Office/Website Sync Guide (Admin Use Only)

2018 - Summer Edition

User Guide - Table of Contents

Overview

Please Note: *The following Guide is intended for **Admin** use only.*

When Clubs have both the Clubessential Office and Website products, the systems work synchronously to ensure data in both systems is current, and accurate. Sometimes, however, discrepancies between the systems can arise. This guide details how the systems and fields integrate, how to troubleshoot data discrepancies, and best practices to ensure the data is current and accurate in both systems.

It is important to note, the following key fields are the main fields of record that are located and sync between the Office and Website products. While syncing of the data can go both ways, in general it is important to think of the Office system as the main system of record, and typically the one that will need modified if changes to many of the fields below need to be made.

Synced Fields:

- Member Number and Relationship Code
- Member Type
- Member Status
- Member Name
- Join Date/Membership Begins
- Gender
- Birthday
- Email
- Phones
- Addresses
- Custom Fields
- Member Photo
- Groups

Please Note: *Edits to existing data related to address, email, and phone numbers (excluding deletion of data) may be made by the Member, and changes will sync to the Office system. Deletions of Member data are **NOT ALLOWED** on the Website. If the Member wishes to clear data from one of the above existing fields showing on the Website, the Club employee with access to the field, will need to delete the data from the Member's profile in Office on behalf of the Member.*
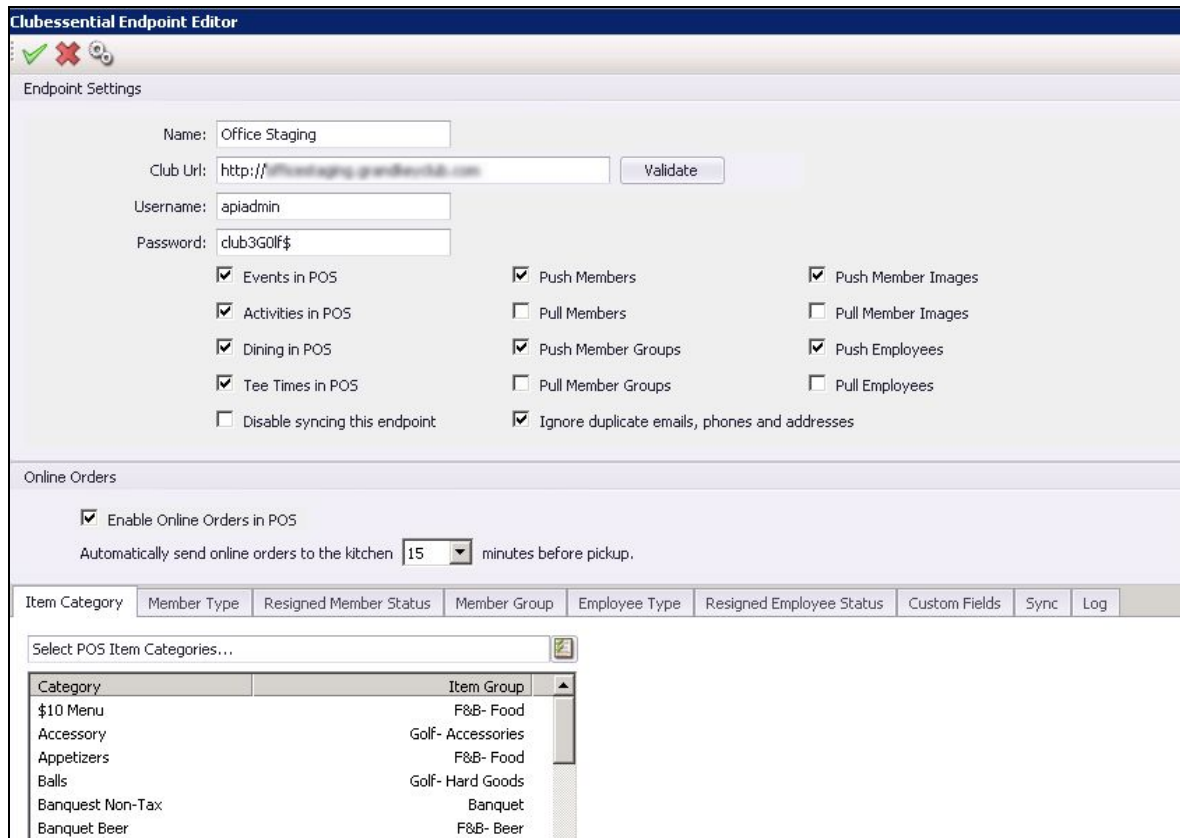
Use Case(s)

- Member Jack Jones moved, and wanted to update his address on the Website. Once he updates his information, the information will also be updated to his Member Profile in Office.
- The Club Controller got a call from a Member who is not seeing their information on the Website. The Controller researched why using this guide, and was able to remedy the situation.

Accessing Toolset to Manage Sync (in Office)

The Club can access the Toolset for managing the sync in Office by clicking on the **System** tab (across the top) in Office ➜ System Settings ➜ Website ➜ Clubessential ➜ double click the URL. The Endpoint Editor will now open.
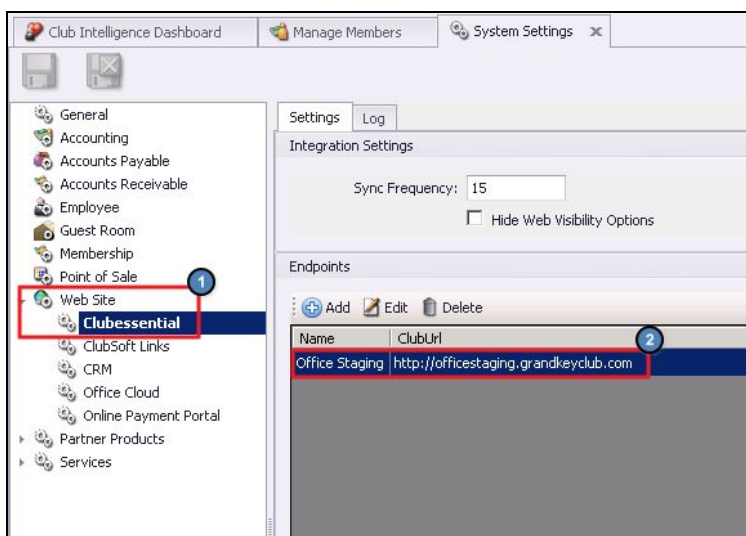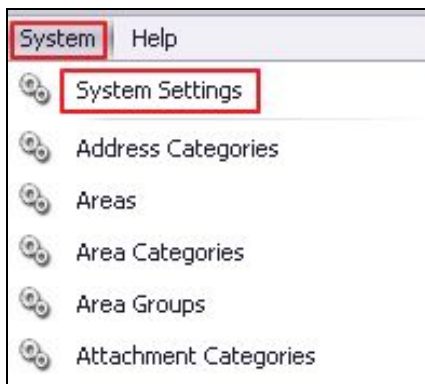
The Endpoint designates where the data is going (the Website), and by editing the settings within the Endpoint, a Club can control which **Member Types** push to the Web, which status indicates if a Member should be made **Inactive** on the Website, which **Office groups** sync to the Website, which **Employee Types** push to the Website, which status indicates that Employees should be **Inactive**, which **Billing Items** Sync to the Website, and which **Photos** (if any) are to be shared on the Website. Double-click the endpoint, or highlight the endpoint, and click **edit** to view the options below.

Fields that Sync

Member Number

The Member ID field in Office syncs to the Membership Number/Relationship Field in Axis.

Please Note: *Changes to a Member number can **ONLY** be made in **Office**.*

Member Relationship Code

Member Relationship Code is derived from the extension of the Member number to indicate a Spouse/dependent. It is not an actual field in Office; it pulls directly from the Member Number Field.

Office View

Primary Member

Spouse Member

Website View

The Website will break the Member Number into two parts; Member Number and Relationship. For spouse accounts, the relationship field shows **1 - Spouse / Secondary**.

If the relationship displaying in the Website is incorrect, check the **Primary** Member's Office record to see if the person displaying incorrectly on the Website is correctly labeled as the Spouse or a Dependent. In Office, both Spouse and Dependents are listed in the Dependents

area of the Primary Member's profile. However, the Spouse Member type auto populates the Spouse in the Spouse Member field. Therefore, if the Spouse is not properly pulled into the Spouse field, the relationship will appear incorrect in the Website profile.
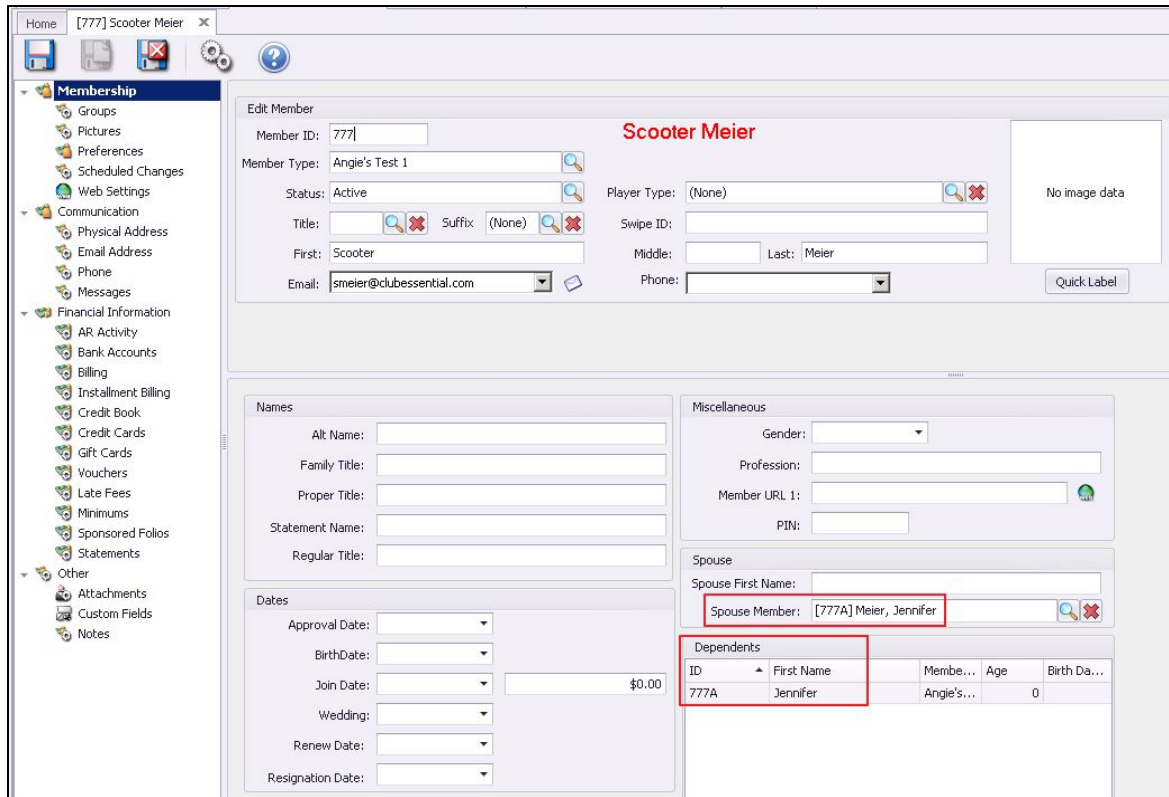
To ensure all Spouse Member types are flagged correctly, go to **Membership** (at the top in CMA) ➜ **Types** ➜ right click on the Grid to customize the columns and add the **is Spouse** field to the grid. All Spouse Member types should be flagged (Is Spouse field checked). When these are set properly, new Spouse Members will populate the **Spouse Member** Area of the Primary Members profile properly.

Member Type

The Member Type field can only be set or changed in **Office**. When this field is changed in Office, it will be updated the Member's Website profile.

Office View:

Website View:

Member Status

Member Status (does not show in Website profile as 'status', but syncs to Membership Expires field). All **Active** status, as defined in the Office sync tool, will display a default date of January 1, 2100 in the Website profile. When a Member's status in Office is changed to an 'inactive' status; the Sync will push over a Member expiration date. It is very important NOT to DELETE a Member record in Office before the Sync has time to update the status/expiration date in the Website profile. The Sync does not include 'deleted' Office records.

Office View:

Website View:

Member Name

Member name fields include: **Title, First, Middle, Last,** and **Suffix.** The Member name fields can **NOT** be edited on the Website (they are locked). These fields can only be changed in Office.

Office View:

Website View:

Join Date/Member Since (Web Label)

Join Date or Member Since will impact whether an account shows active on the Website. If the join date is set for a **future** date, until that date arrives, the Member's Website record will be inactive, and will not display

Office View:

Website View:

Gender

Gender will display M/F or N if not assigned in Office. This can be changed in either Office or the Website Profile and changes will Sync in both directions.

Office View:

Website View:

Birthday

The Birthday field can be configured to Sync in both directions; however we advise that Clubs do **NOT** allow Members to change the DOB in the Website and typically lock that field. If a Birthday is not set in Office, the Website field will display a default date of 1/1/1900.

Office View:

Website View:

Emails

CE Syncs two addresses by default per Member. Email addresses can be edited on the Website Profile and will Sync back to Office.

Please Note: *Can Sync up to 3 emails if requested, but not common.*

Office View:

Website View:

Phones

Clubs can Sync up to 4 phone categories. In Office, the categories are: **Home, Business, Fax, Mobile, Other**. Changes can be made in either system and will Sync in both directions.

Office View:

Website View:

Addresses

Up to 5 address fields may sync back and forth between Office and the Website. The address types are programmed from Office (System Settings ➔ Addresses), based on Club's preferences/definitions at time of implementation.

Please Note: *Clubessential must be notified if the name of an address category must change in*

Office as it will break the Sync for that particular address category. Back end configuration must be adjusted by Clubessential if name needs to change.

Custom Fields

Up to 15 additional Custom Fields (data types must be **text**, **date** or **numeric**) can be defined to sync from Office to the Website profile; but they will **NOT SYNC BACK** to Office.

Member Photo

If a Member has a photo in Office, it will show on the Member's website profile.. The Website is currently set to allow a Member to add or change their photo; however the image 'pull' (from the Website to Office) will only work if the Website image is a .jpg format. This is the preferred Office format.

Groups

Groups can be created in the Office system and synced to be utilized on the Website. These groups can **NOT** be edited on the Website. The ONLY exception to this rule is a Static/Opt-In group created in Office. A Static/Opt-In group will display in the Members Website profile; allowing Members to 'opt-in' to these groups. These are the only group changes that will pull back into Office.

A group **created** on the Website will **NOT** Sync back into Office. Office is the Primary database; therefore only groups created in Office can be included in the sync.

On the Website, groups that Sync from Office are labeled **Office** in the Synced column.

Fields that do Not Sync:

Username/Password

The username/password fields in Office are **NOT** part of the sync. The username is derived from the Member number field on the first push of that Member from Office to the Website. Once the username is set in the Website profile, changes cannot be made in Office to update. Changing a Member number (ID) in the Office record will **NOT** change the username in the Website profile. The username/password must be updated directly in the Member's Website profile once the profile exists on the Website.

The example below shows how the system auto populates the Username/Password when the Member is initially pushed from Office to the Website. As shown below, the '777' Member number is auto populated by the Website system in the Username field. The password takes the data from the last name field and converts it to all lowercase.

Edit a Member

Membership information

Membership Number	777 *
Account Type	Family ▼
Membership Level	Associate ▼
Display Name	Scooter Meier
Member Since	6/28/2018
Membership Expires	1/1/2100

Fill in the boxes below using the Member's information

Relationship	0 - Self / Primary ▼
Title	
First Name *	Scooter
Middle Name	
Last Name *	Meier
Suffix	

☑ Display this user in the Directory
(only affects member viewing, not admin.)

Web Account Information

Username *	777
Password *	••••••••

Resetting UN/PW for Website

The Username/Password can **NOT** be reset in Office. The change must be made directly in the member's Website profile.

To reset a Member's password, as an Admin, go to the **Directory**, select the Member, and click their name to open their profile. Click on the **edit this user** button to open the Member's Website profile. Go to the **Website settings** area of the profile.

Perform one of the following two options to reset the password:

If the Member has an email on file in the Primary email field, click the **Send password reset link via email** link to automatically email Member, and reset password.

If the Member does not have an email on file, physically reset the password by typing in a new one in the Password field and re-type the new password in the Confirm Password field to confirm the new password. Best practice is to return the password to the original default of the Members last name, all lowercase. After resetting the Member's password, check the **Ask user to change username/password on next login** box to ensure Member is prompted to change their password on next login.

Troubleshooting Scenarios

Scenario 1

Member changed Member type and Member number. Mr. CE Test and Mrs. CE Test changed from Member number 999 to 888 and they changed their Member types.

The actual Member Number field and the Member type are what will change in the Website.

Please Note: *The Username will* **NOT** *be updated by the sync.*

The username will still reflect the original Member number. The club needs to **manually** update the Username field in the Website profile, if the Member has not already logged in and updated it to something unique, other than the Member number.

It is important to update the username in the Website profile for two reasons:

1. If the Member has never logged into the Website and their Member number changes, they will not know what Member number to use to log in. Keep the Username consistent with the Member number change. The **only** exception would be if CE Test changed the Username to something unique, other than the Member number. In that case, you would **NOT** need to reset the username.
2. If reusing the original Member number **999** for a new Member, this would cause a login problem for both the original Member and the new Member because both would have the same '999' username. Neither Member would be able to login until the Member number on the original Member is updated.

Scenario 2

Change Primary Member and Spouse. If the Primary Member passed away and the surviving Spouse was taking over the Membership, perform the following steps.

Leave the Member number as is and switch all the personal data for the Member. Example: Mr. CE Test is Primary and Mrs. CE Test is Spouse. Change the name fields, possibly the Member type if that changes, the personal data such as phones, emails, address, DOB, Member photo, etc. Do **NOT** simply Flip their Member numbers. This will cause problems with their statements.

The proper change as shown below is to leave the Primary Member number at 888, and update all the personal data to reflect Mrs. CE Test. Mr. CE Test would then be the 888A record.

If Mr. CE Test passed away and needs resigned, other than changing out the name fields, there really is no need to change all the other personal data fields. Once Mr. CE Test is the 888A record, update the Member Type and status to ensure the 888A account is marked inactive on the Website.

The Office record should look like the following for Mr. CE Test who was switched to the Secondary Member and then resigned.
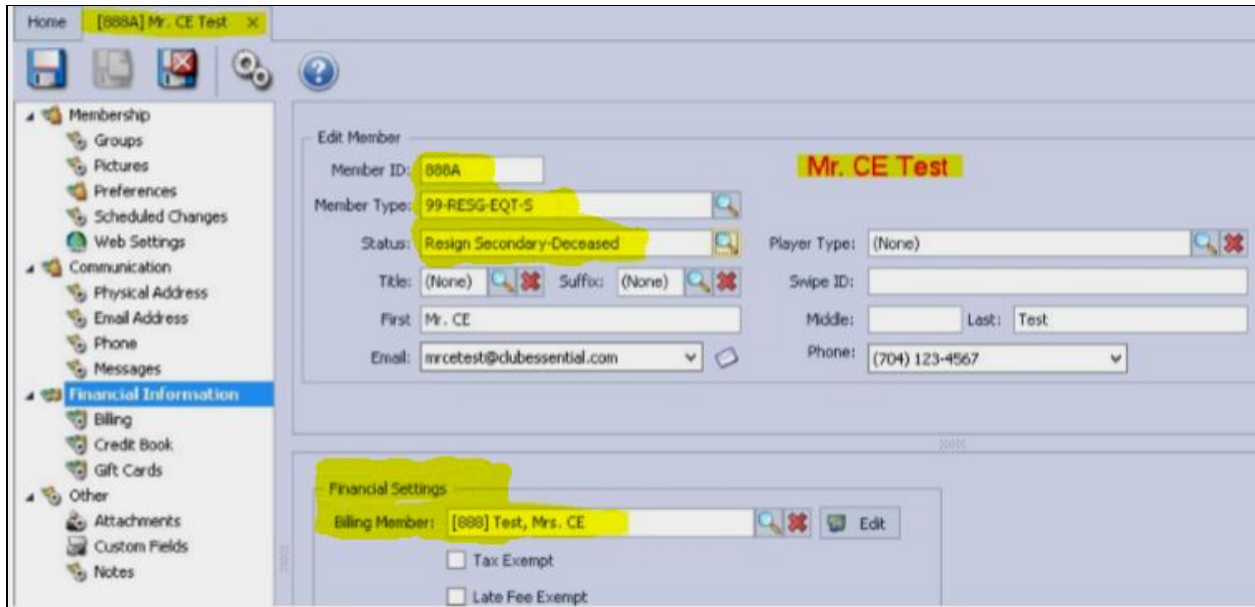
Mrs. CE Test is now the Primary Member/Billing Member, and the records have been successfully switched.

Once the Office system Syncs these changes to the Website, Mrs. CE Test will **no longer** use the 888A username. That account now belongs to Mr. CE Test and has been made inactive. Mrs. CE Test will now log into the Primary account which is the 888 account. Best practice is to also reset the Username/Password on the Primary 888 account in the Website so that Mrs. CE test is able to login to the correct account after the sync has occurred.

In addition to updating the **Username**, update the Display name as this is a field that does not sync. As shown below, Mrs. CE Test is now the Primary Member.

Mr. CE Test is now Inactive after updating the status in Office. His Website profile is updated as follows:

Please Note: *The change in status updated his* **Membership Expires** *field and his account is no longer active.*

Scenario 3

*If the Primary Member is **not** deceased, but the Primary Member and Spouse need switched for some reason, perform the same steps above with the exception of changing Member type or status where not applicable. Additionally, update **all** the personal Member data for the original Primary Member (Mr. CE Test) in the Spouse record.*

Going forward, Mr. CE Test would login to the Website (if still active) using the 888A username since he is now the Spouse record.

Please Note: *Anytime Member numbers are changed or a Member is switched from a Primary Member to a Spouse or vice versa, it would be a best practice to manually update the username and password in the Website record once the Office changes have been made and synced.*

The sync does not match Members based on their actual Member ID field, rather the unique number the Office system auto assigns each Member. This unique Identifier is what the Sync is based on. To locate this **unique ID**, look in the **bottom left** corner of the Member profile in Office.

ID	Member Number	Last Name	First Name	Member Type	Member Status
3141	888A	Test	Mrs. CE	11-FULL-EQT-S	Secondary-Active
3140	888	Test	Mr. CE	11-FULL-EQT-P	Primary-Active

In the Website profile, in Admin View ➔ Interface links, the same unique number will appear and be used for the Office sync. When you update data such as Member number, type, or personal data it is tied to this **unique Member ID** and not the Member number itself, and therefore processes the data appropriately.