HamptonGolf

MEMBER ADDITIONS & EMAIL LIST SEGMENTATION

The steps identified in this document pertain to the majority of Hampton Golf managed clubs using the Jonas operating system. If the managed club you support has employed the Jonas operating system for more than 1 year, it is suggested you contact club leadership to review the steps of execution before reviewing the following material.

How to add a Member: Log into Jonas and click "Club Management," then "Member File," and then double click "Setup / Edit Members".

eneral Ledger	•	Setup / Edit Members
ccounts Payable		Setup / Edit Guests
dministration	•	Change Setup/Edit Member Information Edit Additional Email Address Settings
lub Management	Processing	Change Member Numbers
pint of Sale System	►	Alter Member Status By Threshold
ub Inventory	 Reports 	Alter Member Status
e Time Management	Membership Demographics	Alter Member Status By Balance
	Inquiries/Stmnts/Archives	Alter Member Category/Activities
ctivity Management	b	Alter Guest Status
	Member File	Delete Members by Status
	Club Setup	Delete Guests
	Club Admin.	(Rtness) Advance Contract Renewals
	Club Utilities	 (Fitness) Advance Contract Discount Update
	Locker System	Print Member Cards
	Club Shares	Print Labels & Envelopes
		Print Member Barcodes
	Activity Tracking Systems	Print Free Form Letters
	Credit Book	Mail Merge Club Documents
	Cash Card	Mail Merge Guest Documents
	Communication Tracking	Mail Merge Dues Renewal Letters
		Print Member Checklists
	Interfaces	
		Member Count Report
		Member Mailing Status Report
		Member Master Sheets
		List of Member POS Item Discounts
		Member Proposal Report
		Member Import/Export

The Setup/Edit Members page should pop up. Carefully fill out all the available information in the empty boxes. Important areas are circled in red:

Club	01 TENNESSEE NA	ATIONAL GOLF CLUB	- 3 *				» Billing	» Status Overrides
Member	8041A /-	Prev Ngst	8465				» Fee Billing » PAP/Credit Cards	Credit Book Conse a Chacklists
Surname	Aaron					+	> Minimum History	» Subscriptions
Given Name	Stacy						» Custom Info	» Documents
Familiar Name	Stacy			No Pho	to		» <u>N</u> otes	> Attributes
Title		Suffix	Photo		-	0		= Print Member Car
Home Address	2428 Janell Trail		Signature		-	3 6	» Mailings	» POS Charge Limit
	Murfreesboro, TN		PIN #				» Other Addresses	
			Marital Status				* Dependent	
			Sex	F - Female	~		» Locker/Share	
			Birthdate	19831210	Dec 1	10. 1983	> Dining Info	
ZIP/Postal	37128		Date loised	20160701	The set a	2016	» Activity Tracking	
Phone #	205-310-2038	_	Date Joined	20100701		2010	⇒ Marina Info	
Alternate #			Date Resigned	N/A	DE N/A		Handicap Profile	
Fax #		_	Membership Type)	8		Proposal Setup	
Cell#	lack as a second day		Status	2	\$		Jeetime Mgt Setup	
Email	postua.aarongim	50.000	14				» Edit Log	
strite Options	Printed	N/A V					Communications	
ACCT BALANCE	LAST DUES U	UAST CHIT LAST	PAYMENT RECEN	NT STMT LAS	MN.	LAST INT.	» Account Inquiry	
			(\$)				» History Inquiry	

Some important fields to note below.

Status: This notes the type of Membership of the Member. It also determines which email list the Member will be designated into. If you are new in the system, we'd recommend using the following status codes, where applicable:

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RES = Resident Member
INV = Invitational Member
GOLF = Golf Member
SOCIAL = Social Member
TENN = Tennis Member
Z = Resigned Member (or deceased)
INACTIVE = Inactive Member
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You can also make your own codes if you'd prefer. However, all status codes must be typed out in the exact same way with each Member addition. **Any variations** *in spelling, typos, or capitalization can cause errors within the system.* New Membership categories and codes <u>must</u> be communicated with the marketing team to ensure that the Members are transferred to the appropriate email lists.

Membership Type: This can be used to help further categorize a Membership type. For example, you can use the "DEP" code to note a Dependent Member, or "SPOUSE" to note a Spouse Membership.

Email: After typing the email address, be sure to click on the mailbox image to the right. A new pop up should appear with the option to check boxes based on the Member's email preferences:

imail Ad	dresses for 8041A : Stacy Aaron							?
түре	EMAIL ADDRESS	STATEMENT	EMM	TEETIME	PAYMENTS	INSIGHT	POS CHIT	
Main	joshua.aaron@mtsu.edu		2	N	v			

STATEMENT - Opts the Member into receiving statements via email

EMM – Opts the Member into receiving email communications from the club

TEETIME - Opts the Member into receiving tee time confirmation emails and notifications

PAYMENTS - Opts the Member into receiving payment confirmation emails and notifications

An additional email can be added in the blank spaces below the primary email if desired.

Settings Required For Proper Email Segmentation

1. Test Your Connection: In the JCM backoffice, click Club Management > Member File > Member Import/Export > ClubHouse Online EMM Interface Profile > Test Connection > Make sure this is working correctly. You should receive a message saying, "This is currently running as a service" or "Connection OK".

Club Code	01 Country Club Of Ocala	~ 8 °	Þ	 Elekts Member Status Guest Status
ebservice				= Sync
Provider	Campaigner O Frankie			> Utilities - Email
Site	CountryClubofOcala	🔄 Test Connection		
Username	apiCountryClubofOcala			

2. Check Your Fields Are Set To Export: In the JCM backoffice, click Club Management > Member File > Member Import/Export > ClubHouse Online EMM Interface Profile > Fields > Make sure the fields are all greyed out in a light grey color. The following is an example of the fields set up correctly:

3. Check Which Statuses Are Included: In the JCM backoffice, click Club Management > Member File > Member Import/Export > ClubHouse Online EMM Interface Profile > Member Status > click list of statuses. If it's set to "included," only those statuses listed will be synced to ClubHouse Online. Make sure this list includes all of the statuses you currently use.

		01 Country Club Of Ocala		~ 4	
			Becommended Fields		
neld		JONAS FIELD NAME	CHO EMM FIELD NAME	CHO EMM FIELD LABEL	^
000	9	Email Address Type	emailaddresstype	Email Address Type	
001	\$	Member Type	membertype	Member Type	
401	\$	Member #	member	Member #	
402	\$	Surname	sumame	Sumame	
403	P	First Name	firstname	First Name	
406	\$	Title	title	Title	
410	\$	Sex	sex	Sex	
418	8	Address Line 4	addressline4	Address Line 4	
419	8	Address Line 5	addressline5	Address Line 5	
420	P	Address line 1	addressline1	Address line 1	
421	\$	Address Line 2	addressline2	Address Line 2	
422	\$	Address Line 3	addressline3	Address Line 3	
423	P	Postal / Zip Code	postalzipcode	Postal / Zip Code	
436	P	Date Joined (CCYYMMDD)	datejoined	Date Joined	
084	\$	Member Status	memberstatus	Member Status	
493	\$	Suffix	suffix	Suffix	
495	8	Marital Status	maritalstatus	Marital Status	
496	P	Date Resigned (CCYYMMDD)	dateresigned	Date Resigned	
902	\$	Activity #1 Description	activity1description	Activity #1 Description	
904	P	Category #1 Description	category1description	Category #1 Description	
812	P	Activity #2 Description	activity2description	Activity #2 Description	
814	P	Category #2 Description	category2description	Category #2 Description	~

	1						* Eekk
Club Code 01	ClubHouse Online EMN	Interface Profile - Mem	iber Status Filter	ing		0	+ Guest Sjatus
Webservice							> Sync
Provider @	Club Code 01 Countr	y Oub Of Ocala		~ \$			+ Utilities - Email
Site Co							
Usemane ap	Members to be included i	n export	4.5.7.7.7.2.4				
Apikey **	Filter Type () All M	mbers Included	O Excluded				
	Member Status	8					
Options	Status D	escription		~			
Interface (G)	CEBGOUF Ce	bert Golf Membership		11			
Member Type 🛞	CEBTEN CE	bert Tennis Membership			N		
Administrator CC	CARE CE	arter Member			68		
inactive Time	EMPLOYEE Ex	splayee					
_	GM Fu	I Golf General Manager					
	UNCR IN	i oor Menber					
	LIFE LI	e Time Member					
	OWNER OF	vner Member					
Last mount, and	50CAL 50	cial Member		~			
User ID GITYSTE	Double click on line to remo	we Member Status					

4. Check If Export Is Set Up As A Service: In the JCM backoffice, click Club Management > Member File > Member Import/Export > ClubHouse Online EMM Member/Guest Export > If you click "export," you should receive a message saying, "Club is configured to run as service. You are not allowed to manually start the export for this Club."

A Contract of the second	- FARMARA				0	1
oHouse Oni	ne EMM Member/Gues	t Export			 ~ V	
Clu Frequency (m	s Code 01 P inutes) 0 Once only, do	not repeat			» Terminate	
ast 100 Export	Results					
Date/Time	Comment					
	Sony.					
	Sony.	tured to Run As Service				
	Sony. Club 01 is config You are not allo	ured to Run As Service wed to manually start (the export for thi	s Club.		
	Sorry. Club 01 is config You are not allo	pured to Run As Service wed to manually start (the export for the	s Club.		
	Sony. Club 01 is config You are not allo	pured to Run As Service wed to manually start to OK	the export for thi	s Club.		
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