

# Managing Member Groups

October 14, 2020

1-2 pm



# Ask a Question at Any Time!

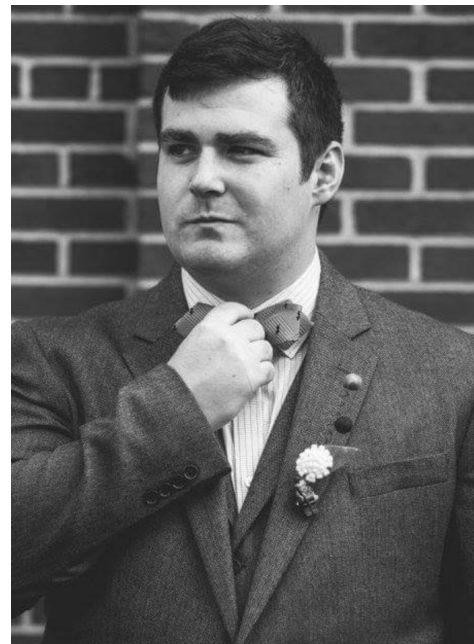
Questions will be addressed at the end of the webinar.

**Please note:** This webinar is being recorded. The recording will be available on our Client Education Resource Center at [kb.clubessential.com](https://kb.clubessential.com) within 48 hours.

**Jen Montano**



**Josh Morrison**





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# Use Case Scenario

The Club may wish to establish several different types of Member Groups to accomplish various marketing and communication goals.

For instance, the Club may wish to place members who are on a Committee in a fixed, or **Static Group**, so they can email minutes, calendar updates, etc.

Perhaps, the Club may want the ability to set up Special Interest or **Opt-In Groups**, such as “Dinner Club” or “Bridge Club”, whereby Members may sign up (or opt-in) to the Group(s) that are of interest to them via the their Member Profile on the website.

Additionally, the Club may also desire to establish **Dynamic Groups**, or Groups that fluctuate members based on certain parameters given to it, such as Male Golf Members or an All Members Mailing Group.

## **Office**

### Groups and Group Creation

- Create a Group
  - Static Group (General) Options
  - Static Opt-In Group Options
  - Dynamic Group Options
- Sync Groups to Website

## **Axis Website**

### View Groups on Website

- As an Administrator (View Groups and Send Emails)
- As a Member (Opt-In to a Group)

## Office Groups and Group Creation

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All Groups that will be shared between the Office and the Axis-Website need to be **created in (back) Office** to effectively sync with the Website.

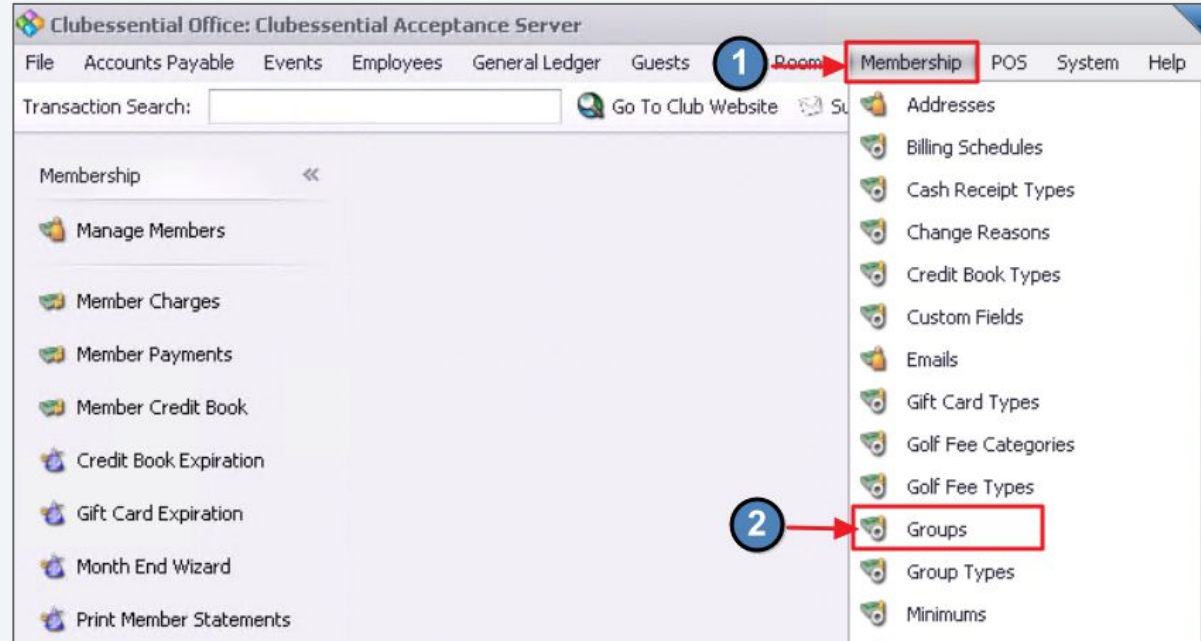
There are three types of Groups that can be created:

1. **(Regular) Static** -This group type contains a fixed group of Members, **assigned by the administrator**. Members do not have the option to add themselves or opt-in to this group.
2. **Static-Opt-In** - This group contains a fixed group of Members of which **Members may join or opt-in** to this group. Administrators may also assign Members to this group.
3. **Dynamic**-This group contains a variable set of Members, **based on the parameters** associated with the group. Membership of a Dynamic Group will change as criteria is met or not met.

## Create a Group

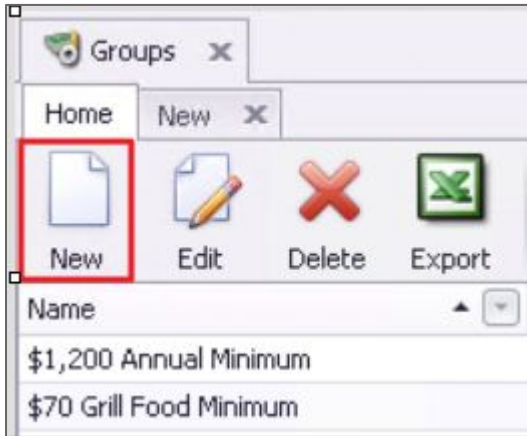
To create a new Group, first navigate to the following:

1. Click on **Membership**
2. Select **Groups**



## Create a Group-Initial Steps

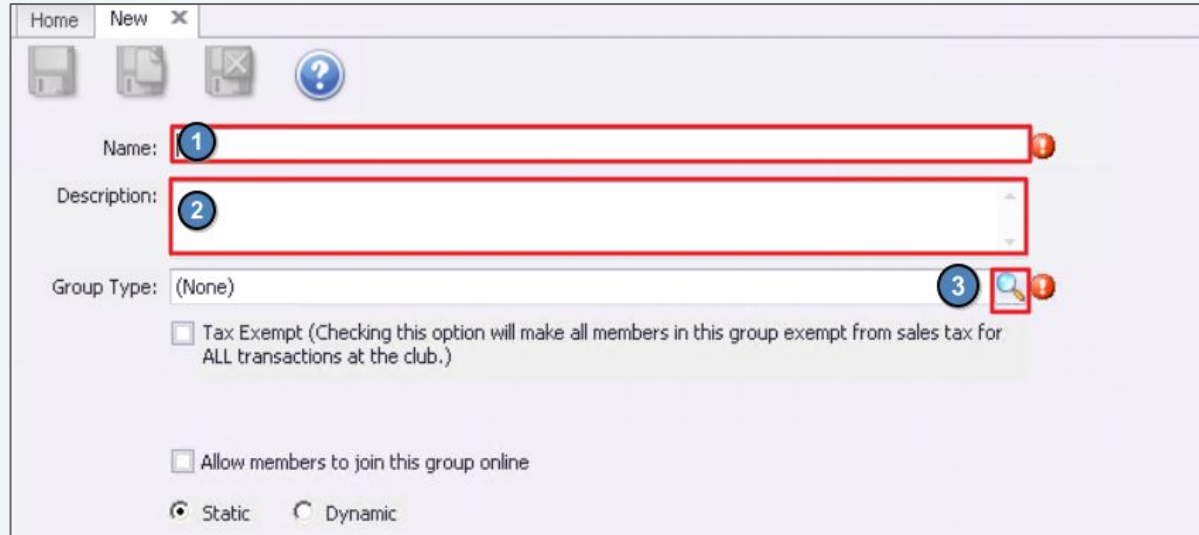
Click **New**.



**\*These steps  
apply to all Groups.**

Provide a **Name**, an additional **Description** (optional), and choose the **Group Type** relevant to the New Group.

Click the **lookup feature** to select the **Group Type**.



A screenshot of the 'New Group' form. The 'Home' tab is active. The form contains the following fields and options:

- Name:** A text input field with a red box and a blue circle containing the number '1' next to it.
- Description:** A text input field with a red box and a blue circle containing the number '2' next to it.
- Group Type:** A dropdown menu showing '(None)' with a red box and a blue circle containing the number '3' next to it. A red box also highlights a lookup icon (magnifying glass) to the right of the dropdown.
- Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)
- Allow members to join this group online
- Radio buttons for **Static** (selected) and **Dynamic**.

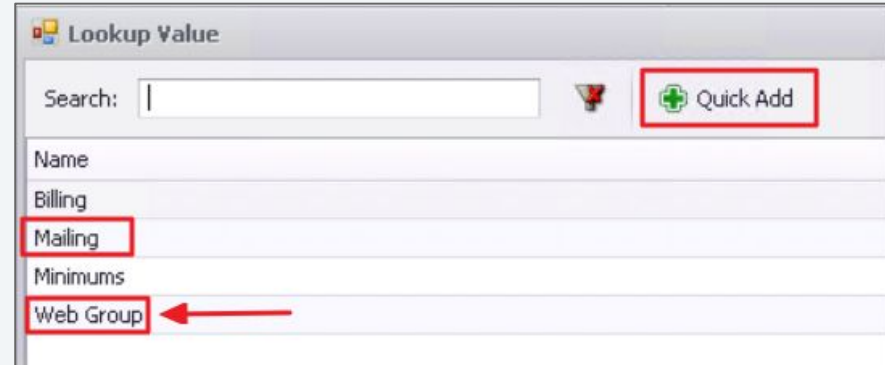


## Select a Group Type


Once **Group Type** Lookup Value screen launches, select appropriate Group Type.

**Mailing** or **Web Group** are most commonly used.

Selecting a **Group Type** is for organizational purposes only, it does not trigger the group to sync to the web.



Lookup Value


Search:   + Quick Add

Name

Billing

Mailing

Minimums

Web Group 



Name:

Description:

Group Type: Web Group 



## Define the Group

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**Static** - Members are manually added or removed by an administrator.

**Static Opt-In** - By Clicking “Allow members to join this group online”, members will see this type of group and can opt-in via their web profile.

**Dynamic** - Criteria is set by the administrator to populate the members in this group. Members are automatically added or removed, according to the parameters set.

# Static Group

1  Static  Dynamic

Members

Select Members...

Member #	Last Name	First Name
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Lookup Value

Search:

Select All  Unselect All

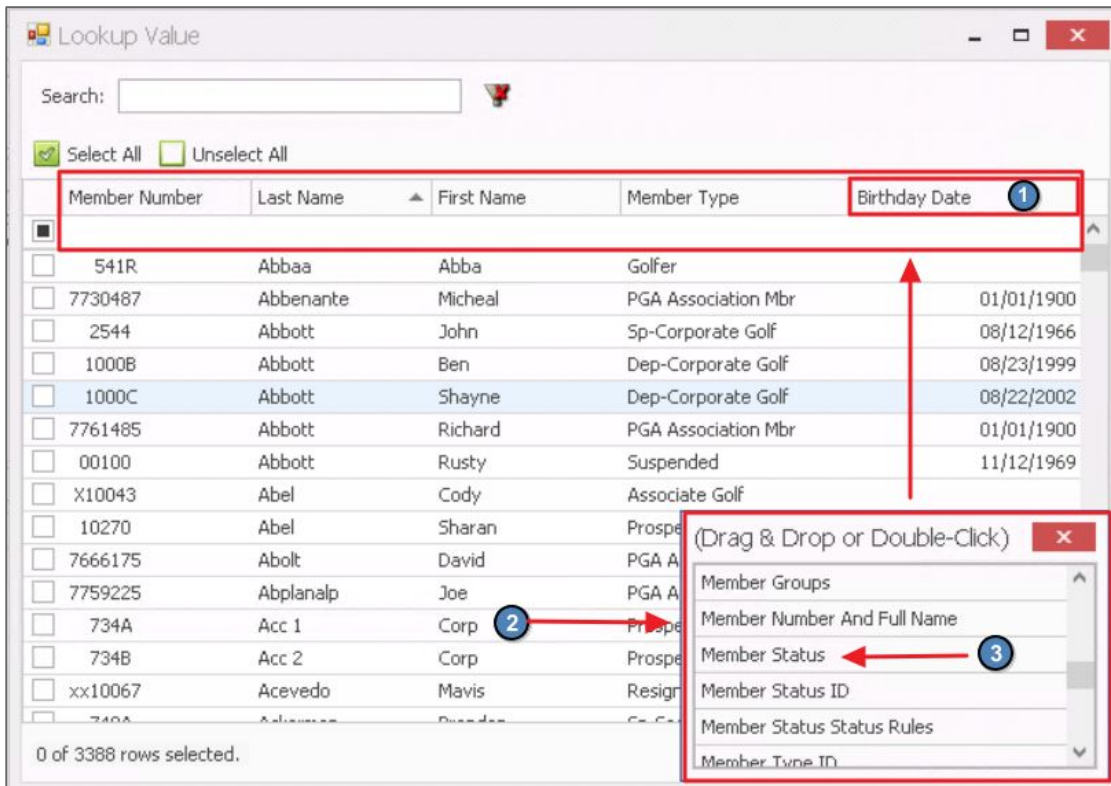
Member Number	Last Name	First Name	Member Type	Member Status	
<input type="checkbox"/>	541R	Abbaa	Abba	Golfer	Active
<input checked="" type="checkbox"/>	7730487	Abbenante	Micheal	PGA Association Mbr	Active
<input type="checkbox"/>	2511	Abbott	John	Sp-Corporate Golf	Active
<input type="checkbox"/>	1000B	Abbott	Ben	Dep-Corporate Golf	Active
<input type="checkbox"/>	1000C	Abbott	Shayne	Dep-Corporate Golf	Active
<input checked="" type="checkbox"/>	7761485	Abbott	Richard	PGA Association Mbr	Active
<input type="checkbox"/>	00100	Abbott	Rusty	Suspended	Active
<input type="checkbox"/>	X10043	Abel	Cody	Associate Golf	Active
<input type="checkbox"/>	10270	Abel	Sharan	Prospect	Active
<input type="checkbox"/>	7666175	Abolt	David	PGA Association Mbr	Active
<input type="checkbox"/>	7759225	Abplanalp	Joe	PGA Association Mbr	Active
<input type="checkbox"/>	734A	Acc 1	Corp	Prospect	Active
<input type="checkbox"/>	734B	Acc 2	Corp	Prospect	Active
<input type="checkbox"/>	xx10067	Acevedo	Mavis	Resigned	Resigned Prospect

2 of 3388 rows selected.

4

1. Select the **Static Radial Button**.
2. Click the **Look up icon**.
3. Select your members.
4. Click **Select** to add to the group.

## Customize Columns/ Filtering Options (Static Group)

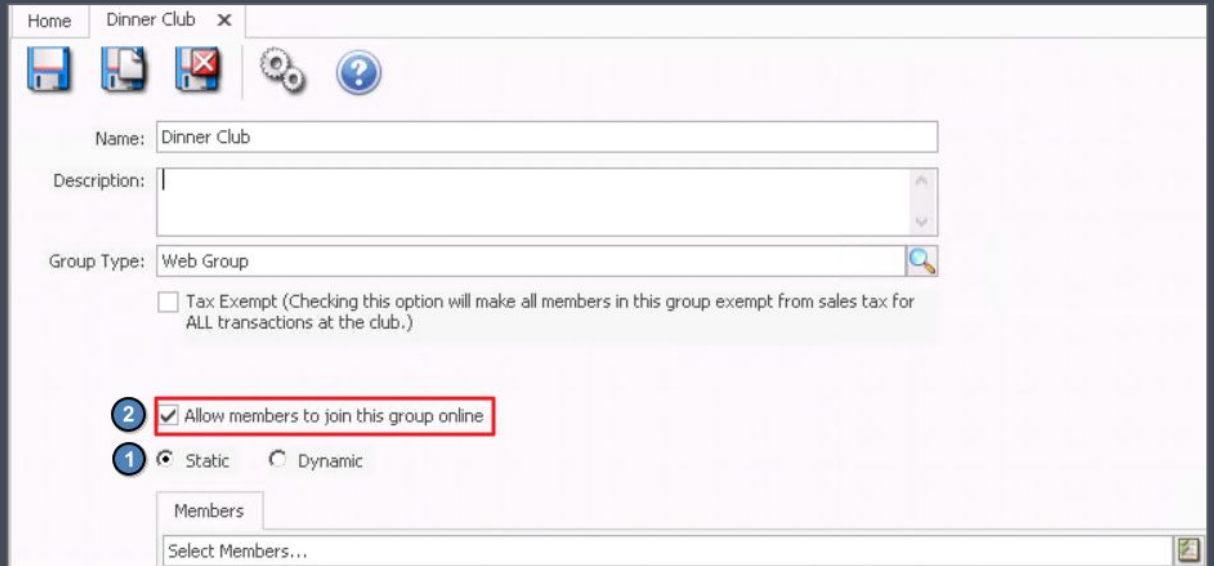


0 of 3388 rows selected.


1. To **Remove a column**, right click the column header name and select the option to **Remove This Column** from the Drop Down.
2. To **add a New Column**, right click anywhere in an open space on the grid. A fly out for **Choose Columns** will appear, select that option and a box will display with additional column choices.
3. **Select the Column Header** you wish to add by either **Drag and Drop** or **Double Click**.

Select **Static** and enable **Allow Members to join this group online**

Administrators CAN add members to an Opt-In Group, by adding the names here in Office, on this members tab, however most clubs create the group and allow the member themselves to opt-in.




Home Dinner Club x

Name: Dinner Club

Description:


Group Type: Web Group 

Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)

**2**  Allow members to join this group online

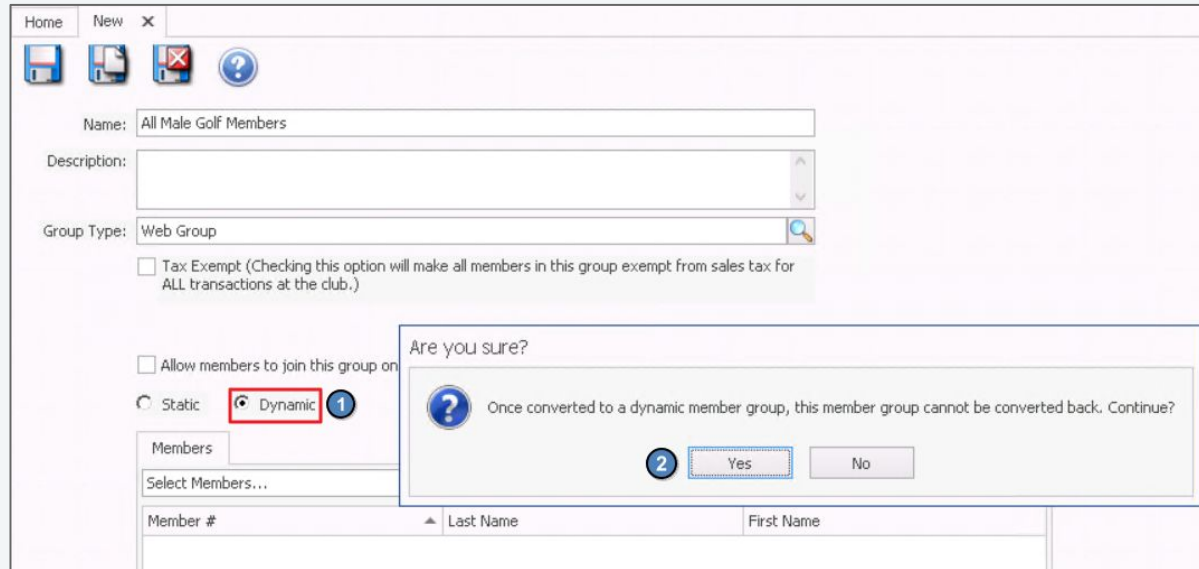
**1**  Static  Dynamic

Members

Select Members... 

Select the **Dynamic** radial button.

Confirm Dynamic Group Setup by clicking “**Yes**”-Once a group is Dynamic, it can not be changed to static.



Home New x

Name: All Male Golf Members

Description:

Group Type: Web Group

Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)

Allow members to join this group on

Static  **Dynamic** 1

Members

Select Members...

Member # Last Name First Name

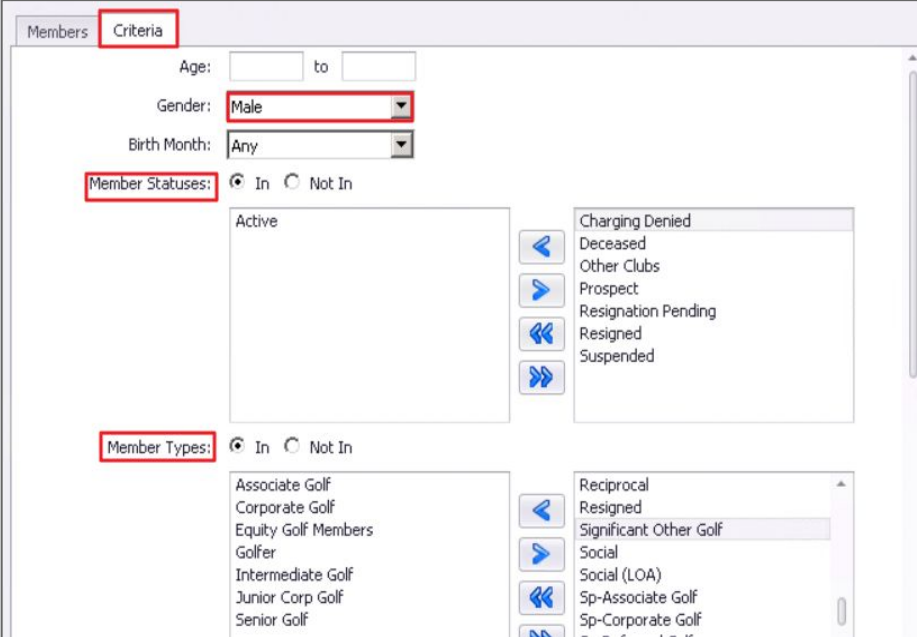
Are you sure?

Once converted to a dynamic member group, this member group cannot be converted back. Continue?

2 Yes No

## Dynamic Group Parameters

- Specify parameters/criteria of the Group
- Filters may be left blank or user may also apply more than one
- Filters include
  - Age
  - Gender
  - Birth Month
  - Member Status
  - Member Type
  - Member Groups
  - Spouse
  - Non-Spouse Dependents/Ages
  - Years of Membership
  - Report Criteria



Members Criteria

Age:  to

Gender:

Birth Month:

Member Statuses:  In  Not In

Active

Charging Denied

Deceased

Other Clubs

Prospect

Resignation Pending

Resigned

Suspended

Member Types:  In  Not In

Associate Golf

Corporate Golf

Equity Golf Members

Golfer

Intermediate Golf

Junior Corp Golf

Senior Golf

Reciprocal

Resigned

Significant Other Golf

Social

Social (LOA)

Sp-Associate Golf

Sp-Corporate Golf

**Note:** Once the group is saved, the system will auto populate the names of the Members within the group on the **Members tab**. Names can NOT be manually added or removed from a Dynamic group.



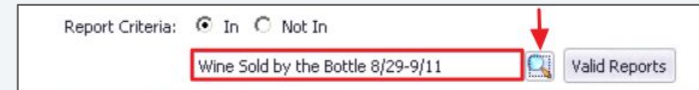
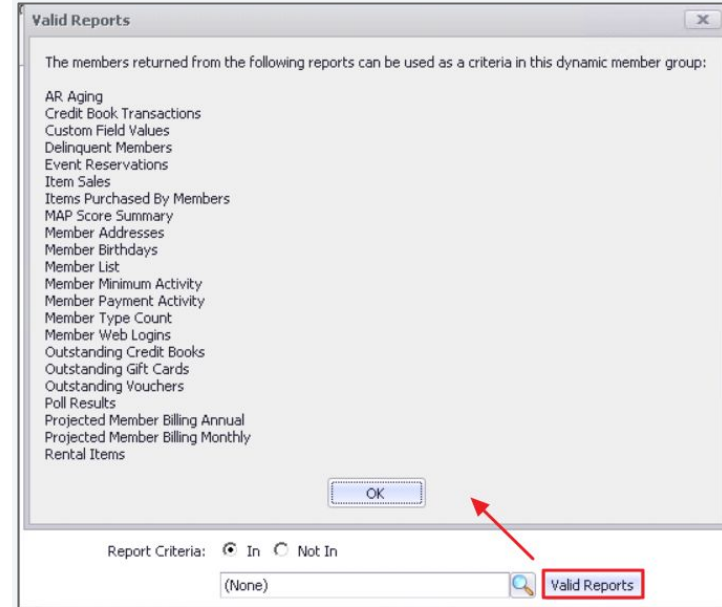
## Report Criteria

Select Reports can be utilized to build a group.

To view which **Interactive Reports** can be used, click the **Valid Reports** button.

Click the **Looking Glass** icon to browse saved reports.

Double click a report name to select.







For all Groups, once setup is complete...

**SAVE AND CLOSE!**

The screenshot shows a web application window with a title bar containing four icons: a floppy disk (save), a floppy disk with a red 'X' (save and close), a red 'X' (close), and a question mark (help). Below the title bar, the form has three main sections:

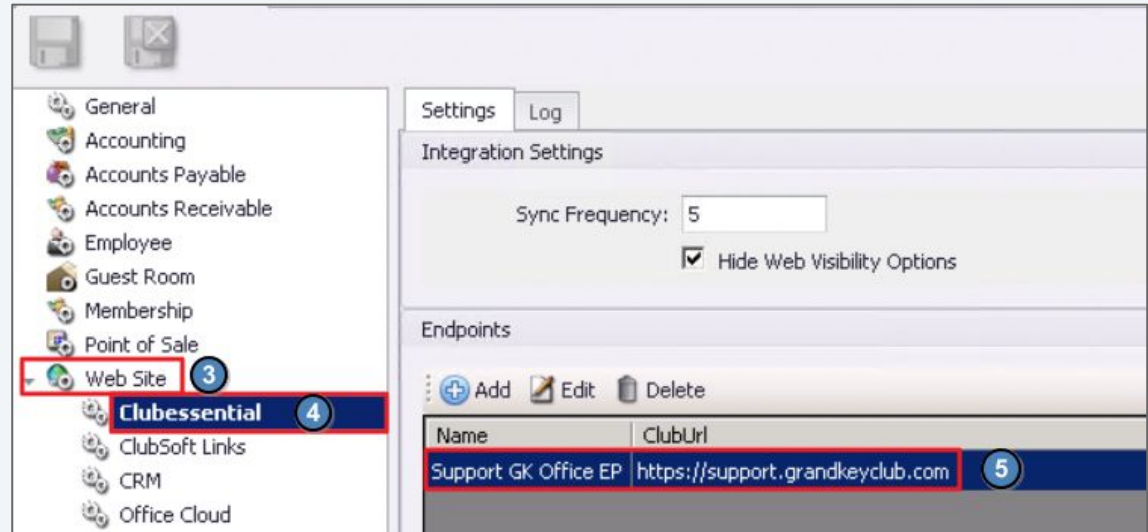
- Name:** A text input field containing the text "All Active Male Golfers".
- Description:** A large, empty text area with vertical scrollbars on the right side.
- Group Type:** A dropdown menu currently showing "Web Group". To the right of the dropdown is a magnifying glass icon for search.

# Sync Groups to Website

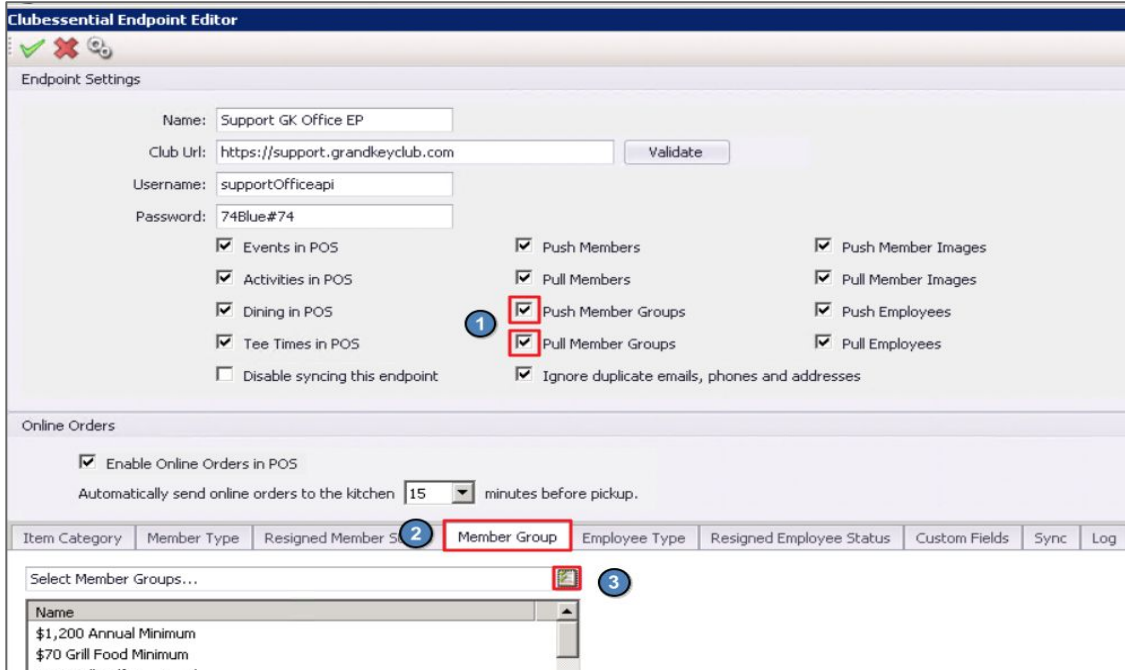
Once Groups have been established in Office, they will need to be set to Sync to the Website.

## Access the Unification Settings

1. Navigate to **System**.
2. Click **System Settings**.
3. Expand **Web Site** from the list.
4. Double click on **Clubessential**.
5. Double Click the **ClubURL** highlighted in blue.



# Configure the Group Sync



The screenshot shows the 'Clubessential Endpoint Editor' window. The 'Endpoint Settings' section includes fields for Name, Club Url, Username, and Password. Below these are several checkboxes for syncing data: Events in POS, Activities in POS, Dining in POS, Tee Times in POS, Disable syncing this endpoint, Push Members, Pull Members, Push Member Groups, Pull Member Groups, Ignore duplicate emails, phones and addresses, Push Member Images, Pull Member Images, Push Employees, and Pull Employees. A blue circle with the number '1' is placed over the 'Push Member Groups' and 'Pull Member Groups' checkboxes. Below the settings is the 'Online Orders' section with a checkbox for 'Enable Online Orders in POS' and a dropdown menu for 'Automatically send online orders to the kitchen' set to '15' minutes. At the bottom, there is a tabbed interface with 'Member Group' selected, highlighted by a red box and a blue circle with the number '2'. Below the tabs is a 'Select Member Groups...' dropdown menu with a red box and a blue circle with the number '3' over the 'Add' button. The dropdown menu shows a list of member groups with names like '\$1,200 Annual Minimum' and '\$70 Grill Food Minimum'.

1. The **Push/Pull Member Groups** should be checked.
2. Click on the **Member Group** tab.
3. Click the **Browse** button to select the Member Groups you wish to sync.

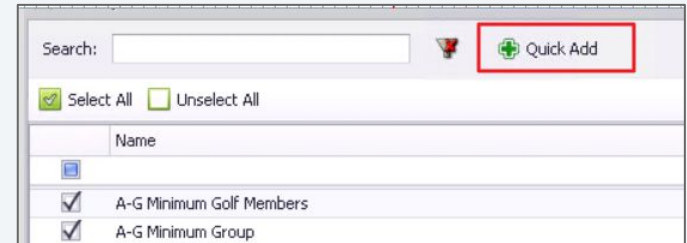
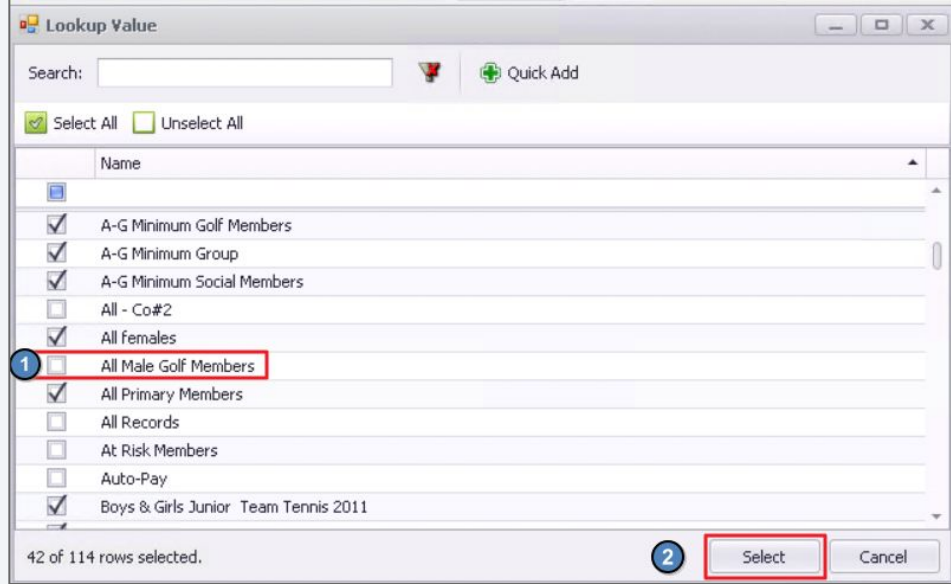
Only **Member Groups** can be created in office and synced to the website.

## Select Group(s)

1. Place a **check mark** in the box to select the group.
2. Click **Select** to add the group to the list of groups you wish to sync.

### Additional Option

*If you didn't create the group ahead of time, use the **Quick Add** button to create a group 'on the fly' directly from this screen. Any groups created using the Quick Add, will automatically be added to the sync.*



Clubessential Endpoint Editor

Endpoint Settings

Name: Support GK Office EP

Club Url: https://support.grandkeyclub.com

Username: supportOfficeapi

Password: 74Blue#74

Events in POS

Activities in POS

Dining in POS

Tee Times in POS

Disable syncing this endpoint

Online Orders

Enable Online Orders in POS

Automatically send online orders to the kitchen  minutes before

Item Category Member Type Resigned Member Status **Member Group**

Select Member Groups...

Name
9 Hole Group
A-G Minimum Golf Members
A-G Minimum Group
A-G Minimum Social Members
All females
<b>All Male Golf Members</b>
All Primary Members
Boys & Girls Junior Team Tennis 2011
Boys Senior Team Tennis 2011
Corporate Golf Sindle

System Settings

General

Accounting

Accounts Payable

Accounts Receivable

Employee

Guest Room

Membership

Point of Sale

Web Site

**Clubessential**

ClubSoft Links

CRM

Settings Log

Integration Settings

Sync Frequency:

Hide Web Visibility Options

Endpoints

Name	ClubUrl
Support GK Office EP	https://support.grandkeyclub.com

Once the newly added group appears in the **Member Group Selection**, the final step is to **save and close**.

This is a 2 step process:

1. Click the **Green Check** in the top left corner.
2. On the following screen, click the **Save and Close** button. This will close the entire System Settings tab.

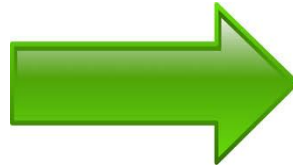


## A Few Rules to Remember

Create Shared Groups in **Office** (*not in the web*).

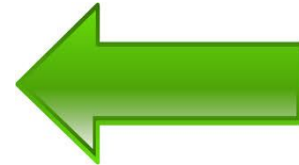
The following groups will all **PUSH** from Office to Web.

- Static Group (Push only)
- Static Opt-In Group
- Dynamic Group (Push only)



The **ONLY** groups will **PULL** back into Office are **Static (opt-In)**.

These groups must be created in Office to sync bi-directionally.



Changes to a Regular Static or Dynamic group can **not** be made on the Web.



# Groups are created and configured to sync!

Next Step...To The Web



ADMIN Client Resource Center

CONTENT MGMT COMMUNICATION USER / PROFILES

- Articles
- Document Upload
- Form Base
- Image Explorer
- Template Manager
- Beacon Manager
- Compose Email
- CRM
- First Impression
- Inbox
- Mail Reporting
- Polling
- Push Notifications
- Surveys
- Voice Messenger
- Directory / Roster
- Dynamic Groups
- Groups**
- Profile
- Roster Search
- Staff
- Yellow Book

To view groups, as an administrator, click the **Admin** toolbar, then choose **Groups**.

- All groups synced from office will display on this **Groups** tab, regardless if it's Static or Dynamic
- All Office groups will display the word "**Office**" under the **Synced** column

Inbox Compose Drafts Filed Sent Scheduled **Groups** Dynamic Groups Phone Lists

Edit Disclaimer Text

To send a message to an existing group please click on the Compose tab.  
Click a group's name to view its members

Add Group | Import Groups | Group Update Lo

Inclusion Groups Exclusion Groups

Group Name	Description	Included Count	Opt In?	Synced?
<b>2020 Board of Governors</b>		6	<input type="checkbox"/>	Office
25-35 years old		5	<input type="checkbox"/>	Office
Bridge Club		0	<input checked="" type="checkbox"/>	Office
<b>Dinner Club</b>		0	<input checked="" type="checkbox"/>	Office
<b>All Male Golf Members</b>		31	<input type="checkbox"/>	Office
Staff Management		0	<input type="checkbox"/>	
Tennis Ladies		0	<input type="checkbox"/>	

# Send Group a Message

1. To email to all Members of a Group, click the **Group Name** from the list of Groups.
2. This will open the group, click the link **Send Group Email** to launch the Email Composing screen. The group will auto populate in the recipient field.

**Remember, Synced Groups can NOT be edited from the web. They can be viewed and used to SEND an email.**

A-G Minimum Social Members	81	<input type="checkbox"/>	Office
All females	291	<input checked="" type="checkbox"/>	Office
All Male Golf Members	31	<input type="checkbox"/>	Office
All Primary Members	521	<input type="checkbox"/>	Office

## INBOX

Mail Reporting

**Inbox** **Compose** **Drafts** **Filed** **Sent** **Scheduled** **Groups** **Dynamic Groups** **Phone** **Lists**

Edit Disclaimer Text

[« Back To Static Groups](#) **2** [Send Group Email](#) [Edit Group Info](#) | [Group Update Log](#) | [Delete Group](#)

Group Name All Male Golf Members

Description

Group Type Office

31 total members included in this group are shown below [Show All](#) | [Export Group](#)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Last Name	First Name	Email	Secondary Email	Expired																					
Abbaa	Abba	rhoendorf@clubessential.com	cetest@clubessential.com	<input type="checkbox"/>																					
Aranda	Benedict	blohde@clubsoft.net		<input type="checkbox"/>																					
Augustine	Darnell	rhoendorf@clubessential.com	rjtestemails@gmail.com	<input type="checkbox"/>																					

# INBOX

The screenshot shows the 'Compose' tab in the Office 365 interface. The 'Recipients' section is visible, with 'Static Groups' highlighted. A 'Select Groups' dialog box is open, displaying a list of available static groups. The 'All Male Golf Members' and 'Bridge Club' groups are highlighted with red boxes. Red arrows point from these groups in the dialog box to the 'Static Groups' option in the main interface. The 'Selected Static Groups' section is empty, showing 'No Results Found'. The 'Update Groups' button is visible in the top right of the dialog box.

Mail Reporting

Edit Disclaimer Text

Recipients

Members <Click to Add Members>

Staff <Click to Add Staff>

List Recipients <Click to Add List Recipients>

Static Groups All Male Golf Members

Dynamic Groups <Click to Add Dynamic Groups>

Mailing Lists <Click to Add Mailing Lists>

Events <Click to Add Events>

Subject

Body HTML Plain Text Text Message

Inbox Compose Drafts Filed

Select Groups

Update Groups

Available Static Groups

- All Male Golf Members
- All Primary Members
- All Records
- Austin - Assessment 1a
- Austin - Assessment 1b
- Austin - Assessment 1c (Exclusion)
- Boys & Girls Junior Team Tennis 2011
- Boys Senior Team Tennis 2011
- Bridge Club

Selected Static Groups

No Results Found

## Compose Email

Now you are ready to compose your email!

All groups that are synced from office will appear under the **Static Groups**, regardless of how they are configured in Office.

\*An Alternative way to select a group is to go directly to the **Compose** tab, click **Static Groups**, then select the recipient group.

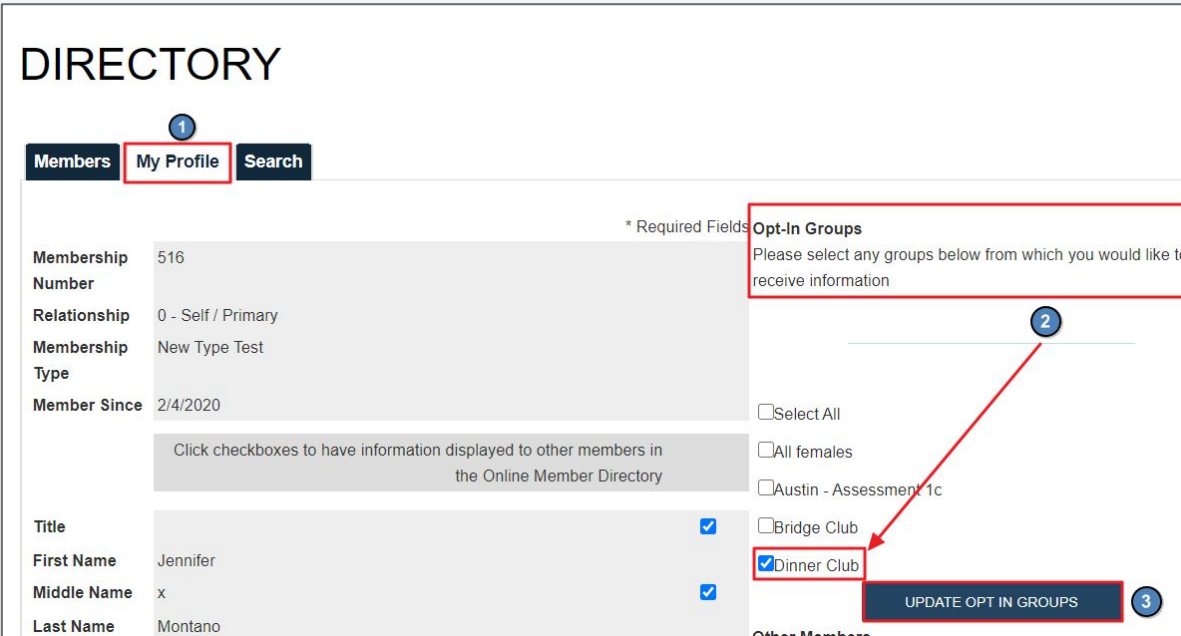
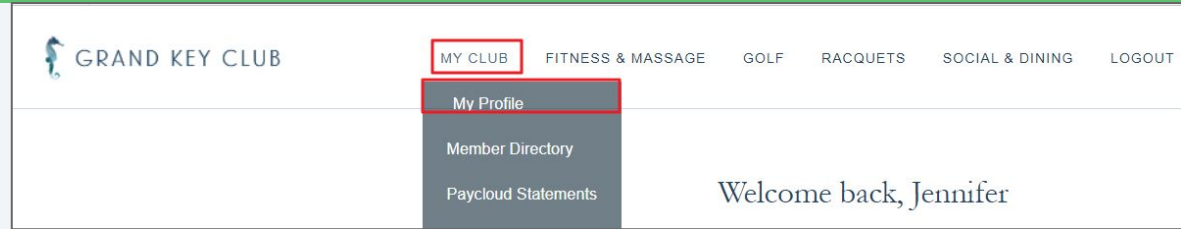


# Opt-In to a Group

The Member Experience

# Member Profile-Manage Your Opt-In Groups

1. Navigate to **My Profile** to view available Opt-In Groups.
2. Click the box next to the Group(s) name so that a **checkmark** appears in the box.
3. Click **Update Opt In Groups**.



# Sync back to Office

Upon the next sync, (typically every 5-15 minutes) the Member will be added to the Group in Office.

*\*Reminder:* This is the only data that is pulled back to Office.

The screenshot displays the Clubessential software interface. On the left, a 'Groups' window shows the 'Dinner Club' group with a red box around the name. Below it, a 'Members' table lists member 516, Jennifer Montano, with a red box around the row. On the right, the 'Manage Members' window shows the details for Jennifer Montano (Member ID: 516) with a red box around the name. The 'Edit Member' form includes fields for Member ID, Member Type (Social), Status (Active), Title, Suffix, First Name (Jennifer), Middle, Last Name, Email (jmontano@clubessential.com), and Phone ((704) 542-0589). A 'Select Member Groups...' list at the bottom right includes 'Dinner Club' with a red box around it.

Member #	Last Name	First Name
516	Montano	Jennifer

Member Group
A-G Minimum Golf Members
Delinquent groups
5-18 Test
Group Billing
Printed Statements
Test Dynamic Group
CRM Dynamic Test Group
Office Group Test
60+ Delinquent
Dinner Club



# This Concludes Today's Webinar!

Managing Your Member Groups

Remember to Visit us at [kb.clubessential.com](https://kb.clubessential.com)!

# Q&A

