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## **Topic:**

Generic information that the board should know. 12-2025

If there are any concerns please bring it up at any board meeting.  
This information should be passed on to any new Club Officers.

This Document resides within the Technology\_Web folder

## Payment System :

The payment online system uses Stripe to collect funds and it is deposited into an account controlled by the Treasurer only. The web software is called EASYCART.

All chairs do not have access to this Credit Card account. Except for the Treasurer and their backup. Only the treasurer and backup has access to this account and is the only one that can refund any funds. This includes a backup person Stephanie Pizer to the Treasurer and the Commodore.

The system produces many logs, one within the server and carbon copies of emails send to both the buyer and the chair selling the item (membership, Store items, Parties etc.). So if a chair loses an order there are copies on the club PC.

The system (home grown php program) has a routine that looks at the items purchased and looks for key words and then forwards the email to the chair responsible for selling those items with copies to treasurer and a special store.purchases email account. 2 Programs are used for this function read\_send\_prod.php and read\_send\_test.php and they sit within the server in the base home folder and contain documentation within them.

December 2024 the ability to order an item and mail in a check to the proper chair is now available. The email sent to the Member has a red banner identifying that no funds have been received and do instruct the member to mail check to the Proper Chair. Zelle was added in 2025 as a payment source.

Access to Credit Card vendor <https://dashboard.stripe.com/dashboard> an ID and password is required and is controlled by the Treasurer.

## Club Laptop:

The Laptop that the webmaster uses is owned by the club and contains all the system items to maintain the entire system. It can read all of these special email accounts and stores them on its pc drive and is also archived to an external drive. So there are plenty of logs on who paid what, when and for what items.

This laptop has backup software (owned by the club) that backups the entire pc whenever this pc is started. The items that belong to the club are the Laptop, its charger unit , an external usb drive for backups , and any software on the laptop.

The laptop also contains an email client program called EmClient that can read all of the clubs special email purchase accounts and can see them all on one screen.

**So if the webmaster responsibility goes to another member the laptop must be retrieved from the previous webmaster and pasted on to the new webmaster.**

**Dell Inspiron 3511**      Service Tag: GLSHYJ3

Purchased Nov 29 2023

Original pc died replaced with 3511 windows 11

Backups to an external drive is when ever one starts the PC and held for 3 weeks.  
The Web Site has its own backups on the server.

Signin to dell using google sbcc.membership account

# Membership System:

PLEASE NOTE email addresses are your club title email address not your private one. Refer to website Officers page for them.

For those that have access to the membership system , this system has many canned reports where one section is related to purchased items. Many of the screens have download functions so data can be exported to excel.

Those with access have been restricted to the Club's Officers, Webmaster and Yearbook chair and Membership per our Commodore's direction. The id's are the club titles (ex commodore with the email address of [commodore@sbccsail.org](mailto:commodore@sbccsail.org)) .

This way as the title and responsibility are passed on to the next Chair they can login and request a password change.

The request will be emailed to that's chair's club email address (ex [Commodore@sbccsail.org](mailto:Commodore@sbccsail.org)) and then forwarded to that person's real email address. The actual web address for the membership system is not shown anywhere for security reasons.

Please note the passwords for these ids on the membership system may not be the same as the passwords used on club documents (web page) access unless you make them the same. The security software is different on the membership and document access system so passwords can be different unless you make them the same.

This system was built by R Mourino for the club's benefit and the source code is on the club PC.

## **NEW Members what happens:**

When a new member is added to the membership system, the Member Chair can add them in as a Pending Member. This makes it easier to create the potential member with all of the information and then activate when they are approved. If they are not approved the Chair can make them as archive to remove them from the active system.

During this pending time they are added to the club Newsletter so they feel like part of the club until they are activated. Nothing else is granted to them.

However once they are approved they are added to the Hospitality\_Team newsletter and are coded as a volunteer to Hospitality. They can remove themselves if they wish later by using the unsubscribe option on the bottom of the newsletter.

## **Titles and Id's (Document access Board members):**

PLEASE NOTE email addresses are your club title email address not your private one. Refer to website Officers page for them.

The ID's are either the Title in lower case as one word or the Title email address in lower case.

All Board members have a Club Title and an alias email account that does forward any mail to your real email account.

On the website under "Officers" one will find all the titles and email addresses of our Board members. These titles or email address are also your ID to gain access to the Club Documents that are secured by requiring an ID and Password. For those titles that containing 2 words your id are the 2 words without the space. Ex Fleet Captain would be fleetcaptain. The ID's and email addresses are always LOWER CASE

All ids are lower case. Passwords are whatever you create and are case sensitive. The ability to reset your password is available. Under the **Table Of Contents** look for the items that start with **Documents.....**

**On the first access, (new to the board or new title) request a password change and enter you title id or Club Title email address and it will send you a password reset email.** One can enter your title email as your id and this is the club title email not your own, refer to the "Officer" page on the web site. Note one can use an email address for an id But it is the Title's email address not your own. Again Lower Case

The webmaster creates these alias whenever it is required using a feature in the server called "forwarding emails". This is the first task that the webmaster does every 2 years or when a new member is raised to a Board Position.

For those chairs that share a Title like Hospitality , Welcome you will need to share the password between each other.

The webmaster does not know your password if you forget it ask the system to reset it for you.

There are 3 levels of Document security (on the Web Site).

This is accessed from the Table of Contents on the web site ( look for “Doucments....”)

**The Member level** only has access to YearBooks and Mastheads and must request access from the WebMaster or Commodore else they do not get it. These special access is for one year and then it expires.

**The Board member level** has access to all documents except to the Documents controlled by the Treasurer and Commodore.

**The Treasurer, Commodore level** has access to the above plus the Treasurer’s files and the **security document that defines all of the securities ids and passwords within the system.**

The Membership System is totally separate from the above and has a limited number of members with access to it.

Canned Reports are available ( added 12-2022) to all except the Member Level.

Except for the Treasurer no one has update access to the documents and any changes must be submitted to the webmaster in order to update them. The Treasurer can update their own files. The webmaster does not have access to treasurer files.

Access to the folders,programs and web site code on the server is restricted to the webmaster and the Treasurer.

## Upload a Document:

An upload feature has been added on Feb 2022 that will allow those that have access to the Club's Documents folder to upload large files from your pc to a staging area and it does send an email to the Webmaster that it is there.

This staging area is the drive feature of google under the account of [John.membership@gmail.com](mailto:John.membership@gmail.com) (made up name) .

It is then the responsibility of the Webmaster to update the file to where it must go (either documents or photos etc). It is best to use zip or compressed files for uploading. Please send a email to webmaster that there is a new document so it can be moved to the server.

Look for "Documents....." in the table of Content

# Archiving Club Information

At the end of the year the web master will cut a USB drive of the Web folders and the zip file of the web backup on to a USB and deliver it to the Historian of the club for safe keeping.

They will contain the Minutes of all meetings, Mastheads and Year Book in pdf format or document format.

It will also contain all documentation , database extracts and Web backups. Basically a copy of the entire Web , Document, Photos, membership system.

Doing the year please verify the data that is in your Chair's folder is current and valid.

The Regatta Web site is controlled and supported by the Regatta Team and I do not have responsibility for that server.

The Club Laptop archives all official email accounts on its drive on a 120 day cycle. The email client on the laptop is EmClient.

# NewsLetters

We currently have 6 Lists (NewsLetter) : Note period between word **team** and word **list**

[Board.list@sbccsail.org](mailto:Board.list@sbccsail.org).....Discussion Board members only.

Webmaster adds board members

[Regatta.list@sbccsail.org](mailto:Regatta.list@sbccsail.org)..... Announcement Members that want racing newsletters. Added by Membership system Interface. Has not been used for 2 years.

[Member.list@sbccsail.org](mailto:Member.list@sbccsail.org)..... Announcement to All Active Members paid or past due prior to June 1. NGS are removed after June 1. Added by membership system Interface. Only Authorized board members can send out a newsletter.

[hospitality.team@sbccsail.org](mailto:hospitality.team@sbccsail.org)..... Discussion between hospitality team. Added by Hospitality Chair or by the member them selves. **See below**

[Regatta.Team@sbccsail.org](mailto:Regatta.Team@sbccsail.org)... ..... Discussion between regatta team. Added by Regatta chair or members them selves. **See below.**

[Community.list@sbccsail.org](mailto:Community.list@sbccsail.org)..... Announcement not active yet for non members, Commodore of another clubs etc. Added by Community Chair.

All board members have access to use the board.list.

## **To add members to Regatta.Team or Hospitality.team**

Regatta.team and Hospitality.team members can join by using the Table Of Content on the web site to find the join option. Look for Regatta... or Hospitality... in the Table of Content on the web site.

Go to the Website Table of Contents look for these titles and select the item. You will be directed to an input screen that will show you who is on them and your Team member Email can be added by the Individual chair or member.

For Member newsletters, one needs specific authorization to use and you should request it from the commodore. If approved forward approval email to webmaster.

To use just enter the newsletter name into the TO: section of your email.

EX to: [member.list@sbccsail.org](mailto:member.list@sbccsail.org)

## **Create Contacts in your Email Client**

Newsletters and other email sent by the system to you, may use different email accounts. To prevent them from going to SPAM, it is best to create a contact in your email client so your system will not sent them to your SPAM folder.

Please add these to your Client. The actual name can be different from what is shown but the email address must be accurate.

Newsletter            sbcc.email@sbccsail.org

zelle\_payments      treasurer@sbccsail.org            This is for storekeeper,  
membership and hospitality to notify  
them of payments rceived by zelle.

Store store            sbcc.store@sbccsail.org