

## MEMBER SEGMENTATION SETTINGS & REQUIREMENTS

If your managed club is using Jonas Club Management (JCM), all new Members joining the club and being added to JCM are set up to transfer to the club's ClubHouse Online email marketing database automatically. There are a few key items that you must review to ensure this process runs correctly.

1. Member Status/Member Type Codes
2. EMM Box
3. Jonas Export/Sync Settings

### Member Status/Type Codes

When entering new Members into the JCM backoffice, please be sure that you are entering the correct membership statuses or codes. The Clubhouse Online system will not be able to read typos, extra spaces, or inconsistencies within these codes. For example: If FULLGOLF is the code, the system will not be able to read FULL GOLF if the code is typed incorrectly with a space in it.

### EMM Box

There is a small box to the right of the email address when you are adding a new Member to the JCM backoffice. It is important that the EMM box is checked so that the contact can be transferred to the email marketing database.

The screenshot shows a form for adding a new member. The form includes fields for Alternate #, Fax #, Cell #, Email, and Stmt Options (E-Mailed and N/A). A red circle highlights the EMM box (a small blue icon) to the right of the Email field. Below the form is a table with columns: TYPE, EMAIL ADDRESS, STATEMENT, EMM, TEETIME, PAYMENTS, INSIGHT, and POS CHIT. The EMM column is circled in red, and the first row shows a checked checkbox in the EMM column.

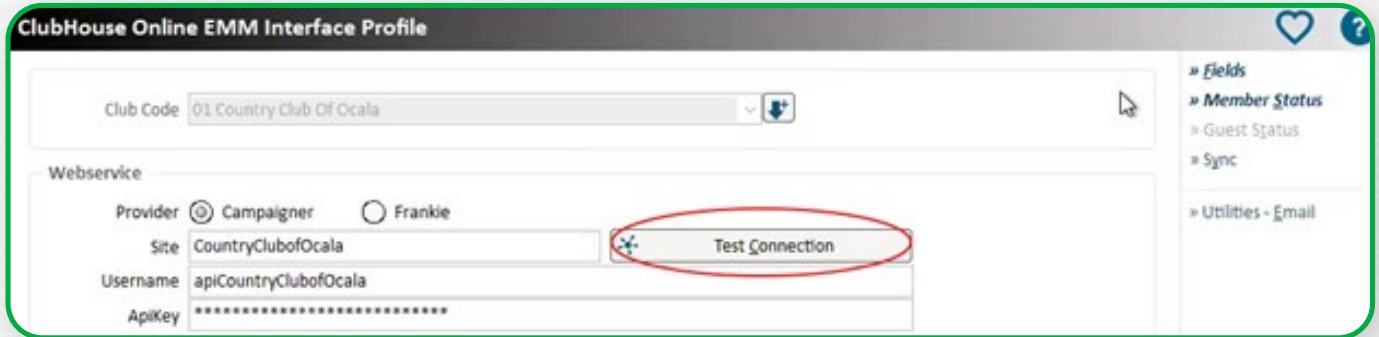
TYPE	EMAIL ADDRESS	STATEMENT	EMM	TEETIME	PAYMENTS	INSIGHT	POS CHIT
Main		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input 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"/>

## Jonas Export/Sync Settings

There are a few key settings you must check within the JCM backoffice. Please see the directions below.

### 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"



### Check Your Fields Are Set To Export

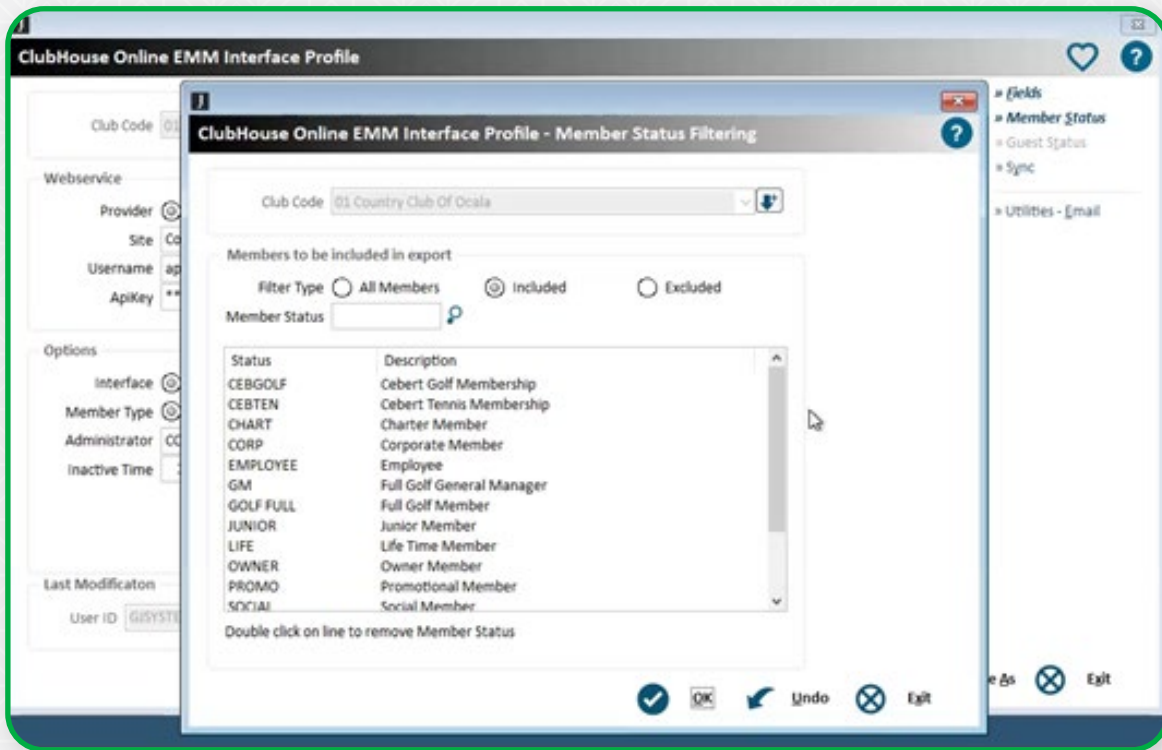
In the JCM backoffice, click Club Management > Member File > Member Import/Export > ClubHouse Online EMM Interface Profile > Fields > Make sure the fields are all greyed out in a light grey color. The following is an example of the fields set up correctly:

The screenshot shows the 'ClubHouse Online EMM Field Mapping Utility' page. At the top, there is a 'Club Code' dropdown menu set to '01 Country Club Of Ocala'. Below this is a 'Recommended Fields' section containing a table with the following data:

FIELD	JONAS FIELD NAME	CHO EMM FIELD NAME	CHO EMM FIELD LABEL
000	Email Address Type	emailaddressstype	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

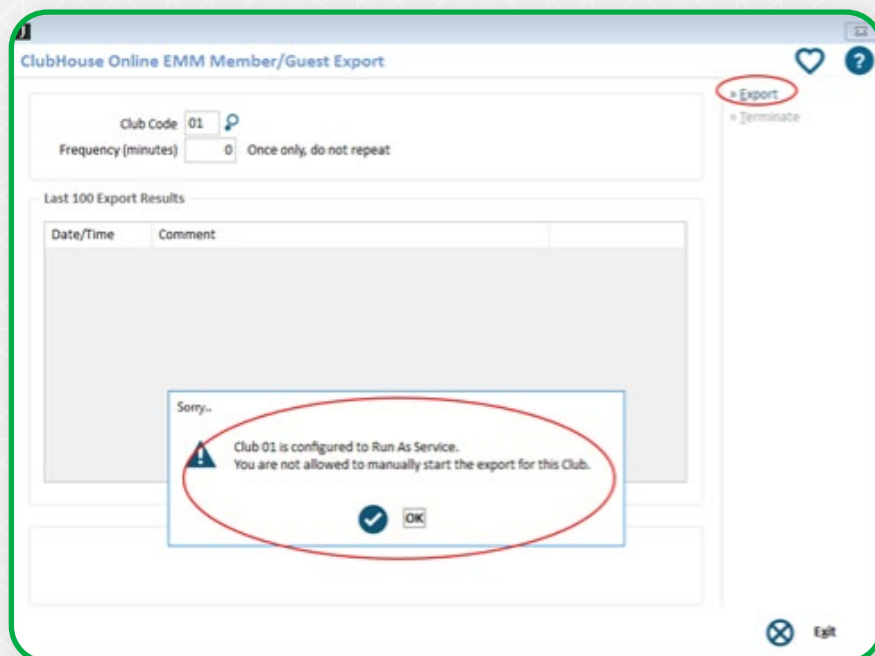
## Check Which Statuses Are Included

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.



## 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."



### **If You've Made Changes**

If you've made any changes with any of the settings above, go to Club Management > Member File > Member Import/Export > ClubHouse Online EMM Interface Profile > and click "Sync." This will sync up your new settings.

### **Next Steps**

We sincerely thank you for taking the time to go through these important settings. If you have any questions or notice anything settings-wise that doesn't seem right, please contact us at [marketing@hampton.golf](mailto:marketing@hampton.golf). We are more than happy to assist with any questions that arise.

### **Jonas Support**

To reach out directly to Jonas Support, please email [websupport@jonasclub.com](mailto:websupport@jonasclub.com) for ClubHouse online inquiries and [support@jonasclub.com](mailto:support@jonasclub.com) for Jonas Club Management inquiries.