

ACTIVE SITE CHECKLIST (GOING LIVE):

This checklist will prepare you for taking your new ClubExpress site live and sending out a Welcome message to all of your members.

For more details on any of these steps, please download and review the ClubExpress Administrator Manual (Control Panel > Support > Administrator Manual)

Member Database Import

Once your website is no longer in Trial mode, we will import your member spreadsheet.

1. Click on the following links for more information on how to prepare/format your member list.
 - A. [Administrator Manual: Appendix A - Bulk Load Specifications](#)
 - B. [Sample Bulk Upload Template](#)
2. When your member list meets these specifications, email them to: support@clubexpress.com.
 - We will review the list and if they do not meet the specifications, we will let you know what needs to be done before we can forward them to the upload team.
3. Once verified, the Upload Team will upload the information to the database. (Please note: The process may take 3-5 business days starting from the time the upload team receives the information.)

Member Database Verification

Once the member list upload is complete, you will be notified, at which time we ask that you look at the data in the Member Manager function to verify the information.

Titles

1. Go to Control Panel > Club tab > Setup section > Titles
2. Click on Add Title
 1. Title field: The name of the Title (e.g. Executive Director, Membership Chair, Vice President, Treasurer)
 2. Email Address: This is the email address attached to the Title - **do not use the member's personal email address**. If the person holding this Title changes, the Title email can be used to preserve continuity for members. (e.g. president@my-club.com, treasurer@my-association.com)
Please see Email Accounts below for more information.
3. Checkboxes: Please choose a function that this Title will serve. You may choose multiple functions per title, but only one title can hold the function. Having multiple titles have the same function will cause issues with the delivery of system emails. (i.e. Please only use one "Yes" in each of the four columns.)

Contacts

1. Go to Control Panel > Club tab > Contact Us
2. Click on Add Contact
 - A. Member:
 - 1) Click on Select Member
 - 2) Type in the Member's Last Name and click Search
 - 3) In the Search Results, click to highlight the Member's Name and Click Select.
 - B. Title: Choose the Title that this person holds. (*This was created in the last step*)
 - C. Show on Contacts: Do you want this person to appear on the Contact Us page?
 - D. Show Phone: Do you want this person's phone number to appear on the Contact Us page?
 - E. Show Email: Do you want this person's email address to appear on the Contact Us page?
 - F. Which Email: Which email would you like to use for this contact? The email that the member has in their profile contact information or the email address attached to the Title?

Merchant Account Processor Setup (Credit Card Processing)

Download [merchant account application](#) and please email geoffrey@clubexpress.com, with the completed form.

USING YOUR OWN MERCHANT ACCOUNT PROCESSOR:

If you choose to provide your own merchant account processor, please note that the merchant processor must use Authorize.net as a Payment Gateway.

For detailed information, please see 'Appendix C' of the Administrator Manual labeled 'Settings for your own Merchant Account'.

For us to configure your own merchant account in ClubExpress, we need three pieces of information from you:

- API Login
- Transaction Key
- Name as it appears on cardholder statements

Once ClubExpress has configured your merchant account, you should run a small test transaction through the system. Be sure not to leave the merchant account in "Test" mode on the Authorize.net website; switch it to "Active" mode to ensure that transactions are actually processed and cards are actually charged.

Domain Pointing

If you have a domain name (i.e., www.myclub.com) that you will be using instead of the ClubExpress URL (i.e., myclub.clubexpress.com) you will need to follow these steps on your

Domain Name Registrar (This is the company which you purchased your domain name through, i.e., GoDaddy, NameSecure).

1. Log into your domain account at your registrar (not your ClubExpress account), select the domain and enter the following information in the appropriate position:
 - A. Primary NameServer: a.dns.clubexpress.com
 - B. Secondary NameServer: b.dns.clubexpress.com
2. Let us know when you have done this, since we also need to make a manual change within ClubExpress so that our servers recognize this new information.
3. NOTE:
 - A. While we make the change immediately, it can take from 4-24 hours to propagate around the Internet from the time you made the change at your end.
 - B. You should not make this change until you are ready to completely switch off your old website and move entirely to the ClubExpress website.

If you don't have a domain, we recommend purchasing one at www.godaddy.com.

Also, if you want to purchase an SSL certificate, once you have updated the domain as stated above, you will follow below:

1. Go to the Website Tab – Setup – Domain Names
2. Click on Enable Always Secure
3. In the maintain section to the right of your domain click on the SSL icon.
4. Choose 1 or 2 yr. option and proceed.
5. Once you order the certificate, it will be active in about 15 minutes.

Email Accounts

Once you have your domain name pointed to our servers, ClubExpress includes support for “forwarding” email accounts. For example, President@MyClub.Org can be configured to point to the president’s personal email address and email will be delivered to that address. Any replies from the president in this case will come from the personal email address.

Alternatively, if you would like to receive *and* send from the email address, you may want to provide your own third-party email service provider. If so, please let us know who your email provider will be. We have configuration information for some of the more popular email providers, but we may ask that you provide MX and CNAME records for your current email server.

FINAL NOTE: If they are using a third-party email provider, once it is setup on our end, please test the email addresses to make sure one can send and receive emails to those accounts.

NOTE: If you use another provider for email services, you will NOT be able to use our Forum Listserver feature without setting up a separate domain name just for forums.

□ Activating Members / Welcome Email

This is the final step. Once you have completed the steps above, have reviewed your site, and are ready to take your site live, we run a process that converts your "Bulk Loaded" members to "Active" or "Expired" status and sends a Welcome Email to all members that have an email address in their record.

1. Review/Customize the Welcome Email (Control Panel > Communications > System Emails > Welcome Email - Bulk Loaded Members).
 - A. The Welcome Email references your organization's President and Membership Director.
 - B. Also note that the Welcome Email is sent from the person designated as the Membership Director.

Once you have confirmed that the Welcome Email is ready to be sent, please email support@clubexpress.com to let us know that your site is ready to go-live and we will process the activation.

The process takes a few minutes to run (during business hours) and after the Welcome Email has been sent, you will receive an email letting you know we have sent it out. This email will include an attachment with names, addresses, usernames and temporary passwords for members that do not have an email address so you can get their information to them via a mail merge.