

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”.



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:

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:

RES = Resident Member

INV = Invitational Member

GOLF = Golf Member

SOCIAL = Social Member

TENN = Tennis Member

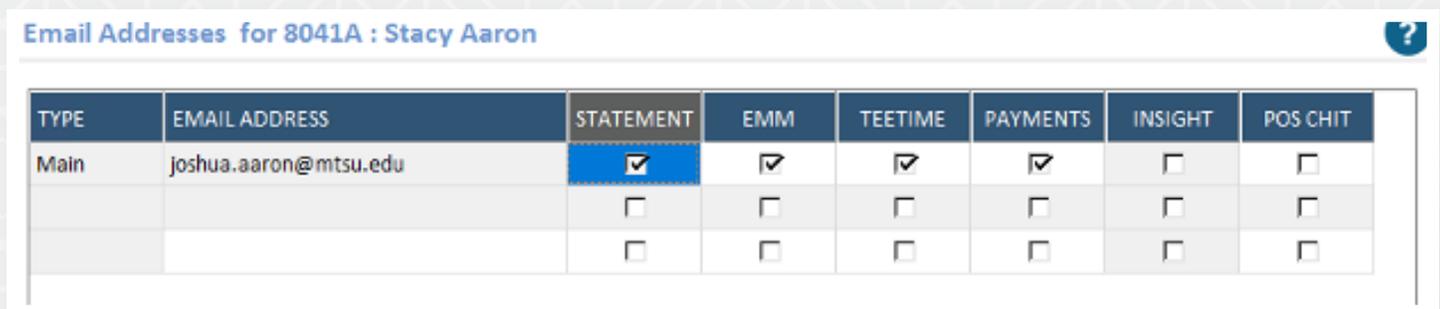
Z = Resigned Member (or deceased)

INACTIVE = Inactive Member

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 **must** 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:



TYPE	EMAIL ADDRESS	STATEMENT	EMM	TEETIME	PAYMENTS	INSIGHT	POS CHIT
Main	joshua.aaron@mtsu.edu	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STATEMENT - Opts the Member into receiving statements via email

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

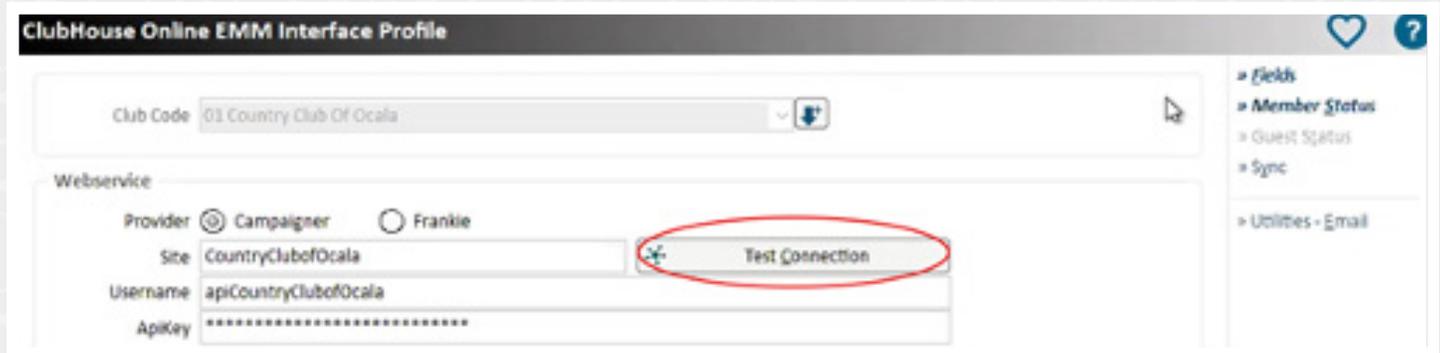
TEETIME - Opts the Member into receiving tee time confirmation emails and notifications

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”.



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:

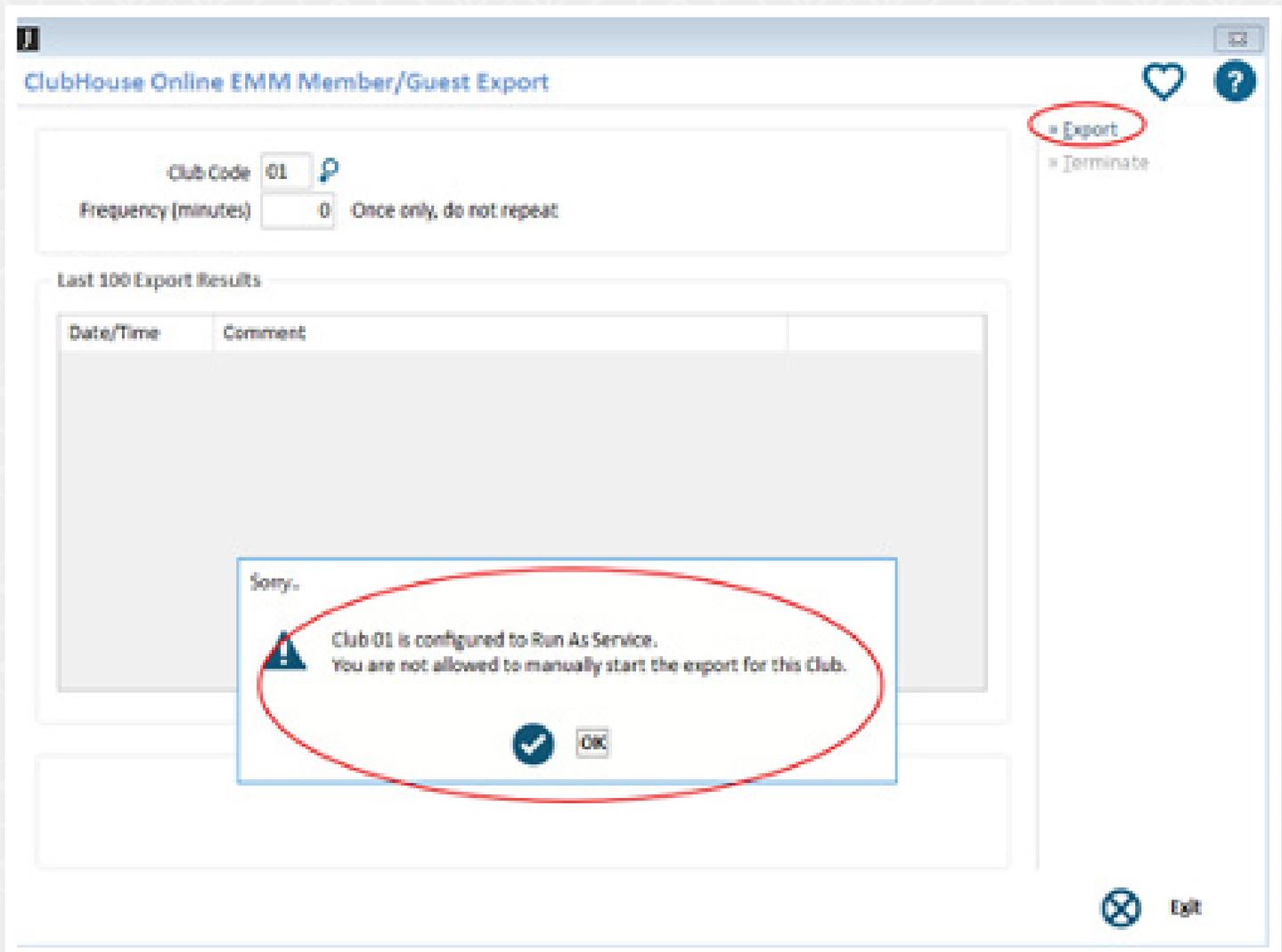
The screenshot shows the 'ClubHouse Online EMM Field Mapping Utility' interface. It displays a table of recommended fields for export, with all fields greyed out. The table has four columns: FIELD, JCMAS FIELD NAME, CHO EMM FIELD NAME, and CHO EMM FIELD LABEL.

FIELD	JCMAS FIELD NAME	CHO EMM FIELD NAME	CHO EMM FIELD LABEL
000	Email Address Type	emailaddresstype	Email Address Type
001	Member Type	membertype	Member Type
A01	Member #	member	Member #
A02	Surname	surname	Surname
A03	First Name	firstname	First Name
A06	Title	title	Title
A10	Sex	sex	Sex
A18	Address Line 4	addressline4	Address Line 4
A19	Address Line 5	addressline5	Address Line 5
A20	Address Line 1	addressline1	Address Line 1
A21	Address Line 2	addressline2	Address Line 2
A22	Address Line 3	addressline3	Address Line 3
A23	Postal / Zip Code	postalzipcode	Postal / Zip Code
A36	Date Joined (CCYYMMDD)	datejoined	Date Joined
A80	Member Status	memberstatus	Member Status
A93	Suffix	suffix	Suffix
A95	Marital Status	maritalstatus	Marital Status
A96	Date Resigned (CCYYMMDD)	dateresigned	Date Resigned
B02	Activity #1 Description	activity1description	Activity #1 Description
B04	Category #1 Description	category1description	Category #1 Description
B12	Activity #2 Description	activity2description	Activity #2 Description
B14	Category #2 Description	category2description	Category #2 Description

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.



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.”



HamptonGolf