



CRM Quick How-To's

2018 - Spring Edition

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Overview

This module will cover some basic how-to's and FAQ's for the Clubessential CRM.

Use Case(s)

This is a valuable module to read through if you are new to the Clubessential CRM, or to CRM's in general, or if you are an experienced user just looking for a refresher.

Accessing the Tool

To access your CRM, first sign in to your member website as an administrator. Then, hover your mouse over the word "Admin" in the top left corner of the page. The CRM link should appear in either the Communication or Content Management section (sometimes the link will instead say CRM & Data Warehouse - this will take you to the same place!).

You will need to have a validated CRM User account set up before you can access the CRM. If you receive a message that says "Unable To Load Page, Invalid User" then you'll need to contact your Account Manager to purchase an additional license to use the CRM.

How can I...?

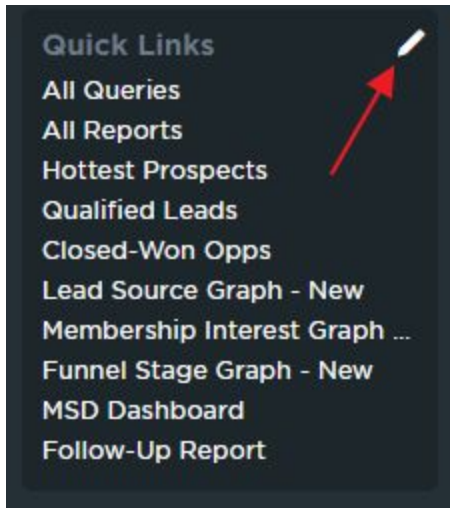
Configure my Quick Links

Each CRM User can configure their own unique set of Quick Links, for easy reference. Quick Links appear in the left sidebar of the CRM, and can link to Queries, Reports, or Views within your CRM.

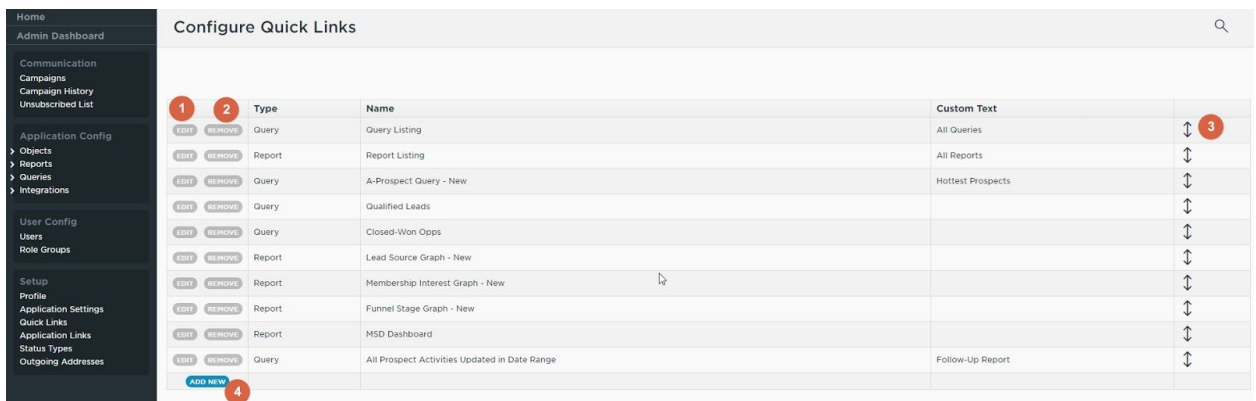
The screenshot displays the Grand Key Club CRM interface. At the top, there is a navigation bar with tabs for Membership Prospects, Private Event Prospects, My Schedule, Members, Club Guests, and D-Prospects. The user is logged in as System User. The main content area shows a table titled "Grand Key Club Membership Prospects" with columns for Prospect, Funnel, Toured, Membership, Lead Source, Referred By, Close, Email, Last Touch, and Created. The table lists various prospects such as Ticer, Cassandra; Conte, Matt; Snipes, Wesley; Claus, Carol; Estein, Theo; Dea, Sandy; Benjamin, Larry; Campos, Jamie; Davo, Josie; Anderson, JJ; Patterson, Greg; Lawrence, Jennifer; Williams, Leslie; Lawson, Tim; Nixon, Richard; and Underwood, Kristi. A sidebar on the left contains a "Quick Links" section with a list of links like All Queries, All Reports, Sales Report, Revenue Report, Close Rates, etc. Below the sidebar is a "Recent Items" list and an "External Links" section.

To edit the list of Quick Links for your login, follow these steps:

1. Hover your mouse over the word 'Quick Links' from the Quick Links section in the sidebar, and click the edit icon that appears to the right of the section title.

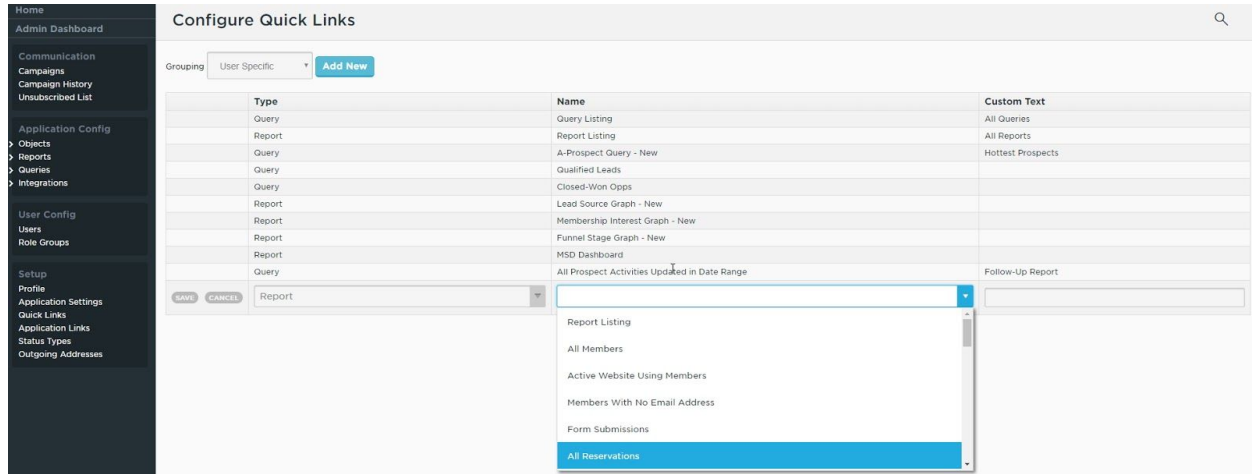


2. This will bring you to the Configure Quick Links Screen:



3. To edit an existing link, click on the edit button (1) to the left of the display link. You'll then be able to change the destination of the link, or any custom text to display as the name of this link in your Quick Links menu.
4. To delete an existing link, click on the delete button (2) to the left of the display link.
5. To rearrange the existing links in the list, click and drag on the arrow handle (3) to the right of the display link. Links will appear in the same order on the list of Quick Links from your home menu as they do in this list on the edit screen.

- To add a new link, click on the Add New button (4) at the bottom of the list of existing links. A new line will be added to the list of links, and you'll be able to select the type (View, Report, or Query), source (which will fill in based on your selection for Type, with all available Views, Reports, or Queries to choose from), and custom text for your new link. You'll need to save your new link before you can reorder it in the list.



- When you are done editing your Quick Links, you can navigate back to your home screen by clicking the Home button in the top left of your CRM. Once back at your home page, you should see your updated set of Quick Links!

Merge two records together

Sometimes you may find the need to merge two CRM records together. This usually is the case when a record is manually created for a prospect, and then they later fill out an inquiry form which creates a second record for them. You may also merge converted prospect records into their Member record that syncs from the member website. Thankfully, the CRM offers the capability to easily merge two records into one, preserving any necessary data from both records. Here's how it works:

1. First, you'll need to have both records that you want to merge displayed in the same View.

Grand Key Club CRM

Membership Prospects Private Event Prospects My Schedule Members Club Guests D-Prospects System User

Grand Key Club Membership Prospects

Export Messaging Merge Selected Records Add New Prospect

	Prospect	Funnel	Toured	Membership	Lead Source	Referred By	Close	Email	Last Touch	Created
<input checked="" type="checkbox"/>	Anderson, JJ	A	True	Intermediate	Email In	Adkins, William A.	March	jj@taco.com	1/19/2018 9:44 AM	4/28/2016 12:26 PM
<input type="checkbox"/>	Benjamin, Larry	C	False	Social	Direct Mail	Smith, Brad	June	larry@att.net	10/3/2017 3:14 PM	8/3/2017 11:05 AM
<input type="checkbox"/>	Campos, Jamie	B	True	Social	Website Form		July	jamie@awesome.net	1/19/2018 9:42 AM	7/28/2016 1:55 PM
<input type="checkbox"/>	Claus, Carol	B	True	Social	Walk In	Abbott, Busty	June	christmas@att.net	12/6/2017 2:37 PM	8/3/2017 11:17 AM
<input type="checkbox"/>	Conle, Matt	A	False	Intermediate	Website Form		May	jd@gmail.com	1/19/2018 9:43 AM	7/28/2016 8:28 AM
<input type="checkbox"/>	Dee, Sandy	B	True	Regular	Internet Search	Aaron, Duane	May	sandy@att.net	1/12/2018 12:03 PM	8/3/2017 11:09 AM
<input type="checkbox"/>	Erstein, Theo	A	True	Junior	Social Media	Aaron, Duane	April	theo@cubs.com	1/8/2018 12:33 PM	8/3/2017 11:14 AM
<input type="checkbox"/>	Lawrence, Jennifer	A	True	Regular	Website Form	Aaron, Duane	June	jennifer.lawrence@yahoo.com	9/5/2017 11:03 AM	2/23/2016 9:52 AM
<input type="checkbox"/>	Lawson, Tim	A	False	Regular	Walk In		May	tim.lawson@clubtech.com	1/19/2018 9:50 AM	2/18/2016 3:39 PM
<input type="checkbox"/>	Nixon, Richard	A	False	Social	Website Form		March	Richard@whitehouse.gov	1/19/2018 9:52 AM	2/3/2016 2:57 PM
<input type="checkbox"/>	Patterson, Greg	B	True	Social	Website Form	Abbott, Busty	May	greg@yahoo.com	1/19/2018 9:45 AM	3/24/2016 12:37 PM
<input type="checkbox"/>	Snipes, Wesley	B	True	Legacy	Social Media		April	wesley@att.net	2/20/2018 1:31 PM	8/3/2017 11:19 AM
<input type="checkbox"/>	Ticer, Cassandra	C	False	Regular Golf	Website Form			andy@clubessential.com		2/22/2018 12:44 PM
<input type="checkbox"/>	Underwood, Kristi	B	True	Social	Email In		June	ku@byc.com	1/19/2018 9:53 AM	12/22/2015 11:08 AM
<input type="checkbox"/>	Williams, Leslie	A	False	Social	Direct Mail	Dinsmoor, Brooke	February	lesimore@att.net	1/8/2018 12:31 PM	2/18/2016 3:40 PM

From there, you should see a checkbox at the far left of each record (1). Check this box next to each record that you'd like to merge. Once you've clicked the second box, a new button labeled Merge Selected Records (2) will appear in the top right of your View. Click this button to start the process.

2. Clicking the Merge Selected Records button will bring up the Record Merge Wizard, seen here:

Grand Key Club Membership Prospects

Export Messaging Merge Selected Records Add New Prospect

Record Merge Wizard

Select the Record to keep in the first row, then select each value to assign to the record in the following rows. Once complete click Save to merge the records into one. The selected Master Record will be updated with each selected value and all references to either record will be updated to it's value and the other record will be deleted.

	Anderson, JJ	Anderson, JJ
Master Record	<input checked="" type="radio"/> 29481	<input type="radio"/> 19427
% change over past 30 days		
30-day set	<input type="checkbox"/> False	<input type="checkbox"/> False
60-day set	<input type="checkbox"/> False	<input type="checkbox"/> False
90-day set	<input type="checkbox"/> False	<input type="checkbox"/> False
Activity History	<input type="radio"/> [no value]	<input type="radio"/> Invite to 4th of July, Call regarding junior options, Invite to play a round of golf with Mr. Jones
Admissions	<input type="checkbox"/> False	<input type="checkbox"/> False
Admissions Interest	<input type="checkbox"/> [no value]	<input type="checkbox"/> Fitness, Golf
Annual Dues	<input type="checkbox"/> [no value]	<input type="checkbox"/> \$0.00
Apparel		
Axis User		
Bag Storage #		

Cancel Merge

This wizard will display all fields in the selected Object containing the two records, and the associated value each record holds in each field. You will have the option to select a value from each field in cases where the two values don't match. In some cases, such as the Activity History field in this example, a third option is available, which will allow you to keep the values from both records without overwriting any values. This will be selected by default for all fields in which this is an option, and is displayed as a button in the field name column to the far left.

3. Once you've worked your way through the list of all available fields and are satisfied with your selection, click the green Merge button, and the two records will be combined into one. **NOTE: This is irreversible, so please take care when merging records.**