# **G** 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)

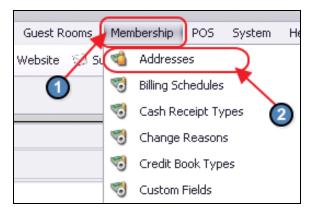
A Club wants to view all members who have Statement notifications linked to a physical or email address. The Club would also like to export a list of addresses or emails that are not configured for any notification types so additional research can be performed, and information can be gathered.

## Accessing the Tools

#### Addresses

For bulk maintenance of Physical Addresses,

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



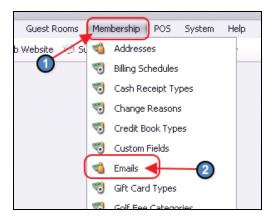
2) The Addresses Grid will launch.

Addr Home	resses 🛪												
New	Edit	X	Export	Refresh	Clear Filter	(2) Help	Search:			All Word Any Wor			
Member N	Jumber	First P	Name 💌	Last Name	Street	1	-	Street 2	City	• •	State 💌	Zip Code 💽	Notification Type
9000		Gilda	ı .	Blackwell	Fairvi	ew Lakes H	ealth S	5200 Fairview Blvd	Wyomi	ng	WA	55092	Social
9000		Gilda		Blackwell	Fairvie	w Lakes Heal	th Services	5200 Fairview Blvd	Wyoming	3	WA	55092	Statement
3366		Ali		Beavers	RXi Pha	armaceuticals	;	60 Prescott Street	Worcest	er		01605-	Social
3366		Ali		Beavers	RXi Pha	armaceuticals	;	60 Prescott Street	Worcest	er		01605-	Statement
3374		Marlin	I	Aranda	9001 H	ighview Lane	•		Woodbu	ry	WA	55125-	Social
3374		Marlin	I	Aranda	9001 H	ighview Lane	•		Woodbu	ry	WA	55125-	Statement
827		Sid		Bonilla	2298 A	mberwood D	rive		Woodbu	ry	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.

📹 Emails	х								
Home									
		×	×	E.	8	(?)	Search:	All Word:     Any Word:	
New	Edit (	Delete	Export	Refresh	Clear Filter	Help			0
Member Nu	mber 🔺 💽	First N	lame 💌	Last Name	💌 Email			💌 Notification Type 💽	Is Selected
2		Gale		Smith	tvanhool	clubess @	ential.com	Statement	$\checkmark$
2B		Rusty		Cardwell	Thomas.Va	an.Hook@m:	sj.edu	Statement	$\checkmark$
3		Xavier		Shanks	john_gran	t@clubsoft.i	net	Statement	$\checkmark$
3		Xavier		Shanks	jlgrant1@o	lubsoft.net		Statement	
ЗA		Tandy		Christopher	grantmba(	⊇clubsoft.ne	et	Statement	
4		wilking		Hugets	maruanda	oru@clubcof	it not	Statemont	

## 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.

 Filter the Notification Type column to only show the Statement Notification Type. Click OK.

📹 Emails	×									
Home										
		×	×	E	8	(?)	Search:		<ul> <li>All Word</li> <li>Any Wo</li> </ul>	-
New	Edit	Delete	Export	Refresh	Clear Filter	Help			S Hilly WO	
Member Nu	umber 🔺	💌 First I	Name 💌	Last Name	💌 Email			-	Notification Type	🚽 Is Selected 💌
2		Gale		Smith	tvanhook	@clubess	ential.com		📃 (Select All)	
2B		Rusty	/	Cardwell	Thomas.Va	n.Hook@m	sj.edu		🔲 Newsletter	<b>^</b>
3		Xavie	r	Shanks	john_grant	@clubsoft.i	net	•	Social	3
3		Xavie	r	Shanks	jlgrant1@c	lubsoft.net			Statement	
ЗA		Tand	у	Christopher	grantmba@	clubsoft.ne	et		Custom Ok	Cancel
4		Wilhu	ır	Huerta	maryandoa	arv@clubsof	ft.net			

2) Filter the Is Selected column for Checked.

📹 Emails	5 ×									
Home										
		×	×	E	8	(?)	Search:		<ul> <li>All Words</li> <li>Any Word</li> </ul>	Ø
New	Edit	Delete	Export	Refresh	Clear Filter	Help			S Hilly Word	
Member Nu	umber 🔺	💌 First I	Vame 💌	Last Name (	💌 Email			💌 Notifi	cation Type 💌	Is Selected 💽
2		Gale		Smith	tvanhool	k@clubesse	ential.com	Stat	ement	(Custom)
2B		Rusty	,	Cardwell	Thomas.Va	an.Hook@ms	;j.edu	State	ment	(Blanks)
3		Xavie	r	Shanks	john_gran	t@clubsoft.r	net	State	ment	(Non blanks) Unchecked
3		Xavie	r	Shanks	jlgrant1@d	lubsoft.net		State	m <b>@</b>	Checked
3A		Tand	/	Christopher	grantmba@	@clubsoft.ne	ŧ	State	~	
										11.

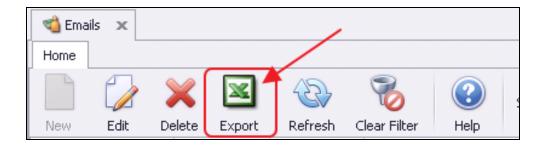
3) The Grid now reflects all members in the system who have Statement notifications linked to an Email Address.

📹 Email Home	ls x			
New	Edit Delete Export	Refresh	Clear Filter Help	All Words     O Any Word
Member N				Votification Type V Is Selected
2	Gale	Smith	tvanhook@clubessential.com	Statement 🗹
2B	Rusty	Cardwell	Thomas.Van.Hook@msj.edu	Statement 🗹
3	Xavier	Shanks	john_grant@clubsoft.net	Statement 🗹
4	Wilbur	Huerta	maryandgary@clubsoft.net	Statement 🗹
4A	Berry	Huerta	nussbaummary@clubsoft.net	Statement 🗹
5	Darrick	Rudolph	tomfoley@clubsoft.net	Statement 🗹
6	Haywood	Behrens	jimstitt22@clubsoft.net	Statement 🗹
6A	Valene	Behrens	chevy22@clubsoft.net	Statement 🗹
7	Doyle	West	gtnational@clubsoft.net	Statement 🗹
8	Carter	Fontenot	BJByram@clubsoft.net	Statement 🗹
9	Shon	Velazquez	scottc@clubsoft.net	Statement 🗹
10	Santiago	Overstreet	ibzrust@clubsoft.net	Statement 🗸

#### 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.

X	III) - ( <sup>2</sup> -  ▼							test.xisx - Microsof	t Excel
F	ile Home Insert	Page Layout	Formulas Da	ta Review View Dev	veloper P9 - 1	The Financ	ial Reporter	PowerPivot	
ľ		ahoma *	8 * A* A*	= = »·· 🔤 Wra	ap Text	Text			Normal
Par		B / U · 🗄	• <u>A</u> •	111 日	ge & Center *	s - %	, 14 43	Conditional Format Formatting * as Table *	Calculation
	Clipboard 12	Font		Alignment		Nur	nber 15		
	A1 •	- £ Me	ember Number						
4	A	В	с	D	E		F	G	н
1	Member Number	First Name	Last Name	Email	Notification Type		Is Selecter	d End Date	Start Date
2	00101	John Allen	Hutchinson	hutchinson@rvaxiantgroup.com	Statements		Checked		
3	00102	Clifford S.	Hidman	hidman@nvdiffa.com	Statements		Checked		
4	00103	Joseph E.	Mcdowell	mcdowell@nvaddlego.com	Statements		Checked		
5	00103	Joseph E.	Mcdowell	mcdowell@nvdwt.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@nvaddlego.com	Statements		Checked		2
9	00107	Charles B.	Wolf	wolf@rvwineshipping.com	Statements		Checked		
10	00108	Eden	Johns	johns@nvseyfarth.com	Statements		Checked		
11	00109	Pete	Durham	durham@mvyahoo.com	Statements		Checked		
12	00110	Robert J. Myers myers@myshoo.com Statement		Statements		Checked			
13	00111	James 5.	Larson	larson@nvdavisnet.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**.

📹 Emai	5	📹 Addresses 🛛 🗙	1								
Home		-									
New	Edit	Delete Export	Refresh	Clear Filter Help	) Search:		<ul> <li>All Word</li> <li>Any Word</li> </ul>				0
Member N		💌 First 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)	<u> </u>
9000		Gilda	Blackwell	Fairview Lakes H	ealth Services	5200 Fairview Blvd	Wyoming	WA	55092	Social	3
3366		Ali	Beavers	RXi Pharmaceutio	als	60 Prescott Street	Worcester	2	01605-	🚺 Statement	
3366		Ali	Beavers	RXi Pharmaceutio	als	60 Prescott Street	Worcester		01605-	Custom OK	Cancel
285		Chi	Wallis	Kowalski's Marke		8505 Valley Creek Road	Woodbury	NS	55125		Corporaco don Jár
285		Chi	Wallis	Kowalski's Marke	:	8505 Valley Creek Road	Woodbury	NS	55125	Social	Corporate Golf Jun
X5092		Heath	Jordon	Metropolitan Uro	logic 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**.

📹 Ada	dress	ses 🗙												
Home														
New	ĺ	💋 🗙 Edit Delet	e Export	Refresh	Clear Filter	(?) Help	Tren:			🔘 All Wo i Any W				
Member			rst Name 💌	Last Name	Street 1	i ioip		Street 2	-	City 🔻	State 💌	Zip Code 💌	Notification Type 💌	s Selected 💌
9000		Gi	lda	Blackwell	Fairvier	# Lakes H	ealth S	5200 Fairview Blvd		Wyoming	WA	55092	Statement	$\checkmark$
3366	_		en la n	Beavers	RXi Phar	maceuticals		60 Prescott Street		Worcester		01605-	Statement	$\checkmark$
285		New	Ctrl+N	Wallis	Kowalski	's Market		8505 Valley Creek Road	ł	Woodbury	NS	55125	Statement	
X5092	0	Edit	Ctrl+E	Jordon	Metropo	litan Urologi	c Specia	6025 Lake Road		Woodbury	WI	55125	Statement	
1394	×	Delete	Dele	Clark	ЗМ	(	2	3M Center		Woodbury	FL		Statement	
2854	4	Undelete		Wallis	Kowalski	's Market	-	8505 Valley Creek Rd.		Woodbury	WA	55125	Statement	
10195			6	Pool	St. Paul	Eye		2080 Woodwinds Drive		Woodbury	FL	55125	Statement	
332	V	Multi Edit		Chance	2617 Ea	igle Valley	/ Drive			Woodbury	WA	55129	Statement	$\checkmark$
3343	Ð	Refresh	Ctrl+R	Aguilera	Metro Ur	ology		6025 Lake Road		Woodbury	WA	55125	Statement	$\checkmark$
2904		Print Grid		Brice	Kowalski	's Market	3	8505 Valley Creek Road	ł	Woodbury	TX	55127	Statement	
827	0			Bonilla	2298 Am	berwood <b>P</b> i				Woodbury	WA	55125	Statement	$\checkmark$
3374		Customize Co	Jumns	Aranda	9001 Hig	hviger Lane				Woodbury	WA	55125-	Statement	$\checkmark$
3297	0	Generate Sur	nmaries	Tracy	857 Eas	t 12th Str	eet	Apt. #101		Winona	WA	55987	Statement	$\checkmark$

 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.

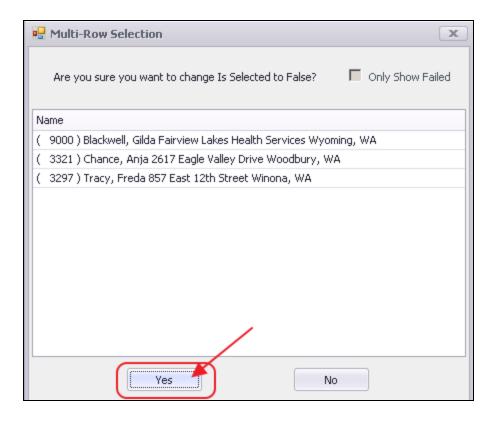
Then, click **OK** to continue.

Multi Edit	x
Select a Column: Is Selected	
Specify a Value:	0
2	OK Cancel

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

Multi Edit	x
Select a Column:	Address Category
Specify a Value:	Is Perpetual
(	Share With Dependent Start Date

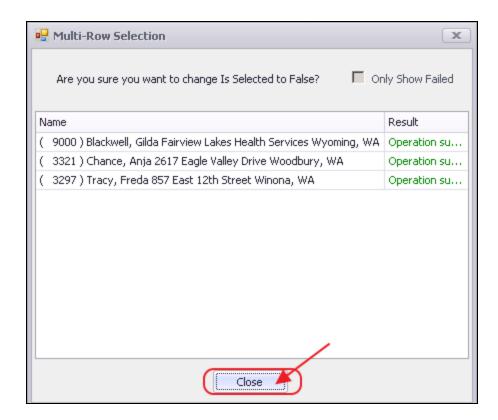
4) Confirm the change to affect the selected records by clicking Yes.



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.

Ado 🌮	dresses >	۲.									
Home											
New	Edit	Delete Export	Refresh	· · ·	Search:		O All Wor O Any Wo				
Member	Number	💌 First Name 💽	Last Name	Street 1	-	Street 2	City 🔹 💌	State 💌	Zip Code 💌	Notification Type 💌	Is Selected 💌
9000		Gilda	Blackwell	Fairview La	ces Health S	5200 Fairview Blvd	Wyoming	WA	55092	Statement	
3366		Ali	Beavers	RXi Pharmace	uticals	60 Prescott Street	Worcester		01605-	Statement	$\checkmark$
285		Chi	Wallis	Kowalski's Mar	ket	8505 Valley Creek Road	Woodbury	NS	55125	Statement	
X5092		Heath	Jordon	Metropolitan l	Jrologic Specia	6025 Lake Road	Woodbury	WI	55125	Statement	
139A		Alice	Clark	ЗМ		3M Center	Woodbury	FL		Statement	
285A		Lenita	Wallis	Kowalski's Mar	ket	8505 Valley Creek Rd.	Woodbury	WA	55125	Statement	
10195		Zana	Pool	St. Paul Eye C	linic	2080 Woodwinds Drive	Woodbury	FL	55125	Statement	
3321		Anja	Chance	2617 Eagle	/alley Drive		Woodbury	WA	55129	Statement	
3343		Rosia	Aguilera	Metro Urology		6025 Lake Road	Woodbury	WA	55125	Statement	$\checkmark$
290A		Jacki	Brice	Kowalski's Mar	ket	8505 Valley Creek Road	Woodbury	TX	55127	Statement	
827		Sid	Bonilla	2298 Amberw	ood Drive		Woodbury	WA	55125	Statement	$\checkmark$
3374		Marlin	Aranda	9001 Highviev	v Lane		Woodbury	WA	55125-	Statement	
3297		Freda	Tracy	857 East 12	th Street	Apt. #101	Winona	WA	55987	Statement	
213		Nathanial	Boren	P.O. Box 114	7		Wilson	ТΧ	83014	Statement	

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.

Multi Edit	x
Select a Column: Is Selected	
Specify a Value: 🚺 🕇 🕘	0
3 ок	Cancel

#### **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.