# Club Express Website Starter Pack Checklist

Thank you for purchasing a Website Started Pack from Club Express! This checklist will allow your Support Engineer to configure the basic settings of your Club Express site. Please read each area carefully and complete to the best of your abilities. Once completed, a conversation can be scheduled to go through the options in further detail.

Current Website:
- Do you currently have a website for your organization?
- If yes, what is the address / URL?

If you already have a domain name and plan on switching the domain over to Club Express, please see page 57 of the Club Express Administrator’s Manual (The manual is located in your Control Panel > Support > Manuals).

Once you have reconfigured the domain name servers through your domain name registrar, please contact your Club Express Support Engineer to complete the switch at Club Express. Please also let us know if Club Express will be handling your email (Email Forwarding only) or if your organization’s email will be handled by a third party vendor.

# Basic Configuration: People Options: (Located in Control Panel > People > People Options)Please look at, and if possible, set the different options within the People Options. We will go through these options in detail later.

**Web Site Options:** (Located in Control Panel > Website > Web Site Options)
Please look at, and if possible, set the different options under the “General” section. We will go through these options in detail later.
 **Contacts and Titles:** Please list your organization’s Contacts and Titles and the emails that will be associated with them. (President, VP, Treasurer, Webmaster). At the very least, we will need a President and Membership Director listed.

Merchant Processor Account – Linked to President/Membership Director.

Membership Configuration:

**Member Types**: Please list the types of memberships you will have and include: Description, Duration, Cost, and whether this membership will include Secondary or Tertiary members.
For examples:
*- Regular Member, Description: Regular Annual Membership, 12 Months, $30, no secondary/tertiary members
- Monthly Family Membership, Description: Full family membership including spouse/partner and children, 1 month, $45, 1 Secondary, up to 5 Tertiary members.***Renewal/Expiration Settings:**- Will everyone renew on the same date or will they renew based on when they join?
- How many renewal notice reminders would you like to send out (Up to 3)?
- How would you like to handle expirations (Expire on the day of, Expire with grace period, Don’t expire memberships).

**Additional Member Data:** Theseare questions outside of the basic member information that you feel are specific to your association.
For example:
A Car club might ask – What Year and Model car do you own? A Fraternity/Sorority may ask for year of graduation. A bicycle club may ask how many miles a cyclist is comfortable with.

**Non-Member Database:** Please list any categories for non-members to be added to.

Module Configuration:
**Committees**: Please list any committees you may have and their description. Members will be added to these committees once their memberships are active.

**Forums:** Please list categories and specific discussion topics for forum creation.

**Donations:** If you take donations, will need the Fund name and description

**Document Library:** If you have documents that you would like uploaded into the site, please provide them along with the folder structure you would like to use.

**Events/Event Calendar:** Please list event categories, locations (if you use the same location(s) for multiple events), and registrant types (e.g. Member, Member + Guest, Non-member, Vendor Admission, Family Registration)

**Emailing:** Please provide at least one category for blast emailings (e.g. Newsletter, Monthly Updates, Letter from the President)

Other:
- Please list five pages from your current site you want to bring over to your new site.

- If you have a current database of members, please see Appendix A of the Club Express Administrator’s Manual in order to organize and prepare the information to be Bulk Uploaded.