



Bulk Maintenance Notification Types

2016 - Winter Edition

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Overview

The CMA application has been updated to include two new grid views available to users with the appropriate roles. These grids allow a user to manage, at a bulk level, the notification types (Statement, etc) linked to physical mailing addresses and email addresses.

Use Case(s)

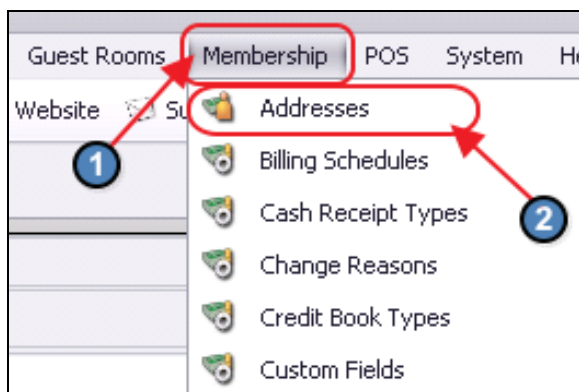
A Club wants to view all members who have Statement notifications linked to a physical or email address. The Club would also like to export a list of addresses or emails that are not configured for any notification types so additional research can be performed, and information can be gathered.

Accessing the Tools

Addresses

For bulk maintenance of Physical Addresses,

- 1) Select **Membership** across the top toolbar and select **Addresses**.



- 2) The Addresses Grid will launch.

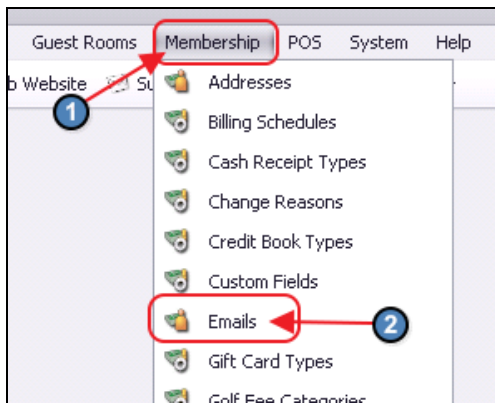


| Member Number | First Name | Last Name | Street 1 | Street 2 | City | State | Zip Code | Notification Type |
|---------------|------------|-----------|--------------------------------|--------------------|-----------|-------|----------|-------------------|
| 9000 | Gilda | Blackwell | Fairview Lakes Health S... | 5200 Fairview Blvd | Wyoming | WA | 55092 | Social |
| 9000 | Gilda | Blackwell | Fairview Lakes Health Services | 5200 Fairview Blvd | Wyoming | WA | 55092 | Statement |
| 3366 | Ali | Beavers | RXi Pharmaceuticals | 60 Prescott Street | Worcester | | 01605- | Social |
| 3366 | Ali | Beavers | RXi Pharmaceuticals | 60 Prescott Street | Worcester | | 01605- | Statement |
| 3374 | Marlin | Aranda | 9001 Highview Lane | | Woodbury | WA | 55125- | Social |
| 3374 | Marlin | Aranda | 9001 Highview Lane | | Woodbury | WA | 55125- | Statement |
| 827 | Sid | Bonilla | 2298 Amberwood Drive | | Woodbury | WA | 55125 | Social |

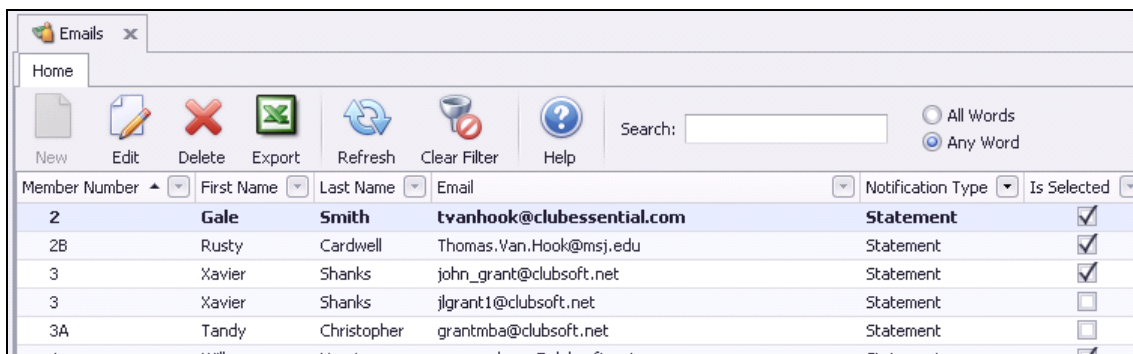
Emails

For bulk maintenance of Email Addresses,

- 1) Select **Membership** across the top toolbar and select **Emails**.



- 2) The Emails Grid will launch.

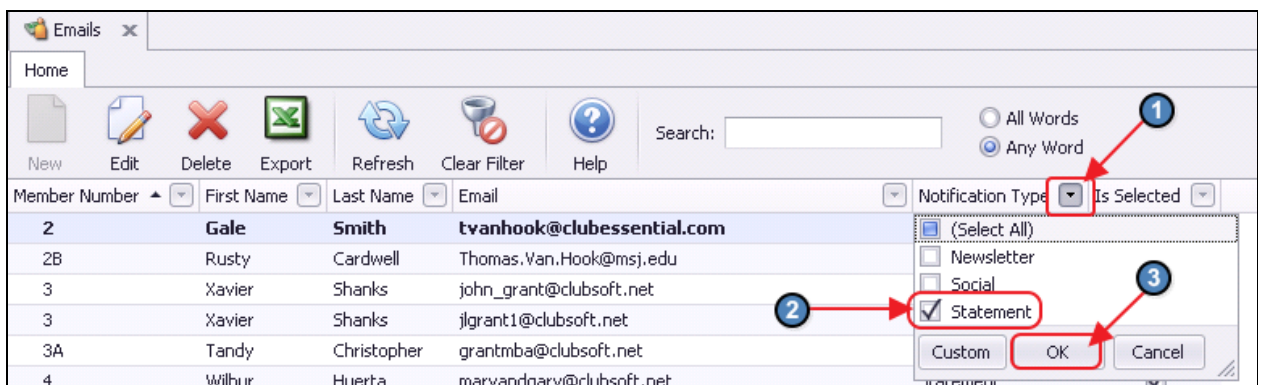


| Member Number | First Name | Last Name | Email | Notification Type | Is Selected |
|---------------|------------|-------------|----------------------------|-------------------|-------------------------------------|
| 2 | Gale | Smith | tyanhook@clubessential.com | Statement | <input checked="" type="checkbox"/> |
| 2B | Rusty | Cardwell | Thomas.Van.Hook@msj.edu | Statement | <input checked="" type="checkbox"/> |
| 3 | Xavier | Shanks | john_grant@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 3 | Xavier | Shanks | jlgrant1@clubsoft.net | Statement | <input type="checkbox"/> |
| 3A | Tandy | Christopher | grantmba@clubsoft.net | Statement | <input type="checkbox"/> |
| 4 | Wilbur | Mueta | maxmudaxu@clubsoft.net | Statement | <input checked="" type="checkbox"/> |

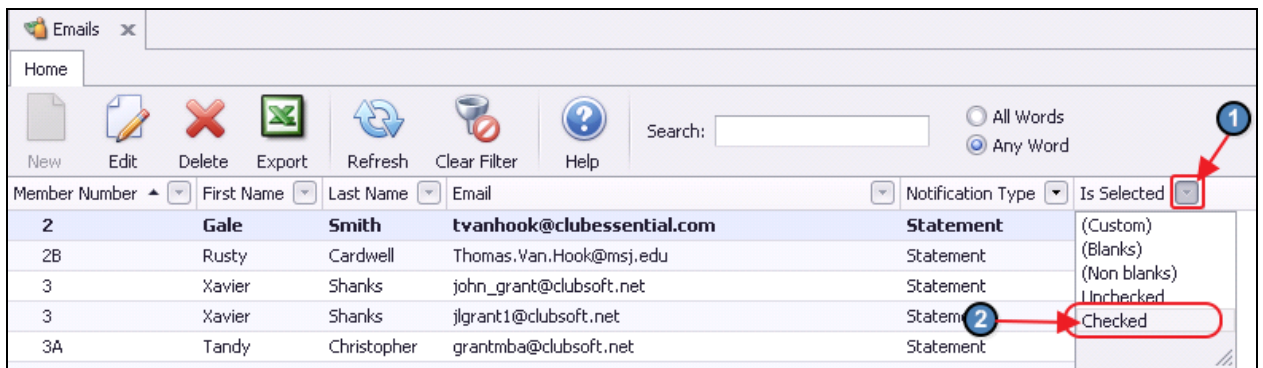
Filtering

The Addresses and Emails Grids can be filtered in the same manner as any other Grid. For example, if a user would like a list of all members who have Statement notifications linked to an Email Address, the **Emails** Grid can be easily filtered to reflect this information. Please see instructions below.

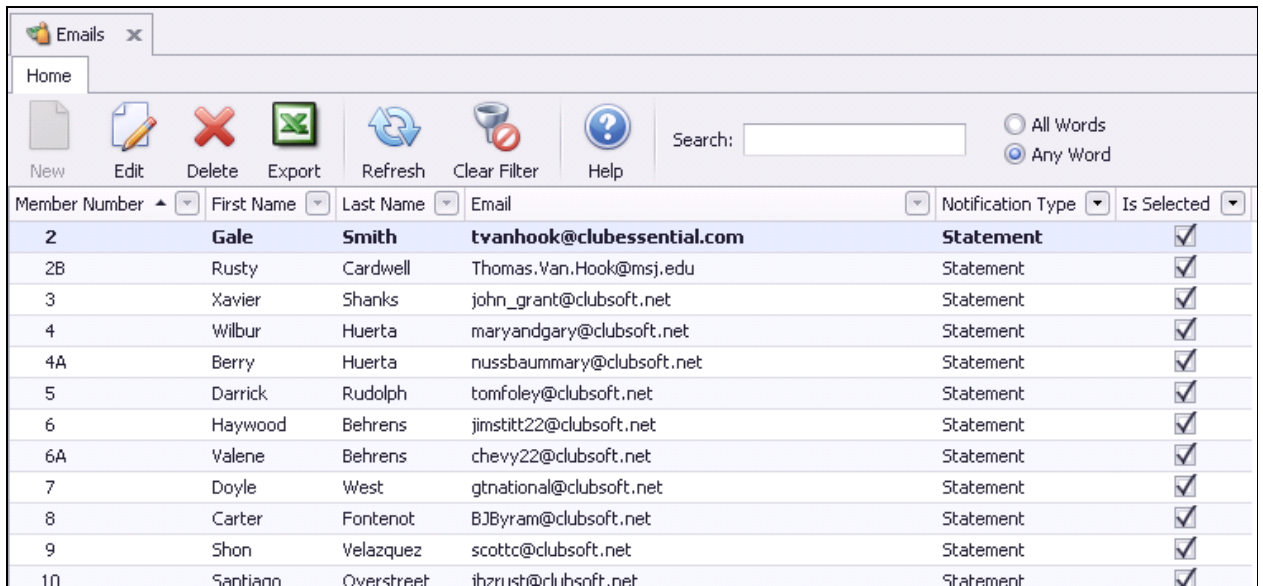
- 1) Filter the **Notification Type** column to only show the **Statement** Notification Type. Click **OK**.



- 2) Filter the **Is Selected** column for **Checked**.



- 3) The Grid now reflects all members in the system who have Statement notifications linked to an Email Address.

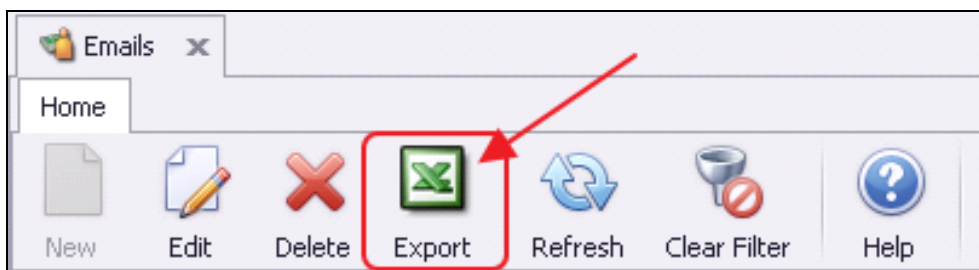


| Member Number | First Name | Last Name | Email | Notification Type | Is Selected |
|---------------|------------|------------|----------------------------|-------------------|-------------------------------------|
| 2 | Gale | Smith | tvanhook@clubessential.com | Statement | <input checked="" type="checkbox"/> |
| 2B | Rusty | Cardwell | Thomas.Van.Hook@msj.edu | Statement | <input checked="" type="checkbox"/> |
| 3 | Xavier | Shanks | john_grant@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 4 | Wilbur | Huerta | maryandgary@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 4A | Berry | Huerta | nussbaummary@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 5 | Darrick | Rudolph | tomfoley@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 6 | Haywood | Behrens | jimstitt22@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 6A | Valene | Behrens | chevy22@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 7 | Doyle | West | gtnational@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 8 | Carter | Fontenot | BJByram@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 9 | Shon | Velazquez | scottc@clubsoft.net | Statement | <input checked="" type="checkbox"/> |
| 10 | Santiago | Overstreet | ibzrust@clubsoft.net | Statement | <input checked="" type="checkbox"/> |

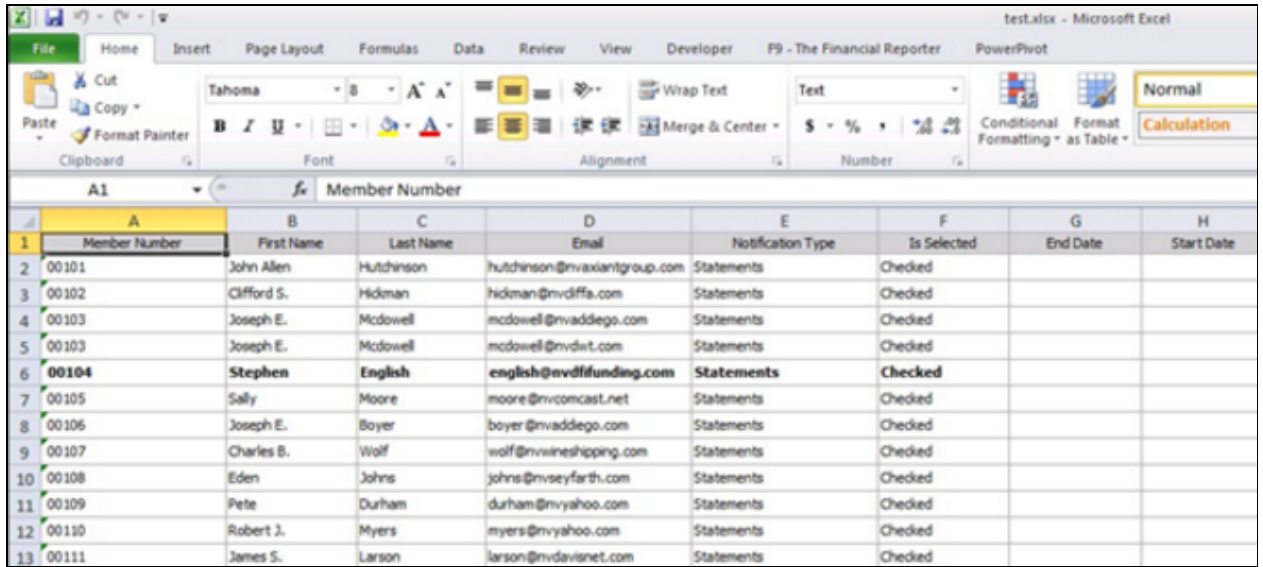
Export to Excel

The **Addresses** and **Emails** Grids can also be easily exported to **Excel** for further data manipulation.

To do so, filter the grid to the preferred view, and select **Export** on the toolbar.



The current grid view will be exported to Excel.



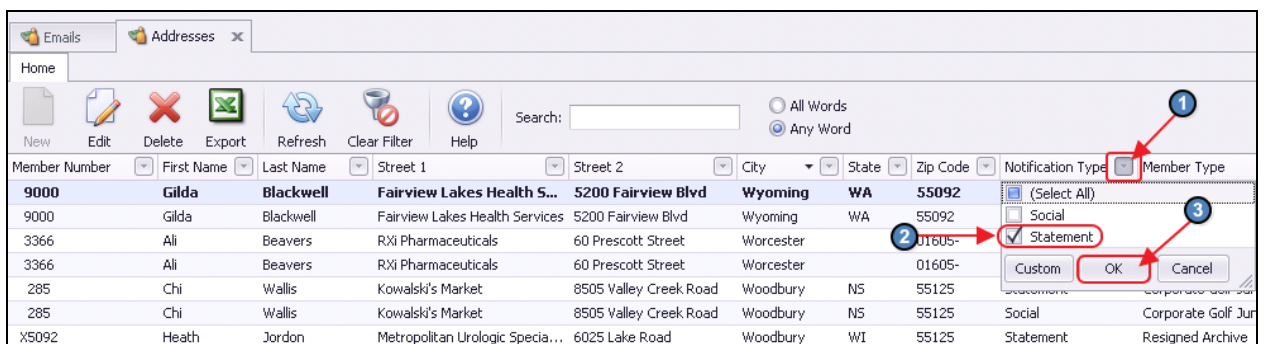
| | A | B | C | D | E | F | G | H |
|----|---------------|-------------|------------|------------------------------|-------------------|-------------|----------|------------|
| 1 | Member Number | First Name | Last Name | Email | Notification Type | Is Selected | End Date | Start Date |
| 2 | 00101 | John Allen | Hutchinson | hutchinson@nvaxiantgroup.com | Statements | Checked | | |
| 3 | 00102 | Clifford S. | Hickman | hickman@nvdiffa.com | Statements | Checked | | |
| 4 | 00103 | Joseph E. | McDowell | mcdowell@nvaddego.com | Statements | Checked | | |
| 5 | 00103 | Joseph E. | McDowell | mcdowell@nvdmnt.com | Statements | Checked | | |
| 6 | 00104 | Stephen | English | english@nvdfifunding.com | Statements | Checked | | |
| 7 | 00105 | Sally | Moore | moore@nvcomcast.net | Statements | Checked | | |
| 8 | 00106 | Joseph E. | Boyer | boyer@nvaddego.com | Statements | Checked | | |
| 9 | 00107 | Charles B. | Wolf | wolf@nvwinshipping.com | Statements | Checked | | |
| 10 | 00108 | Eden | Johns | johns@nvseyfarth.com | Statements | Checked | | |
| 11 | 00109 | Pete | Durham | durham@nvyahoo.com | Statements | Checked | | |
| 12 | 00110 | Robert J. | Myers | myers@nvyahoo.com | Statements | Checked | | |
| 13 | 00111 | James S. | Larson | larson@nvavisnet.com | Statements | Checked | | |

Multi Edit

Just like any other Grid, the **Addresses** and **Emails** Grids can be edited in bulk via the **Multi Edit** function.

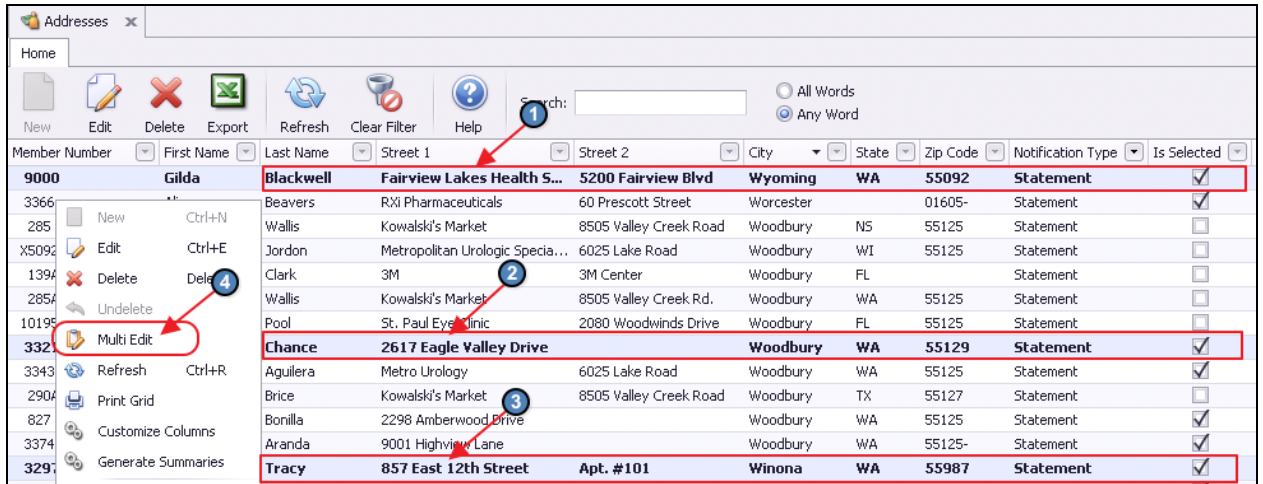
For example, let's assume a group of members, who are currently configured to receive a printed statement, would now like to receive their statement via email. In previous versions, the user would have to navigate to each member's individual profile and edit their notification types. With the addition of the **Addresses** and **Emails** Grids, the notification types for these members can be easily edited in one place. Please see instructions below.

- 1) On the **Addresses Grid**, filter the grid to only show the **Statement Notification Type**.



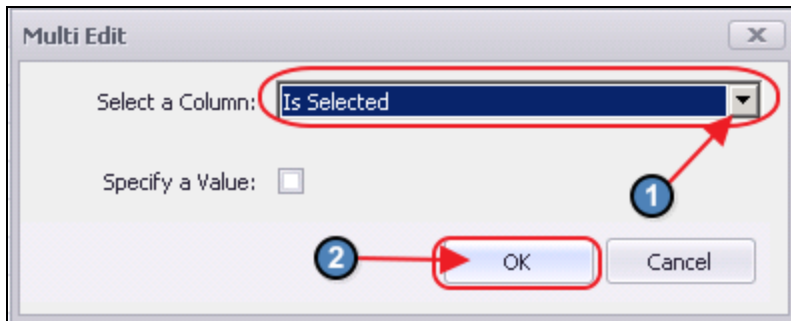
| Member Number | First Name | Last Name | Street 1 | Street 2 | City | State | Zip Code | Notification Type | Member Type |
|---------------|------------|-----------|---------------------------------|------------------------|-----------|-------|----------|---|--------------------|
| 9000 | Gilda | Blackwell | Fairview Lakes Health S... | 5200 Fairview Blvd | Wyoming | WA | 55092 | (Select All) | |
| 9000 | Gilda | Blackwell | Fairview Lakes Health Services | 5200 Fairview Blvd | Wyoming | WA | 55092 | <input checked="" type="checkbox"/> Statement | |
| 3366 | Ali | Beavers | RXi Pharmaceuticals | 60 Prescott Street | Worcester | | 01605- | Custom | |
| 3366 | Ali | Beavers | RXi Pharmaceuticals | 60 Prescott Street | Worcester | | 01605- | | |
| 285 | Chi | Wallis | Kowalski's Market | 8505 Valley Creek Road | Woodbury | NS | 55125 | | |
| 285 | Chi | Wallis | Kowalski's Market | 8505 Valley Creek Road | Woodbury | NS | 55125 | Social | Corporate Golf Jur |
| X5092 | Heath | Jordon | Metropolitan Urologic Specia... | 6025 Lake Road | Woodbury | WI | 55125 | Statement | Resigned Archive |

- 2) Hold **CTRL** to select multiple members from the grid. Right click and select **Multi Edit**.

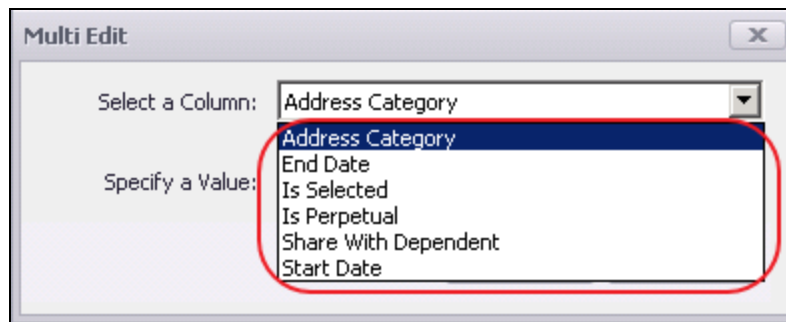


- 3) Choose the **Is Selected** column by utilizing the drop-down arrow. To un-select these members from the **Statement Notification** type, leave the **Specify a Value** field **unchecked**.

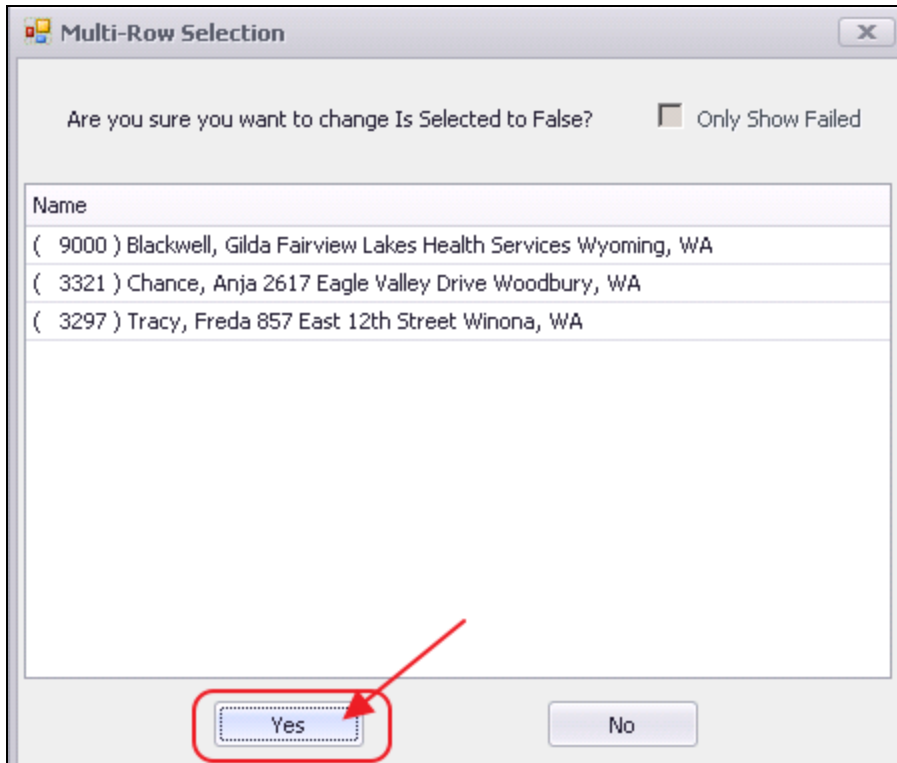
Then, click **OK** to continue.



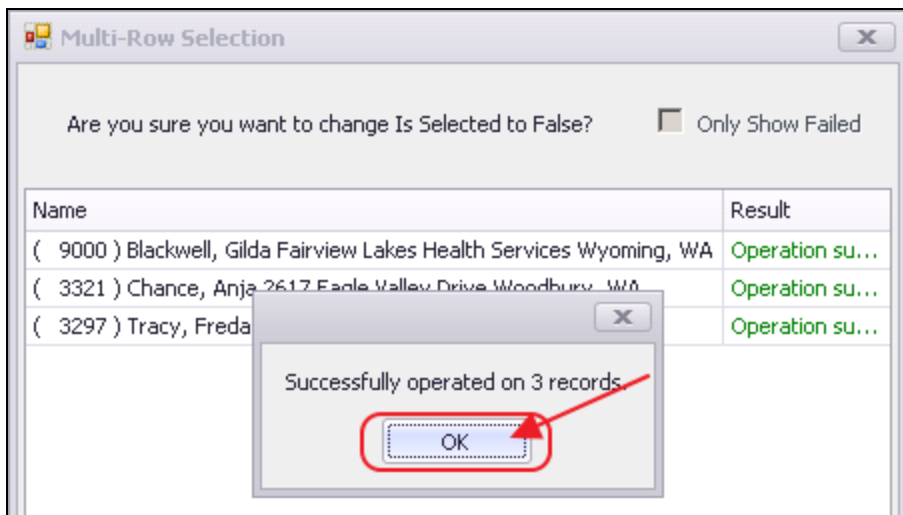
(Note: Other bulk edits (in addition to **Is Selected**) can be performed as well.)



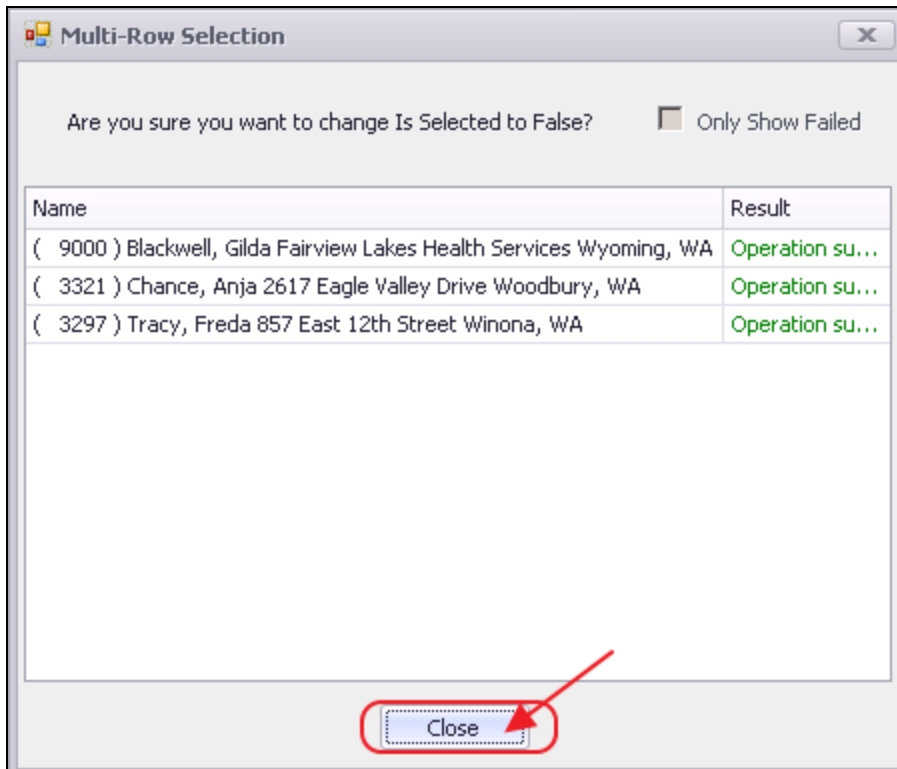
- 4) Confirm the change to affect the selected records by clicking **Yes**.



- 5) Success message will return. Click **OK**.



- 6) Lastly, click **Close** to continue.

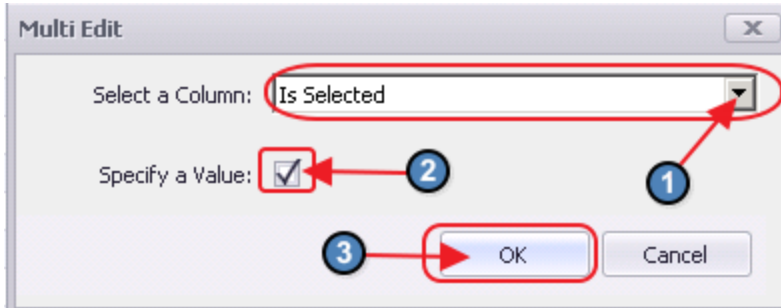


Now that these members are no longer configured to receive a printed statement (shown below), they will have to be configured to receive a statement by email.

| Member Number | First Name | Last Name | Street 1 | Street 2 | City | State | Zip Code | Notification Type | Is Selected |
|---------------|------------|-----------|---------------------------------|------------------------|-----------|-------|----------|-------------------|-------------------------------------|
| 9000 | Gilda | Blackwell | Fairview Lakes Health S... | 5200 Fairview Blvd | Wyoming | WA | 55092 | Statement | <input type="checkbox"/> |
| 3366 | Ali | Beavers | RXI Pharmaceuticals | 60 Prescott Street | Worcester | MA | 01605- | Statement | <input checked="" type="checkbox"/> |
| 285 | Chi | Wallis | Kowalski's Market | 8505 Valley Creek Road | Woodbury | MS | 55125 | Statement | <input type="checkbox"/> |
| X5092 | Heath | Jordon | Metropolitan Urologic Specia... | 6025 Lake Road | Woodbury | WI | 55125 | Statement | <input type="checkbox"/> |
| 139A | Alice | Clark | 3M | 3M Center | Woodbury | FL | 55125 | Statement | <input type="checkbox"/> |
| 285A | Lenita | Wallis | Kowalski's Market | 8505 Valley Creek Rd. | Woodbury | WA | 55125 | Statement | <input type="checkbox"/> |
| 10195 | Zana | Pool | St. Paul Eye Clinic | 2080 Woodwinds Drive | Woodbury | FL | 55125 | Statement | <input type="checkbox"/> |
| 3321 | Anja | Chance | 2617 Eagle Valley Drive | | Woodbury | WA | 55129 | Statement | <input type="checkbox"/> |
| 3343 | Rosia | Aguilera | Metro Urology | 6025 Lake Road | Woodbury | WA | 55125 | Statement | <input checked="" type="checkbox"/> |
| 290A | Jacki | Brice | Kowalski's Market | 8505 Valley Creek Road | Woodbury | TX | 55127 | Statement | <input type="checkbox"/> |
| 827 | Sid | Bonilla | 2298 Amberwood Drive | | Woodbury | WA | 55125 | Statement | <input checked="" type="checkbox"/> |
| 3374 | Marlin | Aranda | 9001 Highview Lane | | Woodbury | WA | 55125- | Statement | <input checked="" type="checkbox"/> |
| 3297 | Freda | Tracy | 857 East 12th Street | Apt. #101 | Winona | WA | 55987 | Statement | <input type="checkbox"/> |
| 213 | Nathanial | Boren | P.O. Box 1147 | | Wilson | TX | 83014 | Statement | <input checked="" type="checkbox"/> |

Other than step 3, please repeat the same steps as above on the **Emails Grid** to configure these members for an emailed statement.

On step 3, **check** the **Specify a Value** field within the **Is Selected** column to designate that the selected email addresses are selected for Statement Notification.



Best Practices

Utilize the **Multi Edit** function to save time and make edits to multiple records at the same time.

Apply filters to help identify/review/clean up data in the database (quickly identify blank records, records within certain ranges, etc).

Frequently Asked Questions

When I click Export, will it export all records, or the view I have selected based on filters I have applied?

The exported grid will contain all columns and rows of the currently displayed grid. If filters are impacting the view, only the returned results based on applied filters will be exported. To export all records, click **Clear Filters** in the toolbar to eliminate any filters impacting the current view.