

Effective 3/9/2018
Please see last page on where to send comments.
Thank you for updating your club roster!

Instructions for Updating Club Rosters

The Federation of Jewish Men's Clubs has created a club management web portal* in order for affiliated clubs to update their rosters in an easy and efficient way. It will be called: **Chaverot**, FJMC Club Roster Management System. Chaverot will provide direct access to your club's roster of members on a daily basis from any computer with high speed internet access.

- Club Presidents or Co-Presidents and Club Treasurers will be the only people with permission for access.
- The above officers' names and e-mail addresses must already be in the database. (Supplied to the FJMC in connection with their record as a club officer.)
- If your name and e-mail address are not already in the FJMC database or if you have multiple e-mail addresses and do not know which one is connected to your name please e-mail webmaster@fjmc.org. Someone from the IT Committee will contact you.

Chaverot will currently allow you to do the following with your club roster:

- **NEW FEATURE:** Export a copy to an Excel Spreadsheet, where you can make your additions, changes, deletions, etc. and then import the spreadsheet back to the database.
- Add new members with contact information online live and in real time.
- Update, correct, or add e-mail or other contact information for existing members online in real time.
- Delete members from the roster with the ability to differentiate circumstances, such as death or moving that will remove an address from future contact rather than just not paying dues this year so that the contact information is retained for future use by the club.

The FJMC Website, the Chaverot Club Management System, and its web portal are designed and maintained by FJMC volunteers.

* Definition: A web portal is an organized gateway that helps to structure the access to information found on a website or on the Internet.

To log into the Chaverot Club Management System please go to the FJMC website at www.fjmc.org and use the **Member Login** box in the right hand column of the screen to log into the site.

- Enter your Username on the top line. **Your user name is the e-mail address supplied to the FJMC by your club or by you.**
- Enter your password in the second line.
- Then click on Log In.
- **If you do not remember your password**, click on “Request new password” and follow the instructions.
- **Please do NOT create a new account. If your current e-mail is not connected to your record, or you do not know which of your e-mail accounts is connected to you as a club officer, please contact webmaster@fjmc.org.**

The Web Portal for Chaverot has been designed and tested to work with three web browsers:

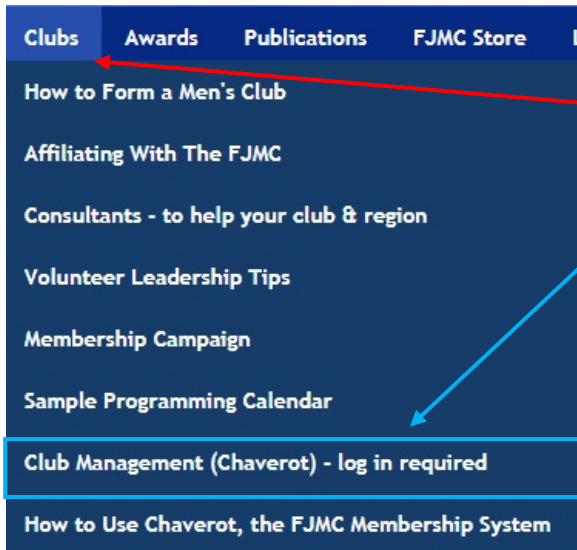
Firefox – may be downloaded for free from **Mozilla** at <http://www.mozilla.org/en-US/>

Chrome – may be downloaded for free from **Google** at <https://www.google.com/intl/en-US/chrome/browser/>

Microsoft Internet Explorer - may be downloaded for free from <https://www.microsoft.com/en-us/download/internet-explorer.aspx>

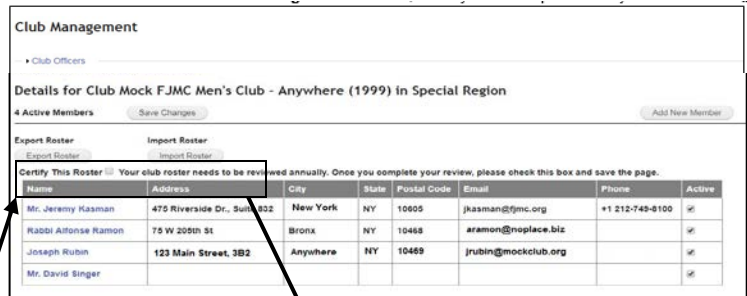
The Web Portal does not work in the Opera Browser.

If you have any technical questions please contact webmaster@fjmc.org. A member of the IT committee will get back to you.



After you log in, your screen will refresh. You now have access to the Members Only sections of the website.

- Go to the Clubs Tab.
- Open the pull down menu.
- Select Club Management, (Chaverot)



This is the Chaverot Club Detail Screen. You have two options to update your roster.

- Export/Import an Excel Spreadsheet - continued below.
- On-line – Live and in real-time – (See Page 3)

How to Update Your Club Roster Using the New Export Roster – Import Roster Function

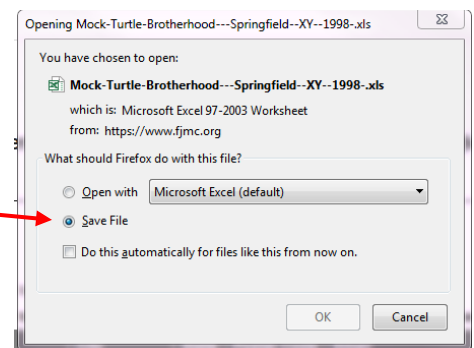


1. You must always use a spreadsheet that is first exported out of Chaverot.

- **DO NOT UNDER ANY CIRCUMSTANCES WHATSOEVER** import a spreadsheet that you create yourself.
- Your creation will be missing the hidden Club ID and Member ID columns that relate your members to their records in the database.
- This WILL cause duplicate records to be added for all of your existing members and WILL require extensive time to repair the damage.

2. To export your first roster from Chaverot, please go to your Club Detail Screen as described and illustrated above. Click on “Export Roster,”

- This will cause your roster to be downloaded as an Excel file.
- Save this file
- Then open it in Excel.
- One tab contains a list of all your current members.
- On the second tab you will see these instructions repeated on how to edit your roster.



3. Click the Roster tab of this spreadsheet to see your club roster. Make your desired changes to existing members and add new members below the last member row. Save your spreadsheet.

4. Names –

- You will notice that First Name starts on column C.
- All existing First Name and Last Name cells are protected and cannot be edited.
- If you need to change a member's first or last name, please email us at webmaster@fjmc.org.
- When you add new members below your last row, you can enter their first and last names.
- Please capitalize the first letter of the first and last names and then use lower case letters for the balance of the name.

5. THREE COMMANDMENTS THAT MUST BE FOLLOWED:

- **Do not attempt to unhide or unprotect columns A and B!** They contain the Club ID and Member ID in the FJMC CRM database and must remain intact in order for import to function properly.
- **Do not attempt to alter or reorder any column headings along row 1!** These also must remain intact.
- **If you have an uncontrollable urge to to do either of the above and cannot help yourself when it come to playing with spreadsheets, please RESIST and then volunteer your time with the FJMC IT Committee by e-mailing webmaster@fjmc.org.. 😊**

6. **Save your file.** If you see a warning Compatibility Checker popup, you may click Continue to save to the original file name or Copy to New Sheet to save as a new .xlsx file. Either option should work for importing.

7. To import your file back into Chaverot - open a browser and return to your Club Detail Screen (aka - club roster page) in Chaverot.

- Click Import.
- Choose the Excel file you just updated and click Import.
- Follow the instructions on the screen. Your roster should be imported.
- If any conflicts occurred, you will receive an e-mail indicating which member rows of the spreadsheet need to be corrected.

8. If there are conflicts and you need to correct rows of the spreadsheet or if after an import you need to make additional changes to members:

- **You should first export from Chaverot again so you have the most up to date spreadsheet.**
- This prevents your data from getting out of sync on the FJMC server, which could occur if you have two or more people maintaining separate copies of the spreadsheet file.

9. **If you have any questions on how to update or import your roster, please email webmaster@fjmc.org..**

How to Update Your roster Live in Real-Time Using Chaverot on the Website



1. Open the **Chaverot Club Detail Screen**.
2. The name, number and region of your club are near the top, under the link for Club Officers. (more on that later) Under your club name on the left hand side will be the number of members in your club.
3. The **names in blue** in the first column of your club members **are links to the "Member Update Form" for that member**. A new Tab will be opened.
4. The next 6 columns to the right of the name display the contact information for each member.

5. If a field is blank it is because that information is not entered in the database. After a name the most important pieces of information to enter are in this order:
 - **E-mail address**
 - **Phone number**
 - **Complete mailing address including the postal code.**
6. There are two **action buttons** above the list of names.
 - i. **“Add New Member”** - will bring you to a BLANK Member Update Form.
 - ii. **“Save Changes”** – obvious, **save your work periodically & when done.**
7. The **“active” checkbox** is the last column. Also obvious, **if a person is currently a member it should be checked, if they are not active then it is not.**
8. **If the person has died or moved away please do not use this box, go to the next step - the “Member Update Form.”**
 - a)
9. **The Member Update Form is used to add new information or change existing information, and enter if a person has died or moved away.**

It may be reached by two ways from the Club Detail Screen

- **Click on a person’s name &** the form will contain existing information.
- **Click on the “Add New Member” button** and a blank form will appear.

If the member is active (new or existing) we start at the top of Form
If a member has died or moved go to step 10.

- Please **capitalize the first letter only** using lower case for the balance of the letters. **Please do not use all upper or lower case.**
- Provide both the first and last name.
- Use pull down menu for Name Prefix or Suffix.
- **The primary e-mail address is VITAL!**
- Provide the street address including the postal code. **We do not use the Zip+four**
- Use pull down menu for Country and State/Province.
- Enter or edit the telephone numbers
- **Proof your work and then click on “Save Changes.”**
- After you “Save Changes” you will be brought to a confirmation screen.
- **Click on “Return to Club Member List.”**

Member Update Form

Contact 1

First Name *

Last Name *

Name Prefix

Name Suffix

Email

Street Address

Street Address Line 2

City

Postal Code

Country

State/Province

Mobile Phone

Home Phone

Active

NOTE: When you return to the list your changes will NOT be immediately visible.

Changes are visible after using the Club Detail Screen’s **“Save/Active Inactive Changes”** button.

10. **If the person is inactive because they have died or moved** use this checkbox, not the one on the previous “Chaverot Club Detail Screen”
- **Unchecking this box** on the “Member Update Form” activates the “Inactive Reason Scroll Box.”
 - **If the person is deceased or moved away, please make the appropriate choice.**
 - If a club member has moved away, and you know the forwarding address information please go back to the top of the form provide it.
This allows us to match him to a club near his new address. If not, no worries!
 - Click on “Save Changes.”

The screenshot shows a portion of the 'Member Update Form'. At the top, there is a 'Home Phone' input field. Below it is an 'Active' checkbox, which is currently checked and circled in black. Underneath the checkbox is an 'Inactive Reason' dropdown menu. The dropdown is open, showing four options: 'Deceased', 'Moved Away', 'Just Inactive', and 'Dropped'. The 'Deceased' option is highlighted in blue. At the bottom of the form, there is a 'Save Changes' button.

NOTE: If someone has become inactive for a reason other than death or moving their record will remain connected to your club. Clicking on the active check box will restore them as an “active member.”

Again, when you return to the list your changes will NOT be immediately visible. Changes are visible after using the Club Detail Screen’s “Save Changes” button.

After you save changes you will get a dialog box with a button “**Return to the Club Members List.**” **Click on it.**

11. **When editing existing members** - scroll to the next person you wish to edit and repeat the process.
12. **When adding new members**, click on the “Add New Member” button, and repeat the above process.
13. **“Cancel Button”** – there is no “cancel button” in the “Member Update Form” – if you change your mind about the entries that you have made, close (i.e. - x out of) the tab without hitting the “save changes” button.
14. Periodically click on the **“Save Changes”** button on the “Club Management Screen” while you are working.
15. **When you are done working, Click on the “Save Active/Inactive Changes” before you Log-out**

The screenshot shows a confirmation dialog box titled 'Member Update Form'. At the top, there is a green checkmark icon and the text 'Member has been updated'. Below this, it says 'Thank you, your changes have been saved!'. At the bottom of the dialog, there is a button labeled 'Return to Club Member List', which is highlighted with a red box. A red arrow points from the top right corner of the dialog box down to the button.

Tips for Managing your FJMC E-mail

- **If you have more than one e-mail address, please choose one** to use as your main or primary e-mail account for communicating with the FJMC.
- **Please keep track of the one e-mail address you use to log-in to the FJMC website.** This helps to avoid creating duplicate records of yourself that result in your being sent duplicate e-mails.
- **Too many messages? Please be careful to filter rather than block or hit unsubscribe button.** File e-mails from FJMC by subject matter outside of your Inbox for future reference. Check the instructions on your E-mail service (Ex. G-Mail, Yahoo, etc.) for how to do this.
- **When forwarding a broadcast e-mail or e-publication use the “Send to a Friend” button inside the e-mail,** not the forward function in your e-mail account or program (Ex. G-mail, AOL or Outlook.) This keeps the next recipient from accidentally unsubscribing you.

Updating Club Officers: Addendum to Instructions for Updating Club Rosters

1. Click on the words "Club Officers" in blue under the words Club Management.

2. A Screen will appear where each of your current officers is listed. One officer per row.

3. To add a more specific description such as "Activities VP", enter the description in the respective "Additional Description" field for that officer and click "Update" on the right-most column.

4. To remove a member from an office, click "Remove" on the right-most column.

5. To update an officer's permissions on this page, under Authorization, select:

6. "View" to allow the officer to view this club management page

7. "Update" to allow the officer to edit the members and officers on this page

8. "None" to prevent the officer from viewing this page

9. And then click click "Update" on the right-most column.

10. To add another officer (ex. – when replacing someone that you have removed.) Click on "Add Another Officer."

11. Select the title of the officer that you wish to add from the pull down menu under "Office"

12. Select the name of the person from your roster that holds that position. If they are not on your roster, you will have to add them first.

13. Additional Description – complete per the instruction in Step 2

14. Authorization – completion is the same as the instructions in Step 2

15. Click Add Officer, If you need to add another officer – repeat the process.

Office	Member	Additional Description	Authorization	Action
Club President	Arthur Q. Public	<input type="text"/>	Update ▼	Remove Update
Club Vice President	John Doe	<input type="text"/>	None ▼	Remove Update
Club Treasurer	Anthony Smith	<input type="text"/>	Update ▼	Remove Update

[-] Club Officers
[+] Help
[+] Add Another Officer

[-] Add Another Officer

Office
Club President ▼

Member
Altman, Ron ▼

Additional Description

Authorization
None ▼

Add Officer

HINTS & TIPS:

- **When updating officers, if you have update permission and are leaving office, do not change yourself until everything else is done.**
- **Limit update permission to ONLY vital officers. FJMC authorizes the Presidents, Co-Presidents & Treasurers. You may wish to add your Membership Chairman, Synagogue Administrator, etc. – but limit your additions carefully.**
- **Keep track of who has authorization. Inform the FJMC by e-mailing international@fjmc.org AND webmaster@fjmc.org when adding someone other than the President, Co-President & Treasurer.**
- **Keep track of which e-mail address you are using to log-in.**
- **Viewing will be useful for most officers.**
- **As part of the "handover" of your office, before leaving help out and sit with your successor during an update.**

If you have any technical difficulties please e-mail webmaster@fjmc.org.

Please send your feedback, comments, suggestions, etc. on the Chaverot Club Management System, its web portal and/or these instructions to:

Jeremy Kasman, Director of Operations

jkasman@fjmc.org

He will forward it to the appropriate officer, volunteer or committee. He does not provide technical assistance.

Thank you!