automatically remain "financial" each year without having to process a membership renewal payment, but are otherwise considered full members They do receive a renewal notice (to ensure the database information is correct) but are automatically renewed each year and, if required, must be manually expired
 - Non-Member - are entities that receive copies of the magazine but do not need to be financial members. They will be included in specific extracts and mailing lists, but excluded from the list of financial members. They do receive a renewal notice (to ensure the database information is correct) but are automatically renewed each year and, if required, must be manually expired
 - If necessary for your Club membership structure, additional Member Types can be added, such as Associate, as long as they are a sub-category of "Member" with the same rights as other financial members (ie receive the same communications, renewal notices, magazine deliveries, and CPS permission as a member).
 - Follow the menus to Database Maintenance>Change Configuration>Maintain Member Type to add additional member types
 - Although multiple member categories can be used (eg Member, Youth, Associate, etc) only one type of Non-Member and Life-member classification is permitted) NB: Only the Non-Member types are excluded from the Member Register Report
- Member No - always leave this field blank to default the next available member No. There are two next number series that can be maintained in the system maintenance menus. One is for Club members, and the other is for non-members (who really don't need a number, but this database does, so nonmember Nos start at 100,000 to keep them separate)
- Date Started - Enter the date that the membership started
 - it is usually a requirement to have this data if the Club is an incorporated body.
 - The default is today's date.
- Expiry Date - Enter the expiry date or double click this field to enter the date at the end of the previous Club membership year (if using fixed renewal dates) or today's date (if using variable renewal dates). This will record them as an un-financial /expired member, for example when nominating members who have not paid their current year fees.
 - NB: If using a fixed renewal date, the Club's expiry anniversary date is maintained in the Club Master data (it is automatically updated as each year passes)
 - When a member is expired most fields on the form become greyed out/disabled.
 - NB: To UNEXPIRE a members simply delete the Expiry date and save it
- Renewal Date - defaults to the next fixed renewal date, or if using variable renewal dates it defaults to 1 year past the current date

- This date can be updated each year when the renewal is to be recorded. Either Click the “Record Renewal” button, or double click the Renewal Date field, to advance the date by 1 year. Alternatively edit the date to set a new renewal date.
- If a member is renewing with a payment for multiple years then repeat as many times as necessary
- NB: Non-Members and Life Member Renewal Dates are automatically advanced by 1 year once the renewal date is passed. No manual maintenance is required
- No of Copies of the magazine (enter 0 or 1)
 - If values greater than 1 are used you need a mechanism to display this on the magazine address label if they are to be posted together (eg per the sample mail merge document called *Club Magazine Address.docm*) so that the magazine wrapping and posting process can correctly pack the required magazines.
- No Print Flag - Should be ticked for those membership types with an online magazine instead of a printed magazine.
 - If this box is ticked then the member details are NOT included in the postal address lists, but are only included in the email lists. This enables the use of separate delivery methods when communicating with members ie by post or by email, which some Clubs link with different membership rates
 - NB: A “No Print” member is NOT the same as a member who receives no magazines.
 - “No-Print” members are expected to have an email address so that all club communications can be by email (eg magazine passwords, Renewal Notices, Final Reminders etc)
 - Members with Magazine Count = 0 are assumed to require postal communications
- Payment method - (optional) a simple reminder to help manage renewals processing
- Comments - optional comments can be recorded for each member. These comments do NOT appear on any reports and can be used as future reminders, or as a record of troubleshooting outcomes.
- Record Renewal Button - use this button to quickly update a member record for another year of membership. It adds 1 year to the renewal date, and clears the Payment method and reference text and sets the reference date to the current date.
- Send Receipt Button - If using the emailing functionality then click this button to send a receipt by email to the relevant email address(es) after prompting for the Receipt amount. If emailing has not been configured previously, then follow the prompts to set this up (or use the separate menu tasks to configure and test the setup first)
 - The nearby “?” button can be clicked to display a history of renewal receipts (NB: This button is only available if the financial receipts functionality has been activated according to the update dated 1/6/2024
 - Receipt history is only saved if the functionality has been activated, and only if the Send Receipt button has been clicked and processed to send an email or display a PDF for printing (actual printing is not needed, but the receipt must be generated)
- Choose a Record Update action... dropdown list - choose from the following actions
 - Send a Renewal - can be used to display a membership renewal form ready for printing. It is also useful for printing membership details for a single member. If the member has an email address then the option is given to email the renewal report (this can be used to send emails with a webmail account - refer to Appendix J), otherwise it can be displayed for printing
 - Send Final Reminder - can be used to display a membership Final Reminder ready for printing if they are unfinancial. If the member has an email address then the option is given to email the report, otherwise it can be displayed for printing
 - Reset Print Member Trigger - Every new member added is configured to print a membership card (refer to the Custom Reports database for these options) but can only be printed once. If it is accidentally printed incorrectly, use this option to reset the trigger so it can be printed again

- Reset Report new Member trigger - Every new member can be printed on a New member Report ONCE. If the report is accidentally printed, use this option or a member who needs to be reset to appear on this report
- Transfer name #2 to the Additional Families tab - use this action to transfer the 2nd member name and birthdate from the membership record as a named (and therefore typically a voting) member to the Additional Family members tab where they only appear on the birthday list rather than as a named/voting Club member

Address Details (Published Home Contacts) are included in the printed member register and include:

- Extra mailing Title - optional extra first line of an address, eg "ATT: Joe Blogs"
- Address - unit, number, street etc
- Town - name of the town/city
- State - This value defaults from the master data, or change it if necessary. International addresses should include the country here
- Postcode - Post Code or overseas zip code etc
- Mail Code - leave blank - this value updates automatically based on the post code and is used to sort mail for Clubs using PRINT POST for bulk mail discounts
- Telephone - home or business phone No. NB: for neatness when printing the Member Register consider entering them the same way every time eg 01 1234 1234
- Mobile - mobile phone No. NB: for neatness when printing the Member Register consider entering them the same way every time eg 0432 123 456
- Email - enter the email address used for communications or magazine delivery
- Class 1 - Optional: Enter a value that can be used to filter the mailing list (eg to create special mailing list segments)
- Class 2 - Optional: Enter a value that can be used to filter the mailing list (eg to create special mailing list segments)

Unlisted Contact Details/Alternate Mailing Addresses do NOT display in the printed member register, but may be used to record the actual postal address for the magazine. They include address and telephone options

- If an address is to remain unlisted it is still required for mailing purposes. Enter the details on the right hand side of the address section, and enter "UL" in the published address field (this propagates the UL code to all other published address fields) or populate both sets of addresses to record the home address and an alternate preferred mailing address
- If the unlisted/Alternate Contacts address is populated it is used for postal purposes, instead of the published home contacts
- The email address cannot be unlisted. If it is used it must be available for publication in all cases.
- NB: There is a special version of the Member Register report that does display unlisted addresses and phone numbers - it is intended for committee use only, rather than for general publication
- Hint: Click on the arrow button to transfer a published address to the unlisted address fields

Vehicle details can be added to any user, but only appear in Vehicle registers if the member is financial. Details include:

- NB: The number above the tab indicates the record count of vehicles for this member
- Year - enter the vehicle year of manufacture
- Make /Model/ Body Style - enter the vehicle name and type. Use the same spelling if possible for the various makes and models and body type relevant for your club. The words used in these descriptions should be standardized and spelt in full if possible, so the Summary Register Report can be designed to report the count of the various makes and models and body types (including SEDAN)
- An alternative method of entering this information is to enter data in the separate fields for Make, Model and Type. As these fields are populated they are concatenated to form a single description that is used in the vehicle reports.
 - Initially the dropdown lists for Make/Model/Type are not populated but are automatically populated with values that have been entered previously. If the required value is not visible in

the list then manually enter it and save the record. The next time the form is used the new value will be available to select if required

- Condition - select the most appropriate description from the drop down list.
NB: Cars marked as 'N=Non-Club Marque' can be included in the database, but are not included in the Club Vehicle Register. This enables a member to include, say, a Holden in a Ford club database if the member has the Holden on CPS plates via that club, but it is not displayed in the printed Ford club vehicle register report
- Permit - Enter the CPS plate No of any cars with permits approved by this club. If the car has permit plates via another club then do NOT record those details here.
 - This enables the reports to clearly indicate those cars with CPS permits that are managed by this Club (Hint: If the CPS is not via your Club then record the Plate No in the Rego field)
- Expiry Date - Enter the expiry date of the current permit. This usually requires the member to advise the club of the expiry date after they have received their permit from VICROADS. It can be used to track permits that may have expired, or where the member has not advised of their current year details.
- Last Signed - Enter the date of the last Club signature authorizing a CPS application/renewal
 - This is optional information to record when the permit was last processed by the Club
- Custom Date - Enter the date to record a significant event for your club vehicle management
 - This is optional information that can be used to record the receipt of signed permit declarations, inspections etc
 - The label that appears on forms and reports to describe the purpose of this date can be changed in the Master Data configuration
- Days - Enter the No of Logbook Days for the CPS permit (optional information)
- Rego - Enter the Registration No if the vehicle is fully registered. This can be useful for identifying cars from display day photos. Also use this field to record the Permit Plate No of cars NOT managed by your Club
- Colour - Enter the colour of the car. This can be useful for identifying individual cars where a member has many similar model cars
- Body No – Enter a Body No/VIN (optional information)
- Engine No – Enter an Engine No (optional information)
- Photo URL – Enter a URL pointing to a PDF document, photo (eg JPG, PNG) or photo folder (ie containing multiple photos).
 - If sharing the database with other users then these URLs should point to an online data source, such as a Google Drive or OneDrive photo or folder, using a valid URL with the required sharing permissions
 - If the database is not shared with other users then the URL can use the local file syntax <file:///C:/users/myname/documents/foldername/photo1.jpg> although note that this is prone to data loss/error if the database is moved to another PC or files are moved
- Comment - Enter other comments or ID details (optional)
- Rather than deleting a vehicle record when it has been disposed of by a current member it is convenient to simply archive it so that it is retained as a historical record of vehicles owned, permit plates transferred etc.
 - Archive the record for a disposed vehicle by selecting the vehicle record and clicking the Archive Vehicle Button on the Vehicle maintenance tab

Year	Make / Model / Body Style		Condition	Permit
------	---------------------------	---	-----------	--------

- The archived disposed vehicle records can be viewed in Database Maintenance (menu)...Archiving and Retrieval (menu)

Additional Members is useful to record associate members, or other non-voting family members (eg partners and children) and can be used to record birthdays for magazine birthday clubs, or other purposes. As many entries can be entered as is required

- NB: The number above the tab indicates the record count of Additional Members for this member
- Full Name - enter the full name (not just first name)
- Birthday - Enter either the full date (dd/mm/yy) or enter the date with the year = 1900 if it is not known. This will enable annual birthdays to be recorded without revealing the year of birth (for those who are less revealing!). Use the calendar to select dates if required
- Year - this is not an entry field, but displays the year if it was included in the entered date
- Relationship - enter their relationship to the member, eg wife, husband, spouse, partner, child etc, or choose from the dropdown list to select from previously used values. This field is searchable in the Search MEMBERS form and can be used to identify and report specific member types such as Junior Members by using the relationship type = JUNIOR, for example.
- Note that as of version 20201216 these additional family names can be searched and reported using the Search MEMBERS form

Skills/Interests may be useful to record special skills that members are prepared to share, or interests or qualifications that they have. There is a separate Skills/Interests register to report on this information

- NB: The number above the tab indicates the record count of skills for this member
- Information Type - Enter a record type, eg SKILL, INTEREST or use the dropdown list to select from previously used values. This record type can be used as a filter for inquiries or reports via the Search SKILLS/INTERESTS form
 - Other record types can be used to identify a specific qualification such as WCC-VIC (ie Work With Children Check – Victoria) to facilitate management and identification of specific qualifications
- Skills - Enter details as required to describe the skills, knowledge, interests or qualifications
- Date – (optional) – use this date when applicable, eg for an expiry date of a specific qualification, such as Working With Children checks. This field is searchable in the Search SKILLS/INTEREST form to identify and report current or expired qualifications

Search Forms

Follow the menus to perform searches of the member or cars database, with the option to edit or print a report of the records found. They are useful for adhoc searches, eg to generate a list of members/vehicles of a particular model or type. Depending on the search field the options may include searching for a particular word/text string (such as find all coupes, using the search word “coupe”) and can be combined with all other search fields (eg to search for all “coupe”s between 1960 and 1970)

1. Select the menu task called **Search MEMBERS** to display the following form

Member No	Name	Relationship	Town/State/Country	P/Code	State	Tel	Mobile	Email	Entry Date	Renewal Date	Member Type	No. Magazines	Class 1	Class 2
2	GEORGE ALEXANDER	Unlisted	MICKLEHAM	3064	VIC	03 9788 7397	0424 646 802	email1@bigpond.com	17/10/1975	31/10/2017	Member CURRENT	1		
13	MICK BLANKLAND	Unlisted	GREENSBOROUGH	3088	VIC	03 9996 8890		email2@bigpond.com	17/10/1975	31/10/2018	LifeMember CURRENT	1		
27	GLENN DELAWARE	Unlisted	MENKTREE Gully	3156	VIC	03 9297 5387	0424 884 248	email4@bigpond.com	1/02/1976	31/10/2017	Member CURRENT	1		
29	CHRIS ESLAKE	Unlisted	NEWBOROUGH EAST	3825	VIC	03 9998 8737	0424 448 232	email5@bigpond.com	1/02/1976	31/10/2017	Member CURRENT	1		
30	KEVIN FUNGLY	Unlisted	ELTHAM	3095	VIC	03 9779 9663	0404 842 340	email6@bigpond.com	30/04/1976	31/10/2018	LifeMember CURRENT	1		
31	JOHN GOODS	Unlisted	MERRIM SOUTH	3831	VIC	03 9677 2888			19/11/1976	31/10/2018	LifeMember CURRENT	1		
32	ILEX HARMAN	Unlisted	LOWER TEMPESTOWNE	2208	VIC	03 9882 9788			28/11/1976	31/10/2017	Member CURRENT	1		

- a. Use the search fields at the top of the form, noting whether the search is From, To, contains or equals. Some searches can select the desired comparison type
- b. As each Search criteria is entered the form displays the matching data
- c. If required, use the EDIT button to open the forms for editing the data
- d. If required, use the buttons at the bottom of the form to print a report containing the displayed records. NB: The reports generated will only include data relevant to the records

selected/displayed on the form, so they are a powerful tool for reporting or extracting data relevant to a particular member or vehicle inquiry

- e. Use the Clear Filters button to reset the search criteria to the default. If necessary select record from the main database only, or include records from the archived data as well
2. Select the menu task called **Search VEHICLES** to choose between search the CURRENT Vehicles only, or to search CURRENT, ARCHIVED and DISPOSED vehicles simultaneously (eg to trace the history of ownership).

- a. The current vehicle search will display the following form

Member No	Name	State	Renewal Date	Year	Description	Code	Rego	Permit	Expiry Date	Last Signed	Colour	
44	FRED TODD	VIC	11/10/2017	1924	CHRYSLER 870	UR						
32	LEX HARMAN	VIC NSW	11/10/2017	1924	CHRYSLER 870 ROADSTER	R	ABC-123				GREY/GREEN	
40	JEFF PEACEMAN	VIC	11/10/2017	1924	DODGE TOURER	UR						
60	PAUL LAMB	VIC	11/10/2017	1925	DODGE TOURER	R						
45	IAN UNLEY	VIC	11/10/2017	1926	CHRYSLER 60 SEDAN	UR						
54	STUART ELDERBURY	VIC	11/10/2017	1926	CHRYSLER 70 SERIES UTILITY	UR						
47	GRAHAM WALLIS	VIC	11/10/2017	1926	DODGE TOURER	UR						
71	ROZ WHILEY	UL VIC	11/10/2017	1926	DODGE 4 TOURER	O		2-452	45	1/01/2013	1/01/2013	GREY / BLACK
47	GRAHAM WALLIS	VIC	11/10/2017	1929	CHRYSLER 65 ROADSTER	O						
48	TOM YOUNG	VIC	11/10/2017	1929	CHRYSLER 65 SEDAN	O						
2	GEORGE ALEXANDER	VIC	11/10/2017	1929	CHRYSLER 65 TOURER	R	DEF-123				GREEN	
53	MIKE DAFFODIL	VIC	11/10/2017	1929	DODGE DA BUDD SEDAN	R						

- b. The CURRENT, ARCHIVED & DISPOSED VEHICLES search will display the following form

Member No	Name	Vehicle Status	Year	Description	Code	Rego	Permit	Body No	Engine No	Colour
2	GEORGE ALEXANDER	CURRENT VEHICLE	15-Feb-16	1929	CHRYSLER 65 TOURER	R	DEF-123			GREEN
2	GEORGE ALEXANDER	CURRENT VEHICLE	27-Jan-16	1930	CHRYSLER V70 SEDAN	UR				
13	MICK BLAKLAND	CURRENT VEHICLE	27-Jan-16	1937	DESOTO S3 COUPE	R		8862 - H		BROWN
13	MICK BLAKLAND	CURRENT VEHICLE	27-Jan-16	1956	DESOTO FIREDOVE SEVILLE 2DR H/TOP	R	ABC-123			PINK/WHITE
20	GRAEME COOPER	CURRENT VEHICLE	27-Jan-16	1926	DODGE 4 ROADSTER	R		6-518		MAROON
20	GRAEME COOPER	CURRENT VEHICLE	27-Jan-16	1930	DODGE DD SEDAN	R	ABC-123			YELLOW/BLACK
20	GRAEME COOPER	CURRENT VEHICLE	27-Jan-16	1963	PLYMOUTH VALIANT TV200 SEDAN	O		CH581K		CREAM
27	GLENN DELAWARE	CURRENT VEHICLE	27-Jan-16	1962	VALIANT S SERIES SEDAN	O	ABC-123			GREEN
29	CHRIS ESLAKE	CURRENT VEHICLE	27-Jan-16	1977	CHRYSLER SEDAN	UR				
30	KEVIN FUNGUY	CURRENT VEHICLE	27-Jan-16	1934	CHRYSLER CA ROADSTER	UR				

- i. Use the search fields at the top of the form, noting whether the search is From, To, contains or equals. Some searches can select the desired comparison type
- ii. As each Search criteria is entered the form displays the matching data
- iii. If required, use the EDIT button to open the forms for editing the data
- iv. If required, use the buttons at the bottom of the form to print a report containing the displayed records. NB: The reports generated will only include data relevant to the records selected/displayed on the form, so they are a powerful tool for reporting or extracting data relevant to a particular member or vehicle inquiry
- v. Use the Clear Filters button to reset the search criteria to the default

3. Select the menu task called **Search SKILLS/INTEREST** to display the following form

Member No	Name	Town/State/Country	P/Code	State	Tel	Mobile	Email	Member Type	Info Type	Info Description	Info Date
2	GEORGE ALEXANDER	Unlisted MICKLEHAM	3064	VIC	03 9788 7397	0424 646 802	email1@bigpond.com	Member	WCC-VIC	Work With Children Check Victoria	17-Dec-2020
50	COLIN APPLE	Unlisted UL	UL	UL	UL	UL	email17@bigpond.com	Member	SKILLS	Wood Work	
	ALEX APPLE	Unlisted MAFRA	3860	VIC	03 5344 3413						

- Use the search fields at the top of the form, noting whether the search is From, To, contains or equals. Some searches can select the desired comparison type
- As each Search criteria is entered the form displays the matching data
- If required, use the EDIT button to open the forms for editing the data
- If required, use the buttons at the bottom of the form to print a report containing the displayed records. NB: The reports generated will only include data relevant to the records selected/displayed on the form, so they are a powerful tool for reporting or extracting data relevant to a particular member or vehicle inquiry
- Use the Clear Filters button to reset the search criteria to the default

Mailing Choices

Follow the menus to generate the following reports and extracts

1. Mailing/Emailing & Renewals/Expiry (menu)

a. Mailing Labels and Extracts (menu)

i. Print mailing Labels

- Answer the prompts to exclude "No Print" and/or Life members, if required, from the full list of members. The report can be used to print on standard mailing labels or on A4 paper that can be cut up and pasted onto envelopes for relatively cheap mailing option

ii. Extract - to update Mailing List

- Generates a query extract of members and non-members, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel spreadsheet)
NB: This extract can be used to copy and paste into a mailing list, such as MailChimp or Brevio (formerly SendInBlue) (refer Appendix G)

b. Send Magazine and Renewals Notices (menu)

i. Print Renewals Notices and Coversheets for the Magazine

- Answer the prompts to print mailing sheets for all printed magazine recipients. These can be printed in a single sided A4 format for use in mailing the magazine (eg in a plastic/transparent wrapping For those members whose renewal is pending the mailing sheet can be substituted with a membership renewal form which is generated as a separate file for printing as a double sided A4 page. This coversheet is used instead of the mailing coversheet with the confidential member details printed on the back of the address page. It includes all printed magazine recipients, including non-members. Both options should be suitable for use in windowed DL envelopes to avoid the need for address labels

- a. If the Renewal Notice is printed then this can be recorded automatically so that they are not printed again for the same renewal date
 - b. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing, or if required, address labels can be generated. Alternatively the double sided renewal can be used as an A4 coversheet for a plastic wrapped magazine
2. By sending these renewals forms each year to confirm the data actually held in the database, it is likely to keep the database much more accurate and reduce the workload of maintaining changes that are advised as corrections.
 3. The printed two page Renewal Notice is intended for double sided printing by sending the report as a PDF to the magazine print house, or another printer capable of double sided printing.

ii. Print Mailing List Summary

1. Prompts for entry of the number of extra magazines to print before generating a Mailing List Summary that can be used when submitting magazines for bulk mailing by PRINT POST. It also indicates how many magazines need to be printed to meet all requirements. This summary includes all financial members and non-members who receive a printed magazine

iii. Email or Print Renewals Notice for 'NoPrint' Members

1. Prompts to send renewal notices by email to No-Print Members, or print them for posting instead.
 - a. If the Renewal Notice is emailed or printed then this can be recorded automatically so that they are not emailed or printed again for the same renewal date
 - b. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing, or if required, address labels can be generated
2. The emailed Renewal Notice prompts with an email formatted with a message and the Renewal Notice as a PDF attachment (using an SMTP Relay Service configured for use on the sending PC. NB It cannot use a browser based email client like Gmail). Emails are sent in small batches (default = 30) as defined in the Master data. This enables the sender to limit the number of emails sent per batch to minimize the risk of exceeding daily of monthly sending limits.
3. If the option to email is NOT selected for "No-Print" members then they can be included in the printed renewals notices and sent by post instead
4. An option exists to also print accompanying mailing addresses on standard mailing labels or on A4 paper that can be cut up and pasted onto envelopes
5. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing.

iv. Email or Print Renewals Notice for emailable Members

1. Prompts to send renewal notices by email to Members with an email address, or print them for posting instead. It is an alternative to the above No-Print option, for those clubs that wish to email notices, but do not have the concept of a no-print member
 - a. If the Renewal Notice is emailed or printed then this can be recorded automatically so that they are not emailed or printed again for the same renewal date

- b. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing, or if required, address labels can be generated
2. The emailed Renewal Notice prompts with an email formatted with a message and the Renewal Notice as a PDF attachment (using only an Outlook or Outlook Express mail client configured for use on the sending PC. NB It cannot use a browser based email client like Gmail). Emails are sent in small batches (default = 30) as defined in the Master data. This enables the sender to limit the number of emails sent per hour to minimize the chance of emails being rejected as spam
3. If the option to email is NOT selected for "No-Print" members then they can be included in the printed renewals notices and sent by post instead
4. An option exists to also print accompanying mailing addresses on standard mailing labels or on A4 paper that can be cut up and pasted onto envelopes
5. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing.
6. If emailing the renewal notices it is possible to also include a second, custom, attachment in the email for example to attach a survey form of another form to collect other information not included in this database. This file can be defined in the Master Configuration form

v. Print Renewals where magazines not sent

1. Use this option to print renewal forms if you have membership types that do not receive a magazine (either printed or online) as this type of member is not included in any of the above renewals options.
2. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing.

vi. History of Sent Reports (For Renewals and Final Reminders).

1. If a Renewal or Final Reminder is printed or emailed then it is recorded for display here, once for each renewal date. Each saved record prevents them from being generated multiple times. These records can be deleted individually if they need to be emailed or printed again.
 - a. These records are also useful to determine whether the Renewals were printed or emailed, and on what date

To choose the best option for printing or emailing membership renewals choose the best option as follows:

1. *If you DO use the concept of PRINT and NO PRINT memberships, then*
 1. use **"PRINT Renewal Notices and Cover Sheets for the magazine"** to generate renewals for those who receive a printed magazine
 1. one double sided report includes the renewals that are due
 2. the other single sided report includes a cover sheet for those whose membership is not due (can be ignored if not needed as an actual magazine cover sheet)
 2. use **"EMAIL or Print Renewal Notices for 'No Print' members"** to either email or print the renewals due
 3. use **"PRINT Renewals where magazines not sent"** to print renewals for someone who should have been included in the second of the above options, but was not because they did not have a valid email address recorded
2. *if you DO NOT use the concept of PRINT and NO PRINT memberships then (assuming none is recorded as a NO PRINT member)*
 1. use **"PRINT Renewal Notices and Cover Sheets for the magazine"** to generate renewals for everyone who receives a printed magazine
 1. one double sided report includes the renewals that are due
 2. the other single sided report includes a cover sheet for those whose membership is not due (can be ignored if not needed as an actual magazine cover sheet)
3. *Whether or not you use the concept of PRINT and NO PRINT memberships, if you want to send all renewals by email instead of printing then*
 1. use **"EMAIL or Print Renewal Notices for all emailable members"**

2. use **"PRINT Renewal Notices and Cover Sheets for the magazine"** to generate renewals for the remaining members who do not have an email address
 1. one double sided report includes the renewals that are due and have not already been emailed
 2. the other single sided report includes a cover sheet for those whose membership is not due (can be ignored if not needed as an actual magazine cover sheet)

c. Send Final Reminder of Membership Expiry (menu)

i. Show Members to Expire (past renewal date)

1. Displays an extract of financial members whose Renewal Date is past due. These members are eligible to receive a Final notice, either by email or by printed post

ii. Email or Print Final Reminders

1. Prompts to send Final Reminders by email to Members with an email address, or print them for posting instead. It only includes financial members whose Renewal Date is past due and should be sent prior to the end of the relevant grace period. It does not include Non-Members or Life members as they are automatically 'renewed'
 - a. If the Final Reminder is emailed or printed then this can be recorded automatically so that they are not emailed or printed again for the same renewal date
2. If the option to email is NOT selected for members with email addresses then they can be included in the printed Final Reminders and sent by post instead
3. An option exists to also print accompanying mailing addresses on standard mailing labels or on A4 paper that can be cut up and pasted onto envelopes
4. By sending out a Final Reminder, the disruption to membership and CPS permit eligibility can be minimized for the member and the Club, by providing a second chance to submit their membership renewal
5. The emailed Final Reminder prompts with an email formatted with a message and the Final Reminder as a PDF attachment (using only an Outlook or Outlook Express mail client configured for use on the sending PC). Emails are sent in small batches (default = 30) as defined in the Master data. This enables the sender to limit the number of emails sent per hour to minimize the chance of emails being rejected as spam
6. The printed one page Final Reminder is intended for single sided printing.
7. If required, they can be folded and posted in a standard windowed DL size envelope without the need for manual or label addressing, or if required, address labels can be generated
8. If emailing the final reminder notices it is possible to also include a second, custom, attachment in the email for example to attach a survey form of another form to collect other information not included in this database. This file can be defined in the Master Configuration form

iii. History of Sent Reports (For Renewals and Final Notices).

1. If a Renewal or Final Reminder is printed or emailed then it is recorded for display here, once for each renewal date. Each saved record prevents them from being generated multiple times. These records can be deleted individually if they need to be emailed or printed again.
 - a. These records are also useful to determine whether the Reminders were printed or emailed, and on what date

iv. Show Members to Expire (past grace period)

1. Displays an extract of financial members whose Renewal Date is past due and past the allowed grace period. These members are eligible to be expired now

v. Expire Unfinancial Members Now

1. This automated update prompts for permission to expire all members whose renewal date exceeds the allowed grace days. Once this is done they are no longer included in the mailing lists
 - a. If necessary, use the above option to show members eligible for expiry, before expiring them
 - b. Once expired the members are eligible to be archived to a separate database

d. Email Setup (menu)

i. RESET the Method of sending emails

1. ~~Resets the configuration by prompting to choose between emails sent using the default Windows email client (eg Outlook or Outlook Express) or using a webmail option~~
NOTE: As of April 2018 Microsoft updated Outlook with new security features that prevents emails being sent from outside Outlook, even by Microsoft applications such as MS Access. So it is NO LONGER POSSIBLE to send emails directly from the Car Club Register using Outlook as the email client. The only option is the CDO method
2. Choose this option to change an existing working configuration.
NB: if emailing fails using the chosen option then it is automatically reset to change the preferred option

ii. TEST the Method of sending emails

1. Test the current email configuration to confirm it successfully sends emails.
2. It prompts for values not currently defined before sending an email using the entered settings

Reports

2. Register Reports (menu)

a. Member Reports (menu)

i. Print Member Register

1. This printable report is suitable as the published member register available to members. It includes addresses, phone numbers and email addresses. The register does NOT include "unlisted" addresses and phone numbers

ii. Print Member Register (with Unlisted Details)

1. This printable report is suitable as a member register available only to executive committee committed to preserving the privacy of unlisted addresses and phone numbers. The register includes both listed and "unlisted" addresses and phone numbers

iii. Extract - Financial Members + NonMembers

1. Generates a query extract of members, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel spreadsheet)
NB: This extract can be used as a mail merge datasource instead of using the database itself.
2. NB: It includes unlisted addresses

b. Print Vehicle Register

- i. This printable report is suitable as the published vehicle register available to members. It includes vehicles, sorted by age, referencing the member details in the Member Register

- c. **Print Help Register**
 - i. This printable report includes any help skills record for a member
 - d. **Print Vehicle Permit Reports (menu)**
 - i. **Print Financial Members with Vehicle Permits**
 - 1. This report documents all members with Vehicle Permits, and includes details recorded of those permits
 - ii. **Print Unfinancial Members with Vehicle Permits**
 - 1. This report documents all unfinancial members with Vehicle Permits, and includes details recorded of those permits. It could be used as a report for VICROADS to confirm vehicles that may no longer comply with the requirement for a vehicle permit owner to be a financial member of the Club
 - iii. **Vehicle Permit Register (Extract)**
 - 1. Generates a query extract of Vehicles with a Club Permit, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel spreadsheet).
 - 2. It does not include unlisted addresses
 - iv. **Vehicle Permit Register (Extract sorted by expiry date)**
 - 1. Generates a query extract of Vehicles with a Club Permit, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel spreadsheet).
 - 2. It can be used to help identify Club Permit vehicles who's permit has or is due to expire
3. **Other Register Reports (menu)**
- a. **Print Register Summary**
 - i. This one page report summarises details of members and their vehicles. It is configurable (refer master data setup) to suit the characteristics of your club membership and vehicles. This can be a really interesting report if configured correctly
 - b. **Print New Members**
 - i. This report requires input of a Member No before printing details of new members who have joined the Club since the input Member No. It is useful for periodic reports that can be included in the Club magazine to introduce new members.
 - c. **Members Years of Service (Extract)**
 - i. Requires input of a minimum years of service, before extracting details of members who exceed that period of membership. It is useful for determining potential years of service awards for the current membership year
 - d. **Print Email Register**
 - i. This report displays all members with email addresses, sorted alphabetically by email address.
 - ii. It can be used to easily identify a member from their email address, although this can also be done using the search options on the first menu page

Extracts

- 4. **Register Extracts (menu)**
 - a. **Member Register (excludes unlisted addresses)**
 - i. Generates a query extract of Members details (without unlisted addresses), which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel

- ii. It can be used to prepare a member register in a different format to the Report generated in this database
- b. Non-Member Register**
- i. Generates a query extract of Non-Members details (without unlisted addresses), which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel)
- c. Vehicles Register with Member Details**
- i. Generates a query extract of Members and their vehicles (without unlisted addresses), which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel)
 - ii. It can be used to prepare a vehicle register in a different format to the Report generated in this database
- d. Help List**
- i. Generates a query extract of Members, contact details and their nominated skills, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel)
- e. Birthday List**
- i. Generates a query extract of Members, partners and associated family members and their birthdays, which can be exported to Excel. (from the MS Access menu/ribbon choose External Data...Excel and nominate the file name/path to save as an excel)
 - 1. The extract is sorted by date, and displays their birthday age in the current year for all significant birthdays (which includes all birthdays under 21, and all decades 30, 40, 50... etc). Use this information for special mentions in the magazine.
 - 2. NB: Members may or may not include their birthdays in the database, and if they do then they may choose to include the year of birth (in which case a significant birthday can be calculated). Alternatively, for personal reasons, they may only advise the day and month (in which case a significant birthday cannot be calculated).
 - a. Remember that all birthdays where the year is not known, they can be recorded as 1900, in which case the year is ignored
- f. Member and Vehicle Count History**
- i. This displays data collected of member and vehicle counts, triggered when magazines or renewals are printed, and when members are expired (for historical tracking of member/vehicle growth).
 - ii. It ensures a log is automatically generated, either monthly or annually or both, depending what functionality is used in the database, of member and vehicle counts that enable the membership and vehicle counts to be tracked over time so that membership growth can be accurately monitored and reported. This data is extremely difficult to calculate in retrospect so recording this at the time is a better option. Historical data can also be added to this table manually eg to add historical data that has been captured or calculated manually.

Database Maintenance

5. Database Maintenance (menu)

a. Archiving and Retrieval (menu)

- i. In order to reduce the number of records in the active membership database, expired members details (including vehicles) can be archived to a separate "archive" database. If necessary, eg if a member rejoins and is permitted to reuse their old membership No, those archived records can be retrieved before manually updating any differences that may apply. Note that not all data is retrieved faithfully - for example the membership start date is reset to the retrieval date, rather than the

original entry date so that the database maintains a record of continuous membership.

ii. Show Members Expired and Ready to Archive

1. Displays an extract of expired members ready to be archived

iii. Archive ALL expired Member/Vehicle records

1. This update query transfers all records for expired members and their vehicles to the archive database

iv. View Archived members

1. This extract displays details of members in the Archive database. Use it to identify the Membership Number of a member to be retrieved

v. Retrieve Selected records from Archive

1. After prompting for, and confirming, a Member No to retrieve from the Archive database the relevant member and vehicle details are returned to the active database as an expired member, where they can be manually updated to reactivate the membership (by setting Renewal Date and Magazine count)
2. Details of the original archive and retrieval dates are saved in the members comments for reference.

vi. View Archived Disposed Vehicles

1. This extract displays details of disposed vehicles in the Archive database. Use it to identify previous owners of a vehicle or permit No. These records cannot be retrieved back into the current database, but must be manually re-entered if necessary

6. Maintain User Security

- a. Used to control users restrictions such as Full, Readonly, or None - refer to Database installation instructions for further details
- b. NB: this setup is optional - if no records are set up then all users have full access

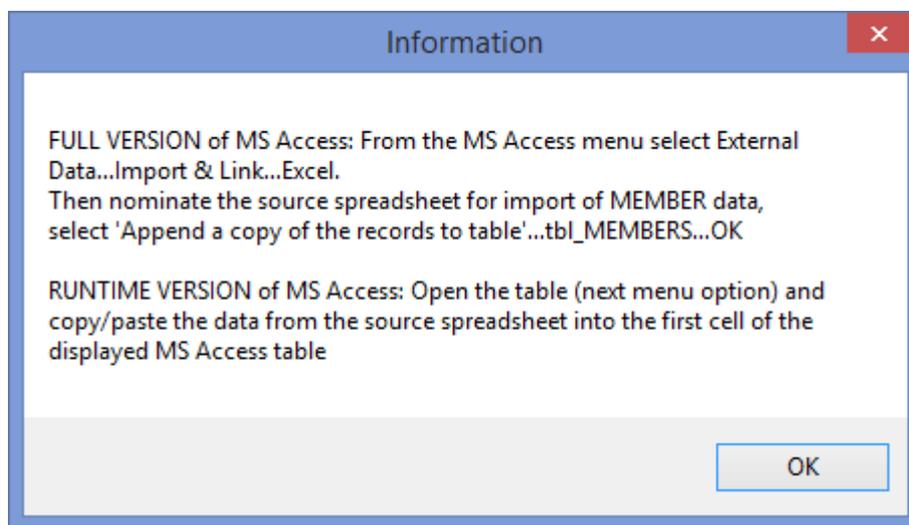
7. Data Upload (menu)

a. Import Data (Menu)

- i. Importing data can be achieved using the MS Access External Data import menu options to load data from a spreadsheet if you have the FULL version of MS Access, however RUNTIME versions of MS Access do not include this feature. It is therefore necessary to copy data from the spreadsheets generated above, before pasting them into the tables. This menu option provides access directly to those tables so the data can be pasted. It can be used with the FULL version of MS Access as well

ii. Import tbl_MEMBERS data (Instructions)

1. Display a reminder of the instructions on importing data from a spreadsheet into the database MEMBERS table using either the FULL or RUNTIME version of MS Access. More detailed instructions can be found in Appendix E

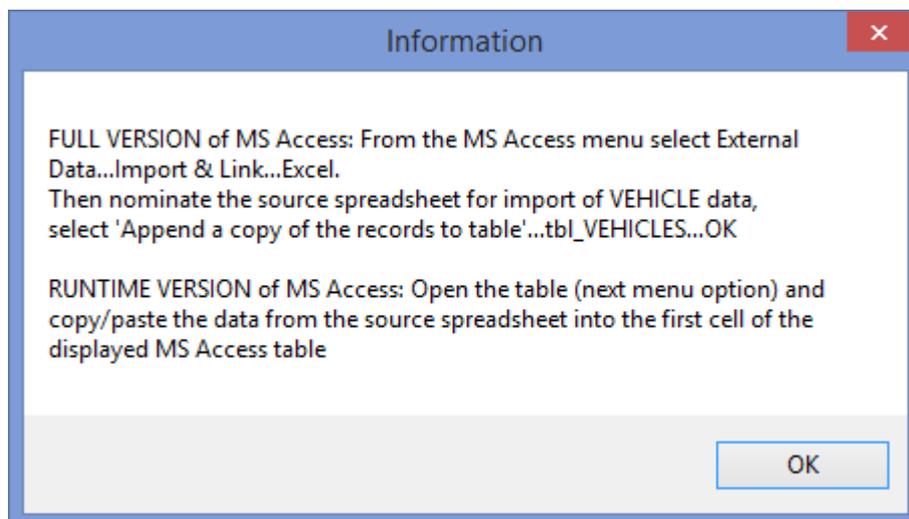


iii. Member data (tbl_MEMBERS)

1. Opens the table allowing data to be pasted directly into the table

iv. Import tbl_VEHICLES data (Instructions)

1. Display a reminder of the instructions on importing data from a spreadsheet into the database VEHICLES table using either the FULL or RUNTIME version of MS Access. More detailed instructions can be found in Appendix E



v. Vehicle data (tbl_VEHICLES)

1. Opens the table allowing data to be pasted directly into the table

b. Validate and Fix MEMBER data & report

- i. This update program processes the imported data to correct any formatting discrepancies (eg converting details to upper case where required), replace null values with "empty strings" and to assign the correct mail Sort Code based on the post code value supplied. It also updates the next number table with the correct next number seed for members and non-members, based on the records in the database
- ii. It then runs a report to identify data that is missing or otherwise invalid (eg no start date). These discrepancies should be manually corrected using the membership maintenance form, or corrected in the spreadsheet used for importing, before importing the data again

c. tbl_MEMBERS Validation Report only

- i. Runs just the member validation report to identify discrepancies. It can be run at any time to check the current member records

d. Validate and Fix VEHICLES data & report

- i. This update program processes the imported data to correct any formatting discrepancies (eg converting details to upper case where required), replace null values with “empty strings”
 - ii. It then runs a report to identify data that is missing or otherwise invalid (eg no manufacturing year). These discrepancies should be manually corrected using the membership maintenance form, or corrected in the spreadsheet used for importing, before importing the data again
 - e. **tbl_VEHICLES Validation Report only**
 - i. Runs just the vehicle validation report to identify discrepancies. It can be run at any time to check the current vehicle records
 - f. **Delete all records**
 - i. This update program deletes all member and vehicle data, including any archived records if present.
 - ii. It is used in order to empty the database before reimporting corrected data from an updated spreadsheet.
- 8. **Change Configuration (menu)**
 - a. **Maintain Club Master Data**
 - i. Used to configure master data for this database including Club names, addresses, bank details, renewal warning and grace days etc that are required to tailor all reports for your Club- refer to Database installation instructions for further details
 - b. **Maintain Next Numbers**
 - i. This table records the next number to be used when a new member or non-member is added to the database
 - 1. It should be automatically set to the correct values if a data import and validation process is run as described in the database installation instructions.
 - 2. DO NOT set this number to be less than any existing records or a “Key Violation error” may result if reuse of the same number is attempted
 - c. **Maintain Member Type**
 - i. This table includes the member types that can be selected for all database records. You can enter more types but please note the following
 - 1. Do NOT delete ‘Non-Member’. This is required for all entries who are not required to make payment (eg The State Library, and other clubs who receive copies of the magazine). When Renewal Notices are generated, they do not include demands for payment. Final Reminders are not generated as they are automatically “renewed” each year
 - 2. Do NOT delete ‘Life-Member’. This is required for all entries who are Life Members. When Renewal Notices are generated, they do not include demands for payment. Final Reminders are not generated as they are automatically “renewed” each year
 - 3. ALL OTHER other member types (existing or added) are treated as a member who needs to make payment to renew each year
 - d. **Maintain Postal Sorting**
 - i. Australia Post offer a discounted “PRINT POST” mailing scheme for approved publications, and this requires mail to be labeled and sorted for easy management in the post office. The mail is sorted, not by postcode, but grouped by regions called Sort Codes that exist within a Sort Division. This database supports the addressing of mail using PRINT POST sort codes and automatically updates the member sort code based on their postcode.
 - ii. The Mail Sort Code data in this database is updated regularly using data obtained from the Australia Post Website and should remain current unless new postcodes are introduced or the sort code are reassigned from existing postcodes.

1. NB: This data includes Sort Codes and Sort Divisions for all Australian States.
2. For all overseas countries it is assumed that they are not pre-sorted for Print Post processing
- iii. A menu option exists to refresh the Mail Sort codes in all member records. This can be run at any time, especially after updating the mail sort code data
- iv. Maintenance of this data is required from time to time, whenever Australia Post change the codes used, and they can be updated if necessary by accessing the tables using the following menu tasks. Contact the writer at mfenton@checksum.com.au if you wish to discuss options for maintenance

1. **Maintain Mail Sort Codes**

2. **Maintain Mail Sort Divisions**

e. Maintain Vehicle Condition

- i. These vehicle condition codes are valid values in the database lookup list
- ii. Values can be added or changed if necessary, however N= Non-Club Marque should remain to identify cars with permit plates issued in the Club name, but should not be included in the published Club Vehicle register
 1. This will keep Holdens out of the Ford Club vehicle register where a member has both vehicles types in the permit scheme from one club
- iii. If values are changed in this table then
 1. the lookup list in vehicle maintenance changes accordingly
 2. the descriptions included on the Renewals Report and the Vehicle Register Report may also need to be updated. Goto to Maintain Club Master Data... Renewals p2 tab to update the description displayed in these reports
 3. The labels and formulas in the Register Summary Report may also need to be changed

f. Maintain Permit Type

- i. These vehicle permit types are valid values in the database lookup list, and are prepopulated for the 45 and 90 day logbooks of the Victorian CPS system
- ii. Values (up to 5 letter code) can be added or changed if necessary, however the blank = Not Specified should remain as not all cars have permits.
- iii. If values are changed in this table then
 1. the lookup list in vehicle maintenance changes accordingly

g. Customise Report Formula

- i. Each Club may have a different structure that is relevant to how the Register Summary Report should be designed. The report can therefore be modified more easily by changing the formulas and labels in this table, rather than changing the Report Design, which would require MS Access development expertise.
- ii. Refer to Appendix F for instructions and sample formulae that can be replaced or modified. The database is originally configured with formulas used by the Chrysler Restorers Club of Australia (Vic) inc.
- iii. These should be replaced as required, however do NOT delete records. If the formula is not required, then simply clear the field in this table

Menu Favourites

On all menu pages there is an option to go to a Favourites menu, which each user can define to include the option they most commonly use. Refer to Appendix K for details on how to create and run the menu favourites.

Member Location Maps

Google My Maps has a very useful feature that can display data on a world maps, and this can be used to visualize the location of members on a Google Map if data is uploaded appropriately. The maps can then be shared with others or displayed on a website

Instructions for using this feature can be found at

<https://www.google.com/earth/outreach/learn/visualize-your-data-on-a-custom-map-using-google-my-maps/>

The Car Club Register now includes the ability the generate extracts that can be loaded into such maps. The extracts can be generated in 2 levels of detail.

1. **DETAIL BY MEMBER:** These extracts can generate a google map showing the location (address) each member, and then display the contact details of that member
 - a. **CAUTION:** Data privacy issues mean that this level of detail should be used with extreme caution as some Club Members may not have provided approval to share the information this way, or may simply be too spooked that it exists.
 - b. The information displayed in this data extract does NOT include members who have been recorded with UNLISTED contact details
 - c. Such maps may have a purpose for planning purposes (eg for specific event) but typically would not be widely shared, and provides an alternate view of member register contact details
2. **DETAIL BY SUBURB:** These extracts can generate a google map showing suburbs where members live, with a count of members in that suburb. It does not show details of individual members
 - a. This level of detail is much more acceptable from a data privacy perspective, and could be shared more safely
 - b. The information displayed in this data extract also does NOT include members who have been recorded with UNLISTED contact details

Once the map has been generated, the user with access to the shared link can zoom in to see the data available for each pinned location



Appendix A - Installation for a Single User

MS Access databases can be used on their own by a single user, or can share access via a network. It is assumed that most car club users will NOT be sharing Car Club Register on a home or business network, but using it on a standalone PC for a single user. **Appendix A** describes installation for a single user on a single PC.

If shared access is required then consider sharing via the internet using Dropbox accounts for each user (see next section).

- It is useful for a Club to have multiple users accessing the files this way to allow for backup in time of holidays or illness.
- Another time when Dropbox file sharing is useful is when a single user wants to access the files from two different computers, eg at home or at work. In this case use the same Dropbox account on both computers.
- Dropbox or Google Drive is also useful for both single and shared use as an automatic backup of critical data, and may avoid the catastrophe that could occur in the event of a hard disk failure, or major user error, as Dropbox and Google Drive automatically retains copies of every file change in the last 30 days, enabling a simple restoration of a previous copy

Step 1: Install MS Access

The PC to be used MUST have one of the following programs installed to be able to use the database:

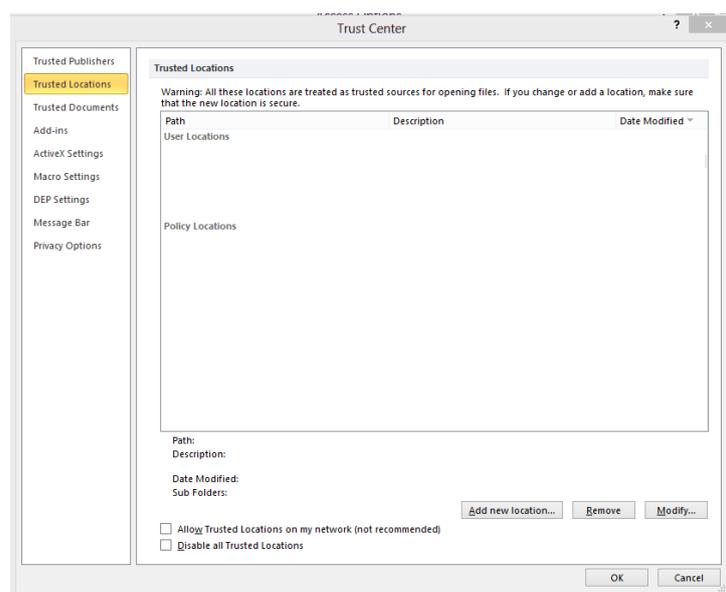
1. MS Access 2007 or
2. MS Access 2010 or
3. MS Access Runtime 2007 or
4. MS Access Runtime 2010

If none of these are installed please install MS Access Runtime 2010 from the supplied files or download from <http://www.microsoft.com/en-au/download/details.aspx?id=10910>. The runtime versions are official Microsoft products, available for free, that enable a MS Access database to be used on a PC without the full version of MS Access. It has all required functionality but is not able to change the design of the database.

Step 2: Create a “Trusted” Network Folder

In order to avoid regular warning messages about potentially damaging database files (ie with “evil” programming code), you should create a suitable folder and make it a “trusted location” for MS Access. If possible choose a hard drive/network path that is regularly or readily backed up.

Create a new folder, such as “My Documents/xxxx db”, where xxxx = the car club initials, then open MS Access (or the runtime version). For MS Access 2010 (MS Access 2007 is similar), choose Options on the File menu tab ... “Trust Centre”... Trust Centre Settings... Trusted Locations to display the following form



Click on Add Locations and browse to select the desired folder, such as "My Documents/Car Club db", then click OK. If the chosen folder is on a network location, instead of a local hard disk drive, you may also have to tick the box "Allow Trusted locations on my network (not recommended)". Click OK, OK and exit MS Access

Step 3: Install Car Club database

All the required database files are supplied in a single installation file called Car Club Register.ZIP.

To install the database open the supplied file Car Club Register.ZIP and extract it to the desired folder. Install the files in the folder created as a trusted location (previous step).

Create a shortcut (to the file *Car Club Register.accdb*) and save it in your preferred location for easy access (eg on the desktop, pinned to your task bar etc, depending on your windows version).

NB: Only use a shortcut to this particular file if it is a single user installation. All other shared user installations must start the file using the supplied START.cmd script so that the correct file locking mechanisms are applied for multiple users

When installed it includes the following files (IMPORTANT: DO NOT change the names of any of these files or they will not work correctly with each other):

- *Car Club Register.accdb* – the database "front end" that contains all menus, forms and reports. It includes no Car Club specific data and can be upgraded by replacing it with a new version as required, without losing car club data
- *Car Club Register_be.accdb* – the database "back end" that contains all current Car Club data. This file contains only the data and should be regularly backed up as required to avoid loss of precious data. It must exist in the SAME folder as *Car Club Register.accdb*
 - *The ZIP file has this file located in the Sample Data File to avoid accidentally overwriting your real data files in the event that the ZIP file is extracted to the working directory. Move this file into the working directory only when it is first installed*
- *Car Club Register Archive_be.accdb* – the database "back end" that contains all archived Car Club data. Expired members can be archived or retrieved from archive as required. It must exist in the SAME folder as *Car Club Register.accdb*
 - *The ZIP file has this file located in the Sample Data File to avoid accidentally overwriting your real data files in the event that the ZIP file is extracted to the working directory. Move this file into the working directory only when it is first installed*
- *Car Club Register Financial_be.accdb* – the database "back end" that contains all Car Club financial history, including receipt data. It must exist in the SAME folder as *Car Club Register.accdb*
 - *The ZIP file has this file located in the Sample Data File to avoid accidentally overwriting your real data files in the event that the ZIP file is extracted to the working directory. Move this file into the working directory only when it is first installed*
- *RENAME ME Custom Reports.accdb* - This database can be used to save custom reports that retrieve data from the backend tables but without affecting the ability to upgrade the main frontend database. This database should be renamed to "Custom Reports.accdb" before being customized with your own reports
- *Club Logo.jpg* – A sample picture file used to display the Club Logo on the database menu. It should be replaced with a jpg file of similar size containing your own Club logo. It must exist in the SAME folder as *Car Club Register.accdb* (and retain the same name)
 - *NB: If you wish the Club logo to also appear on various reports (like the Magazine coversheets and Renewal Notices) then copy this file and save it with name "Club Logo Report.jpg". The file size must be as small as possible to avoid a saved report PDF file size from being unnecessarily large it there are a significant number of pages replicating the logo. And the logo should have a width no more than twice the height*
- *Instructions - Car Club Register Database.pdf* - these instructions
- *Instructions - CPS Photo Rename.pdf* - The instructions for saving CPS photos in a structured archive, using a simple script that renames randomly named photos and records the photos supplied for a specific CPS application. It is provided as an alternative to saving photos in the database (which is not recommended)
- *Start.cmd* - A command script to start the database if it is not already in use and signal it as "in use"

- *Start Custom Reports.cmd* - A command script to start the Custom Reports database if it is not already in use and signal it as "in use"
- In the Sample Data folder are the following sample files that can be used to test the database before installing your own Club data. It includes sample data that can be used to import 55 members and 148 vehicles that demonstrate a range of database functionality, like data import and validation, all reports including renewals notices, data archiving etc
 - SAMPLE MEMBERS.xls
 - SAMPLE VEHICLES.xls
 - tbl_PostCode.xlsx - this file contains the Print Post mail sort codes and Divisions that may be needed to update to the current Sort Codes required by Australia Post
 - tbl_ReportFormula.xls - this file contains sample report formulas for the Database Summary report. They can be imported into the sample database data or modified to suit you own car club before importing them into your actual database

Step 4: Configure Car Club Register

The first time the database is opened it prompts the user to define user security and Car Club Master Data. These forms will be automatically displayed each time the database is opened, until the master data has been entered. Once that has been completed then any changes to this data requires the menu options in Database Maintenance to access the forms

The screenshot shows a 'User Security' window with the following details:

- Window Title: User Security
- Current User: Mark
- Table Headers: User, Security Level
- Table Content: One row with an empty 'User' field and 'FULL' selected in the 'Security Level' dropdown.
- Instructions:
 - Use this form to maintain user security levels:
 - FULL = Full update is enabled
 - READ ONLY = Inquiry Only
 - NONE = Disables user access
 - If no FULL or READONLY records are entered all unspecified users have FULL access.
 - If any FULL or READONLY records exist then unspecified users have no access.
 - In all situations a user can be disabled with NONE
 - The user name is the name used to log in to their own PC
- Record Navigation: Record: 1 of 1, No Filter, Search

For a database that is not shared do not add any user entries to control security, as this will provide full access for all users. If the database is shared and some users require only READONLY access then make sure the first entry is for the user who will have FULL access, before adding other full or readonly users.

NB: the current user name (windows user name) is displayed in the form header and is the name used by the database to control security. Passwords are not used to control access.

When finished, close the form to display the following Club Master Data Maintenance forms

Club Master Data Maintenance

Defaults

1. Include the Club Names, abbreviations, address, bank and print post details to appear on all relevant reports
2. If payment of renewals by EFT is allowed then populate the Bank details or leave blank
3. If using variable renewal dates (ie every member can renew on their own anniversary renewal date) then tick the box, or leave blank to enforce a single anniversary date for all members.
4. Change the renewal warning days and renewal grace days to suit your Club processes and rules
5. Set the maximum Email Count when sending emails, to limit the number that can be sent in one batch
 - a. This functionality is somewhat redundant since the use of personal email accounts for sending emails from the database was discouraged in favour of dedicated SMTP relay services such as Brevo or MailGun. In most cases it can be set to a very high number (eg higher than your membership count) although if using the free Brevo account you may choose to limit it to less than the daily limit of 300 emails per day
6. The State Default can be populated to simplify new member address entry
7. Select the single member checkbox if club membership is restricted to one name, or leave blank to allow up to two names as voting members
8. Enter an email signature to describe who is responsible for the emails being sent
9. Update the Custom Vehicle Date Description if using this date for a specific purpose, eg for recording the date of special documents, or to record the last vehicle inspection, depending on your Club requirements. This description appears on relevant forms and reports
10. Check for Updates (default = Y): tick this option to check if a newer version of this database is available for download, or untick it if you would prefer to manually run the task to check for updates. It affects ALL users of this database
 - a. You may wish to untick this option if you typically run this database without an active internet connection in order to avoid the warnings on startup, but typically you should leave this ticked, so that you are notified of a new version being available and can then make a choice whether or not to download it. If it contains functionality that is not immediately relevant to your club you can select the option to stop reminding you until an even newer version is available. The option to ignore update messages until the next release is a per user setting
 - b. Turn off this setting if you have been notified that updates will no longer be available.
11. Uppercase conversion (default = Y): Select this option to automatically convert most data entered into uppercase text. This becomes a matter of personal opinion/preference but it is recommended to always convert to uppercase as this avoids the need to manually control the case and gives good consistency and readability in reports and address labels. Ultimately this is your choice
12. Hide birthday fields if birthdays are not recorded by your club
13. Fill in any other fields as explained, if required.

Renewals

The image displays three screenshots of the 'Club Master Data Maintenance' software interface, showing various configuration options for renewals.

Top Left Screenshot: Remittance Message
 This section is titled 'Remittance Message' and contains several text boxes for configuring messages. It includes instructions for members to return forms with payment and details for remittance advice. A note states: 'Note: If you currently hold Club permit plates for any of your vehicles you MUST remain financial for it to remain valid.' There are also sections for 'CoverSheet Message 1', 'CoverSheet Message 2', and 'CoverSheet Message 3', each with a text box and a small example message.

Top Right Screenshot: Membership Fees
 This section is titled 'Membership Fees' and contains several dropdown menus and text boxes. It includes options for 'Membership Fees (Line 2)', 'Payment Options', and 'Vehicle Condition'. A 'Declaration' section contains a text box for a statement of acknowledgment. A note at the bottom states: 'This form displays when it is not populated (eg on first call). Use it to customise the database forms and reports with your car club details. If required, changes can be made in future via the System Maintenance menu.'

Bottom Screenshot: Renewal Introduction
 This section is titled 'Renewal Introduction' and contains several text boxes for configuring messages. It includes instructions for members to check details and return forms. A note states: 'This introduction is displayed on the Renewal Notice. Edit it here to change the default text.' There are also sections for 'Final Reminder Introduction' and 'Renewal Attachment 2', each with a text box and a small example message.

Include all details as they should appear on the various forms and reports.

In most cases the default messages and text would be sufficient however if, after running the various reports, you need to customise the report descriptions for your club's purposes then most wording can be modified here, without changing the report design itself. Obviously, descriptions of the annual membership fees that appear on the renewals reports would be modified here as required.

The Remittance Message box, if populated, appears on the membership renewal front page and can be formatted with a special message, using custom fonts/sizes to display a more complicated renewal price list with checkboxes, and optional donation prompts etc if required

Magazine

This tab enables maintenance of the Magazine Name and description/message to appear on the magazine mailing coversheet.

Both of these fields can be formatted to the maximum size possible and with a preferred font for use on the coversheet (use bold, italics, font and size as required)

An example of possible information and format is as follows:

Master Maintenance X

Club Master Data Maintenance

Defaults Defaults 2 Renewal p1 Renewal p2 Renewal p3 Magazine Email Reports on Exit MailChimp Brevo Backup

Magazine Name:

*Enter the name of the Club magazine that should appear on the mailing coversheet, or leave blank for no magazine name.
The text can be formatted such as bold and italics, and a specific font and size can be used. It should fit inside this box to be sure it will display correctly on the report*

Magazine Description:

CONTACT DETAILS

If your inquiry relates to matters involving the CPS scheme (new applications, renewals, eligibility of your vehicle etc.) please contact the following address - and checkout the details on the inside front cover too:
cps@mycarclub.org.au

If your inquiry relates to matters of membership (new applications, renewals, or financial payment of dues, etc) please contact:
membership@mycarclub.org.au

The club also has an email address intended for use by non-members for inquiries about the club, so if you want to pass on an email address for someone to find out more about the Club, or if you are unable to work out who to contact about a specific matter then please contact the following email address for advice:
info@mycarclub.org.au

If you have an idea for the Social Committee, please send it to:
social@mycarclub.org.au

Check out the magazine and/or facebook for more details
<https://www.facebook.com/groups/mycarclub/>

For the latest updates visit the Club website
www.mycarclub.org.au

*Enter a description, or message to appear on the magazine coversheet, or leave blank. It can be a permanent message, or can be changed periodically as required.
The text can be formatted such as bold and italics, and a specific font and size can be used*

This form displays when it is not populated (eg on first use). Use it to customise the database forms and reports with your car club details. If required, changes can be made in future via the System Maintenance menus.

Master Maintenance
☰

Club Master Data Maintenance

Defaults
Renewal p1
Renewal p2
Magazine
Email
Reports on Exit

Define Default Email Address: Select this option ON to always default the following email configuration, eg for a single club outbound email address, or leave OFF to allow each user to define their own email configuration
NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

Email From:
Enter the email address to send emails from. It needs to be capable of sending using Microsoft CDO functionality, eg Telstra Mail, Gmail or MailGun with settings to allow 'Basic Authentication' or to allow 'less secure apps to access your Gmail account'
or leave blank for the outbound email address to be defined separately by each database user (but using the same SMTP server as defined below). NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

Reply To:
Enter the default REPLY TO email address to use for all outbound emails, or leave blank for the outbound REPLY TO email address to be defined separately by each database user. NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

SMTP use SSL:
Enter the 'SMTP Use SSL' setting to send emails from the desired email account
* Gmail/Telstra Mail default = 'True'
* MailGun default = 'False'
NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

SMTP Server:
Enter the SMTP Server to send emails from the desired email account
* Gmail default = 'smtp.gmail.com'
* Telstra Mail default = 'smtp.telstra.com'
* MailGun default = 'smtp.mailgun.org'
NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

SMTP Port:
Enter the SMTP Server Port to send emails from the desired email account
* Gmail/Telstra Mail default Port = 465
* MailGun default Port = 587
NB: Only applies if the user has selected the CDO (ie SMTP) method of sending emails

Default Payment Receipt Message:
Enter the default message to use when sending a membership payment receipt, eg 'Thankyou for your membership payment. I hope you enjoy your time in the club' or leave blank for the message to be defined separately by each database user
NB: Applies to all email sending types Optional: Memorize the password for sending emails using the default Email Address

RESET Email Config
TEST Email Config
Memorize Password

This form displays when it is not populated (eg on first use). Use it to customise the database forms and reports with your car club details. If required, changes can be made in future via the System Maintenance menus.

These configuration options enable a single email configuration to be defined for the Club that applies to all users of the database (on all devices). If a default email address is not defined here then the configuration is defined separately on each device

NB: The use of personal email accounts is no longer supported (and no longer possible in Gmail or Outlook accounts) so it is necessary to use an SMTP Relay Service designed for bulk emailing (eg MailGun or Brevo (formerly SendInBlue)). In this case it may be desirable to set it up for all users of the database, in which case that setup is recorded here as a default email configuration. Only the password then needs to be entered by a user before sending emails, unless the choice is made to memorize the password. Only users with the correct email account password (manually entered or memorized locally) can send emails using this default setup

Define the following attributes (refer to Appendix J for more details):

- Email From Address
- Reply To Address
- Use SSL (or not)
- SMTP Server name
- SMTP Port
- Default Payment Receipt Message, used when sending receipts

Once the default settings have been saved it is possible to test the configuration by sending a test email (eg to your self)

'Reset Email Config' is normally used when not using the default email address config, causing your PC to forget any previous setup so that you are prompted for the new details

Use the optional 'Memorise Password' button to remember the password applicable to the default email config. This password is not saved in the shared database, but is remembered only on the current PC, so it can only be used by designated users with the password. If it is not memorized here then the user is prompted each session when emails need to be sent.

Reports On Exit

The screenshot shows a web application window titled 'Master Maintenance' with a sub-header 'Club Master Data Maintenance'. The navigation tabs include 'Defaults', 'Renewal p1', 'Renewal p2', 'Magazine', 'Email', and 'Reports on Exit'. The main content area contains the following text: 'Select any, or all, of the following reports/extracts to be auto generated on exit from the database, if member or vehicle details have been changed. If necessary activate "Reports on Exit" below'. Below this text is a list of reports with checkboxes: 'Member List PDF', 'New Member List PDF', 'Vehicle List PDF', 'CPS List PDF', 'Register Summary 1 Column PDF', 'Register Summary 2 Column PDF', 'Member List XLS', 'Vehicle List XLS', 'Mail Merge PRINT XLS', and 'Mail Merge ALL XLS'. A button labeled 'Reports on Exit is Activated' is positioned to the right of the list. At the bottom of the window, a small note reads: 'This form displays when it is not populated (eg on first use). Use it to customise the database forms and reports with your car club details. If required, changes can be made in future via the System Maintenance menus.'

Select the reports to be automatically generated report on exit from the database, and click the button to generate the folder that they are saved in (this folder is called "Car Club Reports" and must exist in the same folder that the car Club database folder is saved in).

This feature is useful to automatically generate an up to date member or vehicle register in a folder that can be shared with others in the Club (if using DropBox, Google Drive or Microsoft OneDrive) so they have access to the data without having access to the database itself

MailChimp or Brevo

The image displays two side-by-side screenshots of a web application interface for configuring email marketing integrations. Both screenshots are titled 'Club Master Data Maintenance' and feature a navigation menu with options: Defaults, Defaults 2, Renewal p1, Renewal p2, Magazine, Email, Reports on Exit, MailChimp, Brevo, and Backup.

The left screenshot is for MailChimp configuration. It includes a checkbox for 'MailChimp Synchronisation' with a note: 'Tick this box if you want to auto sync member changes to MailChimp Emailing List'. Below this are three input fields: 'MailChimp API Key' (with subtext 'Enter the API key generated for your MailChimp Account'), 'Audience ID' (with subtext 'Enter the Audience ID generated from your MailChimp Account for the nominated audience/list'), and 'MailChimp Datacentre' (with subtext 'Enter the datacentre for your MailChimp Account - this is the server prefix that appears at the beginning of your mailchimp sign URL'). A 'Test MailChimp Connection' button is located at the bottom right of the form area.

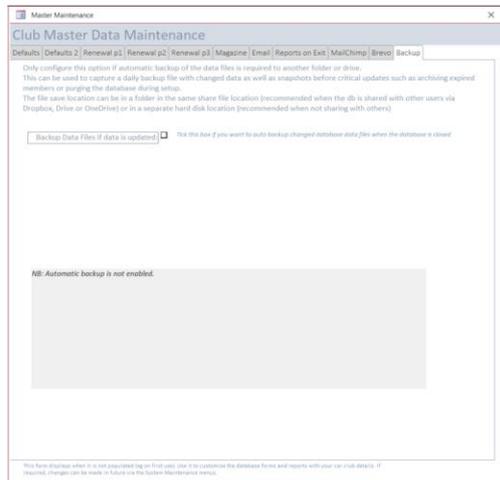
The right screenshot is for Brevo configuration. It includes a checkbox for 'Brevo Synchronisation' with a note: 'Tick this box if you want to auto sync member changes to the Brevo Emailing List'. Below this are two input fields: 'Brevo API Key' (with subtext 'Enter the API key generated for your SendinBlue Account') and 'Audience/List ID' (with subtext 'Enter the List ID generated from your SendinBlue Account for the nominated audience/list'). A 'Test Brevo Connection' button is located at the bottom right of the form area.

Both screenshots have a footer note: 'This form displays when it is not populated (eg on first use). Use it to customise the database forms and reports with your car club details. If required, changes can be made in future via the System Maintenance menu.'

If using a MailChimp or Brevo account for sending email marketing campaigns (not just as an SMTP Relay Service) then set these parameters to activate the API integration to automatically update MailChimp or Brevo with any changes to member or vehicle data. Only one of these APIs can be activate at any time.

Goto the relevant Appendix for more setup details

Backup



This database includes functionality to apply a simple backup strategy to help save data so that it can be restored in the event of inadvertent corruption or loss, It does not include functionality to restore data but leaves this to be a manual choice.

The backup functionality includes 2 components.

1. **Daily backups:** The database saves a copy of the backend data files after any session that updates member or vehicle or configuration data. These files are automatically saved when the database is closed.
 - a. The backend data files are saved with the current date in the file name and override any earlier copies from the same date, So these files represent the data at the end of any day when changes were made
 - b. These files are saved in a master data nominated folder name, located in either the same folder as the current database (if the database is being shared with multiple users or devices), or in a separate drive/folder on the local PC
 - i. NB: If using the database in a shared Dropbox, Google Drive or Microsoft OneDrive folder it is important to nominate this in the backup options so that ALL users save the backups in their shared folder, so they are accessible to all users
 - ii. However if the database is not being shared across multiple users or devices then an alternate backup location can be nominated. In these cases you may choose to backup to a separate hard disk location (eg drive D: instead of the default) so that it can be saved on a separate hard disk or saved as part of an alternate file backup routine
2. **Snapshot backups:** The database saves a snapshot prior to any critical data updates, such as
 - a. purging the database (which is done before setting up with new data), or
 - b. before running the batch process for archiving expired members after the membership grace period has elapsed (as part of the end of year processing)
 - c. A menu option is also available to trigger a manual snapshot to save a snapshot copy at any chosen time
 - d. The snapshot copies of the backend data files are saved in a snapshot folder in the above backup folder, with a file name indicating the trigger (eg *_BEFORE PURGE*) and with the current date. Any files with the same name and date are saved with a unique number/name to prevent previous copies from being overridden. ie the setting to set the maximum number of backup copies is not used here

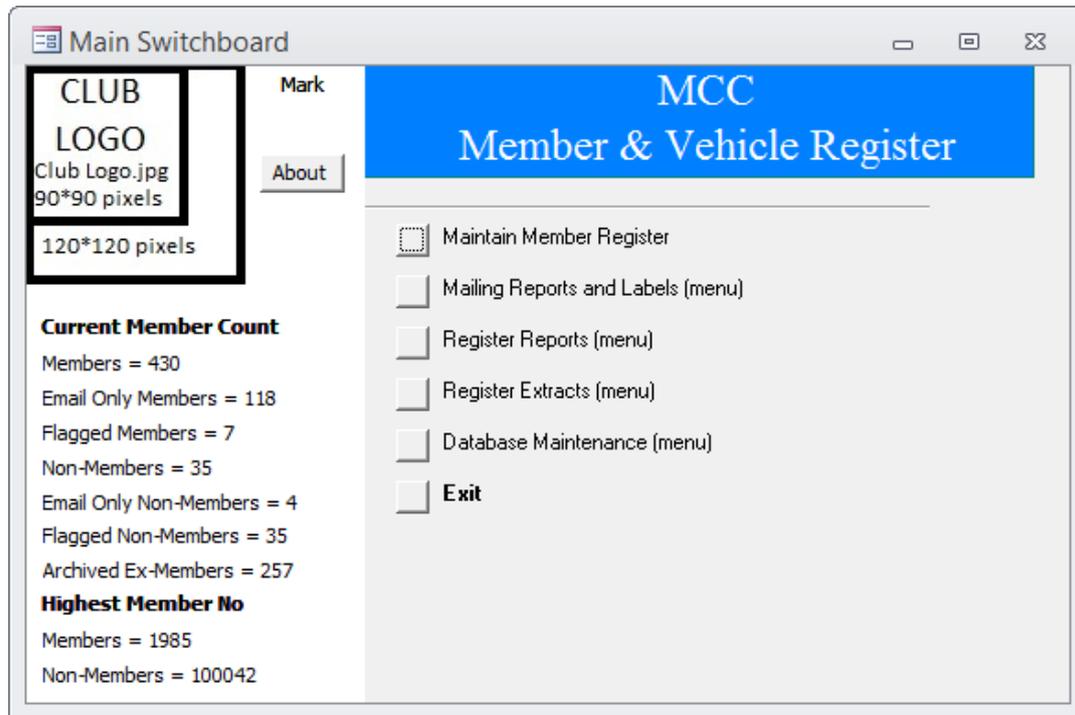
Follow the onscreen set instructions until it is set up correctly

To Restore Files: To restore the data from these backup files simply copy and save the chosen backups into the normal database folder and rename them to remove the extra description and date from the name.

Both backend data files should be restored as they are a matching set

1. Car Club Register_be.accdb
2. Car Club Register Archive_be.accdb

After the master configuration has been closed the main menu switchboard is displayed



Note the following:

- The logo displayed above is the generic logo (supplied with the installation) that should be substituted with your own *Club Logo.jpg* file in the database folder. Make sure the file is a maximum 120x120 pixel file size for best fit. Once this file is replaced the new image will be displayed automatically. Alternatively remove the generic image by deleting or renaming the supplied *Club Logo.jpg* file
- The Club name (short) is displayed in the switchboard header
- The current user name is displayed in the switchboard side panel. If the user is READONLY, then this is also displayed
- Basic statistics about Car Club Members are displayed in the switchboard side panel
- “About” displays details of the current database version

The switchboard buttons provide easy access to maintenance forms, reports, or other menus

Appendix B - Installation Using Dropbox or Google Drive to Share the Database With Others Via the Internet

Dropbox is a free file sharing website that has many useful features. See more details at <https://www.dropbox.com/tour>

Google Drive offers similar functionality if the desktop version of Google Drive is installed, and is available free with a Gmail or G-Suite account.

In our case, each user who needs to share access to the database signs up for their own Dropbox or Gmail account which enables them to automatically synchronise files on their PC (in a nominated folder) with the storage system at [dropbox.com](https://www.dropbox.com) or drive.google.com. The folder containing the database on PC#1 (the "owner's" PC) can then be shared with other user accounts using PC#2, PC#3 etc which enables any changes made on one PC to auto synchronise with [dropbox.com](https://www.dropbox.com) or Google Drive, which in turn then updates all other PCs sharing that folder. If a PC is off-line or turned off then it synchronises automatically next time it is turned on. Even a single user can access the Dropbox or Google Drive folder on multiple PC's (eg at home or at work)

The setup instructions are almost the same as the instructions for a single user except for additional steps for using DROPBOX or GOOGLE DRIVE.

NB: If the database is to be shared via the internet then ALL users must have permanent broadband access to the internet. Dialup connections do not allow automatic synchronization unless an internet connection exists while the database is in use. The START command scripts block access to the database if an active internet connection to [dropbox.com](https://www.dropbox.com) or drive.google.com is not found.

NB: The START.cmd script supplied is written to check it is online by connecting (pinging) the [dropbox.com](https://www.dropbox.com) website. If you are using Google Drive then disable the line for Dropbox and enable the line for Google Drive, as follows, using a text editor like Notepad or Notepad++ to make the change.

```
rem ping -n 1 dropbox.com | find "TTL"  
ping -n 1 drive.google.com | find "TTL"
```

Step1: Create Dropbox or Google Drive accounts for all users

Determine whether you are using Dropbox or Google Drive as the file sharing facility and follow the appropriate instructions.

Dropbox: Go to www.dropbox.com and sign up to create a new account for every user requiring access. This must be done on each user's own PC. HINT: Consider using remote access tools, such as Teamviewer (available free from www.teamviewer.com) to remotely access another user's PC (with their permission granted by password) to assist them with these setup steps, if required.

If a user already has a Dropbox account then that is sufficient. You will need to know the email address used for all these accounts. Do not offer to use an existing account (like your own) on someone else's computer, as this is a significant compromise to your security. If you assist other users to set up their Dropbox account, make sure they choose and record the password used for that account. They own it and must remember it in future.

It is recommended that users sign up using their own (private) email address, not a car club specific email address, as the required account is a personal one that can be used for other, non- car club, purposes as well. It is not possible to satisfactorily manage multiple Dropbox accounts on one PC as each PC can only log into one Dropbox account at a time.

Follow the instructions given, which generally include responding to an email sent to the nominated email address, until the account is activated and ready for use. Each user is then allocated a minimum Dropbox allowance (usually 2 Gb). Take the Dropbox tour to learn about its features, and perform the steps in Get Started to install Dropbox on each PC

The Dropbox (main) folder is usually created as a sub-folder in My Documents, eg ...My Documents/Dropbox

HINT: Dropbox offer incentives to encourage you to recommend Dropbox to other users, so it is a good idea for the first Dropbox user to "invite your friend". That will earn credits that increase their allowance by 500Mb per friend who joins up

Google Drive: All users with a Gmail or G-Suite account will have a Google Drive option available as part of that account. If the user does not have a Gmail account, then they could sign up for a free account, although it generally means they should also monitor that email address regularly. They should also install the Google Drive desktop software from <https://www.google.com.au/drive/download/>

Step 2: Determine who the “owner” of the database is

File sharing via Dropbox or Google Drive needs to start from one user account (the owner). This user is responsible for controlling access by other users so requires some “computer savvy” to manage the Dropbox or Google Drive configuration. In some cases this could be the Club membership secretary, while for other clubs it may be the Club webmaster. The choice obviously depends on who has sufficient skill to manage the file sharing, but also needs to consider factors such as privacy of data as they have full access to the database. If possible, the user should be likely to retain the authority/responsibility for a number of years, or else the “ownership” of the Dropbox or Google Drive folder will need to be passed over to another authorized user.

NB: **Dropbox:** If the “ownership” of the Dropbox folder needs to be changed then the original “owner” must log a [support ticket](#) with dropbox.com requesting that ownership of the shared folder should be transferred to a new email address. This may need to be a specific Club procedure carried out asap when the designated owner relinquishes the role, as it is much easier for the owner to log a service request than it is for someone else (not an owner) to ask for it to be done.

Google Drive: The owner of the Google Drive folder can transfer ownership when required

Step 3: Install Car Club database in the Owners shared folder

Follow the instructions for setting up the database for single user use, but ensure the database is installed in a sub folder of your Dropbox or Google Drive or Microsoft OneDrive folder (eg My Documents/Dropbox/xxxx db where xxxx=car club initials, or Google Drive/xxxx db where xxxx=car club initials). Ensure that this folder is configured as a “trusted location” in MS Access (see previous instructions)

You should note that the files are fairly quickly marked as synchronized (using a green tick  or ) to

distinguish them from unsynchronised files (blue rotate symbol  or ). Always wait long enough for the files to synchronise before turning off your PC

Step 4: Configure Car Club database

Follow the instructions for configuring the database for single user use, including user security and master data.

Step 5 Configure the Shortcut to open the Database

NB: while the database is not shared with other users it can be started as for the instructions for single user startup. However once sharing by Dropbox or Google Drive is intended it is essential that the database is started using the START.cmd script provided.

This script ensures that it is safe to open the database by checking that there is a valid connection to the internet (dropbox.com or drive.google.com site), and that it is not already in use by someone else. The script creates or updates a file called “Clubdb.lock” (in the database folder) to record who is using the database. This locking file then synchronises with the copy on all other user PCs. When another user runs the startup script the contents of the new Clubdb.lock file triggers the user to receive a message that the database is already in use. When the database is closed, the lock is released, enabling another user to access the database

Create a shortcut to START.cmd and save it in your preferred location for easy access (eg on your desktop, pinned to your task bar etc, depending on your Windows version). It should be used in all cases. Do not open *Car Club register.accdb* without using the script.

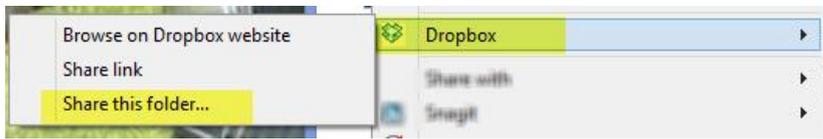
Also ensure that your virus checking software does not block the startup up scripts and databases. If prompted, always select “ALLOW” to enable the programs to run

Step 6: Populate the Database

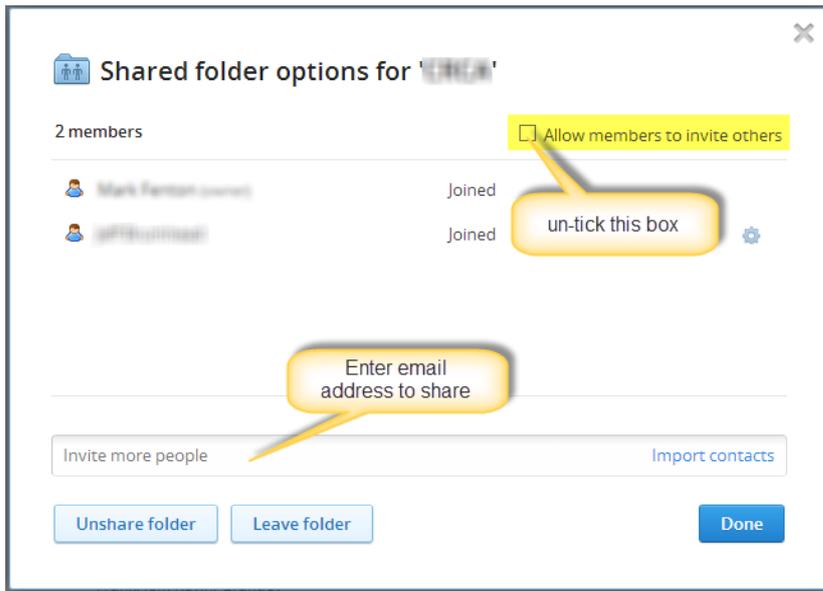
Populate the database with members details until the database is ready to share (refer later instructions)

Step 7: Share the folder with other users

Dropbox: There are several ways to initiate sharing (such as by signing in to www.dropbox.com in your browser) but try this method. From Windows File Explorer, left click on the Dropbox sub-folder where the database is installed and choose the option to Dropbox...Share this folder...



This displays the following Dropbox form in your browser (you may need to sign in if not already signed in)

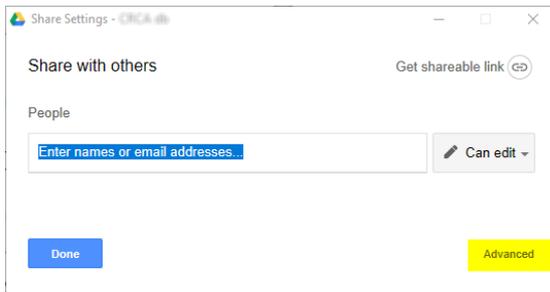


Enter the email address for the specific users to be invited to share, using the email address they use for their Dropbox account, un-tick the box that allows the other users to share the folder with yet more people, then click Done.

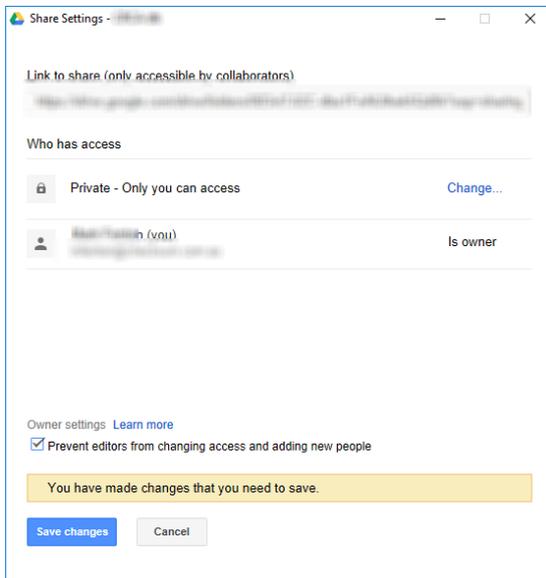
Google Drive: From Windows File Explorer, left click on the Google Drive sub-folder where the database is installed and choose the option to Google Drive...Share ...



This display the following form where the required gmail address can be entered to send the invitation to share (choose the option To Edit)



Click "Advanced to display the extended form as follows, and tick the box to restrict the ability for the other users to share the database with other users



These users will then receive an email inviting them to share the folder, and once they respond, then the folder should be added to their own Dropbox or Google Drive folder, displaying all the files in the owners folder.

Configure the new Dropbox or Google Drive sub- folder as a “trusted location” using the previous instructions for a single user

Each user must then set up a shortcut to the START.cmd start script. They are then ready to start using the database

File recovery

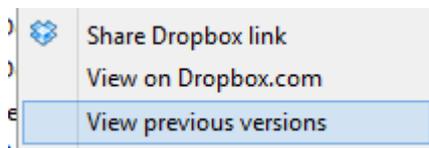
Refer to the Master Data setup to understand the automated backup functionality available in this database, and activate it if desired. These backup files can be used to recover to a previous days data files if available.

However most file share systems do include some file version recovery options which can be used instead. Please get familiar with the options in Dropbox or Google Drive or OneDrive to restore old versions of the files from these file share systems. Restoration from either source of backups may prove useful in the event of data loss, corruption, or inadvertent mass updates.

From time to time users may inadvertently delete or possibly corrupt the files in the share folder, and you should remember that every change to the database in the last 30 days has probably been saved in dropbox or Google Drive as a separate file version that can be restored if necessary. So always consider the merits of restoring a previous file version by:

Automated database backup: refer to the master data configuration instructions for details and location of automatic backups, if activated. Restore the backend files from the chosen date or snapshot copies

Dropbox: right clicking on the the file in Dropbox and selecting View previous versions



From the dropbox website you can view and restore files as required.

NB to view previous versions of a deleted file you may need to first click the icon to “show deleted files”

Google Drive: right clicking on the file in Google Drive and selecting View on the Web. Coose the option to Organise, then open the folder to display all the files (in the web browser). Alternatively log into your Google Drive account (in the web browser) and find the file to be restored. Right click on the file and choose ...Manage Versions.... Find the version to restore and choose Download

File Share Troubleshooting

Despite your best efforts, be assured that things WILL go wrong occasionally. Users are not always highly skilled and the quality of their own PC and virus checking software varies, so be prepared for the odd support requirement.

Some of the issues that may arise include:

- The database won't open but reports that it is in use by another user
 - RESOLUTION: If you are absolutely sure that the user has logged out of the database and closed MS Access then delete the file called Clubdb.lock from the database folder
- The database folder contains files that have been renamed with the suffix "Joe Bloggs Conflicted copy".
 - This indicates that they attempted to save their copy of the file after it had been opened and saved by someone else (simultaneously). This might happen if they lose internet connections, turn off their PC before Dropbox or Google Drive has resynchronised or restore an older copy in their own drop box folder etc.
 - It may also occur if users manually close the Windows Command box that is open while the Start.cmd script is running. Therefore users should be advised to leave it open, and allow it to close automatically when MS Access is closed
 - RESOLUTION: It is usually best to delete the "Conflicted copy" and review the databases to determine if any changes have been lost (and need to be redone). In many cases there will be no changes lost if users were just reviewing membership data. Consider restoring data files (ie backend database files named_be.accdb) from Dropbox, or using the conflicted copy and renaming back to its original file name. It all depends on what has happened
Ensure users always use the START.cmd script to open the database as this is designed to minimize the conflicts caused by simultaneous opening of files

Appendix C - Preparing MEMBER Data to Load into the Database

For some clubs it may be easiest to load the data manually using the input forms used for new members, however for other clubs it may be easier to mass up load the data by importing data from an existing register that has been maintained in Excel (or exported to Excel from another MS Access database). If the data already exists in an excel spreadsheet try these instructions to load some, if not all, of the data. It is likely that most car clubs would not have all the data that can be input to this Car Club Register database, but even a partial load of member's names and addresses, and possibly cars would be beneficial, followed by manual entry to complete the data entry.

NB: These instructions assume that Excel (any version) is installed on the PC, and the user has a reasonable understanding of how to maintain data in a spreadsheet, as well as how to navigate their way around MS Access.

In principle, data in the correct format can be imported, or copied and pasted into the tables of an MS Access database, in bulk, or a record at a time, as long as:

- the sequence of columns in the spreadsheet matches the sequence of columns in the database table
- the data type is compatible (dates in date fields, numbers in number fields, text in text fields etc)
- the data does not violate the table key eg Membership No is a primary key in the table called tbl_MEMBERS so, unlike Excel, only one record can be loaded for each membership No or a duplicate key error will occur

NB: Due to a quirk of MS Access, when you are importing data from Excel, it MAY get confused when a text field is presented with many rows of numbers (eg the numeric Australian Postcodes) it will assume the rest of the data coming will also be numeric, and then omits to load any alphanumeric post codes. So if you have international ZIP codes later in the data, they may be loaded as BLANK! This can be very annoying/frustrating when it does not load all the data you have. It can also happen with telephone numbers (some are numeric, while others with spaces are considered to be text)

In order to prevent this from happening, the affected numeric data should be saved in the Excel spreadsheet with a leading single quote (this forces Excel to save the number as text)

The Spreadsheet columns should be in the following sequence and can include the headings in Row 1 as follows:

Column	Heading	Data Type (*)	Purpose	Comments
A	MemberNo	Integer	member No	Required: less than 100,000 for members, or >100,000 for nonmembers
B	Entry Date	Date	Joining Date	Preferred
C	Expiry Date	Date	Expiration Date	Required if Member is expired, else blank
D	Title	Text (20)	Salutation	Optional. If left blank will use members first name instead of the entered Salutation (eg MR X) in address labels
E	Name	Text (35)	Surname	Required: Surname of Member or Name of Non-Member/Organisation
F	First Name1	Text (35)	First Name of 1st member	Preferred, can leave blank for nonmembers
G	Birthdate1	Date	Birth Date of 1st Member	Optional, can use year 1900 if year is not known or divulged
H	First Name2	Text (35)	First name of 2nd member	Optional. Leave Blank if Club membership only allows ONE person with full voting rights. Add a second name here only if the second person has the same membership rights, including voting, as the first member. All other family members can be listed as Additional members by maintaining members data in the database Additional Member tab
I	Birthdate2	Date	Birth Date of 2nd Member	Optional, can use year 1900 if year is not known or divulged. Same applies as for First Name2
J	Extra	Text (35)	Extra address line	Optional eg ATT: recipient name
K	Address	Text (35)	Listed Address	Enter UL if address is unlisted
L	Town	Text (35)	Listed Address Town/City	Leave blank if address is unlisted
M	State	Text (35)	Listed Address State	Leave blank if address is unlisted
N	P/Code	Text (20)	Listed Address PostCode	Leave blank if address is unlisted
O	Mail	Text (10)	PRINT POST Mail Sort Code	Leave Blank

Column	Heading	Data Type (*)	Purpose	Comments
P	Tel	Text (15)	Listed Phone No	Leave blank if address is unlisted
Q	Mobile	Text (15)	Listed Mobile No	Leave blank if address is unlisted
R	Email	Text (255)	Email address	Required if NoPrint = TRUE
S	UnlistExtra	Text (35)	Unlisted Extra address line	Optional eg ATT: recipient name for unlisted addresses
T	Unlist Address	Text (35)	Unlisted Address	Optional:Unlisted address or alternate mailing address
U	Unlist Town	Text (35)	Unlisted Address Town/City	Optional:Unlisted address or alternate mailing address
V	Unlist State	Text (35)	Unlisted Address State	Optional:Unlisted address or alternate mailing address
W	Unlist P/Code	Text (20)	Unlisted Address Post Code	Optional:Unlisted address or alternate mailing address
X	Unlist Phone	Text (15)	Unlisted Phone	Optional
Y	Unlist Mobile	Text (15)	Unlisted Mobile	Optional
Z	MemberType	Text (20)	Member Type	Member, NonMember or LifeMember or as allowed in the Member Type List
AA	NoPrint	Yes/No	NoPrint membership Type	Enter TRUE or YES or ON for NoPrint members
AB	Magazine Count	Integer	No of Magazines to receive	=1 or more if member is financial, 0 if unfinancial
AC	Flag	Yes/No	Obsolete Renewal Tracking Flag	leave blank
AD	PayMethod	Text (20)	Renewal tracking information	Leave Blank
AE	Comments	Text (unlimited)	Optional comments	Optional
AF	Update Date	Date	Date of last database update	Leave Blank
AG	UserID	Text(255)	Last Changed by UserID	Leave Blank
AH	Renewal_Date	Date	Renewal Date	Leave blank to default the next variable renewal date (based on the joining date anniversary) or fixed renewal date (from master data) or enter the date if known
AI	Class1	Text	Class 1	Optional Classification field. Can be used as an additional member filter in the mailing list
AJ	Class2	Text	Class 2	Optional Classification field. Can be used as an additional member filter in the mailing list
AK	Reference_No	Text	Reference No	Optional record, eg to record a payment receipt No
AL	Reference_Date	Date	Reference Date	Optional record, eg to record a payment receipt date
AM	Country	Text (35)	Country	Leave Blank if your domestic country
AN	UnlistCountry	Text (35)	Unlisted Country	Leave Blank if your domestic country
AO	Tel2	Text (15)	Listed Phone No 2	Leave blank if address is unlisted (optional)
AP	Mobile2	Text (15)	Listed Mobile No 2	Leave blank if address is unlisted (optional)
AQ	Email2	Text (255)	Email address 2	Optional
AR	Unlist Phone2	Text (15)	Unlisted Phone 2	Optional
AS	Unlist Mob2	Text (15)	Unlisted Mobile 2	Optional

- = numbers in parenthesis indicate the maximum field length

Additional Family Members

Sometimes there is a need to record the names of family members. The Chrysler Restorers Club uses this information about additional family members to enable the magazine to announce their birthday. Such names are NOT part of the formal membership (ie with voting rights) but can be useful additional information that includes spouses and children. This data is stored in a table called tbl_Extra_Birthdays, although recording the actual birthday is optional. They can be uploaded using a spreadsheet with the following layout and loaded using a process similar to the main member information

Any birthdays included here will be included in the Birthday extract, together with members birthdays

The Spreadsheet columns should be in the following sequence and can include the headings in Row 1 as follows:

Column	Heading	Data Type (*)	Purpose	Comments
A	MemberNo	Integer	member No	Required: less than 100,000 for members, or >100,000 for nonmembers

Column	Heading	Data Type (*)	Purpose	Comments
B	ExtraName	Text(35)	Family members name	Include the FULL Name ie first name and last name (as these names often differ from the members surname)
C	Birthdate3	Date	Birthday	Optional, can use year 1900 if year is not known or divulged
D	Relationship	Text (20)	Relationship to Member	Optional: Wife Daughter, Son etc

Appendix D - Preparing VEHICLE Data to Load into the Database

Once the member data has been loaded into the database the vehicle data can also be loaded. Obviously the vehicle data needs to be linked to the member data using the Membership No, however multiple vehicles can be loaded for each member if required (there is no limit to the number of vehicles per member)

NB: Due to a quirk of MS Access, when you are importing data from Excel, it MAY get confused when a text field is presented with many rows of numbers (eg the numeric Permit Numbers for vintage cars) it will assume the rest of the data coming will also be numeric, and then omits to load any alphanumeric Permit numbers. So if you have alphanumeric Permit numbers later in the data (eg those ending H or CH), they may be loaded as BLANK! This can be very annoying/frustrating when it does not load all the data you have. It can also happen with rego numbers, engine numbers, chassis numbers numbers if they contain a mixture of numeric and alphanumeric data.

In order to prevent this from happening , the affected numeric data should be saved in the Excel spreadsheet with a leading single quote (this forces Excel to save the number as text)

Column	Heading	Data Type	Purpose	Comments
A	MemberNo	Integer	Member No, as defined in tbl_MEMBERS	It MUST be a valid value in tbl_MEMBERS and already be loaded in the database
B	Year	Integer	Required: Model Year of Car	Required: used for sorting the vehicles in all reports
C	Description	Text (255)	Required: Description of car	Required: include terms relevant to your club's vehicle range, such as SEDAN, CONVERTIBLE, TRUCK, WAGON etc as well as the "make" and "model" of vehicle, eg GTHO FALCON. Use standard terms and abbreviations where possible as all text here is searched when building the Register Summary Report NB: If the Make or Model or Style fields are populated then the database will populate this field using the make/model/style information instead
D	Code	Text (5)	Value from Condition Lookup List	Valid values are defined in tbl_Condition. Standard values are O, R, UR, P, N but values can be added/changed if required. Refer Master data instructions
E	Permit	Text (10)	Permit Plate No	Optional: In Victoria this is the H, or CH, CPS plate. Only include Permit Plate No here if the permit was issued from THIS club
F	PermitType	Text (5)	Permit Type	Optional: Valid Values are defined in tbl_PermitType but values can be added/changed if required. In Victoria CPS this would be 45 or 90 day Logbook.
G	Expiry	Date	Expiry Date of the Permit Plate	Preferred: Enables the database to report upcoming or past due expiry dates. Requires the member to pass this information to the Club once the Permit has been issued/renewed
H	LastSigned	Date	Last signed date of the Permit	Optional: Enables the database to record permits that have been processed via this Club, even if the Expiry Date has not been advised by the member when it is received
I	Colour	Text (50)	Colour(s) of the car	Optional: Enables the database to distinguish members cars of similar model

Column	Heading	Data Type	Purpose	Comments
J	Rego	Text (10)	Registration No	Optional: If the car is registered this helps to identify the vehicle
K	Comment	Text (255)	Further Identification of Vehicle	Optional: Additional information to identify the vehicle if required. This information is not included in any reports
L	Declaration_Date	Date	Custom Date to record a significant Date	Optional: May be used for date of significant events, such as sighting a mandatory club document, or attendance at a mandatory club inspection
M	Permit_Holder	Text (255)	Name of the Permit Holder	Optional, defaults to the members name if not populated, but may be used to identify permit holders within a multi person household where different vehicles have different owners
N	Garage_Address	Text (255)	Address of the CPSVehicle	Optional: May be entered to record the address on the permit where it differs from members listed address
O	Vehicles_Updated_by	Text(255)	Last Changed by UserID	Leave Blank
P	Vehicles_Updated_Date	Date	Date of last database update	Leave Blank
Q	Make	Text(50)	Make of vehicle	If populated it is used to generate the Vehicle Description automatically If populated it is used to generate the Vehicle Description automatically If populated it is used to generate the Vehicle Description automatically Optional: may be used to record the vehicle Body or VIN No Optional: may be used to record the vehicle Engine No Optional: can be used to quickly point to a Google Drive or OneDrive document or folder using an appropriate sharing URL
R	Model	Text(50)	Model of vehicle	
S	Style	Text(50)	Style of vehicle	
T	BodyNo	Text(50)	Body or VIN No	
U	EngineNo	Text(50)	Engine No	
V	Photo_URL	Hyperlink	URL to online vehicle photo, or photo folder or PDF document	

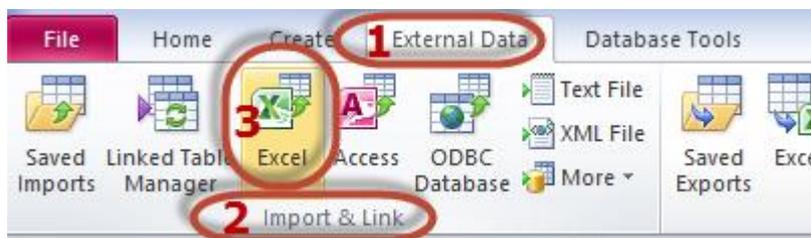
MemberNo	Year	Description	Condition	Permit	PermitType	Expiry
*	0					

Record: 1 of 1 | No Filter | Search

3. Click on the row header (the cell with asterisk) to select the whole input row, then paste from the Clipboard (eg using Ctrl-V)
4. Accept the message indicating that records are to be inserted into the table, then close the tbl_VEHICLES form
5. NB: The Validation report runs automatically when the import data form is closed, in order to confirm the data is valid, fix typical defects, and report on any remaining invalid data that should be considered for correction (manually for each record, or by reloading the data)

Data Import using the FULL version of MS Access

Import MEMBER data from the spreadsheet prepared in Appendix C. On the MS Access menu select External Data...Import & Link...Excel as follows:



To open the following "Get External Data - Excel Spreadsheet form

Get External Data - Excel Spreadsheet

Select the source and destination of the data

Specify the source of the data.

File name: C:\Users\Mark\Documents\Club db\SAMPLE MEMBERS.xlsx [Browse...]

Specify how and where you want to store the data in the current database.

Import the source data into a new table in the current database.
If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.

Append a copy of the records to the table: tbl_MEMBERS [v]
If the specified table exists, Access will add the records to the table. If the table does not exist, Access will create it. Changes made to the source data will not be reflected in the database.

Link to the data source by creating a linked table.
Access will create a table that will maintain a link to the source data in Excel. Changes made to the source data in Excel will be reflected in the linked table. However, the source data cannot be changed from within Access.

[OK] [Cancel]

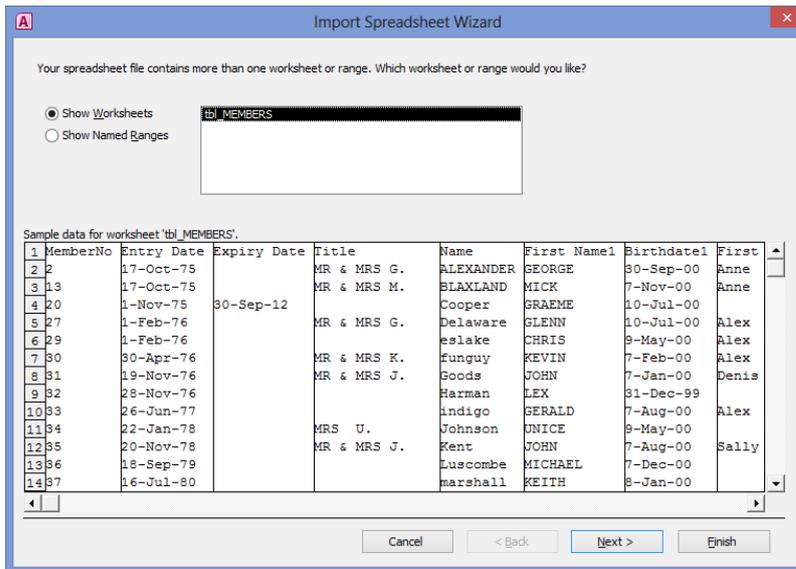
To import MEMBER data:

- Browse to find the relevant spreadsheet with member data. Use your own prepared club data or, for your first test, use the sample member data supplied with the database which can be deleted after your initial familiarisation.
- Select “Append a copy of the records to the table.” and nominate “tbl_MEMBERS” from the dropdown list

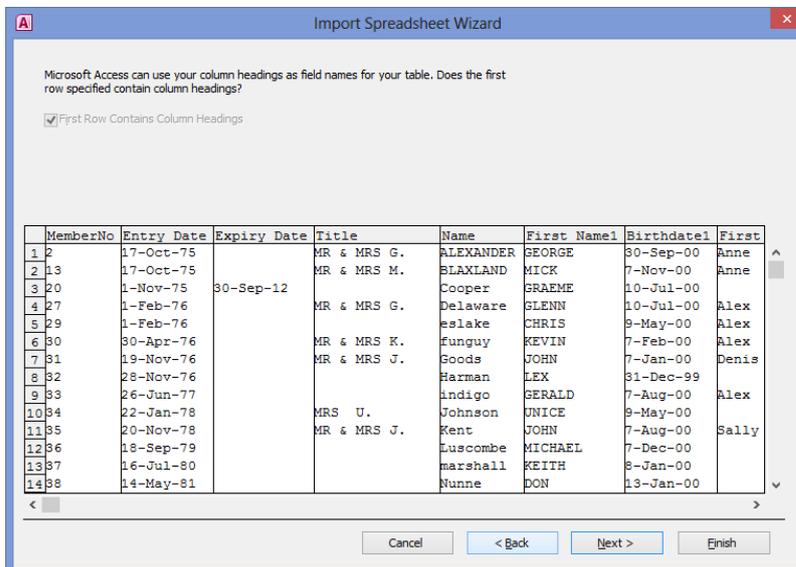
To import VEHICLE data:

- Browse to find the relevant spreadsheet with vehicle data. Use your own prepared club data or, for your first test, use the sample vehicle data supplied with the database which can be deleted after your initial familiarisation.
- Select “Append a copy of the records to the table.” and nominate “tbl_VEHICLES” from the dropdown list

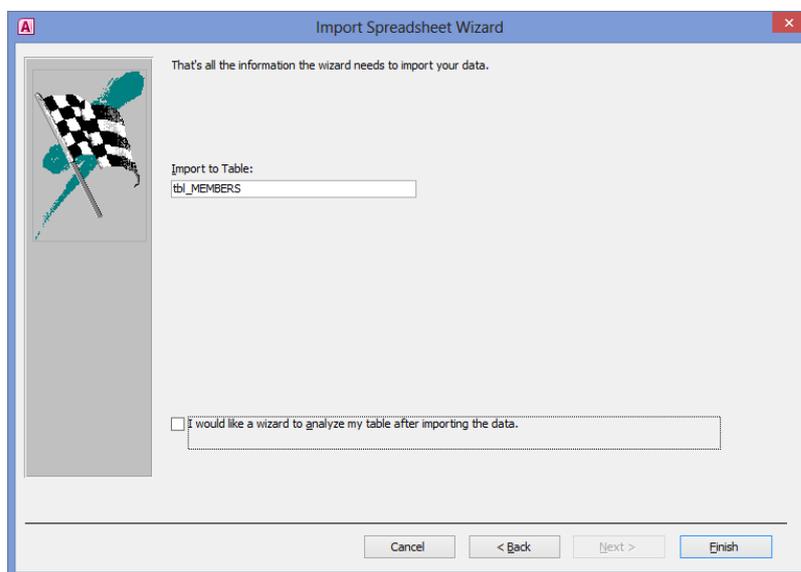
Click OK to import the data. This will start the Import Spreadsheet Wizard. The wizard should automatically choose all the required import options, by default



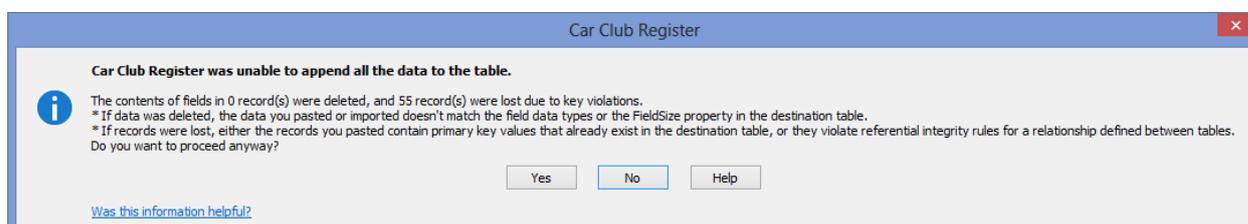
Click Next



Next



Finish, begin the import. If any errors occurred when importing the data then a message will appear, such as the following. Read the message carefully to determine what the problem may be.



For example the above message refers to records lost due to key violations, indicating that some records could not be added because records already existed for some Member Nos

Another message may refer to fields in some records being deleted. That may occur if, for example, you attempted to paste text data into a number field, or the text field was too long, etc review the data and check it against the requirements in Appendix C & D to confirm it complies with all data type requirements in every record. If you get errors do not proceed. Fix the data and try again.

Data Validation

From the switchboard menu select either

- Validate and fix MEMBER data & report, or
- Validate and fix VEHICLE data & report

This performs some data reformatting (eg conversion to upper case) and adds default data (eg Mail Sort codes, and Salutation) etc before running a report to describe data that needs correction.

If data requires correction, then this can be done manually if they are minor and not many to do, or can be fixed in the spreadsheet and re-uploaded after deleting all the data loaded previously

NB: The Fix and Validation report runs automatically when the relevant import data form is closed after using the spreadsheet copy/paste method to import data, but must be run manually when the MS Access Get External Data method is used to import the data

Validation Reports

These reports can be run at any time without affecting existing data, as may occur if the above "fix" task is selected. It can be run after any invalid data is corrected to confirm that all corrections have been made

DELETE all records (Members and Vehicles)

This menu task deletes all member and vehicle data including related data in the birthdays, skills/interests, and archive tables and email history tables. Click OK to confirm the deletion or Cancel to abort

Other Data Import Options

In addition to the above Members and Vehicle data import options there are also options to import the following data for each member, by copy/paste from a spreadsheet

- Additional Family Members
- Member Skills/Interests

These import options do NOT include an automatic validation check, but simply facilitate access to import data from a spreadsheet direct into the tables used by this database. The spreadsheet data format required is as follows.

In order to fix and validate the imported data in these tables, MANUALLY run the Fix and Validate MEMBER data & Report after the extra data is imported. This fix and validate routine includes any data fixes for this supplementary member data

Additional Family Members

Column	Heading	Data Type	Purpose	Comments
A	MemberNo	Integer	Member No, as defined in tbl_MEMBERS	It MUST be a valid value in tbl_MEMBERS and already be loaded in the database
B	ExtraName	Text(35)	Full name of the additional family member	These names may be included in the printed member Register report, if required It is searchable in the Search MEMBER form
C	Birthdate3	Date	Optional – to record the birthday of the additional family member	Use the year = 1900 if the actual birth year is not to be recorded These birthdays are included in the Members Birthday extract that can be used for magazine inputs if required
D	Relationship	Text(20)	Optional – to record the relationship to the financial member	It is searchable in the Search MEMBER form, if required

Skills/Interests

Column	Heading	Data Type	Purpose	Comments
A	MemberNo	Integer	Member No, as defined in tbl_MEMBERS	It MUST be a valid value in tbl_MEMBERS and already be loaded in the database
B	Description	Text(255)	Description of the Skill, Interest or qualification being recorded	These descriptions are included in the printed Skills/Interests Register report It is searchable in the Search SKILLS/INTERESTS form
C	InfoType	Text(30)	Used to record the type of record, eg SKILL, INTEREST or a specific qualification	It is searchable in the Search SKILLS/INTEREST form, if required
D	InfoDate	Date	Optional – to record a date, such as an expiry date of a specific qualification	It is searchable in the Search SKILLS/INTEREST form, if required

Appendix F - Register Summary Report Formulas

The Register Summary Report is a very useful report for displaying all sorts of information about your car club members and their vehicles, but it needs to be customized to suit your clubs characteristics. This can be done by defining the formulas and labels on the report as part of the master data setup. The formulas and labels provided as a sample are those used by the Chrysler Restorers Club and in some cases should be changed to suit your club requirements. Run the report to see what it could look like but note that some of the formulas may not count any matching records. These will need modification

For example you may have Kingswood's and Monaro's and Torana's instead of Chryslers, Dodges and Valiants, so those formulas should be changed to suit your requirements. And if you are a Holden Club then "Up to 1919, 1920-1930 etc is probably not relevant, so you will want to change those formulas as well.

Formulas are maintained from the switchboard menu...Database Maintenance (menu)...Change Configuration (menu)... Customise Report Formulae to open the tbl_ReportFormula table where you can see the existing sample formulas. They can be edited in this form

The sample formulas provided show that they usually take the form of a "=DCOUNT" formula to count the data for a particular field in a table, while using a where clause. You may not be too familiar with how to construct these formulas, so feel free to ask for advice from someone who is, and if there is no one in your Club able to do so then please email mfenton@checksum.com.au and ask for help.

If you choose to maintain the formulas yourself then please be aware that there are up to 49 rows that can be displayed on the report (as of the database version released in Feb 2016, EVERY row can be changed to suit your requirements (Prior to this some rows and columns were hard coded). The data to display in this report is therefore completely customizable by modifying the data in the table tbl_ReportFormula.

Furthermore by understanding how these search/counting formulas find record you will soon understand that it will benefit from consistent usage of the same terms when describing vehicles in the database. For example if you want to count SEDANS as a category then all sedans will need this in their description, rather than trying to assume if it is not a ute or a wagon or a convertible etc then it must be a sedan. The formulas are not case sensitive.

The columns in this table are as follows:

1. Category: The values in this field MUST be in the range "Line01" to "Line49" (any other value is ignored).
 - a. They are the key to define each of the 49 rows on the report (in sequence)
2. LabelDesc: This is the text that displays as the description for each row value
 - a. The row labels can be modified to describe the purpose of that row. In most cases the labels are just text, however please note that each label can also be a formula, such as is supplied in the sample data to change the label description for members who joined last year, eg Line11 in the examples shown below.
3. ControlSource: This is the formula used to retrieve the desired information (count)
 - a. The sample formulas are all DCOUNT formulas using the syntax required for MS Access. In some cases the formula is a concatenation of several values formatted to display as required (eg as for Average Vehicle Age in the examples below
4. Group: This is the text that displays as a group label
 - a. For neat formatting it should only be entered for the first row in a group, in which case it is displayed with a group separating line above it
 - b. Groups in the examples below include Membership, Year Joined, Location etc
5. Section: This is the text that displays as a section label
 - a. For neat formatting it should only be entered for the first row in a section, in which case it is displayed with a section separating line above it
 - b. Sections in the examples below include MEMBERS and VEHICLES

Depending on your requirements you may want to decrease or increase the number of categories (rows) displayed in each section or group, or even add more sections or groups. Just remember that a maximum of 49 rows can be displayed on the standard report. Alternatively up to 98 results can be reported in 2 columns using a variation of this report in the menu. If using this report then formulas can be added for LINE01 to LINE98, omitting lines where the second column is not to be displayed. Load the formulas using the formats of the the relevant 1 or 2 column sample spreadsheets.

The sample formulas included are as follows:

Note that vehicle counts are based on the vehicle description field, however they can also be based on the Make, Model, Style fields that are optionally available for use

Category	LabelDesc	ControlSource	Group	Section
Line01	Total:	=DCount("[MemberNo]","tbl_members","[MemberType] <> 'NonMember' and [Expiry Date] is null")		MEMBERS
Line02	including Life Members:	=DCount("[MemberNo]","tbl_members"," [Expiry Date] is null and [MemberType] = 'LifeMember'")		
Line03	Single:	=DCount("[MemberNo]","tbl_MEMBERS","[First Name2] =" and [Expiry Date] is null and [MemberType] <> 'NonMember'")	Membership	
Line04	Family:	=DCount("[MemberNo]","tbl_MEMBERS","[First Name2] <>" and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line06	up to 1979:	=DCount("[MemberNo]","tbl_MEMBERS","[Entry Date] < #31/12/1979# and [Expiry Date] is null and [MemberType] <> 'NonMember'")	Year Joined	
Line07	1980-1989:	=DCount("[MemberNo]","tbl_MEMBERS","[Entry Date] between #1/1/1980# and #31/12/1989# and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line08	1990-1999:	=DCount("[MemberNo]","tbl_MEMBERS","[Entry Date] between #1/1/1990# and #31/12/1999# and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line09	2000-2009:	=DCount("[MemberNo]","tbl_MEMBERS","[Entry Date] between #1/1/2000# and #31/12/2009# and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line10	2010 on:	=DCount("[MemberNo]","tbl_MEMBERS","[Entry Date] >= #1/1/2010# and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line11	="Last Year (" & Year(Date())-1 & "):"	=DCount("[MemberNo]","tbl_MEMBERS","year([Entry Date]) =year(date())-1 and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line12	Victoria:	=DCount("[MemberNo]","tbl_MEMBERS","([State]='VIC' or [Unlist State] = 'VIC') and [Expiry Date] is null and [MemberType] <> 'NonMember'")	Location	
Line13	NSW:	=DCount("[MemberNo]","tbl_MEMBERS","([State]='NSW' or [Unlist State] = 'NSW') and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line14	SA:	=DCount("[MemberNo]","tbl_MEMBERS","([State]='SA' or [Unlist State] = 'SA') and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line15	Other:	=DCount("[MemberNo]","tbl_MEMBERS","[State] not in ('VIC', 'NSW', 'SA') and [Unlist State] not in ('VIC', 'NSW', 'SA') and [Expiry Date] is null and [MemberType] <> 'NonMember'")		
Line16	Have email address:	=DCount("[MemberNo]","tbl_MEMBERS","[Expiry Date] is null and [email] <> " and [MemberType] <> 'NonMember'")	Internet	
Line17	Receive magazine by email only:	=DCount("[MemberNo]","tbl_MEMBERS","[Expiry Date] is null and [email] <> " and [noprint] = true and [MemberType] <> 'NonMember'")		
Line18	No. of Vehicles	=DCount("[Year]","qry_VEHICLE REGISTER","")		VEHICLES

Category	LabelDesc	ControlSource	Group	Section
Line19	Average Age:	=Format(DAvg("[Year]", "qry_VEHICLE REGISTER", "Year <> 9999"), "0") & "/" & Format(Year(Date()))-DAvg("[Year]", "qry_VEHICLE REGISTER", "Year <> 9999"), "0.\9") & " yrs"		
Line20	No. of Club Permits:	=DCount("[Year]", "tbl_VEHICLES", "[Permit] <> """)		
Line21	Original:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Code] = 'O'")	Condition	
Line22	Restored:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Code] = 'R'")		
Line23	Unrestored/Under Restoration:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Code] = 'UR'")		
Line24	Parts:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Code] = 'P'")		
Line25	up to 1919:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] <= 1919")	Year	
Line26	1920-1929:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1920 and 1929")		
Line27	1930-1939:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1930 and 1939")		
Line28	1940-1949:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1940 and 1949")		
Line29	1950-1959:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1950 and 1959")		
Line30	1960-1969:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1960 and 1969")		
Line31	1970-1979:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1970 and 1979")		
Line32	1980-1989:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] between 1980 and 1989")		
Line33	1990 on:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Year] >= 1990")		
Line34	Chrysler (not 1966-81):	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*CHRYSL*' and [Description] not like '*VALIANT*' and [Year] Not Between 1966 And 1981")	Make	
Line35	Valiant (or Chrysler 1966-81):	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*VALIANT*' or ([Description] like '*CHRYSL*' and [Year] Between 1966 And 1981)")		
Line36	Dodge:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*DODGE*')"		
Line37	Desoto:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*DESOTO*' or [Description] like '*DE SOTO*')"		
Line38	Plymouth:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*PLYMOUTH*')"		
Line39	Fargo:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*FARGO*')"		
Line40	Graham Bros:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*GRAHAM*')"		
Line41	Other:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] not like '*CHRYSL*' and [Description] not like '*DESOTO*' and [Description] not like '*DE SOTO*' and [Description] not like '*DODGE*' and [Description] not like '*PLYMOUTH*' and [Description] not like '*FARGO*' and [Description] not like '*VALIANT*' and		

Category	LabelDesc	ControlSource	Group	Section
		[Description] not like '*GRAHAM*')		
Line42	Sedan:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*SED*')	Body	
Line43	Coupe/Hardtop:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*COUPE*' or [Description] like '*TOP*')		
Line44	Roadster:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*ROADSTER*')		
Line45	Truck:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*TRUCK*')		
Line46	Hearse:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*HEARSE*')		
Line47	Ute:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*UTE*' or [Description] like '*UTILITY*')		
Line48	Convertible:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*CONV*')		
Line49	Tourer:	=DCount("[Year]", "qry_VEHICLE REGISTER", "[Description] like '*TOURER*')		

Appendix G - Other Useful Functionality

The database can be used for a range of other tasks, such as a Mail Merge datasource, or as a source of data to upload to an email mailing list system such as MailChimp or Brevo (formerly SendInBlue).

Mail Merge - Custom

If using your own mail merge documents, please note the following:

PLEASE NOTE: If using the database in a shared DROPBOX folder then ALWAYS open the database before opening the mail merge document, to ensure that the correct links are re-established to the backend database. This is because the links may change (automatically) for every user using the database, and if you were not the last database user then the links required for mail merging will probably be incorrect and or will error

1. Create a datasource (use the Mail Merge Wizard if possible) to the database Car Club Register.accdb and use one of the following “tables”
 - a. qry_Address Label ALL
 - i. includes all financial members and non-members
 - ii. If this data is used then additional filters can be applied in the mail merge process to select member required based on other characteristics such as the NoPrint Flag, etc. Alternatively use one of the following pre-filtered data sources
 - b. qry_Address Label
 - i. includes all financial members and non-members, EXCEPT NO-PRINT members
2. Also print the Mailing Summary Report for Australia Post use, whether or not PRINT POST is being used

Third Party Mailing Lists for Sending Campaigns

It is highly recommended that an electronic mailing list is used to send out bulk emails to the Club membership, and systems are available online for this purpose eg at www.mailchimp.com or brevo.com. For small to medium size clubs these can be free and are useful for communication with members, such as for invitations or for online distribution of the Club magazine.

Consider which one is most suited to your needs as they both change (add to) their functionality all the time, as well as imposing tighter restrictions on the free account.

For MailChimp, there is a free subscription that allow you to send 1,000 total emails a month to up to 500 subscribers (sufficient for most small clubs), For larger clubs a subscription may be required.

Brevo (formerly SendInBlue) also has a free plan that limits you to a maximum of 300 emails per day with unlimited contacts, which is manageable for most small to medium size clubs. If you exceed the 300/day limit then the campaigns can be manually rescheduled the following day to continue sending those that were held after the limit was reached. Alternatively a subscription can be used to increase the sending limits

Full instructions are not provided here for either MailChimp or Brevo (formerly SendInBlue) as the website and search engines provide plenty of assistance to getting you up and running by creating an account, before setting up your lists and then sending a "campaign"

Prior to the 21/3/2021 release of this database, the data in MailChimp was either manually maintained, or was updated using MailChimps copy/paste capability using data extracted from this database. Following this release new functionality was added to automatically add, update or archive MailChimp contacts via an internet connection calling MailChimp APIs.

Similar functionality was introduced in this db 1/3/2023 to integrate with the Brevo (formerly SendInBlue) Contact Lists using the Brevo (formerly SendInBlue) API

This Car Club database facilitates the manual creation and regular updating of the MailChimp and Brevo (formerly SendInBlue) email address lists by providing extracts that include useful data that can be copy/pasted from Excel into the list and then used to send emails to certain segments of the Club membership if required. In most cases emails would be sent to the full email list. However, by activation the integration to MailChimp or Brevo (formerly SendInBlue) the contacts could be automatically maintained, avoiding the need for regular updates by copy/paste.

It is recommended that a single email list is maintained in MailChimp or Brevo (formerly SendInBlue), for members and non-members whether they are current or expired. This means that by using segments to select specific records then emails can be easily sent to all magazine recipients, members, non-members, CPS permit holders etc by selecting the relevant segment.

The extracts from this database are designed to upload the following List data into an email list such as a MailChimp Audience or a Brevo (formerly SendInBlue) Contact List

MailChimp Audience List

It is highly recommended that an electronic campaign mailing list is used to send out bulk emails to the Club membership, and one such FREE system is available online at www.mailchimp.com. Choose the "Forever Free Plan." MailChimp's Forever Free Plan allows you to send 1,000 total emails a month to up to 500 subscribers (which may be sufficient for small clubs), however if greater limits are required then consider a subscription plan for MailChimp, or an alternative such as Brevo (formerly SendInBlue) (refer below)

Full instructions are not provided here as the website contains plenty of assistance to getting you up and running by creating an account, before setting up your lists and then sending a "campaign"

Prior to the 21/3/2021 release of this database, the data in MailChimp was either manually maintained, or was updated using MailChimps copy/paste capability using data extracted from this database. Following this release new functionality was added to automatically add, update or archive MailChimp contacts via an internet connection calling MailChimp APIs.

This Car Club database facilitates the manual creation and regular updating of the MailChimp email address lists by providing extracts that include useful data that can be copy/pasted from Excel into the list and then used to send emails to certain segments of the Club membership if required. In most cases emails would be sent to the full email list. However, by activation the integration to MailChimp the contacts could be automatically maintained, avoiding the need for regular updates by copy/paste.

It is recommended that a single email list is maintained, for members and non-members whether they are current or expired. This means that by using segments to select specific records then emails can be easily sent to all magazine recipients, members, non-members, CPS permit holders etc by selecting the relevant segment.

The extracts from this database are designed to upload the following List data into a MEMBERS email list such as MailChimp

Field label	Field type	Required?
1. Email Address (EMAIL)	Email	Always
2. First Name (FNAME)	Text	
3. Last Name (LNAME)	Text	yes
4. Partner or 2 nd Member Name (PARTNER)	Text	
5. Member No (MEMNO)	Text	
6. Member Type (TYPE)	Text	
7. Membership Type (MEMTYPE)	Text	
8. CPS (CPSHOLDER)	Text	
9. Renewal Date (RENEWAL)	Date	
10. Expiry Date (EXPIRY)	Date	
11. Class1 (CLASS1)	Text	
12. Class2 (CLASS2)	Text	
13. Address State (POSTSTATE)	Text	

Merge Fields

When setting up MailChimp MERGE FIELDS use the names suggested above (eg FNAME for first name). This will ensure the copy/pasted data, or the integration by API can successfully update those fields using data from the database. Any field not defined as above will not be updated by this extract, nor the MailChimp integration.

List Segments

Suggested List segments include:

- Current Members
 - ALL of EXPIRY is blank and TYPE is not 'NonMember'
- Current Non-Members
 - ALL of EXPIRY is blank and TYPE is 'NonMember'
- Magazine Recipients
 - ALL of EXPIRY is blank and MEMTYPE is not 'No Magazine'
- CPS Notices
 - ALL of EXPIRY is blank and CPSHOLDER is 'Yes'

Import Contacts

Generate the data to copy/paste into the MailChimp email list as follows:

From the switchboard menu Mailing Choices (menu)... Mailing Labels and Extracts (menu) choose the Mailing List extract. You will be prompted to respond whether to include expired members. Typically you would answer YES so that the database is updated with new expiry dates, where applicable

Once the query data is displayed, then the data can be copied and pasted into MailChimp. Use Ctrl-A then Ctrl-C to select and copy all data into the clipboard, before pasting it (Ctrl-V) into MailChimp when prompted after selecting the mailing list...Add Subscribers...Import Subscribers...Copy/Paste from file...Next.

Be sure to choose the option to update the mailing list so that the existing entries are updated, and new ones are added. Wherever contacts needed to be removed, eg because of an email change, or a member expiry, this task usually required manual maintenance of MailChimp, however the MailChimp integration now adds, update or archives contacts in situations that require it

Learn all the features available with this system, including using custom templates to simplify the sending of professional looking bulk emails. An example used by the Chrysler Restorers Club is shown here



MailChimp Integration

It is recommended that the interface to MailChimp is configured after the data has been loaded into this database, and when MailChimp is configured it should be loaded with member data using the data from the MailChimp extract (Car Club db menu task). By then turning on the MailChimp interface the list can be maintained automatically when edits are made to the member data and the vehicle CPS data. The batch tasks to expire members who have not renewed within the grace period, and who are subsequently archived from this database also trigger the interface to remove them from MailChimp (by archiving the contact)

In order to successfully use the MailChimp Integration, if it is running on a Windows 10 device, then you must install/enable .NET Framework 3.5 first. This software component is supplied free by Microsoft and is usually installed by default for all versions of Windows, however not Windows 10. It is compatible with other versions of .NET Framework and can be installed

side by side with versions such as 4.0. If it is not installed on this device then it will display an error when attempting to do some of the MailChimp updates by the API integration.

Note: if the Car Club db is being shared with multiple users (eg via Dropbox), then before activating the MailChimp Integration all PCs used to access the database must be updated to include .NET Framework 3.5

To install .NET Framework on a Windows 10 device, follow the instructions provided by Microsoft <https://docs.microsoft.com/en-au/dotnet/framework/install/dotnet-35-windows-10>

Follow the instructions to **Enable the .NET Framework 3.5 in Control Panel**. Once installed, reboot your PC before continuing.

To activate synchronisation with MailChimp, open the Master Configuration form (Database Maintenance (menu)...Change Configuration (menu)...Maintain Club Master Data) and click on the MailChimp tab.

The screenshot shows a web application window titled "Master Maintenance" with a sub-header "Club Master Data Maintenance". The "MailChimp" tab is selected. The form contains the following elements:

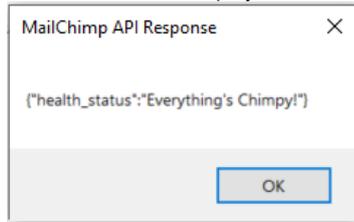
- A warning message: "Only configure this option if automatic synchronisation of member data to a MailChimp Audience/List is required. You must have a valid MailChimp Account and obtain the relevant API Key, Audience ID and account datacentre before activating this option. Refer www.mailchimp.com for details"
- A checkbox for "MailChimp Synchronisation" with the instruction: "Tick this box if you want to auto sync member changes to MailChimp Emailing List"
- An input field for "API Key" with the instruction: "Enter the API key generated for your MailChimp Account"
- An input field for "Audience ID" with the instruction: "Enter the Audience ID generated from your MailChimp Account for the nominated audience/list"
- An input field for "Mailchimp Datacentre" with the instruction: "Enter the datacentre for your MailChimp Account - this is the server prefix that appears at the beginning of your mailchimp login URL"
- A "Test MailChimp Connection" button.

Set the following values to configure the interface to an existing MailChimp account

1. **Mail Chimp Synchronisation:** tick the box to activate the interface
2. **API Key:** MailChimp assign a unique API key for each user defined in MailChimp, and because the free account may only allow one user then that is the user account that should be used. If the account allows multiple users to be configured then choose one of them to find the API key to use for the integration.
 - a. To find the API key, navigate to the account settings to generate/find the API key to use. At the time of writing these instructions the MailChimp menus involve
 - i. clicking on the Account icon (bottom left hand side of the menu)
 - ii. choose Account from the menu pane
 - iii. choose Extras from the menu tabs
 - iv. choose API keys
 - v. if a new API key is required for the nominated user then Create a new Key (use a label = "CarClubdb" to identify this interface)
 - vi. copy the generated API key and paste it into the Car Club db master data form
 - vii. NB: if a new key is ever generated then it will deactivate the existing API key in the Car Club db, which will need to be updated
3. **Audience ID:** Some MailChimp accounts can have multiple Audience lists, and this Audience ID uniquely identifies the Audience to update in this MailChimp Account
 - a. To find the Audience, navigate to the audience settings to find the ID to use. At the time of writing these instructions the MailChimp menus involve
 - i. clicking on the Audience icon (left hand side of the menu)
 - ii. choose Settings from the Manage Audience dropdown list

- iii. choose Settings from the menu tabs
 - iv. The Audience ID is displayed on this form with an instruction “Some plugins and integrations may request your Audience ID. Typically, this is what they want”
 - v. Copy the Audience ID and paste it into the Car Club db master data form
4. **MailChimp Data Centre:** Enter the prefix used by MailChimp to identify the datacentre (server) that your account runs on. It can be identified as the first 3 or 4 characters in the first segment of the MailChimp login URL. Eg for <https://us5.admin.mailchimp.com/>, enter “us5” it is also identified on the end of the API Key
5. **Test MailChimp Connection:** after the above configuration is entered, click the button to test the connection with MailChimp.

- a. If successful it will display a successful health message such as



- b. If the connection is not successful then an alternate error message will be displayed
- c. NB: this test pings the MailChimp servers using the API Key only, so any errors in the Audience ID or Datacentre settings will only be displayed when the interface is used to attempt an update. In all cases, any errors generated during member maintenance on the Member Maintenance for of this Car Club db will display the error response from MailChimp

6. MailChimp Statuses

- a. When the MailChimp integration is activated it will be displayed on the main Switchboard with a message “MailChimp Integration is ON”
- b. When a member is viewed or updated in the Member Maintenance form, the MailChimp Status of each email address nominated for the member is displayed on the form. These statuses are real time statuses updated using this integration.
 - i. In most cases they should indicate the MailChimp Status for that email address is “subscribed”, indicating that the contact is fully functional in MailChimp
 - ii. However expired members should be “unsubscribed”
 - iii. Other statuses, such as “cleaned” indicate that the email address has been disabled by MailChimp, usually due to the email address bouncing too many times. In such cases the email address should be removed and replaced with another

Brevo (formerly SendInBlue) Contacts List

The following Fields can be added as List Fields in Brevo (formerly SendInBlue). It is recommended that all are added as List fields however if they are omitted or different ones are used then the API does not update them

Field label	Field type	Required?
1. Email Address (EMAIL)	Email	Always
2. First Name (FIRSTNAME)	Text	Yes as a default
3. Last Name (LASTNAME)	Text	Yes as a default
4. Partner or 2 nd Member Name (PARTNER)	Text	
5. Member No (MEMNO)	Text	
6. Member Type (TYPE)	Text	

7. Membership Type (MEMTYPE)	Text	
8. CPS (CPSHOLDER)	Text	
9. Renewal Date (RENEWAL)	Date	
10. Expiry Date (EXPIRY)	Date	
11. Class1 (CLASS1)	Text	
12. Class2 (CLASS2)	Text	
13. Address State (POSTSTATE)	Text	

List Fields

When setting up Brevo (formerly SendInBlue) List FIELDS use the names suggested above (eg FIRSTNAME for first name). This will ensure the copy/pasted data, or the integration by API can successfully update those fields using data from the database. Any field not defined as above will not be updated by this extract, nor the Brevo (formerly SendInBlue) integration.

List Segments

List segments can be created from a fully populated contact list and update automatically based on the contacts information. Suggested List segments include:

- **Current Members**
 - **EXPIRY** is has not been entered
and **TYPE** is not 'NonMember'
and **Member of a List** is a Member of CarClubdb
- **Current Non-Members**
 - **EXPIRY** is has not been entered
and **TYPE** is 'NonMember'
and **Member of a List** is a Member of CarClubdb
 -
- **Magazine Recipients**
 - **EXPIRY** is has not been entered
and **MEMTYPE** is not 'No Magazine'
and **Member of a List** is a Member of CarClubdb
 -
- **CPS Notices**
 - **EXPIRY** is has not been entered
and **CPSHOLDER** is 'Yes'
and **Member of a List** is a Member of CarClubdb

These segments can be easily used to nominate the contacts for specific campaigns

Import Contacts

Generate the data to copy/paste into the Brevo (formerly SendInBlue) email list as follows:

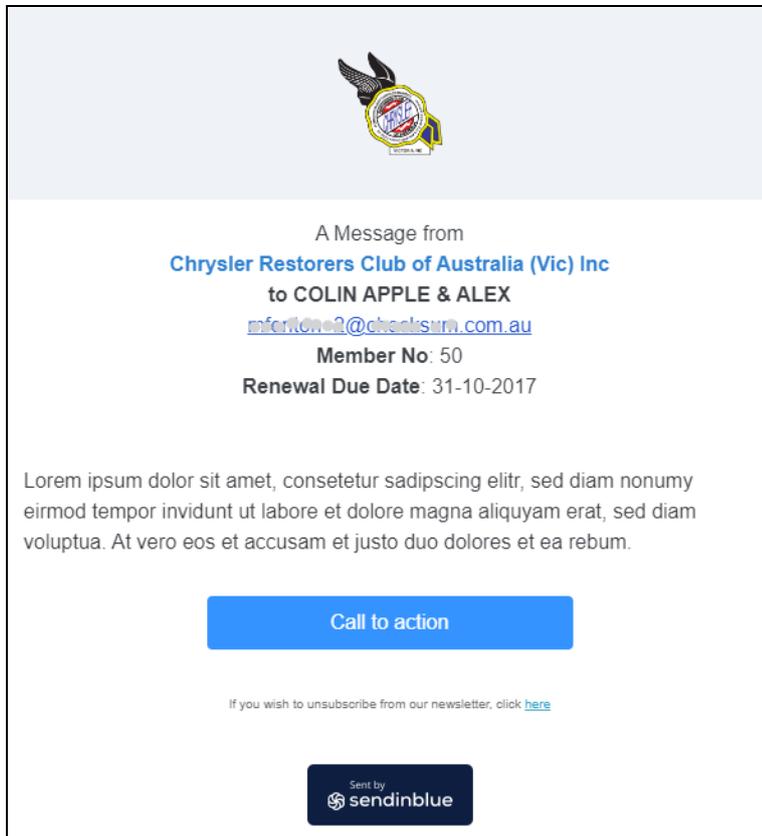
From the switchboard menu Mailing Choices (menu)... Mailing Labels and Extracts (menu) choose the Mailing List extract. You will be prompted to respond whether to include expired members. Typically you would answer NO so that the database is only updated with current members, however by including expired members after the unfinancial members have been expired then these members can be more easily identified and removed/deleted from the list. However when the integration is active this step is not usually needed as they are automatically removed for the list with they are expired (and deleted as a contact if they do not appear on any Brevo (formerly SendInBlue) List)

Once the query data is displayed, then the data can be copied and pasted into Brevo (formerly SendInBlue). Use Ctrl-A then Ctrl-C to select and copy all data into the clipboard, before pasting it (Ctrl-V) into Brevo (formerly SendInBlue) when prompted after selecting the Contacts...Import Contacts...Copy/Paste.

Be sure to choose the option to update the contacts so that the existing entries are updated, and new ones are added. Wherever contacts needed to be removed, eg because of an email change, or a member expiry, this task usually required

manual maintenance of Brevo (formerly SendInBlue), however the Brevo (formerly SendInBlue) integration now adds, update or archives contacts in situations that require it

Learn all the features available with this system, including using custom templates to simplify the sending of professional looking bulk emails as an Email Campaign. An example formatted for use by the Chrysler Restorers Club might look as shown here



Brevo (formerly SendInBlue) Integration

It is recommended that the interface to Brevo (formerly SendInBlue) is configured after the data has been loaded into this database, and when Brevo (formerly SendInBlue) is configured it should be loaded with member data using the data from the Brevo (formerly SendInBlue) extract (Car Club db menu task). By then turning on the Brevo (formerly SendInBlue) interface the list can be maintained automatically when edits are made to the member data and the vehicle CPS data. The batch tasks to expire members who have not renewed within the grace period, and who are subsequently archived from this database also trigger the interface to remove them from Brevo (formerly SendInBlue) (by removing the contact from the list, or deleting the contact as long as they remain in no other lists)

In order to successfully use the Brevo (formerly SendInBlue) Integration, if it is running on a Windows 10 or later device, then you must install/enable .NET Framework 3.5 first. This software component is supplied free by Microsoft and is usually installed by default for all versions of Windows, however not Windows 10 or later. It is compatible with other versions of .NET Framework and can be installed side by side with versions such as 4.0. If it is not installed on this device then it will display an error when attempting to do some of the Brevo (formerly SendInBlue) updates by the API integration.

Note: if the Car Club db is being shared with multiple users (eg via Dropbox), then before activating the Brevo (formerly SendInBlue) Integration all PCs used to access the database must be updated to include .NET Framework 3.5

To install .NET Framework on a Windows 10 device, follow the instructions provided by Microsoft <https://docs.microsoft.com/en-au/dotnet/framework/install/dotnet-35-windows-10>

Follow the instructions to **Enable the .NET Framework 3.5 in Control Panel**. Once installed, reboot your PC before continuing.

To activate synchronisation with Brevo (formerly SendInBlue), open the Master Configuration form (Database Maintenance (menu)...Change Configuration (menu)...Maintain Club Master Data) and click on the Brevo (formerly SendInBlue) tab.

Master Maintenance ×

Club Master Data Maintenance

Defaults Defaults 2 Renewal p1 Renewal p2 Renewal p3 Magazine Email Reports on Exit MailChimp **SendInBlue**

Only configure this option if automatic synchronisation of member data to a SendInBlue Audience/List is required. You must have a valid SendInBlue Account and obtain the relevant API Key and Audience ID before activating this option. Refer www.sendinblue.com for details

SendInBlue Synchronisation *Tick this box if you want to auto sync member changes to SendInBlue Emailing List*

SendInBlue API Key
Enter the API key generated for your SendInBlue Account

Audience/List ID
Enter the List ID generated from your SendInBlue Account for the nominated audience/list

Set the following values to configure the interface to an existing Brevo (formerly SendInBlue) account

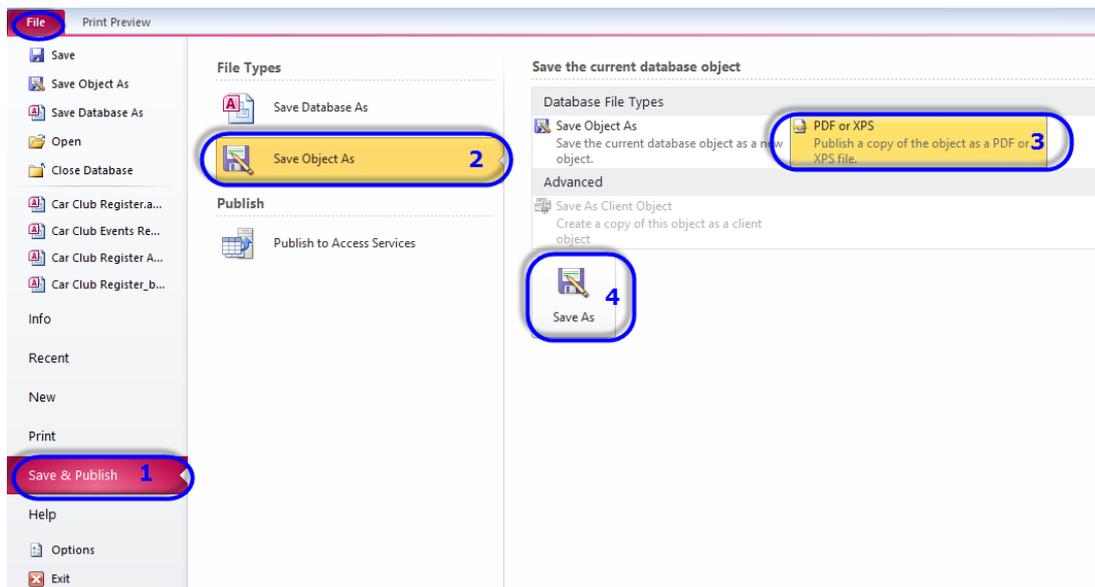
7. **Brevo (formerly SendInBlue) Synchronisation:** tick the box to activate the interface
8. **Brevo (formerly SendInBlue) API Key:** Generate a unique API key for in Brevo (formerly SendInBlue) for this interface to use.
 - a. At the time of writing these instructions the Brevo (formerly SendInBlue) steps involve
 - i. To Generate a new API key, navigate to the account settings and find the SMTP & API page. Goto to the API Keys tab to generate a new API key.
 - ii. Name it “app-carclubregister” for future recognition. Be sure to record the API key when it is generated as it cannot be looked up later without generating a new one (for security reasons)
9. **Brevo (formerly SendInBlue) Audience/List ID:** Some Brevo (formerly SendInBlue) accounts can have multiple Contact lists, and this List ID uniquely identifies the Brevo (formerly SendInBlue) List to be updated by this integration
 - a. To find the Audience/List ID, navigate to the Contacts...Lists to find the ID to use.
 - b. NB: DO NOT USE the default “identified_contacts” list as this is used for Brevo (formerly SendInBlue) login purposes, but Add a new List if necessary, choosing a name such as CarClubdb for easy recognition
10. **Test Brevo Connection:** after the above configuration is entered, click the button to test the connection with Brevo (formerly SendInBlue).
 - a. If successful it will display a successful health message such as
 - b. If the connection is not successful then an alternate error message will be displayed
 - c. NB: this tests the Brevo (formerly SendInBlue) API using the API Key and List ID. In all cases, any errors generated during member maintenance on the Member Maintenance for of this Car Club db will display the error response from Brevo (formerly SendInBlue)
11. **Brevo (formerly SendInBlue) Statuses**
 - a. When the Brevo (formerly SendInBlue) integration is activated it will be displayed on the main Switchboard with a message “Brevo Integration is ON”

- b. When a member is viewed or updated in the Member Maintenance form, the Brevo (formerly SendInBlue) Status of each email address nominated for the member is displayed on the form. These statuses are real time statuses updated using this integration.
 - i. In most cases they should indicate the Brevo (formerly SendInBlue) Status for that email address is "subscribed", indicating that the contact is fully functional in Brevo
 - ii. However expired members should be "not found"
 - iii. Other statuses, such as "BLOCKLISTED" indicate that the email address has been disabled by Brevo, usually due to the email address bouncing too many times. In such cases the email address should be unblocked in Brevo if the block was inadvertant or temporary or replaced with another one in the db

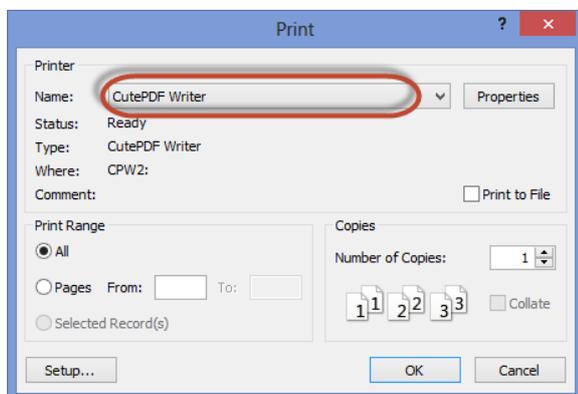
Printing & Emailing Reports as PDF documents

This database displays reports in Print Preview mode, where they can also be printed. However on most occasions it may be necessary to save the report as a PDF file that can be emailed to other club members. The latest version Microsoft Office products (eg Word and Excel) enable the documents to be saved as a PDF and this includes MS Access 2010, as follows: Select File...Save & Publish...Save Object as...PDF or XPS then click Save As to save the report as a PDF document that can be send in an email as an attachment

This functionality is available standard in Office 2010, and is available in Office 2007 by installing the free add-in available from Microsoft at <http://www.microsoft.com/en-au/download/details.aspx?id=7>



If you do not have this feature, then consider downloading one of many free apps that are available on the internet for this purpose. For example PDF files can be saved from most programs by installing free versions of programs such as "CutePDF Writer" then "printing" the report to the CutePDF Writer printer which prompts for a file name to save it as.



CutePDF Writer is available free from www.cutepdf.com

Database History Logs

It is often useful when diagnosing problems to understand the previous history of who has opened the database, especially when it is shared.

The START.cmd includes functionality to write details to a file *Clubdb_HISTORY.txt*, which can be examined at any time. It is located in the database folder, and includes details of users names (PC login names), entry and exit times and error codes encountered, if any.

It may be useful to understand who uses the database, and what errors have been encountered when opening and closing the database.

Online Support

From time to time, other database users will have a problem with their PC, or with using the shared Club databases, or they have simply forgotten how to do something. You may want to help them out, without leaving home. There ARE options to connect to their PC and take control of their monitor, mouse and keyboard, to investigate (and hopefully fix) a problem, install some new software, or show them how to do a new task - all without leaving home!. If this is what you need, then check out TeamViewer at www.teamviewer.com.

But also consider this in reverse.

What if it is YOU who is the IT challenged user who needs help? Use TeamViewer to ASK someone to help you solve a problem (by sending them an email with the required link to connect to your PC), without them having to make the journey to your place. After a few seconds of agreeing on connection IDs and authorising passwords (on the phone) you will be off and running. It works great, and is not only suitable for Club business. For example it might allow a friend, or your more IT competent son/daughter who does not live at home, to more easily help you out with sorting out simple PC problems. This may be beneficial for you as well as for Club related problems.

Published Club Register

Most clubs publish a list of members and their cars from time to time, making it available as a printed or online document for members as a resource to understand who has what cars and how to contact them. For example, the Chrysler Restorers Club publish a register every two years. It is issued to new members as part of their "Welcome Pack" and contains all details about current members (except unlisted addresses / phone numbers), their cars, tools available for loan and a list of publications in the Club library. This document is distributed to members every 2 years either as a printed copy or is made available online for download for those members who use the online membership - No Print - option (be sure to maintain adequate privacy standards by only making this available online from a secure, members only, web page that prevents search engines/web bots trawling the document to retrieve confidential details such as email addresses).

This database produces several reports that could be used to assemble a comprehensive Club Register ready for publication., for example a Member Register (without unlisted addresses), a Vehicle Register and a Register Summary. When saved as a PDF report they can be combined with other content to generate a single PDF that combines all these reports.

For example, CRCA Vic generates various individual pages using Publisher, Word, Excel and this database before using a FREE online PDF joiner service to create a single PDF document containing the following

- front cover (using Word or Publisher)
- inside front cover (with Club contact details, Club "purpose", honour roll of President, Life Members and Club members) (using Word or Publisher)
- member register report (from this database)
- vehicle register report (from this database)
- tools register (using Word or Publisher)
- library register (using Word or Publisher or Excel)
- register summary report (from this database)

Blank spaces on some pages are filled using photos of recent Club Awards (display day winners, or Clubman/Clubwoman), and the page count is boosted to a multiple of 4 using advertisements from significant Club sponsors, so that the register can be printed as an A4 saddle stitched booklet without blank pages.

Although the standard member and vehicle register reports can be used as is, we actually use the option to reformat the standard reports (eg to remove the No Print membership type and the renewal date). This is done using the 2nd front end database supplied with this database, called "RENAME ME Custom Reports.accdb", to import and customise the standard report to suit our purpose without compromising the original report

FREE online PDF Joiner services include the following (or just google for more options):

- <http://pdfjoiner.com/>
- <https://www.pdfjoin.com/>
- <http://smallpdf.com/merge-pdf>

Appendix H - Software Update Special Instructions

Depending on your current version and the date of release for a new version, it may be necessary to replace specific files and/or perform additional steps to activate new features.

If you have already installed the database and it is in use with current data, then you must take care to preserve the current data in the backend database tables (ie Car Club Register_be.accdb and Car Club Register Archive_be.accdb). If you have previously extracted the "RENAME ME Custom Reports.accdb" file and modified it with custom reports, then DO NOT extract this file again.

To be safe, please backup these files before extracting any updated files from the downloaded ZIP file. The best precaution is to temporarily copy the whole folder to a folder with another name, in case you need to retrieve one or more of the original files

NB: the sample data files have now been moved to the sample data folder to minimize the risk of inadvertently overriding the existing data during an upgrade

Follow the instructions provided to download the latest software ZIP file that contains all the files provided for a new install, and then extract/replace ONLY the required files into the desired location. DO NOT accidentally extract/replace your backend files containing valuable current data

Depending on which version you are upgrading from you may need to perform the special instructions for some or all of the following updates. Be sure to read ALL the relevant special instructions and warnings before performing the update to the latest version

Update Releases 2016

Includes the following updates

- Update20151101CPS
- Update20151223EMAILSIG

This release fixed some bugs and added new features requiring specific setup.

1. Extract the following files from the updated ZIP file and replace the current file in the required folder
 - a. Car Club Register.accdb
 - b. Optional: PHOTO INPUT Folder (refer below for instructions)
 - c. **DO NOT extract the backend database tables (ie Car Club Register_be.accdb and Car Club Register Archive_be.accdb)**
2. Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the vehicle table to support the new functionality.
3. NOTE: If you are updating files saved in Dropbox then consider momentarily pausing the file synchronization (see in settings by right clicking the Dropbox icon in your System Tray - bottom RH corner). This will avoid errors caused by file locking as the files are open and closed rapidly causing Access to clash with Dropbox. If errors do occur due to the file locking then just open and close the database repeatedly until all the updates have been completed
4. Close the database and reopen it before further use
5. The following instructions are optional
 - a. **Email Signature:** A new email signature option has been added to include a custom email signature (text only) on the bottom of outbound emails generated directly from the database
 - i. The Master data maintenance form should be displayed after this update, or follow the menu to Database Maintenance>Change Configuration>Maintain Club Master Data after the database is opened
 - ii. Enter a suitable text message to append to the bottom of the currently generated email

Email Signature

Enter a signature for outbound emails eg Sent on behalf of the Secretary (secretary@club.org.au)

- b. **Auto-Generated Reports:** This new feature is disabled by default, preventing the tick box at the bottom of the main menu form from being changed.

Generate Offline Reports on Exit

To auto generate new reports whenever a member or vehicle record is updated, you only need to create a folder in the correct location.

- i. Use Windows File Explorer to create a folder called “Car Club Reports” in the same PARENT folder as the Car Club database folder.
 1. If your database is currently set up in a folder in your Dropbox folder the the new folder should also be set up in Dropbox, adjacent to the existing database folder
 - ii. If you are using Dropbox to share files with others then the reports generated in this new folder can be shared with others as required, without affecting the security of, or access to, the actual Car Club database folder
 1. NB: if the recipients of your share offer also have Dropbox (on their PC and/or Apple/Mac and/or Android device) then the updated reports are automatically synchronised and available to them at anytime
 - iii. The following reports are automatically generated when the database is closed and the tickbox called “Generate Offline reports on Exit” is ticked. By default this tickbox is set on when any member or vehicle record is updated, but it can also be manually overridden
 1. Member List (PDF and XLS format includes all member details - including unlisted address details)
 2. Vehicle List (PDF and XLS format)
 3. New Member List (PDF format includes new members in the past 12 months)
 4. CPS List (PDF format includes details of all CPS vehicles and their owners- including unlisted address details)
 - iv. Note: if you are using MS Access 2007, but have NOT installed the addin to be able to print/save to PDF, then the above PDF documents will not be auto generated. This functionality is available standard in Office 2010, and is available in Office 2007 by installing the free add-in available from Microsoft at <http://www.microsoft.com/en-au/download/details.aspx?id=7>
- c. **CPS Photos:** Although not part of the actual database, a simple system for archiving photos as part of the requirement for the Victorian Club Permit Scheme (CPS) was added to the ZIP file
- i. Extract the folder called “PHOTO INPUT” from the ZIP file to a suitable location
 1. This folder can be located anywhere however, if you are sharing data by Dropbox, then consider using a separate folder location where this data can be shared only with designated CPS officers
 - ii. Follow the instructions in “Instructions - CPS Photo Rename.pdf” to run the cmd script in the PHOTO INPUT folder that prompts to record data for each permit, renames photos and saves them in a named folder for easy retrieval

Includes the following updates

- Update20160201VARRENEWALDATE
- Update20160201MODELMAKESTYLE
- Update20160201SUMMARYRPT

This release included significant changes to the underlying data tables, as well as forms, queries, reports etc to:

1. support variable renewal dates (ie variable per member) which is accompanied by a new process to record updated renewals, and includes a default leadtime warning for renewals, and a grace period before unfinancial members are expired.
 - a. The fixed annual renewal date used by many clubs remains as the default option, but can be changed in the Master data form, however the management of renewal updates is the same for both fixed and variable renewal dates (ie renewals are generated when the leadtime days is reached and are expired after the grace days has elapsed), making the management of renewals an annual process (for fixed renewal dates) or a monthly process (variable renewal dates).

- b. The new renewal process also allows for multi-year renewal payments to be recorded (which was requested by several clubs)
- 2. support additional membership types that may or may not be eligible for a magazine
 - a. NB: the previous functionality that used the magazine count to determine if a member was financial has been replaced by the variable renewal date process which does NOT assume financial members always receive a magazine (this was added for some clubs that have special membership types with limited conditions)
 - b. The renewal tracking process using the renewal flag has been eliminated and is now managed using updates to the renewal date
- 3. support make/model/style recording of vehicle descriptions.
 - a. The use of these fields is optional and any existing vehicle descriptions remain valid
- 4. Enable the Register Summary Report to be fully customizable for every line displayed
 - a. This make the report much more configurable and will enable clubs to display a summary of the data in their data that suits the composition of members and vehicles in their club. Previously the report was partially customizable, however now EVERY line can be changed, and the sections, groups and categories can be you want
- 5. Added a new (second) front end database (called "RENAME ME Custom Reports.accdb") that can be used if required to develop custom reports without affecting the standard Car Club Register database design.
 - a. After extracting this file rename it so it cannot be accidentally overridden by the unmodified file in a future update
 - b. For some Clubs with expertise available in MS Access development, this may be useful. NB: Never modify the design of tables, reports, forms, queries or modules in Car Club Register.accdb as any changes may be lost when new updates are available, whereas reports developed in the (renamed) RENAME ME Custom Reports.accdb will never be updated
 - c. This database includes a menu switchboard that can be customized to call reports developed within this front end database. Use standard MS Access Switchboard Management functionality to add new menu items (Google it if you can't find it)
 - d. This database also auto links to the backend database located in the same folder (same as the Car Club Register database. NB: Never edit records using the links to these tables or you will risk corrupting the data or their relationship to other data
 - e. It includes an IMPORTED copy of several standard reports like rpt_VEHICLE_REGISTER which can be used as an example of a report to be modified to better suit a car clubs reporting requirements(refer Appendix I for more details)
 - i. If other reports are required then they can be
 - 1. Created from scratch
 - 2. Or choose an existing report to IMPORT from Car Club Register.accdb before modifying to suit

Despite these significant changes, NO additional manual conversions are required as existing member and vehicle data is automatically converted to the new format as the update progresses. However, note that some new Master data needs to be checked before further use, and the formulas for the Register Summary Report will need to be reloaded

1. **WARNING: This update should NOT be applied if the previous renewal process (using the renewals flag) is in progress**, or else the automatic calculation of the new renewal date will be incorrect. Wait until the renewals process is completed, any grace period has expired and the process to expire unfinancial records based on the renewals flag has been completed.
 - a. If the renewals process managed using the renewals flag has commenced then the final step (called 'Cancel Magazines for unflagged members') must be completed otherwise the update of the renewal date must be performed manually, after the upgrade
2. Extract the following files from the updated ZIP file and replace the current files in the required folder
 - a. Car Club Register.accdb,

- b. Club Magazine Address.docm
 - c. Instructions - Car Club Register Database.pdf
 - d. **DO NOT extract the RENAME ME Custom Reports.accdb database if it has been previously extracted and modified with custom reports, but has not yet been renamed**
3. Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the member and vehicle tables to support the new functionality.
 4. NOTE: If you are updating files saved in Dropbox then consider momentarily pausing the file synchronization (see in settings by right clicking the Dropbox icon in your System Tray - bottom RH corner). This will avoid errors caused by file locking as the files are open and closed rapidly causing Access to clash with Dropbox. If errors do occur due to the file locking then just open and close the database repeatedly until all the updates have been completed
 5. Close the database and reopen it before further use
 6. The following instructions are optional
 - a. **Renewal Date:** A new checkbox enables variable renewal dates to be used by default
 - i. The Master data maintenance form should be displayed after this update, or follow the menu to Database Maintenance>Change Configuration>Maintain Club Master Data after the database is opened

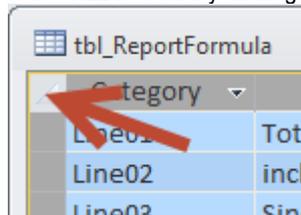
Variable Renewal Dates *Tick this box if each membership expires on the anniversary of their previous renewal date or leave blank if renewals for all members is on the above due date*

Renewal Warning Days *Enter the number of days BEFORE renewals are due to trigger the Renewal Notice*

Renewal Grace Days *Enter the number of days AFTER renewals are due to trigger membership Expiry*

- ii. Turn on Variable Renewals, if required (Note: if this is done after data has been loaded with a fixed renewal date then all existing renewal dates remain the same but new members will be set up using the current date for the renewal anniversary). The existing or default renewal date can be overridden if required
 - iii. Confirm the Renewal Warning Days and the Renewal Grace Days default values are satisfactory, or change them to suit
- b. **Register Summary Report Formulas:** reload the formulas in the new table format
 - i. NB: Until the data is reloaded in the correct format, the Register Summary Report will be blank
 - ii. If you have previously customised the formulas used in the Register Summary Report, then export this data as an excel spreadsheet for reference prior to reloading the formulas in the new table format
 - iii. Refer to Appendix F for further details on how these formulas are defined for the report
 - iv. Formulas are maintained from the switchboard menu...Database Maintenance (menu)...Change Configuration (menu)... Customise Report Formulae to open the tbl_ReportFormula table where you can see the existing sample formulas. They can be edited in this form
 - v. To delete the existing data

1. select ALL records by clicking in the top left corner of the displayed table, as follows



This will highlight all rows and columns

2. press DELETE (on your keyboard or on the menu ribbon) and if requested confirm to delete all the selected data
- vi. To insert new data

1. Open the spreadsheet called tbl_ReportFormula.xlsx, supplied in the ZIP file (in the folder called SAMPLE DATA)
2. This contains the data formatted to display the report in the format used by the Chrysler Restorers Club of Australia (Victoria) inc, and suits the sample data supplied with the database when first installed
3. If you have previously modified these formulas in your database to suit the data in your own Club then please take the time to update the formulas in the sample spreadsheet supplied, before reloading it. You may subsequently want to take the time to further customise the report, given that it is now customisable for EVERY row on the report

Includes the following updates

- No database table changes
- Updated Custom Reports database front end, called RENAME ME Custom Reports.accdb
- New start script call "Start Custom Reports.cmd"

This release included minor updates to existing reports, and added new sample reports to the existing RENAME ME Custom Reports database frontend to:

1. Enable a printable Club Register to be generated, by creating individual member and vehicles registers, and a register summary report, with more consistent formatting. These reports, when saved as PDF reports, and combined with Club specific cover pages etc can be merged/joined into a single PDF report for printing or distribution online
2. Generate membership cards, or labels to attach to existing membership cards. These are generated for all new members and renewed members. Id required, address labels can be printed to assist postage. These reports have been created in the sample custom reports database frontend, so they can be further modified by the Club if required without affecting the main database
3. It also included a bug fix to prevent unintended deletion of the Comms history data that prevents membership renewal and final notices from being printed more than once

These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- RENAME ME Custom Reports.accdb, which should then be renamed by removing "RENAME ME" from the existing name. The Custom Reports.accdb file is then protected from accidentally being overridden in a future upgrade, and can be opened by the following start commend
- Start Custom Reports.cmd

Once extracted to the same folder as the existing database files, they can be used as normal, although you may want to add a shortcut to the desktop for the new start command for the custom reports database

Includes the following updates

- Update20160315MAGNAME

This release included additional Master Data options to:

1. Enable the Magazine coversheet to print with the Club's magazine name and a description or message

These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the member and vehicle tables to support the new functionality.

It will also prompt to display the Master Data maintenance form. On the Magazine Tab enter and format the data for the magazine name and the description or message to appear on the coversheet when printed.

Both of these fields can be formatted to the maximum size possible and with a preferred font for use on the coversheet (use bold, italics, font and size as required)

Includes the following updates

- Update20160503ENGNO

This release included additional fields to record:

1. Body No
2. Vehicle Engine No

It also included bug fixes, particularly related to apostrophes in names. These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the vehicle tables to support the new functionality.

Includes the following updates

- Update20160602CLASS

This release included additional member fields to record:

1. Class 1
2. Class 2

These additional member fields can be used, if required, to add fields to the mailing list extract that can be used to filter members for targeted mailing purposes. For example one Club wanted this functionality to be able email only those members with motorcycles, but use it how you like.

These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the vehicle tables to support the new functionality.

Includes the following updates

- Update20160720PRIORITYPOST
- Update20160720REFERENCEDATE

This release included additional Master field to record:

1. PriorityPost

These additional Master field can be used, if required, to change the Post Paid logo on coversheets and renewals, to a PRIORITY Post Paid logo per Australia Post standards.

This release included additional member fields to record:

1. Reference No
2. Reference Date 2

These additional member fields can be used, if required, to record member reference data. For example one Club wanted this functionality to be able record payment receipt No and date, but use it how you like.

These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the vehicle tables to support the new functionality.

Includes additional functionality to support emailing using a webmail solution such as a Gmail or Telstra Mail account. No database table changes were required to implement this functionality

It also included a revised start.cmd script that avoids unnecessary warnings when a conflicted Dropbox file is created for non-data containing database files

Update Releases 2017

Includes the following updates

- Update20170319COUNTRY
- Update20170319ADDRESSLENGTH
- Updated Mail Sort Codes

This release included additional member fields to record:

1. Country
2. And a longer address field length (35)

These additional member fields can be used, if required, to record address country. This was to assist clubs that have international members, where the existing address fields did not suit well.

These changes are relatively minor and do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the members tables to support the new functionality.

The ability to update Mail Sort Codes for those clubs using discounted Print Post options with Australia Post has been improved

Includes the following updates

- Update20170513CONTACTS

This release included additional member fields to record:

1. Alternate Telephone, Mobile, Email, unlisted phone and unlisted mobile

These additional member fields can be used, if required, to record a second set of contact details for the first or additional member.

These changes enabled additional member information to be recorded and the additional fields were added to the maintenance screens and the renewal forms, but do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases by adding new fields to the members tables to support the new functionality.

Update Releases 2018

Includes the following updates

- Update20180426POSTLENGTH

This release included additional Print Post sort fields to record:

1. Print Post sorting data

This additional field enables the latest Australia Post Print Post sorting requirements to be supported.

In addition the Australia Post Print Post sort codes have been updated as of March 2018 and now automatically update existing member Print Post sort codes when the database is used for the first time after this update

These changes included updates to the Print Post Mail Summary, but do not affect existing database functionality unless updating from versions prior to the last release, in which case those instructions should be followed as well.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20180812CHECKUPDATES

This release included additional Master Data fields to enable the Automatic check for updates to be turned ON/OFF. It defaults to ON. This checks for updates when the database is opened. If updates are available it prompts for the option to close the database and download the changes from the download site (on Dropbox)

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

The Australia Post Print Post sort codes have been updated to comply with requirements as of 1st September 2018 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20180930HISTORY

This release includes functionality to record and subsequently report detail member and/or vehicle history as Member or Vehicle Journals. These can be selectively included in a Member or Vehicle Journal reports generated using the Member or Vehicle Search forms

It includes an enhancement to the auto update check with the ability for the user to skip an update that might not be so relevant in their case, but still be notified when the next version is released.

It can now also export additional spreadsheets following updates to the database. These always-up-to-date spreadsheets can be used as mail merge data sources without needing access to the database itself

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20181031VALIDATION
- Update20181031USERSECURITY

This release includes updated post code data including from Australia Post 1/9/18 revision 1 which corrected some missing data.

It has improved data validation to minimize the potential for bad data affecting selection of records for reports and extracts

It also fixes an issue preventing configuration of users to restrict them to maintenance of Vehicle Only.

It is now possible to configure the database via master data to choose to NOT save all (most) data in uppercase. For ease of use and consistent appearance in reports it is recommended that this setting be left as UPPERCASE = YES, however some Clubs have requested the ability to do otherwise.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20181130COUNTHISTORY

This release includes automated capture of member and vehicle counts when magazines or renewals are printed, and when members are expired (for historical tracking of member/vehicle growth).

It ensures a log is automatically generated, either monthly or annually or both, depending what functionality is used in the database, of member and vehicle counts that enable the membership and vehicle counts to be tracked over time so that membership growth can be accurately monitored and reported. This data is extremely difficult to calculate in retrospect so recording this at the time is a better option. The data can be accessed, or maintained, from time to time via the extracts menus. Historical data can also be added to this table manually eg to add historical data that has been captured or calculated manually.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

NB: Because this update involves a new table being added to the database there will also be an additional warning displayed that a connection to this table (tbl_CountHistory) could not be established on startup. This message can be ignored as the next step in the upgrade is to add it

Update Releases 2019

The Australia Post Print Post sort codes have been updated to comply with requirements as of 1st March 2019 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update

Includes the following updates

- Update20181231ADRESSEXTRA

This release includes a separate Extra Mailing Title for Unlisted addresses, instead of sharing it with the listed address (It never made sense the way it was). If you use mail merge from this database then you should review the fields used for the address and replace the field "Extra" with "Address0" to get the correct Extra Mailing Title when unlisted addresses are used

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates 17/9/19

The Australia Post Print Post sort codes have been updated to comply with requirements as of 1st September 2019 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update

Update Releases 2020

Includes the following updates 11/1/2020

- Update20200101EMAILCONFIG

This release included additional Master Data fields to enable a default email configuration to be defined for all users of the database when sending outbound emails. For example this can be used to define a single outbound SMTP email address for all users of the database

Some options can be left blank in which case the user is prompted to save their own personal configuration parameters. For example this can allow separate reply to email addresses to be defined for each user.

NB: The email account password is never saved in the database and must be re-entered for the first email sent after each time the database is opened

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

It will also prompt with the Master Data maintenance form. Navigate to the "Email" tab and maintain the new settings as required

Includes the following updates

- Update20200102MEMBERTYPEDEFAULT

This release includes additional Member Type Data fields to enable a default member Type to apply when creating new members. Previously this was hard coded, allowing "Member" to be a required (and default) member type. This enable greater choice of member types to be used.

2 report enhancements are included

1. The "Years of Service" can now be generated with a user defined 'as of' date, instead of defaulting to the master data defined end -of-membership year date
2. An alternative Register Summary Report with a 2 column format can be used to display more data, which suits clubs with a large array of makes or models to report. This report used to exist in the associated Custom Reports database, but has been moved into the Car Club Register database for easier access for those clubs that use it. An additional custom formula spreadsheet for the 2 column layout is included in the ZIP file to demonstrate how to prepare the formulas to load into the configuration table

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20200103GoogleAPI

****NB: This functionality was subsequently removed 25/2/2022****

<details removed>

Please note that for clubs with a large membership (eg > 50-100) it is highly recommended to avoid using normal email accounts like Gmail (whether it be by SMTP or Google APIs), due to the limits that apply to the sending of bulk emails. (eg <https://support.google.com/mail/answer/22839?hl=en>) If sending large numbers of emails, such as for annual renewals notices, then a "proper" bulk email SMTP Relay Service such as those provided by mailgun.com or Brevo is a much better option, as they enable large volumes of emails, to be sent from a managed bulk email server that automatically controls the deliverability, without being classified as spam. Mailgun.com do have a free offering that applies for <10,000 emails per month. To be able to apply for such an account will require the club to have their own website domain name that can go through a verification process to confirm ownership, so it might not suit the smaller clubs. Brevo is another option for free emailing to a limit of 300 per day. In both cases if higher email volumes are required then subscription options are available. Making the right choice is a balance....

And if a mailing list option is also required to send "marketing" campaigns (eg information, event or meeting notifications to members) then make the decision after considering the options provided by Brevo (includes functionality for BOTH SMTP Relay Service + Marketing Campaigns to member contacts), or use the combination of MailGun (SMTP Relay Service only) PLUS MailChimp (Marketing Campaigns to member contacts only)

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Includes the following updates

- Update20200104REPORTSONEXIT

This release includes additional Master Data fields to enable the reports generated by the existing “Reports on Exit” functionality. By using this functionality the main member and vehicle reports can be auto generated as PDF reports or XLS extracts whenever the database has been updated. The reports are saved in a folder that, if the database is being run in Dropbox, then the reports are also generated in a separate Dropbox folder and can be shared with other users who do not have access to the database itself. It is an easy way of sharing up to date information with other club members, eg committee or CPS administrators needing to know whether a member is currently financial.

This update enables the functionality to be activated more easily, if not already activated, and the reports to be generated can be selected

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

It will also prompt with the Master Data maintenance form. Navigate to the “Reports On Exit” tab and maintain the new settings as required

Includes the following updates

- Update20200111RENEWALFORMAT

This release includes additional Master Data fields to enable more renewal fee explanation, especially for multi layer fee structures. The Renewal and Final Reminder reports were slightly reformatted to display the additional information.

Some of the “hard coded” text on the renewals cover page is now editable, and a new formattable message panel is available, if required. For example you may wish to use it to explain the fee structure more clearly than occurs on the back page

Also note that the Privacy Declaration is now optional and can be replaced with a formatted text to collect credit card details, similar to the following. More options, your choice

RENEWAL DETAILS: Magazine is currently: **PRINTED**
 Membership Type is: **Metro** Printed Magazine: Metro & Overseas (\$75), Country & Interstate (\$70)-Donation Optional
 Please renew my membership Email of Magazine: Metro & Overseas (\$85), Country & Interstate (\$80)-Donation Optional
 I am paying by: (please circle your choice) **CASH / CHEQUE / MONEY ORDER / BANK TRANSFER / CREDIT CARD**

SIGNED: DATE: TOTAL PAID: \$

CREDIT CARD AUTHORITY	
(Do Not Detach)	CARD HOLDERS NAME: AMOUNT \$
	CREDIT CARD No: EXPIRY DATE:
	CARD HOLDERS SIGNATURE: DATE:

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

It will also prompt with the Master Data maintenance form. Navigate to the “Renewal p2” tab and maintain the new settings as required

Update Release 31/8/2020

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

The Australia Post Print Post sort codes have been updated to comply with requirements as of 1st September 2020 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update.

A new Membership Type called "Honorary" will be recognized during the renewals processing to auto update the renewal date each year, without requiring payment of fees. This new member type is just like Life Members, but without that label, and is reported as a member, rather than a non-member. To be able to use the new member type you must manually add it to the Member Type list in Maintain Database (menu)...Change Configuration (menu)...Maintain Member Type, and follow the instructions.

An additional Master Data maintenance option has been added to save a default email password if the CDO/SMTP method of sending emails is being used. If the "Memorize Password" button is pressed it will prompt for the password to memorize. NB: this password is not saved in the database, so if the database is being shared with others (eg via dropbox) then each user that is authorized to use send emails using the default email configuration must memorize the password on their PC.

You will also notice that when sending bulk emails from the database, eg to send renewal notices to eligible members, a progress status bar displays the progress through the list of emails being sent.

All reports now include an option to print a Club logo. To add a Club logo to all reports, simply add a jpg logo file to the main Car Club Register folder with the name "Club Logo Report.jpg". You can for example copy and rename the existing logo file called Club Logo.jpg, or you can edit it to change/improve the appearance on the generated reports.

Update Release 20/10/2020

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

These updated files should be extracted or copied into the database folder.

The changes implemented in this release include new functionality (eg menu favourites and member map locations). Follow the instructions in this document to set up and use these features if required

This release also fixes some date formatting issues caused by long standing issues related to default Microsoft interpretation of dates as mm-dd-yyyy instead of dd-mm-yyyy, despite the PC regional settings. Such problems manifest only in the first 12 days of the month which means that for many users the problem may never arise, however those Clubs using variable expiry dates (instead of a single annual expiry date) may have experienced selection errors when processing Renewal Notices during the first 12 days of a month – this has now been corrected. All record selection based on dates has been reviewed to ensure these errors are eliminated.

This release also adds some missing SA post codes, caused by an error in the Australia Post Print Post sort code data released for effect on 1/9/2020. The update will therefore automatically include the additional data and update the member sort codes automatically.

This release also fixes the data format used for the MailChimp emailing list extract to default to the (MailChimp preferred) "dd-mmm-yyyy" date format

Update Releases 2021

Includes the following updates 10/1/2021

- Update20201221EXTRAINFO

This release included new fields to record additional information about skills and interests of the member, as well a new search inquiry (Search SKILLS/INTEREST) and report formats to search for and display the additional information. The data is optional but the specific use case for this functionality was to enable management and reporting of not only member skills and interests but also qualifications, such as Working With Children Checks that have an expiry date associated with them. New data import forms are provided to facilitate the loading of this data (v20201221)

Changes were also made to improve the reporting of additional family member types who are actually associated with the recorded member, rather than a separate member (for example a SPOUSE member or a JUNIOR member). Additional Family members can now be selected in the Search MEMBER form and included in the Member Register Reports if required. (v20201216)

Another small but convenient change was to increase the number of menu options per page from 8 to 9 (v20201220)

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

No other user input is required, other than the optional use of the new functionality

Update Release 26/2/2021

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

The Australia Post Print Post sort codes have been updated to comply with requirements as of 26th February 2021 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update.

Other enhancements include the ability to print magazine coversheets in separate batches for Members and Non-Members if necessary, simplifying the sorting of magazines when members and non-members get different loose leaf inserts to the magazine. An enhancement was also made to the management of email passwords allowing a user to manage different passwords when multiple membership databases are used on the same PC

Includes the following updates 17/5/2021

- 20210313 includes minor updates (additional columns) to the mail merge output
- Update20210321MAILCHIMPSYNC add functionality to integrate with MailChimp to automatically keep it up-to-date with all changes made in the database
- 20210409 changed the sort sequence of mailing documents and labels to sort by print post sort code and member name (ie to group family members).
Added an option to enable the introduction on Membership Renewals and Final Reminders to be edited
- 20210517 added some missing sort codes for SA Print Post configuration, and fixed the selection of renewals and final reminder notices when printed, to exclude members who have already received one by email

This release included additional Master Data fields to enable MailChimp synchronization to be activated, and to enable the introduction on Membership Renewals and Final Reminders to be changed.

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

It will also prompt with the Master Data maintenance form:

- Navigate to the “Renewals p3” tab and edit the introduction printed on Membership Renewals and Final Reminder, or leave unchanged to use the previous introduction text
- Navigate to the “MailChimp” tab and maintain the new settings as required to configure and turn on the synchronization of MailChimp with the database (NB: in all cases the Car Club db is the master/source of data). Refer to the instructions (page 55) on how to set up MailChimp and the configuration for this integration.

In order to successfully use the MailChimp Integration, if it is running on a Windows 10 device, then you must install/enable .NET Framework 3.5 first. This software component is supplied free by Microsoft and is usually installed by default for all versions of Windows, however not Windows 10. It is compatible with other versions of .NET Framework and can be installed side by side with versions such as 4.0. If it is not installed on this device then it will display an error when attempting to do some of the MailChimp updates by the API integration.

Note: if the Car Club db is being shared with multiple users (eg via Dropbox), then before activating the MailChimp Integration all PCs used to access the database must be updated to include .NET Framework 3.5

To install .NET Framework on a Windows 10 device, follow the instructions provided by Microsoft

<https://docs.microsoft.com/en-au/dotnet/framework/install/dotnet-35-windows-10>

Follow the instructions to **Enable the .NET Framework 3.5 in Control Panel**. Once installed, reboot your PC before continuing.

Includes the following updates 27/8/2021

- Print Post sort codes
 - The Australia Post Print Post sort codes have been updated to comply with requirements as of 27th August 2021 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update
- Member Renewal Notices
 - This update includes changes to the selection of members when sending Renewal Notices, so that members who are already renewed (or are automatically renewed, like Life Members) also receive a Renewal Notice, but without the instructions and request for payment.
- Update20210827HIDEBIRTHDAYS
 - Update20210827HIDEBIRTHDAYS added an option to hide Member Birthday fields on the Member Maintenance form and on the Renewal Notice and Final Reminder Notice. Clubs that do not want to collect this information can activate this option in the Master Configuration form.
- Update20210827RENEWALATTACHMENT
 - Update20210827RENEWALATTACHMENT added an option to enable a second, custom, attachment to be included on Membership Renewal emails. The file (usually a PDF) should be saved in the folder where the database exists, and the file name (without the file path) should then be nominated in the Master Configuration form. If left blank then no second attachment is sent

To perform the update extract the following files from the supplied ZIP file

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf
- Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.
- It will also prompt with the Master Data maintenance form:
 - Confirm the desired settings for the new options on tab Default 2
 - Hide Birthdays
 - Renewal Attachment 2

Includes the following updates 29/9/2021

- QR Code for Online Renewals
 - If a picture file called QR Renewal.JPG or .PNG is saved in the db folder then it will be displayed on Membership Renewals and Final Reminders. A QR code can be generated as the picture file by free online tools to point to an online renewal processes, if required
- MailChimp Status Report
 - A new Report has been added for use if the integration with MailChimp is turned on. Run the report to generate a list of members email addresses that are not currently subscribed in MailChimp. The inoperative email addresses (because they are Cleaned, Archived) should be deleted from the database so they are auto-archived in MailChimp, while any email addressed not found in MailChimp should be re-entered to trigger the synchronization. NB: depending on how many email addresses need to be checked this report may take some time to generate (eg up to 5 mins)
- Archived Vehicle Search
 - A new search form has been added to investigate the previous ownership of vehicles. This search can be used to identify possible ownership trails by enabling records to be found no matter if
 - The current or previous owner is a member, or an expired and archived member

- The car is current, was archived with an expired and archived member, or was disposed of by a current or previous owner
 - The search form is accessed from the current Vehicle search menu by choosing to search current records only, or current/archived/disposed vehicle records
- FIX to the last update 27/8/2021 – Renewal Form format enhancement and record selection fix
 - The renewal forms for non-members has been improved to hide some irrelevant renewals information
 - The fix to the selection of members receiving printed renewal forms is **ONLY MANDATORY IF**
 - You have already updated to the Member Register version released on 27/8/2021, AND
 - You print Renewal Forms and or Cover Sheets for your magazine from the database, AND
 - You have a fixed annual renewal date for renewals
 - renewals with a variable anniversary date are not affected
 - This fix **MUST** be applied **BEFORE** you commence the annual renewal process to avoid interference with the generation of Renewal Notices or Coversheets in subsequent months once the renewal process begins, as defined by the Due Date and Renewal Warning Days settings

To perform the update extract the following files from the supplied ZIP file and replace the existing files in the database folder

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

Update Release 25/2/2022

Includes the following updates

- Print Post sort codes
 - The Australia Post Print Post sort codes have been updated to comply with requirements as of 25th February 2022 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update
- Bug Fixes
 - This update fixes a bug when archiving expired members with no email address (no longer stops archiving),
 - improves the vehicle search form options.
 - Removed the Google Email API as a method of sending emails from the database. Only sending by SMTP is now supported, which enables bulk email by SMTP Relay Services such as MailGun and Brevo. This option was deprecated as Gmail is not a viable email provider when sending bulk emails such as renewal reminders, and the Google API functionality added in Jan 2020 was not compatible with 64 bit versions of Windows

To perform the update extract the following files from the supplied ZIP file and replace the same files in the existing database folder

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf
- Open the database as usual.

Update Release 15/10/2022

Includes the following updates

- Print Post sort codes

- The Australia Post Print Post sort codes have been updated to comply with requirements as of 25th February 2022 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update
- Bug Fixes
 - Vehicle information updates include body and engine No duplicate warnings and vehicle searching now includes Body No and Engine No filters

To perform the update extract the following files from the supplied ZIP file and replace the same files in the existing database folder

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf
- Open the database as usual.

Update Release 1/3/2023

Includes the following updates

- Print Post sort codes
 - The Australia Post Print Post sort codes have been updated to comply with requirements as of 24th February 2023 and automatically prompts to update existing member Print Post sort codes when the database is used for the first time after this update
- Updates
 - Introduced new multiuser locking logic. Required for Windows 11 onwards. This is mandatory for all multi user implementations sharing via Dropbox or similar where any user is using Windows 11. Also requires updated copies of the Custom Reports db and Start.cmd and Start Custom Reports.cmd scripts
 - Removed support for personal email addresses when sending emails from the db. Only SMTP Relay Services like MailGun and Brevo are now recommended.
- Bug Fixes
 - Improved cleanup of hidden text characters when copying and pasting information from a browser
- Update20230301SENDINBLUESYNC
 - Update20230301SENDINBLUESYNC adds functionality to integrate with Brevo (formerly SendInBlue) to automatically keep it up-to-date with all changes made in the database.
 - Do not confuse this with the Brevo (formerly SendInBlue) SMTP Relay Service which is an alternative to MailGun. By integrating with Brevo (formerly SendInBlue) Contacts it is possible to use Brevo (formerly SendInBlue) INSTEAD of MailChimp for your email campaigns

To perform the update extract the following files from the supplied ZIP file and replace ALL of the following files in the existing database folder

- Car Club Register.accdb
- RENAME ME Custom Reports.accdb
 - If this file have previously been used and renamed to Custom Reports.accdb then it will be necessary to manually merge the custom changes from the old version with the new version. This requires MS Access developer experience. Contact Mark Fenton ph 0419 347 325 for further advice, if needed
- Instructions - Car Club Register Database.pdf

NB: The following files do not normally require updating with each new release, but this release is different. These files MUST be updated if using the start commands to manage file sharing as they are part of the Windows 11 compatibility fix

- Start.cmd
- Start Custom Reports.cmd
- Instructions - Car Club Register Database.pdf

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

- It will also prompt with the Master Data maintenance form:
 - Navigate to the “Brevo” tab and maintain the new settings as required to configure and turn on the synchronization of Brevo (formerly SendInBlue) with the database, or return later to make these changes (NB: in all cases the Car Club db is the master/source of data). Refer to the instructions (Appendix G) on how to set up Brevo (formerly SendInBlue) and the configuration for this integration.

In order to successfully use the MailChimp or Brevo (formerly SendInBlue) Integration, if it is running on a Windows 10 device or later, then you must install/enable .NET Framework 3.5 first. This software component is supplied free by Microsoft and is usually installed by default for all versions of Windows, however not Windows 10. It is compatible with other versions of .NET Framework and can be installed side by side with versions such as 4.0. If it is not installed on this device then it will display an error when attempting to do some of the MailChimp updates by the API integration.

Note: if the Car Club db is being shared with multiple users (eg via Dropbox, Google Drive or OneDrive), then before activating the MailChimp or Brevo (formerly SendInBlue) Integration all PCs used to access the database must be updated to include .NET Framework 3.5

To install .NET Framework on a Windows 10 or later device, follow the instructions provided by Microsoft <https://docs.microsoft.com/en-au/dotnet/framework/install/dotnet-35-windows-10>

Follow the instructions to **Enable the .NET Framework 3.5 in Control Panel**. Once installed, reboot your PC before continuing.

Update Release 1/9/2023

Includes the following updates

- Print Post sort codes
 - No new Print Post Sort Codes have been introduced since the last release
- Updates
 - Introduced an automated backup functionality.
- Bug Fixes
 - Minor fixes to the Google Maps extract, NoPrint search extracts, data validation errors and a new URL redirect for software downloads
- Update20230703NULLFIX fixed a data validation check error that was preventing proper data validation
- Update20230801BACKUPFILES
 - adds functionality to enable automatic backups on a daily basis, or as a manual or automated snapshot prior to significant or end of years processes.

To perform the update extract the following files from the supplied ZIP file and replace ALL of the following files in the existing database folder

- Car Club Register.accdb
- Instructions - Car Club Register Database.pdf

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

- It will also prompt with the Master Data maintenance form:
 - Navigate to the Backup tab and follow the instructions to activate automated backups, if desired.

Update Release 25/9/2024

Includes the following updates

- Updates
 - Introduced an option to record a URL link to a vehicle photo file or folder.
 - Introduced functionality to record details of historical renewal receipts when receipts are generated, and to display them for inquiry and reporting purposes
 - Introduced additional configuration option to define a sending account different to the from email address when sending emails from the database
- Update20240501HYPERLINK
 - adds functionality to enable URLs link to a vehicle photo file or folder.
- Update20240814EMAILCONFIG
 - adds functionality to enable a sender (login) email address for CDO email configuration.

To perform the update extract the following files from the supplied ZIP file and replace ALL of the following files in the existing database folder

- Car Club Register.accdb
- Car Club Register Finance be.accdb
 - OPTIONAL: Copy this new file from the ZIP file SAMPLES folder
 - NB: If this file is not copied into your db folder then this functionality will not be available
- Instructions - Car Club Register Database.pdf

Open the database as usual, and note that the first time it is run it will display messages indicating it is updating the backend databases to support the new functionality.

Appendix I - RENAME ME Custom Reports Database

This new “front end” database was added to facilitate to use of reports that can be customized by individual clubs without affecting the main database. It is supplied in the ZIP file with several example reports that were customized from the existing reports, and automatically links to the same backend database files that are maintained by the Car Club Register.

As the name suggests it should be renamed so that any future database updates don't inadvertently blow away any changes that you have made yourself.

1. Change the name from “RENAME ME Custom Reports.accdb” to “Custom Reports.accdb” so that it can be opened using the “Start Custom Reports.cmd” file provided.
2. Using this start command is essential when files are shared with other users on dropbox (for the same reasons it is used for car club register)
3. NB: There should be no problem if the same user is using Car Club Register and Custom Reports databases simultaneously on the same PC

The sample reports can be used “as is” or customized further, remembering that if new functionality is added to the main Car Club Register database then there is a small risk that these custom reports may be affected adversely, and may need to be updated too (but manually), however they will not be automatically overridden by future upgrades in the downloaded ZIP file (as long as it has been renamed)

The sample reports included are

1. variations of the member and vehicle registers that may be more suitable for preparing a single Club Register document with a consistent format. For more details refer to Appendix G. This variation of the original report can also include up to 98 formulas compared with the original 49. They are displayed in a 2 column report
2. 3 variations of a report to print **membership cards** when a member renews their membership. Use which ever option is best for your club
 - a. Versions 1 is designed for clubs who print labels to attach to a membership card of at least 100 mm width

- ii. It prints two labels on each row, one as a mailing address and one for the member card

Chrysler Restorm Club of Australia Vic Inc MICK BLAXLAND and ANNE PO BOX 791 GREENSBOROUGH VIC 3088	<table border="1"> <thead> <tr> <th>Member No</th> <th>Member Type</th> <th>Expires</th> </tr> </thead> <tbody> <tr> <td>13</td> <td>LtMember</td> <td>1-Mar-2016</td> </tr> <tr> <td colspan="3">MICK BLAXLAND and ANNE</td> </tr> <tr> <td colspan="3">POBOX 791 GREENSBOROUGH VIC 3088</td> </tr> </tbody> </table>	Member No	Member Type	Expires	13	LtMember	1-Mar-2016	MICK BLAXLAND and ANNE			POBOX 791 GREENSBOROUGH VIC 3088		
Member No	Member Type	Expires											
13	LtMember	1-Mar-2016											
MICK BLAXLAND and ANNE													
POBOX 791 GREENSBOROUGH VIC 3088													

- ii. It uses Avery labels **J8162** or equivalent (2 columns, 8 rows per A4 page) and prompts to ask how many labels have already been consumed from the first page of labels. It then prints the new labels starting at the first unused label

- b. Versions 2 is designed for clubs who print labels to attach to a membership card of at least 100 mm width, and may or may not require a mailing address label

- i. It prints 1 label for the member card

Member No	Member Type	Expires
13	LtMember	1-Mar-2016
MICK BLAXLAND and ANNE		
POBOX 791 GREENSBOROUGH VIC 3088		

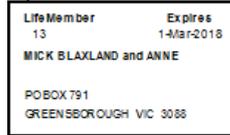
- ii. Once printed then it prompts to print mailing address labels, if required

MICK BLAXLAND and ANNE
PO BOX 791 GREENSBOROUGH VIC 3088

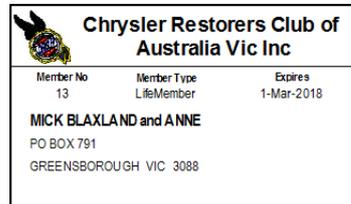
- iii. It uses Avery labels **J8162** or equivalent (2 columns, 8 rows per A4 page) for both labels
 - iv. It prompts before each label type to ask how many labels have already been consumed from the first page of labels. It then prints the new labels starting at the first unused label

- c. Versions 3 is designed for clubs who print labels to attach to a membership card of at least 65mm width, and may or may not require a mailing address label

- i. It prints 1 label for the member card



- ii. Once printed then it prompts to print mailing address labels, if required
 - iii. It uses Avery labels **J8159** or equivalent (3 columns, 8 rows per A4 page) for the membercard labels and Avery labels **J8162** or equivalent (2 columns, 8 rows per A4 page) for the address labels
 - iv. It prompts before each label size to ask how many labels have already been consumed from the first page of labels. It then prints the new labels starting at the first unused label
- d. Version 4 is designed for clubs who print on standard business card perforated card stock (2 columns, 5 rows A4) often found in stationery suppliers such as Officeworks, and may or may not require a mailing address label
- i. It does not prompt for a starting position as these sheets need to be fed into the printer whole, although if renewals are done in small batches it may be possible to load a partially used page in reverse so that card sheets can be used twice (ie printed from each end)



- ii. It prints with the same logo being used by the database on the switchboard
 - iii. Once printed then it prompts to print mailing address labels, if required
 - iv. After the cards are printed it prompts to ask how many labels have already been consumed from the first page of mailing address labels. It then prints the new labels starting at the first unused label
 - v. It uses Avery labels **J8162** or equivalent (2 columns, 8 rows per A4 page) for the address labels
- e. In all cases the only details printed are for members who have joined the club or who have renewed their membership. And once they are printed successfully they cannot be reprinted until membership is renewed again. Therefore the reports are used periodically to print in batch after renewals have been recorded
- f. In both cases, a competent MS Access user can modify the report to suit the Clubs requirements even better, but in most cases you may want to use it "as is"
3. Membership Payment Report can be used to print a list of members who have or have not paid their membership during the membership renewal period. It may be useful for reconciliation with other data records
4. Membership Turnover Extract can be used to identify if a member renewed, joined, expired or archived during the nominated financial year, and can then be used to count membership turnover counts for that period. This can be useful for annual reporting purposes

Appendix J - Configuration to Send Emails

There are several options to send emails to members, eg to send renewals or final reminders, direct from the database. These require a functioning bulk outbound email capability and unfortunately that means that normal email accounts cannot be used.

Email accounts such as Gmail, Hotmail, Telstra, Optus, IInet have too many restrictions in the name of controlling inbound or outbound spam. For this reason these types of accounts cannot be used or are no longer recommended. Similarly local email accounts running in a desktop app like Outlook no longer support this method of connection by 3rd party apps

It is therefore necessary to use a dedicated bulk email system that has an SMTP Relay Service for sending email that can be used by this database. Two such systems have been used successfully and are recommended. Both have options for FREE use although they do have limits such as, at the time of writing this document, a maximum of 300 emails per day (Brevo (formerly SendInBlue)) or approximately 625 per month (MailGun). But this is adequate for most clubs. Larger Clubs will need to consider subscribing to an SMTP Relay Service such as MailGun or Brevo (formerly SendInBlue)

1. **MailGun** has been used with this database for many years, but in recent years it has been more difficult to set up a free account, with a one month free trial available and with all advertised plans involving a monthly subscription. The Flex Pay You Go plan is no longer advertised, but it still exists. As of Jan 2023, it is still possible to use MailGun free of all costs by doing the following.
 - a. Sign up for and start a free trial at <https://www.mailgun.com/pricing/>
 - b. A credit card is still required, but will never be used unless you exceed the sending limits
 - c. Find the option to UNSUBSCRIBE (not DELETE) and you will downgrade to the FLEX Pay As You Go plan
 - i. If you do not get this option while in a free trial then temporarily subscribe and then immediately UNSUBSCRIBE
 - d. The Flex Pay As You Go plan has no monthly subscription, and as long as your usage costs less than 50c per month (ie ~625 emails per month) then you will never be invoiced, making it free to use
2. **Brevo (formerly SendInBlue)** has been used with this database more recently by some clubs and has been reported to be easier to setup, and does not require a credit card
 - a. Sign up using the free account at <https://www.brevo.com/pricing/>
 - b. *NB: There are many other features in Brevo (formerly SendInBlue) that can replace MailChimp campaign functionality but for the SMTP Relay Service it is not necessary to onboard your contacts or schedule campaigns, nor is it required to turn on the Brevo (formerly SendInBlue) Contacts Integration – the two operate, and are activated, independently*

NB: If you also require a separate campaign mailing service to deliver bulk emails (such as information, event or meeting notifications) to members then you should also consider making the choice about which SMTP Relay Service to use after considering options such as Brevo (formerly SendInBlue) (which has both SMTP Relay Service functionality and campaign emailing options to a contact list) or MailChimp (which only has a campaign emailing function to contacts and would therefore still need a separate SMTP Relay Service such as MailGun). This Database can keep both Brevo (formerly SendInBlue) and MailChimp contact lists (ie member email addresses) automatically up to date by activating the API integration from this database. Refer to Appendix G for more information.

In both of these cases it is necessary to create a login account using an email using your club's domain name (ie cannot use a generic Gmail or Hotmail account) and then to verify and authorize the relay service to confirm that you own the domain being used to send the emails. It is therefore a requirement to have access to the DNS settings of your Clubs internet domain in order to add TXT records as well as adding verification files to your website root directory, a task that may need assistance from your website administrator.

Unlike other Car Club database functions, the configuration for sending emails can be specific to each database user, or more accurately each PC. So it is possible that the emailing functionality can be limited to certain users of a shared car club db. This is done using the email setup menus to define the required setup on specific PCs only.

1. Configure or test the send of emails using the option provided in the menu Mailing/Emailing & Renewals/Expiry (menu)...Email Setup (menu).... If using the per person setup

However, the best option is usually to configure the db so that the functionality is defined in the db master data so that the SMTP Relay Service is available to all users of the db when required. In this scenario the user must know the password before it can be used, either for the first time only (memorizing the password is the preferred option) or for every new db session (less convenient)

1. Use the options in the Master Data configuration forms to setup and test the connection, and to remember a password to avoid re-entry every time it is used

SMTP Relay Services

The configuration of the db to connect to an SMTP Relay Services requires the following inputs by this db, which are saved for future use

- From Address
 - Enter the email address to use as the account to send emails from.
 - Use the email address used to create the account in MailGun or Brevo (formerly SendInBlue) or another email address if allowed
 - NB: The email address used for sending these emails should NOT be an existing email account used by the club as this increases the risk of having that email address blocked as a spam account if excessive use is suspected. Choose a new account like postmaster@yourdomain.com.au to make it a distinctly different email address.
- Email Sender Address
 - Nominate an email sending login account to use when sending via SMTP, or leave it blank to use the From Address. The same email address can be used in most cases, but if using a unique IP address for sending emails from Brevo via SMTP then a different account address will be required
- Reply To Address
 - Nominate an alternative email address or group email address to have emails sent to if the recipient chooses the Reply To option. This email should one that is actively monitored by the club's membership officer, (or whoever the membership renewal information must be returned to)
- SMTP Authenticate
 - The method of authentication for these emails = 1 (basic clear-text authentication). This the default option and other options do not apply for this database. The Car Club Register does not prompt for this option.
- SMTP Use SSL
 - This setting determines whether Secure Sockets Layer (SSL) should be used when posting messages over the network using the SMTP protocol. Use True or False. The current recommendations are as follows
 - MailGun = False
 - Brevo (formerly SendInBlue)= False
- SMTP Server
 - Enter the correct SMTP server for the email address being used. Follow the instructions available from your SMTP Relay Service. The current recommendations are as follows:
 - MailGun = smtp.mailgun.org
 - Brevo (formerly SendInBlue) = smtp-relay.sendinblue.com
- Send Using
 - The method of sending for webmails is 2. This the default option and other options do not apply for this database. The Car Club Register does not prompt for this option.
- SMTP Server Port
 - Enter the recommended port number for your email provider
 - MailGun = 587
 - Brevo (formerly SendInBlue) = 587
- Password
 - This is the password to access your sending email account. It is always prompted for the first outbound email, each time the database is opened, or can be memorized on each PC using the option in the Master Data Setup

Appendix k – Menu Favourites

Many users perform tasks on a frequent basis, and ordinarily need to navigate multiple menus to find the options they need. Up to 8 favourites can now be defined for all users of a database to run their most frequent menu tasks more easily. All users can define their own favourites, even for those clubs who share a single database.

The use of favourites is optional.

To ADD a new favourite (or CHANGE an existing favourite),

1. navigate to the menu page that has the desired option (it can be another menu, a form, a report or any other type of menu task)
2. from the –FAVOURITES-- drop down list choose “Add Favourite 1”, or any of the subsequent options
3. then run the menu task to add to that Favourite

Add or change more favourites using the 3 steps above.

Up to 8 favourites can be defined

To SEE the FAVOURITES menu

1. choose “Goto FAVOURITES MENU” from the –FAVOURITES-- drop down list
2. The nominated menu tasks should be displayed on this User Favourites menu page

To REMOVE a favourite on the FAVOURITES MENU

1. from the –FAVOURITES-- drop down list choose “Add Favourite x” for the favourite to be removed
2. immediately choose “Goto FAVOURITES MENU” from the –FAVOURITES-- drop down list
3. This removes the existing favourite and bypasses the nomination of a new favourite

To REMOVE ALL favourites on the FAVOURITES MENU

1. from the –FAVOURITES-- drop down list choose “Clear ALL FAVOURITES” and then confirm the removal of all favourites