



# From Prospect To Member: Making The Most Of Your CRM

November 3, 2020



# 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 sent out after the webinar.



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# Agenda



- Customization
- Managing Prospects
- Membership Data
- Utilizing Campaigns
- Editing Fields, Layouts, & Views
- Reporting Tools & Dashboards

## Customer Relationship Management

ADMIN	Client Resource Center								
CONTENT MGMT	COMMUNICATION	USER / PROFILES	EVENTS	REPORTING	CONFIGURATION	ESSENTIAL SITE TEMPLATES	PREMIER	PLATINUM	
Articles	Beacon Manager	Directory / Roster	Event Manager	Active User Listing	Editor Sandbox	Content	Public Home	Public Home	
Document Upload	Compose Email	Dynamic Groups	Today	CE Stats	Site Configuration	Member Login	Member Login	Member Login	
Form Base	CRM	Groups	Week   Month   Year	Global Services	Site Notifications	Member Login	Private Home	Private Home v1	
Image Explorer	First Impression	Profile	All	Menu Details	INTEGRATIONS	Private Home	Private Content	Private Home v2	
Template Manager	Inbox	Roster Search	Event Reports	Profile Update		Public Home	Private Module	Public Content	
	Mail Reporting	Staff		Session Details	Event Billing	Style Guide	Style Guide		
	Polling	User Registration		Site Statistics	RosterSync				
	Pop Up Example	User Registration		Summary	RESERVATIONS				
	Push Notifications	Confirmation		User Logins		Event Manager			
	Surveys	Yellow Book				Role Security			
	Voice Messenger								

- Manage Prospects
- Track Members
- Data flow between CMA, Events, Forms

# Top Navigation Customization

The screenshot displays the CRM interface for 'Grand Key Club Demo 2020 CRM'. The top navigation bar includes 'Membership Prospects', 'Event Prospects', 'To-Do List', 'Current Members', and 'Closed Prospects'. A user profile for 'System User' is visible in the top right, with a 'Setup' button circled in red and labeled '1'. A dark sidebar on the left contains a 'Setup' section with 'Application Settings' circled in red and labeled '2'. The main content area shows the 'Membership Prospecting Dashboard' with a 'Qualified Leads:' section and a 'Configure Application Links' modal window. The modal window contains a table of header links with columns for Type, Name, and Custom Text, and a vertical double-headed arrow for reordering.

Grand Key Club Demo 2020 CRM

Membership Prospects Event Prospects To-Do List Current Members Closed Prospects

System User

Setup 1

View Compact Normal

Impersonate User

Logout

Membership Prospecting Dashboard

Export

Qualified Leads:

Configure Application Links

Header Links

Grouping System Default Add New

	Type	Name	Custom Text	
EDIT REMOVE	View	Membership Prospects	Membership Prospects	↕
EDIT REMOVE	View	Event Prospects		↕
EDIT REMOVE	Object	Activities	To-Do List	↕
EDIT REMOVE	View	Members	Current Members	↕
EDIT REMOVE	View	Closed Prospects		↕
EDIT REMOVE	View	D-Prospects		↕

ADD NEW

Setup

Profile

Application Settings 2

Quick Links

Application Links

Status Types

Outgoing Addresses

1. Select **Setup**
2. Click on **Application Settings**
3. Edit, Remove, Add or Rearrange Views, Reports, and Queries.



## Introducing Quick Links

- Use Pencil Icon to edit
- User Specific
- Can be:
  - Views
  - Reports
  - Queries

### Grand Key Club Demo 2020 CRM

#### Quick Links



All Queries

All Reports

Closed-Won Membership Opport...

Follow-Up Report

Everyone

Membership Prospecting Dashb...

Event Opportunities Dashboard

Reservations Dashboard

#### Communication

Campaigns

Campaign History

#### Recent Items

Cronan, Ashley

Booked

Abbott, Jackson

Abbott, David

#### External Links

➤ Client Resource Center

➤ Document Upload

➤ Template Manager

# Editing/Adding/Removing Quick Links

Configure Quick Links 🔍

Grouping: User Specific ▼ Add New

	Type	Name	Custom Text	
1 <span>EDIT</span> <span>REMOVE</span> 2	Query	Query Listing	All Queries	↑ ↓
<span>EDIT</span> <span>REMOVE</span>	Report	Report Listing	All Reports	↑ ↓
<span>EDIT</span> <span>REMOVE</span>	Query	Closed-Won Membership Opportunities		↑ ↓
<span>EDIT</span> <span>REMOVE</span>	Query	All Prospect Activities Updated in Date Range	Follow-Up Report	4 ↑ ↓
<span>EDIT</span> <span>REMOVE</span>	View	Everyone		↑ ↓
<span>EDIT</span> <span>REMOVE</span>	Report	Membership Prospecting Dashboard		↑ ↓
<span>EDIT</span> <span>REMOVE</span>	Report	Event Opportunities Dashboard		↑ ↓
<span>EDIT</span> <span>REMOVE</span> 3	Report	Reservations Dashboard		↑ ↓
<span>Add New</span>				

1. Use **EDIT** to update existing quick links.
2. Use **REMOVE** to delete.
3. Use the **ADD NEW** to add a new quick link.
4. Use arrows to drag and drop to Rearrange.





# Introduction to Prospects & Views

Membership Prospects    Event Prospects    To-Do List    Current Members    Closed Prospects    System User

## Membership Prospects

Export    Messaging    Add New Prospect

		Prospect	Funnel	Membership	Club Interests	Lead So
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Wellness	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">McGibney_Laura</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Spinning, Youth & Family	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf, Tennis	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">O'Mahony_Sung</a>	C-Prospect			Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Thompson_Ted</a>				
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">McCarron_Joe</a>	C-Prospect	Proprietary Membership	Golf, Tennis	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">McCarron_Joe</a>	A-Prospect		Golf, Tennis	Member R
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Nathan_Curt</a>	C-Prospect			Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Cronan_Ashley</a>	C-Prospect	Proprietary Membership	Golf	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Ferber_Laura</a>	C-Prospect	Proprietary Membership		Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Alyson_Barbara</a>	C-Prospect			Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">McCarron_Joe</a>	B-Prospect	Intermediate Membership	Spinning, Biking, Wellness	Walk In
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Harrison_Cody</a>	A-Prospect	Corporate Membership		Email Inq
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Jackson_Paul</a>		Social Membership	Wellness	
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Smith_Jordan</a>	C-Prospect	Corporate Membership	Golf, Tennis, Youth & Family	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Geraghty_Andrew</a>	C-Prospect	Corporate Membership	Golf	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Shields_Alyson</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Swimming	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Harrison_Cody</a>		Intermediate Membership	Golf, Sailing, Kayaking	Website F
<input type="checkbox"/>	EDIT DELETE WON! DEAD	<a href="#">Cronan_Ashley</a>	C-Prospect	Corporate Membership	Wellness	Website F

- Prospect views allow you to track the sales journey
- Customized to your own club's data and designations
- Views display a group of records
- 20 per page

## Prospects & Views Cont.

**EDIT** - Add or remove information from this prospect

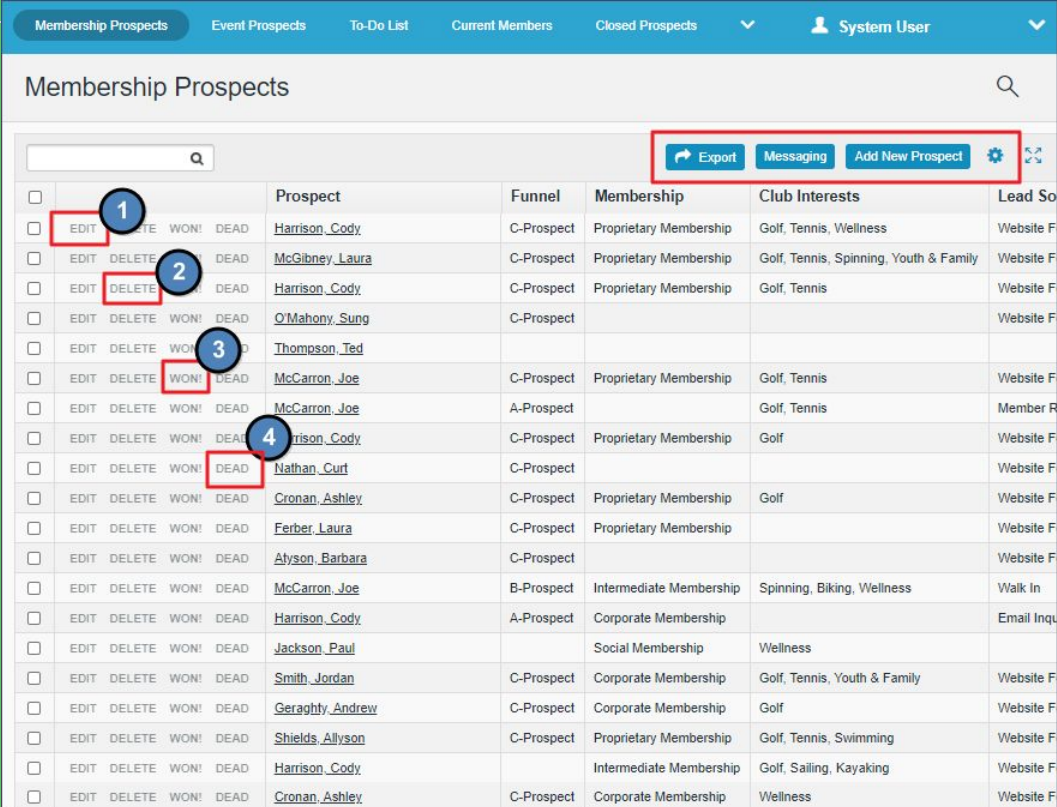
**DELETE** - Remove contact from CRM

**WON!** - Update prospect status to “Closed-Won”

**DEAD** - Update prospect status to “Closed-Lost”

**Export** - download view (excel, csv, pdf, word)

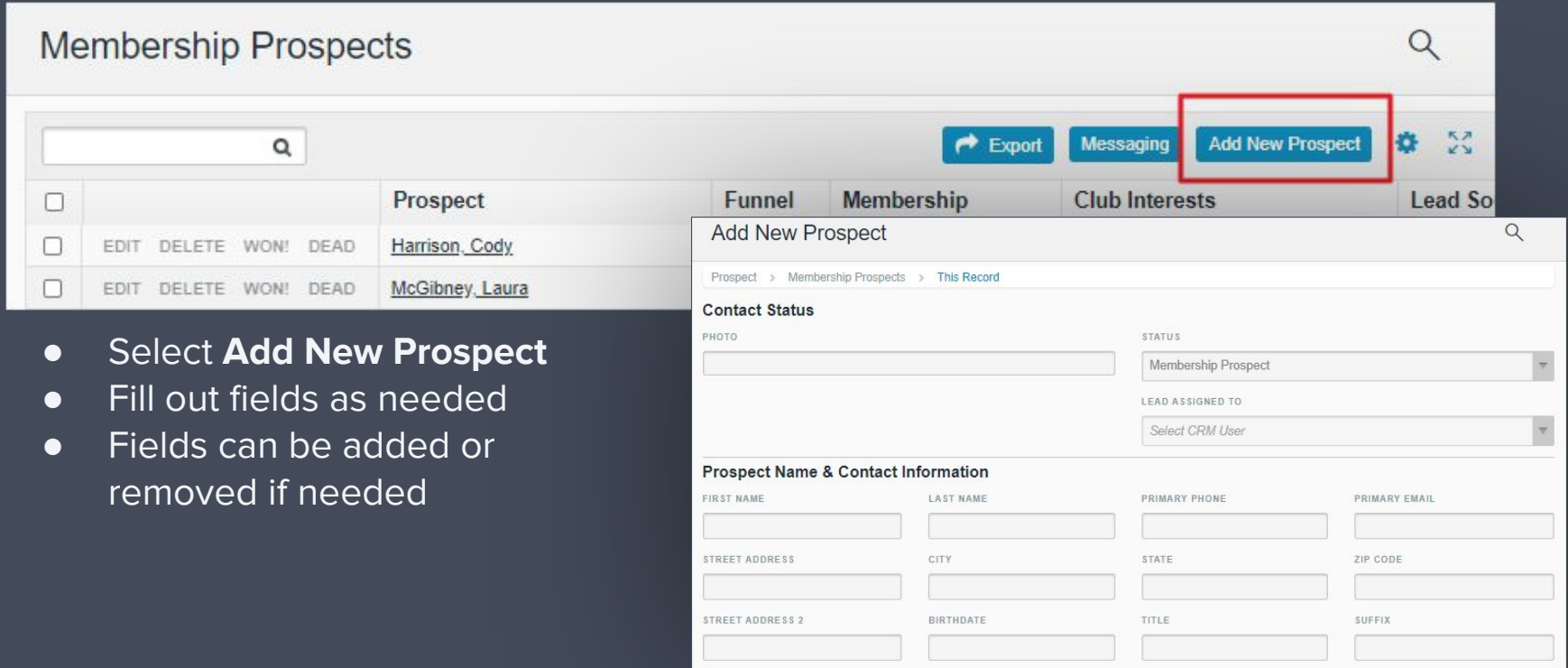
**Messaging** - Send emails, review history



The screenshot shows the 'Membership Prospects' interface. At the top, there are tabs for 'Membership Prospects', 'Event Prospects', 'To-Do List', 'Current Members', and 'Closed Prospects'. The user is logged in as 'System User'. Below the tabs is a search bar and a table of prospects. The table has columns for 'Prospect', 'Funnel', 'Membership', 'Club Interests', and 'Lead Source'. The 'Prospect' column contains names like 'Harrison\_Cody', 'McGibney\_Laura', 'O'Mahony\_Sung', etc. The 'Funnel' column contains 'C-Prospect', 'A-Prospect', 'B-Prospect'. The 'Membership' column contains 'Proprietary Membership', 'Intermediate Membership', 'Corporate Membership', 'Social Membership'. The 'Club Interests' column contains 'Golf, Tennis, Wellness', 'Golf, Tennis, Spinning, Youth & Family', 'Golf, Tennis', etc. The 'Lead Source' column contains 'Website F', 'Member R', 'Walk In', 'Email Inq'. There are four red boxes with numbers 1, 2, 3, and 4. Box 1 is around the 'EDIT' button in the first row. Box 2 is around the 'DELETE' button in the second row. Box 3 is around the 'WON!' button in the third row. Box 4 is around the 'DEAD' button in the fourth row. At the top right of the table, there are buttons for 'Export', 'Messaging', 'Add New Prospect', and a settings gear icon.

		Prospect	Funnel	Membership	Club Interests	Lead Source
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Wellness	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">McGibney_Laura</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Spinning, Youth & Family	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf, Tennis	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">O'Mahony_Sung</a>	C-Prospect			Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Thompson_Ted</a>				
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">McCarron_Joe</a>	C-Prospect	Proprietary Membership	Golf, Tennis	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">McCarron_Joe</a>	A-Prospect		Golf, Tennis	Member R
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Harrison_Cody</a>	C-Prospect	Proprietary Membership	Golf	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Nathan_Curt</a>	C-Prospect			Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Cronan_Ashley</a>	C-Prospect	Proprietary Membership	Golf	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Ferber_Laura</a>	C-Prospect	Proprietary Membership		Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Alyson_Barbara</a>	C-Prospect			Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">McCarron_Joe</a>	B-Prospect	Intermediate Membership	Spinning, Biking, Wellness	Walk In
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Harrison_Cody</a>	A-Prospect	Corporate Membership		Email Inq
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Jackson_Paul</a>		Social Membership	Wellness	
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Smith_Jordan</a>	C-Prospect	Corporate Membership	Golf, Tennis, Youth & Family	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Geraghty_Andrew</a>	C-Prospect	Corporate Membership	Golf	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Shields_Alyson</a>	C-Prospect	Proprietary Membership	Golf, Tennis, Swimming	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Harrison_Cody</a>		Intermediate Membership	Golf, Sailing, Kayaking	Website F
<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Cronan_Ashley</a>	C-Prospect	Corporate Membership	Wellness	Website F

## Adding a new Prospect



The screenshot shows the 'Membership Prospects' interface. At the top, there is a search bar and a magnifying glass icon. Below the search bar, there are three buttons: 'Export', 'Messaging', and 'Add New Prospect'. The 'Add New Prospect' button is highlighted with a red box. Below the buttons, there is a table with columns for 'Prospect', 'Funnel', 'Membership', 'Club Interests', and 'Lead So'. The table contains two rows of data: 'Harrison, Cody' and 'McGibney, Laura'. Each row has a checkbox and a set of action buttons: 'EDIT', 'DELETE', 'WON!', and 'DEAD'.

**Add New Prospect**

Prospect > Membership Prospects > This Record

**Contact Status**

PHOTO

STATUS

LEAD ASSIGNED TO

**Prospect Name & Contact Information**

FIRST NAME <input type="text"/>	LAST NAME <input type="text"/>	PRIMARY PHONE <input type="text"/>	PRIMARY EMAIL <input type="text"/>
STREET ADDRESS <input type="text"/>	CITY <input type="text"/>	STATE <input type="text"/>	ZIP CODE <input type="text"/>
STREET ADDRESS 2 <input type="text"/>	BIRTHDATE <input type="text"/>	TITLE <input type="text"/>	SUFFIX <input type="text"/>

- Select **Add New Prospect**
- Fill out fields as needed
- Fields can be added or removed if needed

## Prospect Notes

NOTE SECTION

Search:

**Add New Note** **Link Existing Note Section**

Notes

No Note Section Records Found

Select Relationship

Excel CSV PDF Word Messaging Add New Note

		Notes	Updated	Created By
<input type="checkbox"/>	SELECT	test note 1	10/22/2020 9:13 AM	Axis.CRM.CrmUser
<input type="checkbox"/>	SELECT	test note 1	10/21/2020 9:16 AM	Axis.CRM.CrmUser
<input type="checkbox"/>	SELECT	Hi, We're wondering if you've considered taking the write... There's a 14 day free trial available to you at the follow...	9/29/2020 8:26 PM	Axis.CRM.CrmUser
<input type="checkbox"/>	SELECT	Regards, Sung	9/25/2020 1	
<input type="checkbox"/>	SELECT	test note DWC	9/10/2020 2	
<input type="checkbox"/>	SELECT	Want to learn more about a golf membership		

Select Relationship

### Add New Notes

NOTES

RELATED CONTACT

*New Related Contact [pending parent record save]*


- Allows for administrative notes on a record
- Can be specific or generalized
- Link existing note to quickly choose a commonly used note (example would be “Prefers phone or email”)

# Tasks

- Set **Tasks** for you or other Admins
- Set a Due Date and Reminders
- Useful for follow up communications or scheduling tours

### Follow-Up Tasks

ACTIVITY HISTORY



Related Contact	Activity Type	Activity Description	Activity Due Date	Activity Status
No Activity History Records Found				

#### Add New Activities

**Activity Entry**

ACTIVITY OWNER

ACTIVITY STATUS

RELATED CONTACT


ACTIVITY TYPE

ACTIVITY DESCRIPTION

ACTIVITY DUE DATE

ACTIVITY REMINDER  
 24 HOURS OUT  
 2 HOURS OUT  
 1 HOUR OUT  
 ON TIME

#### Select Relationship



<input type="checkbox"/>	Related Contact	Activity Type	Activity Description	Activity Due Date
<input type="checkbox"/>	SELECT Spaeth, Bethany	Phone Call		
<input type="checkbox"/>	SELECT Spaeth, Bethany	Schedule Tour		2/21/2020 10:00 AM
<input type="checkbox"/>	SELECT Spaeth, Bethany	Follow Up	bethany submitted contact us form; follow up...	3/12/2020 9:30 AM
<input type="checkbox"/>	SELECT Cronan, Ashley	Phone Call	Follow Up on Tour	4/30/2020 12:00 AM
<input type="checkbox"/>	SELECT Coston, Kelly	Tour	Schedule Tour for Kelly for May	5/4/2020 12:00 AM
<input type="checkbox"/>	SELECT Geraghty, Andrew	Schedule Tour	Tour for next week - 6/2	6/5/2020 12:00 AM
<input type="checkbox"/>	SELECT Smith, Jordan	Follow Up	Jordan would like to host his wedding at GK...	6/19/2020 11:00 AM
<input type="checkbox"/>	SELECT Smith, Jordan	Follow Up	Follow up 6/22	6/22/2020 11:00 AM
<input type="checkbox"/>	SELECT Cronan, Ashley	Follow Up	Follow Up on Tour	6/30/2020 12:00 AM
<input type="checkbox"/>	SELECT Aaron, Duane	Phone Call	Call to demo crm	8/28/2020 4:00 PM
<input type="checkbox"/>	SELECT McCarron, Joe	Email		9/24/2020 12:00 AM
<input type="checkbox"/>	SELECT Aaron, Duane	Phone Call	call to train on crm	9/30/2020 12:00 PM

## New Member Wizard AP

Import prospects from CRM to members in CMA.

1. Change the Status to **Closed - Won**.
2. Within CMA, while on Members screen, select **NEW**.
3. Click **Load from CRM**.
4. Select the name from the list of prospects and click **OK**.
5. Member data will flow back to CRM eliminating need to merge records.

**Sales Opportunity**

OPPORTUNITY STATUS

Open


Open

Closed - Won

New Member Wizard

**Create a New Member**

Create a brand new member or load information from the CRM.



This wizard is designed to assist you in the creation of a new member record. Once completed, it will open the enter member record for you to edit.

Cancel Load From CRM Previous Next Finish

Prospective Members

Select a member from the list, then click OK.

First	Last	Spouse First	Street 1	City	State	Zip	Phone	Email
John	Doe		123 Main ...	Anywhere	ST	1111		jdoe@gmail...

OK Cancel



# Membership

- Similar to Prospects, links can be added to top navigation or quick links
- Fields available can be added or removed
- Reservations & Guests information is key to track member behavior and retention

The screenshot displays the Clubessential software interface, divided into three main sections: Members, Reservations, and Guests.

### Members

At the top right, there are buttons for 'Export', 'Messaging', and 'Add New Member'. Below these is a search bar and a table with columns: Member, Status, Member Number, Membership Begins, Membership Level, and Primary Email. The table contains three rows of member data.

Member	Status	Member Number	Membership Begins	Membership Level	Primary Email
[Redacted]	Member				
[Redacted]	Member				
[Redacted] Chris	Member	cpaine			cpaine@clubessential.com

### Reservations

This section features a search bar, an 'Add New Reservations' button, and a table with columns: Status, Event Title, Date, Created, and Updated. The table lists various reservations such as 'Tea Time', 'Monthly Wine Tasting', 'Tennis Court', 'Lobster Bake', and 'Lessons'.

Status	Event Title	Date	Created	Updated
Booked	Tea Time	10/7/2020 8:40 AM	10/6/2020 12:51 PM	10/6/2020 12:51 PM
Active Reservation	Monthly Wine Tasting	10/2/2020 7:00 PM	9/11/2020 4:14 PM	9/11/2020 4:14 PM
Booked	Tennis Court	10/2/2020 9:00 AM	10/2/2020 7:31 AM	10/2/2020 7:31 AM
Active Reservation	Lobster Bake	10/2/2020 6:30 AM	9/24/2020 12:50 PM	9/24/2020 12:50 PM
Booked	Tea Time	9/29/2020 8:00 AM	9/29/2020 7:52 AM	9/29/2020 7:52 AM
Booked	Tea Time	9/27/2020 3:10 PM	8/28/2020 3:57 PM	8/28/2020 3:57 PM
Booked	Tea Time	9/25/2020 10:20 AM	9/25/2020 8:06 AM	9/25/2020 8:06 AM
Booked	Lessons	9/24/2020 7:30 AM	9/22/2020 4:44 PM	9/22/2020 4:44 PM
Booked	Lessons	9/24/2020 7:30 AM	9/22/2020 4:44 PM	9/22/2020 4:44 PM
Booked	Tea Time	9/23/2020 4:00 PM	9/23/2020 2:57 PM	9/23/2020 2:57 PM
Checked In	Tea Time	9/23/2020 3:10 PM	9/23/2020 2:28 PM	9/23/2020 2:30 PM
Active Reservation	Lobster Bake	9/18/2020 6:00 PM	9/14/2020 12:23 PM	9/14/2020 12:23 PM
Booked	Tea Time	9/18/2020 4:10 PM	9/18/2020 3:33 PM	9/18/2020 3:33 PM
Active Reservation	Body Sculpt	9/17/2020 11:00 AM	9/17/2020 2:28 PM	9/17/2020 2:28 PM
Booked	Personal Training	9/15/2020 1:00 PM	9/15/2020 11:44 AM	9/15/2020 11:44 AM
Booked	Tea Time	9/14/2020 5:30 PM	9/14/2020 5:21 PM	9/14/2020 5:21 PM
Booked	Tea Time	9/12/2020 8:20 AM	9/11/2020 10:34 AM	9/11/2020 10:35 AM
Booked	Child Care	9/12/2020 8:00 AM	9/11/2020 11:08 AM	9/11/2020 11:09 AM
Booked	Tea Time	9/12/2020 7:30 AM	9/11/2020 10:35 AM	9/11/2020 10:35 AM
Booked	Tea Time	9/11/2020 8:50 AM	9/10/2020 6:52 PM	9/10/2020 6:52 PM

At the bottom of the Reservations section, it says 'Displaying 1 to 20 of 432 total records'.

### Guests

This section has a search bar, an 'Add New Guests' button, and a table with columns: Contacts, Status, Primary Email, Guest Of, and Primary Phone. It lists three guests: Aaron Cathy, Annev Davis, and Doe Kevin.

Contacts	Status	Primary Email	Guest Of	Primary Phone
Aaron Cathy	Guest		Aaron Duane	
Annev Davis	Guest		Aaron Duane	
Doe Kevin	Guest		Aaron Duane	

## Reservations

RESERVATIONS

		Status	Event Title	Date	Created	Updated
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	10/7/2020 8:40 AM	10/6/2020 12:51 PM	10/6/2020 12:51 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Active Reservation</a>	Monthly Wine Tasting	10/2/2020 7:00 PM	9/11/2020 4:14 PM	9/11/2020 4:14 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tennis Court	10/2/2020 9:00 AM	10/2/2020 7:31 AM	10/2/2020 7:31 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Active Reservation</a>	Lobster Bake	10/2/2020 6:30 AM	9/24/2020 12:50 PM	9/24/2020 12:50 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/29/2020 8:00 AM	9/29/2020 7:52 AM	9/29/2020 7:52 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/27/2020 3:10 PM	8/28/2020 3:57 PM	8/28/2020 3:57 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/25/2020 10:20 AM	9/25/2020 8:06 AM	9/25/2020 8:06 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Lessons	9/24/2020 7:30 AM	9/22/2020 4:44 PM	9/22/2020 4:44 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Lessons	9/24/2020 7:30 AM	9/22/2020 4:44 PM	9/22/2020 4:44 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/23/2020 4:00 PM	9/23/2020 2:57 PM	9/23/2020 2:57 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Checked In</a>	Tee Time	9/23/2020 3:10 PM	9/23/2020 2:28 PM	9/23/2020 2:30 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Active Reservation</a>	Lobster Bake	9/18/2020 6:00 PM	9/14/2020 12:23 PM	9/14/2020 12:23 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/18/2020 4:10 PM	9/18/2020 3:33 PM	9/18/2020 3:33 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Active Reservation</a>	Body Sculpt	9/17/2020 11:00 AM	9/17/2020 2:26 PM	9/17/2020 2:26 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Personal Training	9/15/2020 1:00 PM	9/15/2020 11:44 AM	9/15/2020 11:44 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/14/2020 5:30 PM	9/14/2020 5:21 PM	9/14/2020 5:21 PM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/12/2020 8:20 AM	9/11/2020 10:34 AM	9/11/2020 10:35 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Child Care	9/12/2020 8:00 AM	9/11/2020 11:08 AM	9/11/2020 11:09 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/12/2020 7:30 AM	9/11/2020 10:35 AM	9/11/2020 10:35 AM
<input type="checkbox"/>	<a href="#">VIEW</a> <a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Booked</a>	Tee Time	9/11/2020 8:50 AM	9/10/2020 6:52 PM	9/10/2020 6:52 PM

<< < 1 2 3 4 5 > >> PAGE SIZE 20

Displaying 1 to 20 of 432 total records



## Reservations & Guests

**Reservations** - See how many and what reservations a member has booked, cancelled, or currently has a reserved.

**Guests** - Track who is visiting your club. Keep track of the number of guests, types of events, and possible prospects that are attending.

## Guests

GUESTS

		Contacts	Status	Primary Email	Guest Of	Primary Phone
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Aaron_Caily</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Agnew_Davis</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Doe_Kevin</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Doe_Kevin</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Doe_Tom</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Doe_Tom</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Ford_Tom</a>	Guest	<a href="#">tford@email.com</a>	<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Johnson_Celia</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Leli_Stroh</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">Smith_Jack</a>	Guest		<a href="#">Aaron_Duane</a>	
<input type="checkbox"/>	<a href="#">EDIT</a> <a href="#">DELETE</a> <a href="#">REMOVE</a>	<a href="#">TBA_Guest</a>	Guest		<a href="#">Aaron_Duane</a>	

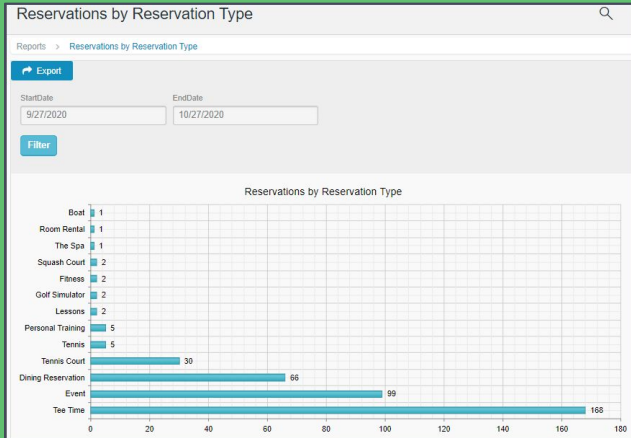


# Reservation Reports

## Application Config

- > Objects
- > Reports
  - > Activities
  - > Event Prospect Reports
  - > Members
    - Members - Reservations
    - All Reservations
    - Netcaddy Reservations b...
    - Reservations Dashboard
    - Reservations Red Flag List
    - Reservations by Member
    - Reservations by Guest
    - Reservations by Member...
    - Reservations by Guest Ty...
    - Reservations by Reservat...
    - Reservations by Day of ...
    - Reservations by Timeslot ...
  - > Membership Prospect Reports
  - > Revenue
- > Queries
- > Integrations

	Name	Category	Type	Description
EDIT RUN	All Reservations	Members - Reservations	Graph	Graph showing the count of all reservations by modul...
EDIT RUN	Netcaddy Reservations by Admin vs. Member	Members - Reservations	Graph	Comparison graph showing number of reservations ...
EDIT RUN	Reservations Dashboard	Members - Reservations	Dashboard	
EDIT RUN	Reservations Red Flag List	Members - Reservations	Grid	
EDIT RUN	Reservations by Member	Members - Reservations	Grid	
EDIT RUN	Reservations by Guest	Members - Reservations	Grid	
EDIT RUN	Reservations by Membership Type	Members - Reservations	Graph	
EDIT RUN	Reservations by Guest Type	Members - Reservations	Graph	
EDIT RUN	Reservations by Reservation Type	Members - Reservations	Graph	
EDIT RUN	Reservations by Day of Week	Members - Reservations	Graph	
EDIT RUN	Reservations by Timeslot (Hour)	Members - Reservations	Graph	



- Under Reports, select **Members - Reservations**
- Next to a report, click **RUN**
- Multiple types of reports are already available to use including **Grids** and **Graphs**
- More can be added!



## Guest Reports

- Track guests who frequent your club events
- Track the interests of the guests attending your events
- Convert Guests to Prospects

### Reservations by Guest

Reports > Reservations by Guest

StartDate

9/27/2020

EndDate

10/27/2020

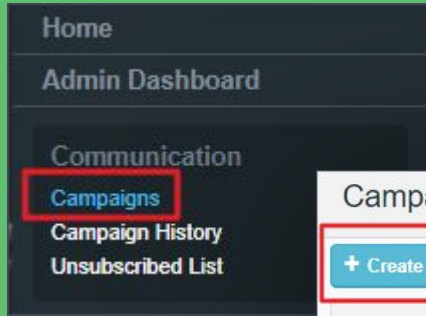
Export

Filter

Guest Name	Reservations
TBA, Guest	13
Grier, Will	5
Craig, Jennifer	2
Thomas, Michael	2
Sanders, Jill	2
Austin, Miles	2
Miller, Max	2
Mitchell, Robert	2
Neinaber, Jen	1
Nienaber, Adam	1
pkol, james	1
Rusty Abbott, Mr.	1
Becker, Bob	1
Bell, Kristen	1
Aaron, Caity	1
Able, Clint	1
Aniston, Jennifer	1
Santucci, Karen	1
Santucci, Kevin	1
smitty, brad	1



# Introduction to Campaigns



### Campaigns

[+ Create New Campaign](#) [View Completed Campaigns](#)

	Name	Category	Type	Send
Pending				
<a href="#">EDIT</a> <a href="#">COPY</a> <a href="#">DELETE</a>	Prospect Email		Merge	One Time 3/16/2020 10:29:00 AM
Drafts				
<a href="#">EDIT</a> <a href="#">COPY</a> <a href="#">DELETE</a>	test		Email	One Time 1/23/2020 11:56:00 AM
<a href="#">EDIT</a> <a href="#">COPY</a> <a href="#">DELETE</a>	test		Email	One Time 2/3/2020 1:37:00 PM

- Excellent way to communicate with prospects
- Email to specific prospect or a query of records
- Can be sent in the moment or scheduled for later
- To begin, Select **Campaigns** from Quick Links and then **Create New Campaign**

## Campaign Properties

**Title** - Often the same as the subject line. \*Can be used to remember Dates.

**Categories** - Optional field that is typically used for organizational purposes.

**Descriptions** - Optional as well which can help differentiate Campaigns.

**Campaign Type** - Choose either **Email** or **Mail Merge**. \*Email is used most commonly.


### Step 1 - Properties

Title

Category

Description

Campaign Type

Select a Campaign Type 

[Next Step - Targets](#)

## Campaign Targets

---

### Select **Add Targets**

- Sending to an **Object** will allow you to send to a specific contact or ALL contacts in CRM
- Sending to a **Query** allows you to use the results of a saved query within your CRM (normally based on criteria such as prospect level, member type, age, etc.)

#### Step 2 - Targets

[+ Add Targets](#)

Type	Name	Field
No Targets Selected		

[Last Step - Properties](#) [Save Draft](#) [Next Step - Create Message](#)

Select Campaign Targets

Send To  
Object

Object Type  
Contacts

Records  
Selected Records

Select Records

Filter

	Record Name	Email Address
<input type="checkbox"/>	<u>. Chris</u>	cpeine@clubessential.com
<input type="checkbox"/>	<u>. Chris</u>	cpeine@clubessential.com
<input type="checkbox"/>	<u>a. bryan</u>	bbruning@clubessential.com
<input type="checkbox"/>	<u>Aaron, Duane</u>	stephanielcarr@gmail.com
<input type="checkbox"/>	<u>Abbott, Jackson</u>	ahendy@clubessential.com
<input type="checkbox"/>	<u>Abbott, Jackson</u>	
<input type="checkbox"/>	<u>Abbott, Jackson</u>	
<input type="checkbox"/>	<u>Abbott, Olivia</u>	jwood@clubessential.com
<input type="checkbox"/>	<u>Abbott, Olivia</u>	jwood@clubessential.com

## ➤ Sending to an Object

**All Records** will send to every contact in the CRM (NOT RECOMMENDED).

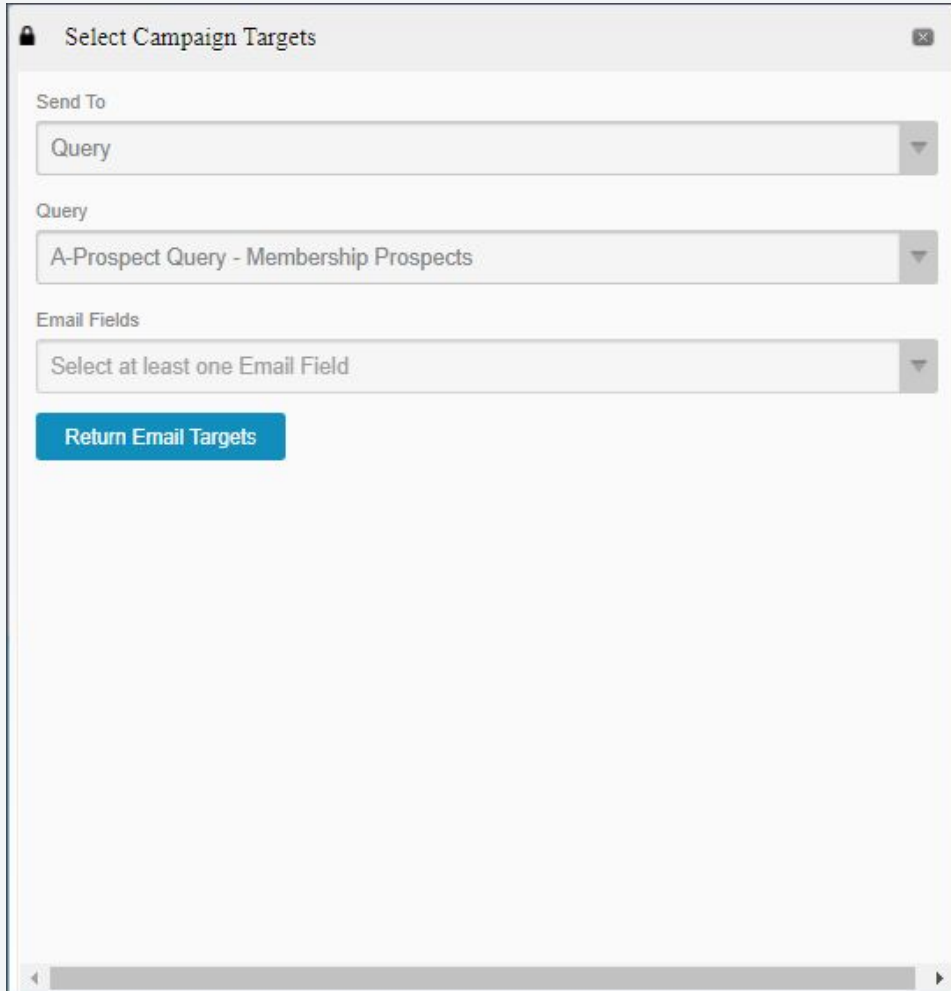
**Selected Records** allows for specific contacts to be chosen.

**Email Fields** - Select which email of the contact (example would be Primary Email, Business Email).

## Sending to a Query

---

- Select **Query** to send to from an available list
- Select which email to send to such as Primary, Secondary, or Business
- Click **Return Email Targets** to save



The screenshot shows a dialog box titled "Select Campaign Targets" with a close button in the top right corner. It contains three dropdown menus and a button:

- Send To:** A dropdown menu with "Query" selected.
- Query:** A dropdown menu with "A-Prospect Query - Membership Prospects" selected.
- Email Fields:** A dropdown menu with "Select at least one Email Field" selected.
- Return Email Targets:** A blue button located below the dropdown menus.

At the bottom of the dialog box, there is a horizontal scrollbar.





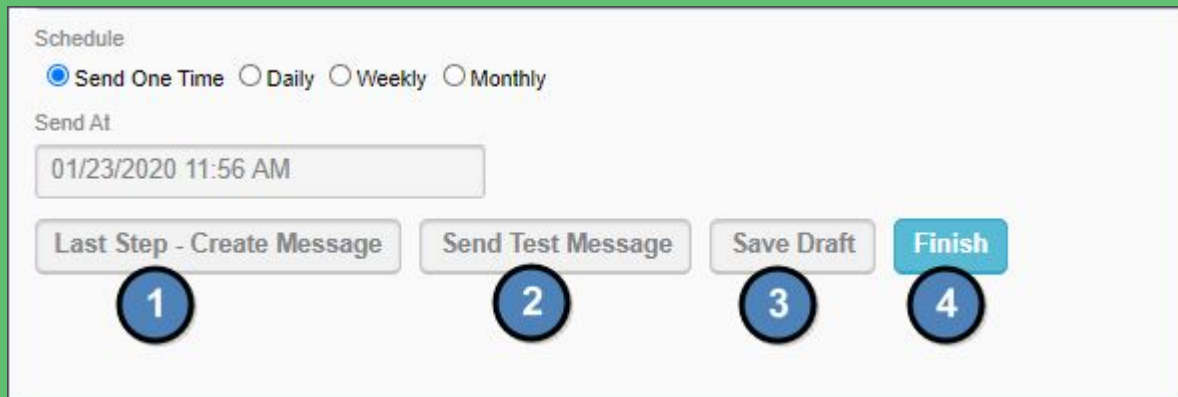
## Sending

**Last Step - Create Message** - Takes you to previous step to make changes to email.

**Send Test Message** - Send the campaign to one recipient. Very useful for verifying formatting.

**Save Draft** - Saves your current campaign to work on later.

**Finish** - Sends your email. The system will queue your email based on the schedule you selected.



Screenshot of the email sending interface. The interface includes a "Schedule" section with radio buttons for "Send One Time" (selected), "Daily", "Weekly", and "Monthly". Below this is a "Send At" field containing the text "01/23/2020 11:56 AM". At the bottom, there is a horizontal navigation bar with four buttons: "Last Step - Create Message", "Send Test Message", "Save Draft", and "Finish". Each button is numbered in a blue circle below it: 1, 2, 3, and 4 respectively. The "Finish" button is highlighted in blue.

# Campaign History

- Use **Filters** to find specific former campaigns
- View details and Open Rates for every message
- See details of Recipients and track prospect interest

### Filters

Campaign Name

Subject

Sent By

Type

Sent On or After

Sent On or Before

[Filter](#)

---

### Messages

Campaign Name	Message Subject	Sent By	Selected Recipients	Recipients Sent To	Opened	Open Rate	Link Clicks	Timestamp
<a href="#">Image Formatting Test</a>	<a href="#">CRM Campaign Image Formatting Test</a>	msmall@clubessential.com	1	1	1	100%	0	9/24/2020 5:25:23 PM

## Messages

Message Subject	Sent By	Selected Recipients	Recipients Sent To	Opened	Open Rate	Link Clicks	Unsubscribed	Bounced	Timestamp	
<a href="#">CRM Campaign Image Formatting Test</a>	msmall@clubessential.com	1	1	1	100%	0	0	0	9/24/2020 5:25:23 PM	<a href="#">Re-Send</a>
<b>1 messages</b>		<b>1</b>	<b>1</b>	<b>1</b>	<b>100%</b>	<b>0</b>	<b>0</b>	<b>0</b>		

## Fields Overview and Objects

---

1. **Fields:** Fields describe Objects within your CRM. The most common type of field is info such as First Name or Email.
2. **Layouts:** A layout is a collection of fields that describe a single Object. When adding or editing a prospect, you are seeing a Layout.
3. **Views:** A view is a collection of fields that describe multiple records based on a certain criteria. Fields make up vertical columns while Records make up horizontal rows
4. **Queries:** A query is a request of the CRM database of filtered data based on criteria.
5. **Reports:** A report is a visualized breakdown of an existing query.

## Adding New Fields

- **Label:** Title of the field (make it descriptive but concise)
- **Column Name:** Database name (autofills from field)
- **Description:** Optional (if Label is precise then not needed)
- **Data Type:** Type of data to be filled (examples are Text, Currency, Dates)

**Fields**

[+ Add New Field](#) [View Archive](#)

	Name	Column Name	Data Type	Description
<a href="#">EDIT</a>	% change over past 30 days	__change_over_past_30_days	Text	
<a href="#">EDIT</a>	% ownership	__ownership	Percent	testing for wvyc
<a href="#">EDIT</a>	30-day set	30_day_set	Checkbox	

**Properties**

Label  
Used on Displays, Layouts, Reports, and Lists

Column Name  
Name of the Database Column used for storage and API access. Maximum Length is 50 characters.

Description

Data Type

Select a Data Type ▼

[Save Properties](#)

# Introduction to Layouts

Edit Record

Edit Contacts

**Section**

**Misc. Information**

PHOTO STATUS SALES PERSON BIRTHDATE

Membership Lead Select CRM User

**Prospect Information**

FIRST NAME LAST NAME EMAIL PHONE

Jessica Anderson

STREET ADDRESS CITY STATE ZIP CODE

**Family Information**

SPOUSE CHILD NAME(S)

**Business Information**

BUSINESS BUSINESS TITLE

**Notes**

NOTES

<input type="checkbox"/>		Note	Created	Created By
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE	JA 12:26pm	2/25/2019 1:26 PM	System User
<input type="checkbox"/>	VIEW EDIT DELETE REMOVE	JA 12:15pm 2/25/2019	2/25/2019 1:16 PM	System User

A **Layout** is a detailed listing of fields for a specific record.

To Edit, select Objects > **Layouts**.



# Editing your Layouts

## Layouts

+ Add New Layout

EDIT

Contacts System Default

EDIT

Member Layout

EDIT

Prospect Layout

1. Use the **Edit** button to update existing Layouts.
2. Layouts are divided into sections. Use **+Add Section** to add a new Section.
3. Drag & Drop existing fields into sections to add fields to the layout.
4. Each section is made up of four columns.

The screenshot shows the 'Layout Structure' editor. At the top, there is a 'Layout Structure' header with a '+Add Section' button (labeled 2). Below this is a large grid of 'Available Fields' (labeled 3) organized into four columns. Fields include: '% change over past 30 days', '30-day set', '60-day set', '90-day set', 'Admissions', 'Admissions', 'Apparel', 'Axis User', 'Bag Storage #', 'Bag Storage Number', 'Ball', 'Bracon His', 'Beer Choice', 'Beverage Preference', 'Board', 'Business City', 'Business Statn', 'Business Street Address', 'Business Street Address2', 'Business Zip Code', 'Cart', 'Child #1 Age', 'Child #1 Name', 'Child #2 Age', 'Child #2 Name', 'Child #3 Age', 'Child #3 Name', 'Children', 'City, State', 'Club Affiliations', 'Club Brand', 'Club Interests', 'Clubhouse ID', 'Cocktail Preference', 'College', 'College/University', 'Contact Name', 'Converted', 'Converted Date', 'Date of Last Activity', 'Date of Last Activity', 'Dexterity', 'Dining Reservations', 'Documents', 'Drink Preference', 'Driver', 'Email 2', 'Email 2', 'Email 3', 'Email 4', 'stereo', 'Entertainment', 'Est. Head Count', 'Est. Price Per Head', 'Est. Revenue Gained', 'Event Date', 'Event Reservations', 'Event RSVP', 'Event Type', 'Facebook Link', 'Favorite Caddie(s)', 'Favorite Clothing Brand', 'First Website Login', 'Fitness News', 'Food Allergies', 'Food Preference', 'Gender', 'Glove', 'Glove Size', 'Gluten Free', 'Golf Locker', 'Group By', 'Groups', 'Guest ID', 'Guest Of', 'Guest Type', 'Hand', 'Handicap', 'Holes', 'House', 'ID update?', 'Invoices', 'Irons', 'Irons Grade', 'Junior Age', 'Kids' Activities', 'Last Website Login', 'LinkedIn Link', 'Locker #', 'Member Number', 'Member Referrer', 'Member Retention Score', 'Member Retention Score', 'Member Shared Key', 'Member Type', 'Membership', 'Membership Books', 'Membership Changes', 'Minto Championship?', 'Moto's Golf', 'Moto's Events', 'Moto's Topics', 'Name', 'Notes', 'Number 1', 'Number 2', and 'Save Structure'. Below the grid is a preview of a 'Prospect Layout' section (labeled 4) titled 'Misc. Information'. It contains four columns: 'PHOTO' with a text input field containing 'imagename.png'; 'STATUS' with a dropdown menu labeled 'Status Options'; 'SALES PERSON' with a dropdown menu labeled 'Sales Person Options'; and 'BIRTHDATE' with a text input field containing '10/28/2020'. A red arrow points from the 'Available Fields' grid to the 'BIRTHDATE' field in the preview.

- Fields can be made Read Only
- Fields can be made Required
- The label of the field can be hidden

# Introduction to Views

**Layout** = one record

**View** = Many records

Use the **Gear** icon to edit

Grand Key Club Membership Prospects 🔍

**Records**  Advanced Filter **Fields** → Export Messaging Add New Prospect ⚙️ 🔄

<input type="checkbox"/>		Prospect <input checked="" type="checkbox"/>	Funnel	Toured	Membership	Referred By	Close	Email	Last Touch	Created
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	1.1		False						2/25/2019 1:24 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	1.2		False						2/25/2019 1:24 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	1.3		False						2/25/2019 1:25 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	1.4		False						2/25/2019 1:27 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	AaronTestProspect_1	B	False					5/31/2020 9:57 AM	2/25/2019 2:15 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	AaronTestProspect_2		False						2/25/2019 2:16 PM
<input type="checkbox"/>	EDIT DELETE WON! DEAD SENT INFO EMAIL!	Anderson, Jessica		False					6/7/2020 11:17 PM	3/26/2018 11:24 AM

## Editing Your Views

Edit View

Fields

	Column Name	Data Type	Display As	Hide On Mobile View	User Filterable
<b>1</b>	RecordName	Text		<input type="checkbox"/>	<input type="checkbox"/>
	Membership_Funnel_Stage	Picklist	Funnel	<input type="checkbox"/>	<input type="checkbox"/>
	Toured	Checkbox		<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Membership_Interest	Picklist	Membership	<input type="checkbox"/>	<input type="checkbox"/>
	Referred_By	ChildParentRelationship		<input type="checkbox"/>	<input type="checkbox"/>
	Expected_Close_Month	Picklist	Close	<input type="checkbox"/>	<input type="checkbox"/>
	Email2	Email		<input type="checkbox"/>	<input type="checkbox"/>
	Date_of_Last_Activity2	DateTime	Last Touch	<input type="checkbox"/>	<input type="checkbox"/>
	Created	DateTime		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>2</b>					

ADD NEW

Sorting

1. Use **Edit** and **Remove** to alter existing fields.
2. Use the **ADD NEW** button to add new fields to the view.
3. Drag & drop the fields to re-order the view. The order here will be the same when looking at the view.



## Filters

The filter controls what records will be shown in the view. Use the **Edit Filter** button to update the view.

1. **Column** is the field being used.
2. **Operator** compares value to the field.
3. **Value** is the information in the field.
4. Logic allows you to compare multiple indexes to create filter.

### Filtering

Quick Filter Field

Contacts, Member Number

Show Letter Picker







Apply any default filters for the View. These will not be visible when using the View, and will be applied regardless of any selected user filtering.

([Status Equal Member] AND [Status NotEqual Prospect])

[Edit Filter](#)

 Filter 

Filters

	Index	Column	Operator	Value
  	A	Status	Equal	Member
	B	Status	NotEqual	Prospect

Filter Logic

Add Logic to Perform Multi Field Filtering. For Example "1 AND 2" or "(1 AND 2) OR 3", Where the Number is Represented by the Index Column above. Valid Terms are AND, OR, and NOT. Any fields not included in the Filter Logic will be treated as an AND operation.

[Apply Filter](#)

		Name
EDIT	<b>RUN</b>	Member Usage Query 1-2
EDIT	RUN	Pipeline Report
EDIT	RUN	Victories
EDIT	RUN	Member Categories
EDIT	RUN	Sales Performance - Rolling 30
EDIT	RUN	New Member List - Last 60 days
EDIT	RUN	2015 New Membership Count
EDIT	RUN	Prospects by City
EDIT	RUN	Interests Query
EDIT	RUN	Field Test Query
EDIT	RUN	Closed-Lost Opps
EDIT	RUN	Expected Close Month
EDIT	RUN	A Prospects Interested in Regular Golf
EDIT	RUN	hotpage
EDIT	RUN	Amenities Interest Query
EDIT	RUN	New Prospects in Range
EDIT	RUN	Inactive Members
EDIT	RUN	New Member List
EDIT	RUN	Titleist Preferences
EDIT	RUN	Address Data

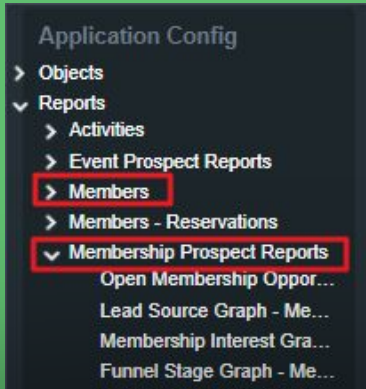
## Queries & Reports

A **Query** is a request of the CRM database of filtered data based on certain criteria. It's helpful to know that all Reports are made from Queries.

The Support Team can make new Queries upon request. Be sure to include:

- Exactly what should be displayed
- Purpose of the query
- How it will be used
- How it will be displayed

# Report listings



- Use the left hand panel to view **Reports**
- Select the header of reports and not the specific report (if a specific report was selected here, the edit window will appear for that report)
- While viewing the list of reports, select **RUN** to view

Reports

+ Add New Report View Archived Reports

Q Export

	Name	Category	Type	Description
EDIT <b>RUN</b>	Open Membership Opportunities	Membership Prospect Reports	Grid	Grid report of all open sales opportunities for reporting
EDIT RUN	Lead Source Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph showing count of different lead sources where prospects inquired first about membership
EDIT RUN	Membership Interest Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph which shows the count of prospects by their desired membership interest
EDIT RUN	Funnel Stage Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph which shows the count of prospects in their current qualification stage
EDIT RUN	Qualified Membership Leads	Membership Prospect Reports	Grid	Grid report showing the A and B prospects
EDIT RUN	Membership Prospecting Dashboard	Membership Prospect Reports	Dashboard	Dashboard of multiple reports regarding the Membership Prospecting process
EDIT RUN	Membership Prospects by City of Residence	Membership Prospect Reports	Graph	Graph of prospects counted by city of residence
EDIT RUN	Close Rates by Lead Source - Membership Prospects	Membership Prospect Reports	Grid	

## Reports

[+ Add New Report](#) [View Archived Reports](#)

[Export](#)

	Name	Category	Type	Description
EDIT RUN	Open Membership Opportunities	Membership Prospect Reports	Grid	Grid report of all open sales opportunities for reporting
EDIT RUN	Lead Source Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph showing count of different lead sources where prospects inquired first about membership
EDIT RUN	Membership Interest Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph which shows the count of prospects by their desired membership interest
EDIT RUN	Funnel Stage Graph - Membership Prospects	Membership Prospect Reports	Graph	Graph which shows the count of prospects in their current qualification stage
EDIT RUN	Qualified Membership Leads	Membership Prospect Reports	Grid	Grid report showing the A and B prospects
EDIT RUN	Membership Prospecting Dashboard	Membership Prospect Reports	Dashboard	Dashboard of multiple reports regarding the Membership Prospecting process
EDIT RUN	Membership Prospects by City of Residence	Membership Prospect Reports	Graph	Graph of prospects counted by city of residence
EDIT RUN	Close Rates by Lead Source - Membership Prospects	Membership Prospect Reports	Grid	

## Reports can be created when a query is requested

- Report options:
  - Grid
  - Merge
  - Graph
  - Gauge
  - Dashboard
  - Flow
  - Map

**Grid:** Similar to a View in that it displays the Query as a series of rows and columns

**Merge:** Document Merge will take information from one document and populate it in another

## Open Membership Opportunities

Reports > Open Membership Opportunities

Prospect	Primary Email
<a href="#">test_test</a>	
<a href="#">Harrison_Cody</a>	<a href="#">Cody.Harrison@clubessential.com</a>
<a href="#">Jackson_Paul</a>	
<a href="#">Thompson_Ted</a>	
<a href="#">Nixon_Richard</a>	<a href="#">Richard.Nixon@clubessential.com</a>
<a href="#">Lawson_Tim</a>	<a href="#">Tim.Lawson@clubessential.com</a>
<a href="#">Williams_Leslie</a>	<a href="#">Leslie.Williams@clubessential.com</a>
<a href="#">Lawrence_Jennifer</a>	<a href="#">Jennifer.Lawrence@clubessential.com</a>
<a href="#">Anderson_JJ</a>	<a href="#">JJ.Anderson@clubessential.com</a>

Query: Social Membership Contract  
 Recipient Email Field: Select an Email Field

Add Section

Merge Content

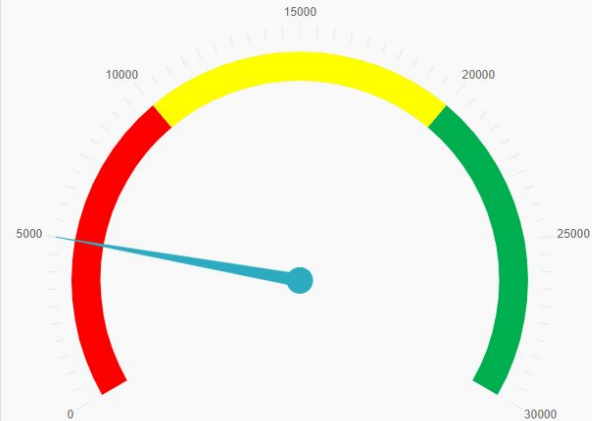
Full Name: ##First_Name## ##Last_Name##	SS#	Birth Date: ##Birthdate##
Residence Address: ##Street_Address## ##Street_Address_2##		Mobile Phone Primary: ##Mobile_Phone##
##City##, ##State## ##Zip_Code##		Home Phone: ##Primary_Phone##
Email: ##Primary_Email##		Driver's License (Primary):
<b>Primary Member's Employment Information:</b>		
Name of Business:		Position:
Business Address:		Work Phone:

CLICK TO EDIT

## Initiation Fee Potential - Qualified Leads

Reports > Initiation Fee Potential - Qualified Leads

Export



## Graph & Gauge

**Graph:** Displays data in a bar, line, plot which is great for visualizing data (most popular)

**Gauge:** Displays data in a format similar to a speedometer to track attendance or interest



# Dashboard, Flow, & Map

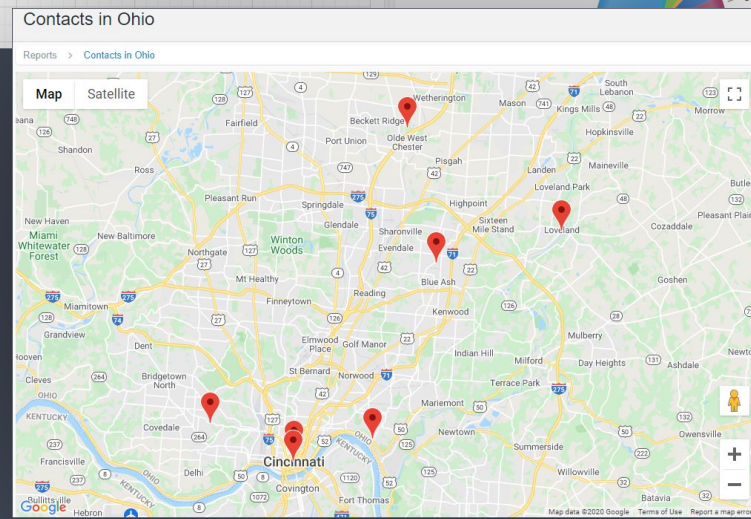
**Dashboard:** A collection of reports together.

**Flow:** Displays HTML of a set of records. Used for something like Beacon hits.

**MAP:** Uses address data to display Google map and add pins.

Qualified Leads

Prospect Name	Funnel Stage	Membership Interest	Primary Phone	Primary Email	Create Date
Nixon, Richard	A-Prospect	Social	555.555.2585	Richard@whitehouse.gov	1/13/2020 10:48:48 AM
Larson, Tim	A-Prospect	Regular	555.258.6587	tim.larson@clubessential.com	1/13/2020 10:48:49 AM
Williams, Leslie	A-Prospect	Social	555.866.2528	lesliewilliams@att.net	1/13/2020 10:48:49 AM
Lawrence, Jennifer	A-Prospect	Regular	555.962.2574	jennifer.lawrence@rthco.com	1/13/2020 10:48:51 AM
Anderson, JJ	A-Prospect	Intermediate	555.876.4321	jj@taco.com	1/13/2020 10:48:54 AM
Doug, Josie	A-Prospect	Intermediate	513.132.3214	jdoug@gmail.com	1/13/2020 10:49:05 AM
Hecker, Aaron	A-Prospect	Social	513.533.7775	ahecker@clubessential.com	1/13/2020 10:50:12 AM
Spaeth, Bethany	A-Prospect			bspaeth@clubessential.com	2/11/2020 2:16:16 PM
Harrison, Cody	A-Prospect	Corporate Membership	80467.13570	codyharrison@24cloud.com	7/1/2020 3:09:25 PM
Epstein, Tires	A-Prospect	Junior	555.867.8543	tires@taco.com	1/13/2020 10:49:25 AM
McCarron, Joe	A-Prospect			joemccarron@att.net	9/10/2020 5:24:29 PM
Underwood, Kristi	B-Prospect	Social	513.322.4210	kui@taco.com	1/13/2020 10:48:45 AM
Claus, Carol	B-Prospect	Social	555.333.9876	christmas@att.net	1/13/2020 10:49:26 AM
Snipes, Wesley	B-Prospect	Legacy	555.321.7654	wesley@att.net	1/13/2020 10:49:26 AM
McCarron, Joe	B-Prospect	Intermediate Membership	7039150708	joemccarron@clubessential.com	7/28/2020 2:17:34 PM
Campos, Jamie	B-Prospect	Social	555.251.2654	jamie@awesome.net	1/13/2020 10:49:05 AM
Dee, Sandy	B-Prospect	Regular	555.321.8768	sandy@att.net	1/13/2020 10:49:25 AM
Glacznook, Jennifer	B-Prospect	Regular Gift	7807779221	jglacznook@att.net	1/13/2020 10:49:04 AM
Patterson, Greg	B-Prospect	Social	555.214.5658	greg@rthco.com	1/13/2020 10:48:52 AM



Flow Test

Reports > Flow Test

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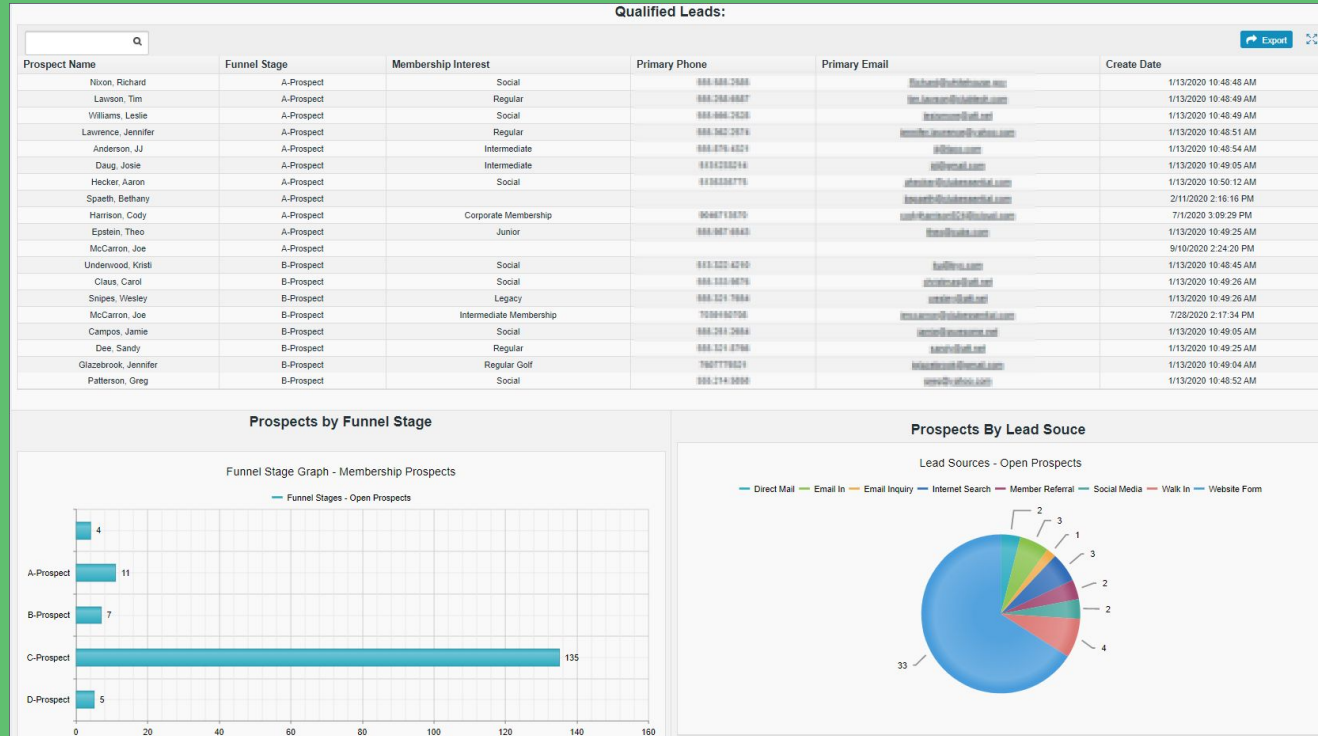
David Abbott (00100-D)

# Using Your Default Dashboards

## Available Dashboards

- Reservations
- Membership
- Prospect

\*\*If for any reason you don't see these pre-built dashboards or will like to edit, contact Support for assistance







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# Clubessential Client Resource Center

Check out information on the **Client Education Resource Center** to get started using the Email Editor Today!

*[clubessential.com/new-email-editor](https://clubessential.com/new-email-editor)*

[Client Education Resource Center](#)

# Q&A

