



# Unification - Groups

2016 - Summer Edition

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# Overview

The Unified Platform allows Clubs to manage their Member Groups seamlessly across the (back) Office and Axis-Website, ensuring Club Administration has the tools they need for managing and communicating to Groups, and Members can easily join Groups that are relevant to them.

## Use Case(s)

A Club may wish to establish several different types of Membership Groups to accomplish various marketing and communication goals. For instance, a Club may wish to put all Members who are on the Board in a specific fixed, or Static group, so they can email minutes, calendar updates, etc. The club may also desire to establish Dynamic Groups, or Groups that fluctuate Membership based on certain parameters given to it (for instance all Members who have Birthdays for the current month). Additionally, the Club may also want the ability to set up Special Interest or Other Groups, like a Wine Club, whereby Members may sign up (or opt-in) to the Group(s) that are of interest to them via the Club's Website. The Unified Suite provides the Club with the ability to meet their goals.

## Office

### Groups and Group Creation

**All Groups that will be shared between the Office and the Axis-Website need to be created in Office** to effectively sync with the Website.

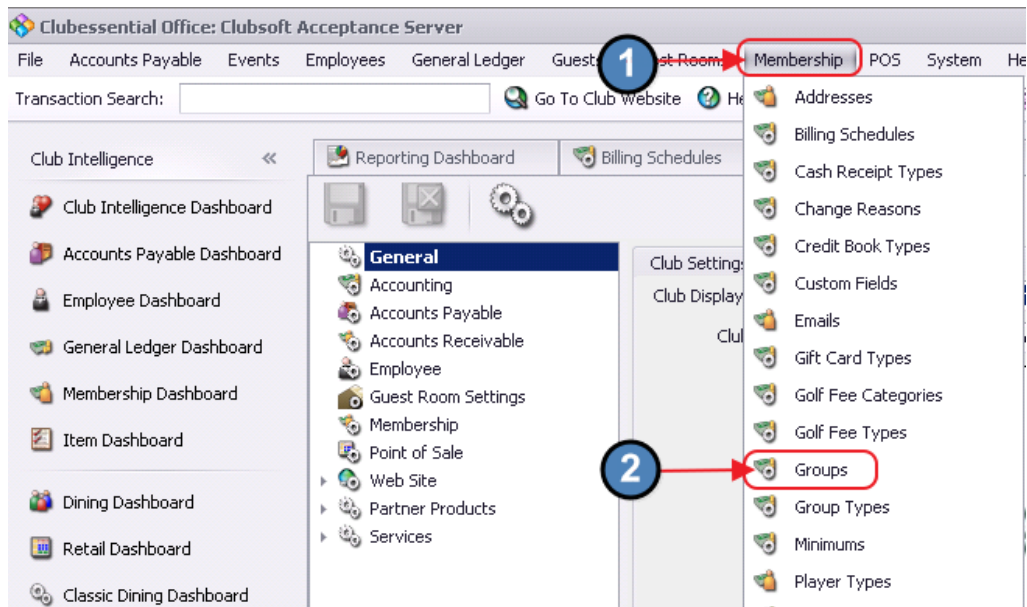
There are three types of Groups that can be created:

- 1) **Static - Regular** - This group type contains a fixed group of Members, and is assigned by the Administrator. Members do not have the option to add themselves or opt-in to this group.
- 2) **Static - Opt-In** - This group type contains a fixed group of Members. Additionally, Members may join or opt-in to this group. Administrators may also assign Members to this Group.
- 3) **Dynamic** - This group type contains a variable set of Members, based on the parameters associated with the group. Administrators set the parameters, and the system automatically assigns membership based on the parameters. Depending on the parameters set, the Membership of a Dynamic Group may change as criterion is met or not met.

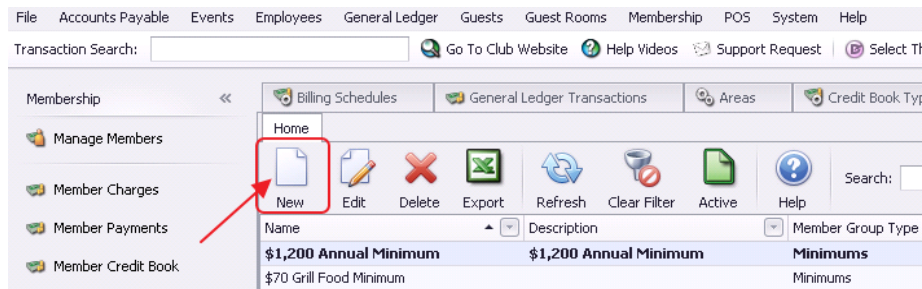
## Create a Group

To create a new Group, first navigate to the following:

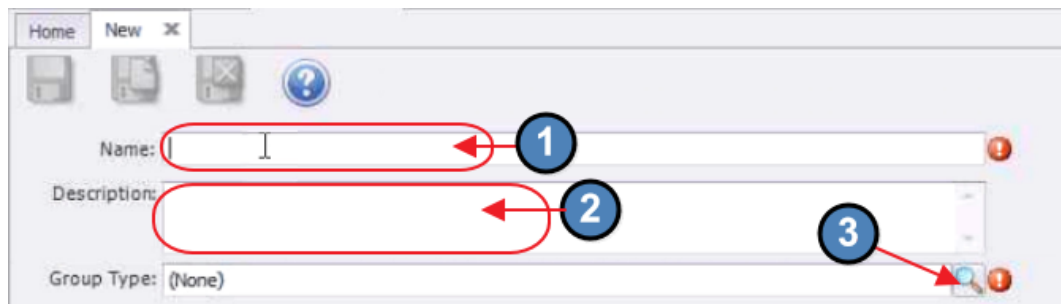
- 1) Click on “Membership”
- 2) Select, “Groups”



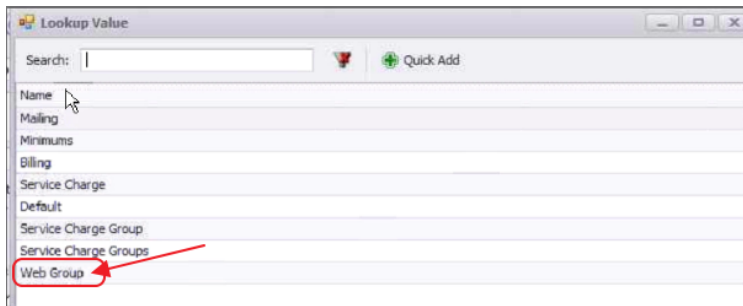
Then, click “New”.



For all Groups, provide a **Name**, an additional **Description** (if desired), and choose the **Group Type** relevant to the New Group. Note the lookup feature may be utilized to assist with Group Type.



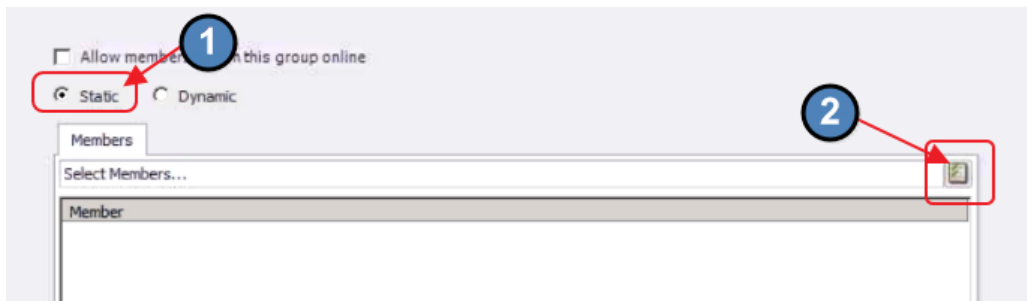
Once Group Type Lookup Value screen launches, select appropriate Group Type. Note - the Group Type is an internal reference, and does not automatically sync to the Web, simply because it may be titled, "Web Group".



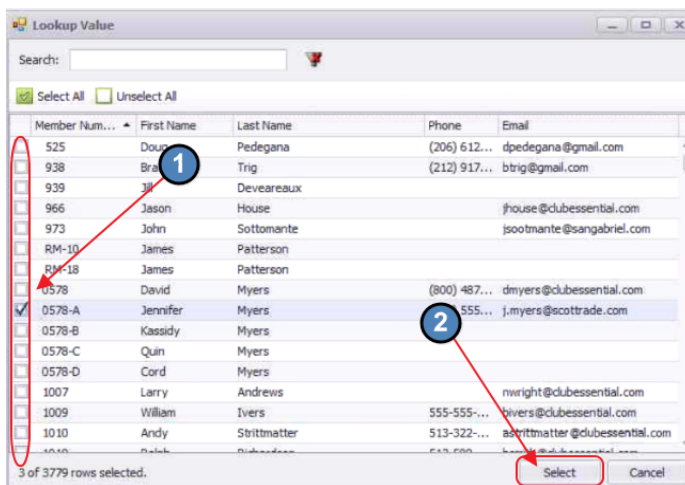
The following settings define the Type of Group.

## Static Group (General) Options

To establish a Static Group (General), select the "Static" option, and then add Members to the Group by clicking on the Member selection box.



Check Members to include in Group, and then, click, "Select."



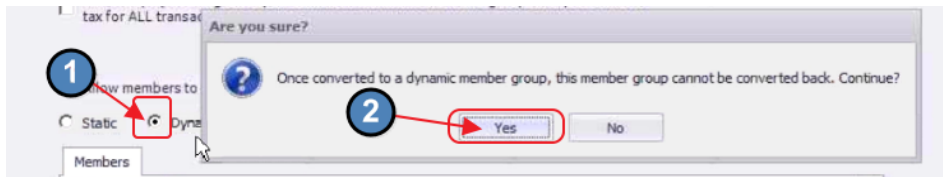
## Static Opt-In Group Options

To set up a Static (Opt-In Group), select the “Allow members to join this group online” option, and select the “Static” option. Optionally, add Members if desired. Once synced, Members will be able to join, or “Opt-in” to the group via the Website.

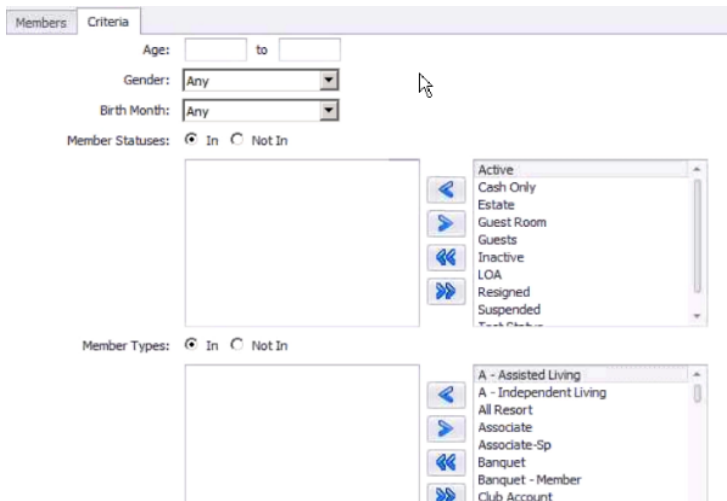


## Dynamic Group Options

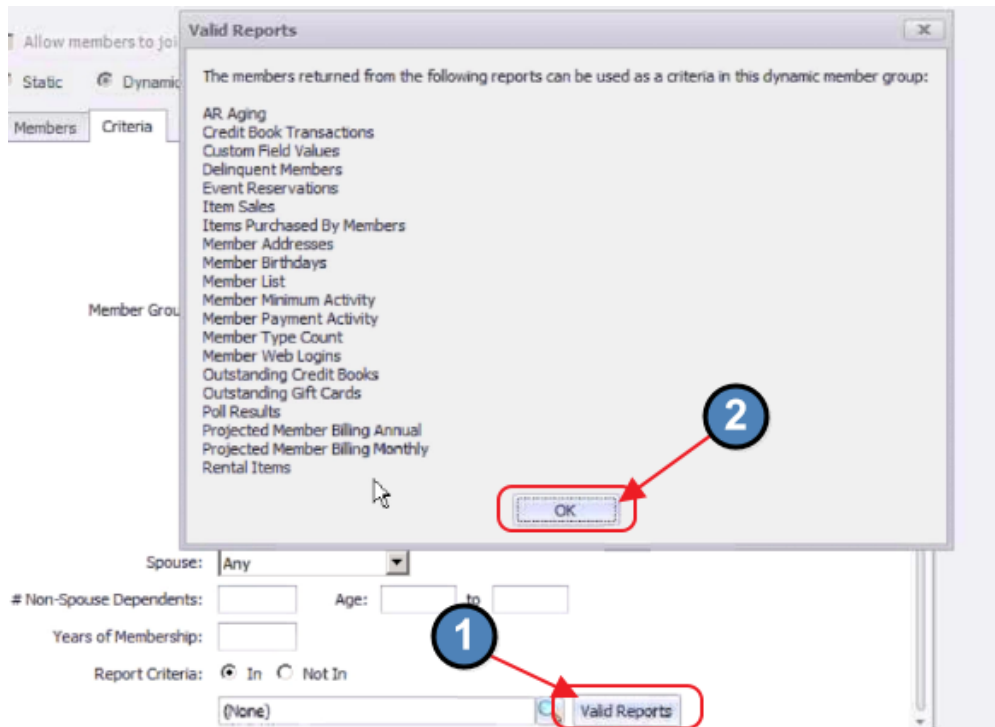
To set up a Dynamic Group, select the “Dynamic” option. Confirm Dynamic Group setup by clicking, “Yes.”



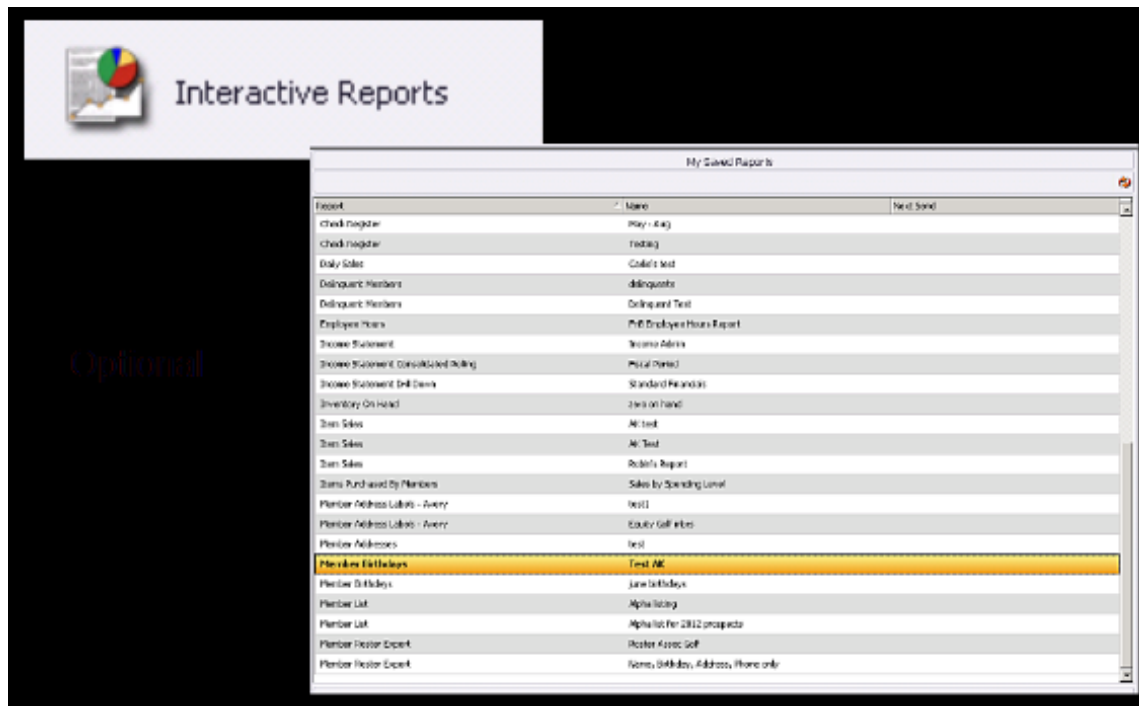
Then, specify parameters/criteria of the Group. Age, Gender, Birth Month, Member Status, Member Type, Member Groups, Spouse, #Non-Spouse Dependents and their respective age ranges, years of Membership, and Report Criteria may all be used to define how Membership within the Group will be generated.



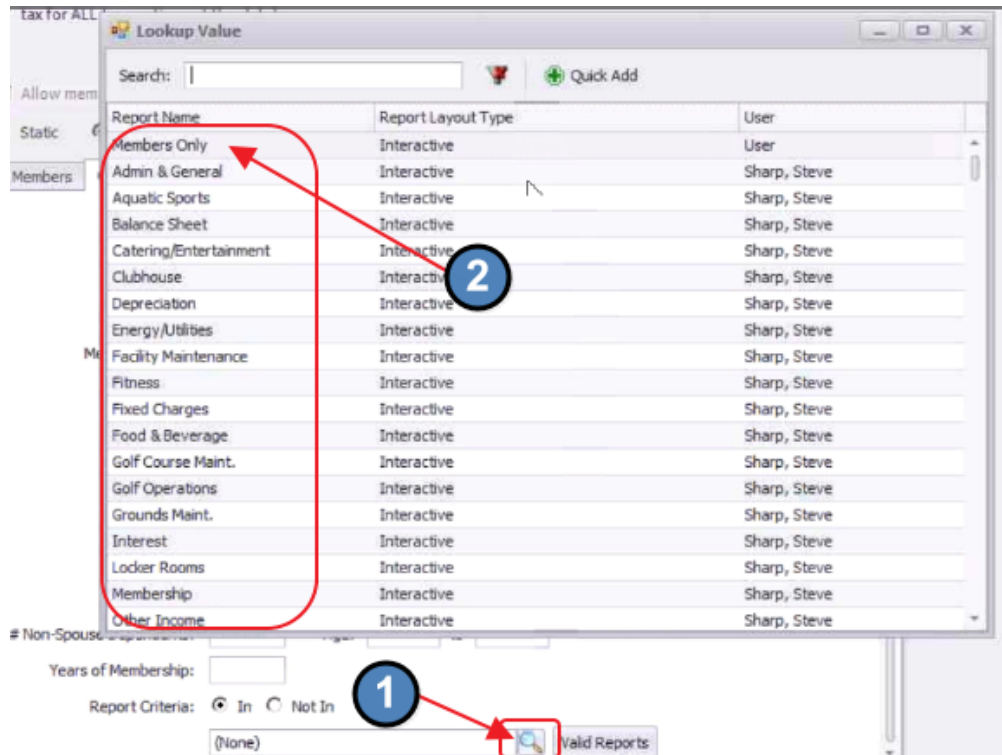
Note: To utilize the “Report Criteria,” click on the “Valid Reports” option to view which reports can be utilized to define Membership.



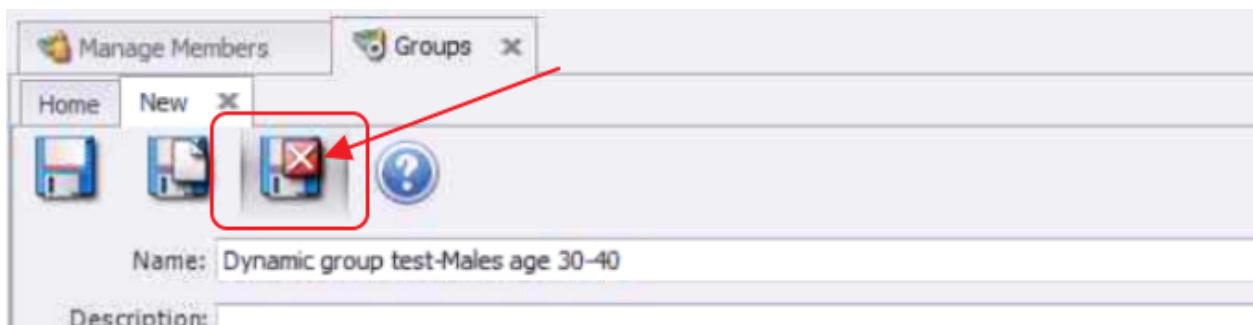
If a new report is needed, navigate to Interactive Reports, create and save the report (to a recognizable name).



Navigate back to the Group setup screen, and then choose the new report utilizing the Report Lookup feature.



For all Groups, once setup is complete, click Save and Close.

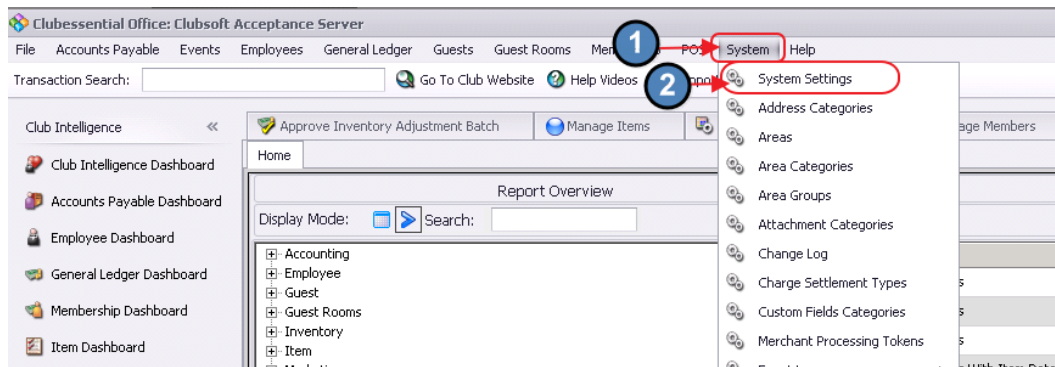


## Sync Groups to Website

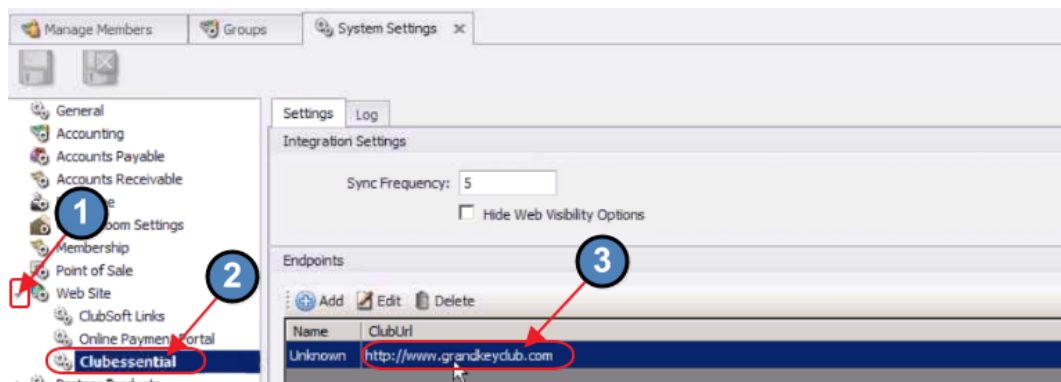
Once Groups have been established in Office, they will need to be set to Sync to the Website.

To set the Groups to Sync, navigate to the following:

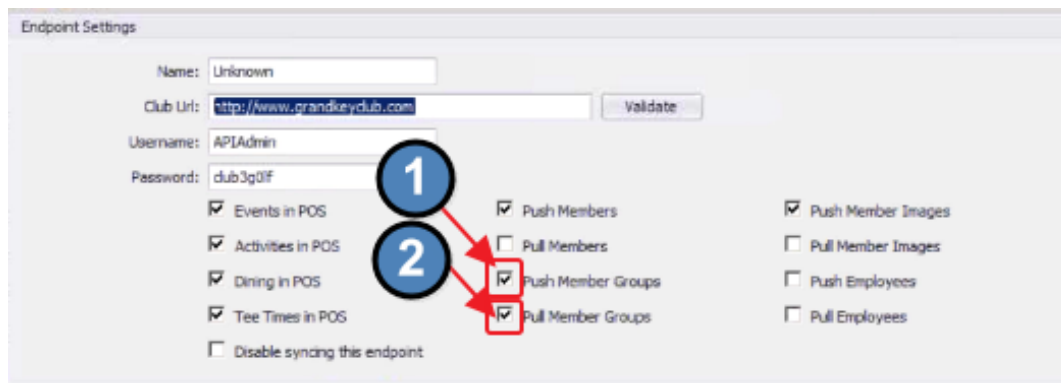
- 1) Click on "System"
- 2) Select, "System Settings"



Next, click to expand the Web Site section, click on Clubessential, and then double-click on the Cluburl link.



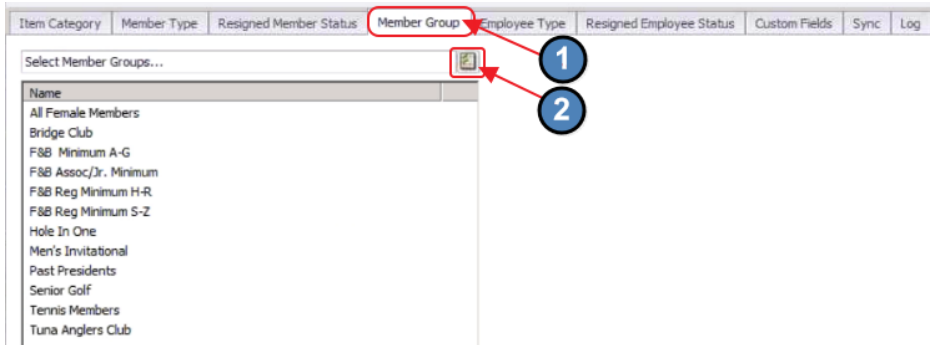
Ensure the "Push Member Groups", and "Pull Member Groups" options are checked.



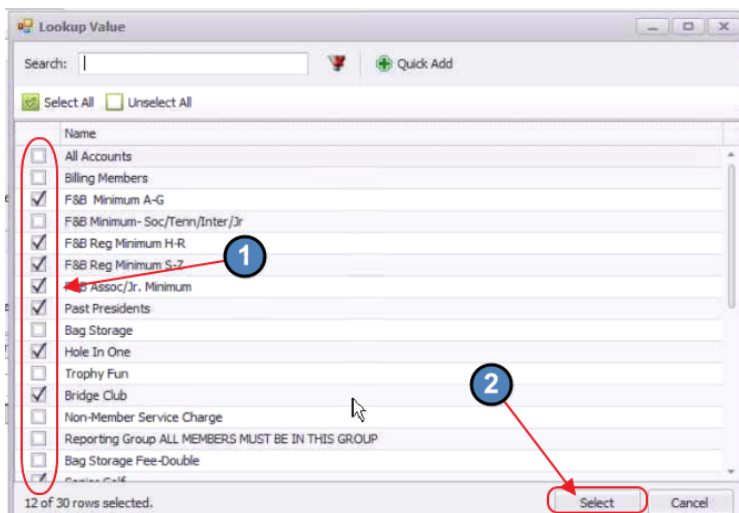


Next, ensure the Group is added to the Groups to Sync List.

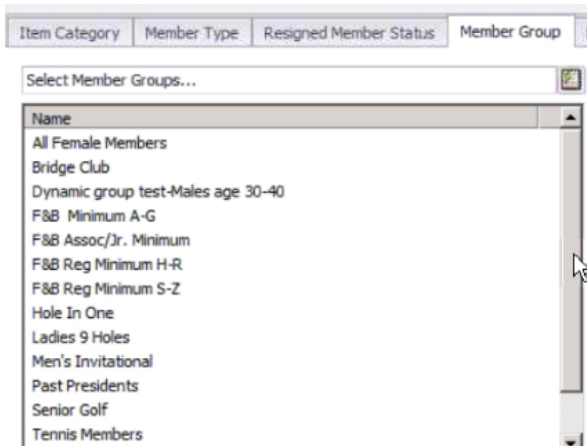
Click on the "Member Group" tab, and then click the Group selection box to choose Group and add to the list.



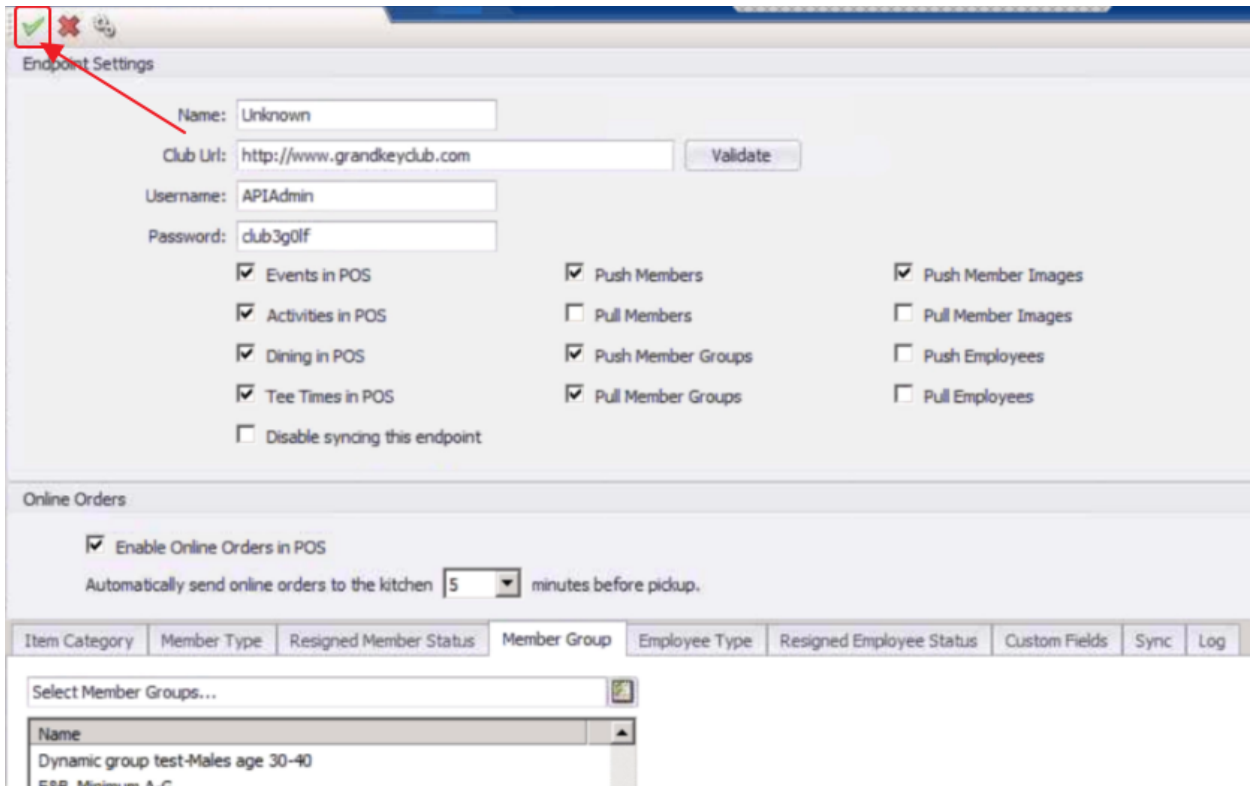
Designate Groups to Sync, and then click Select. A check mark next to the Group indicates the Group will be synced.



Once selected, the Group will then display in the Group list, and will Sync to the Website.

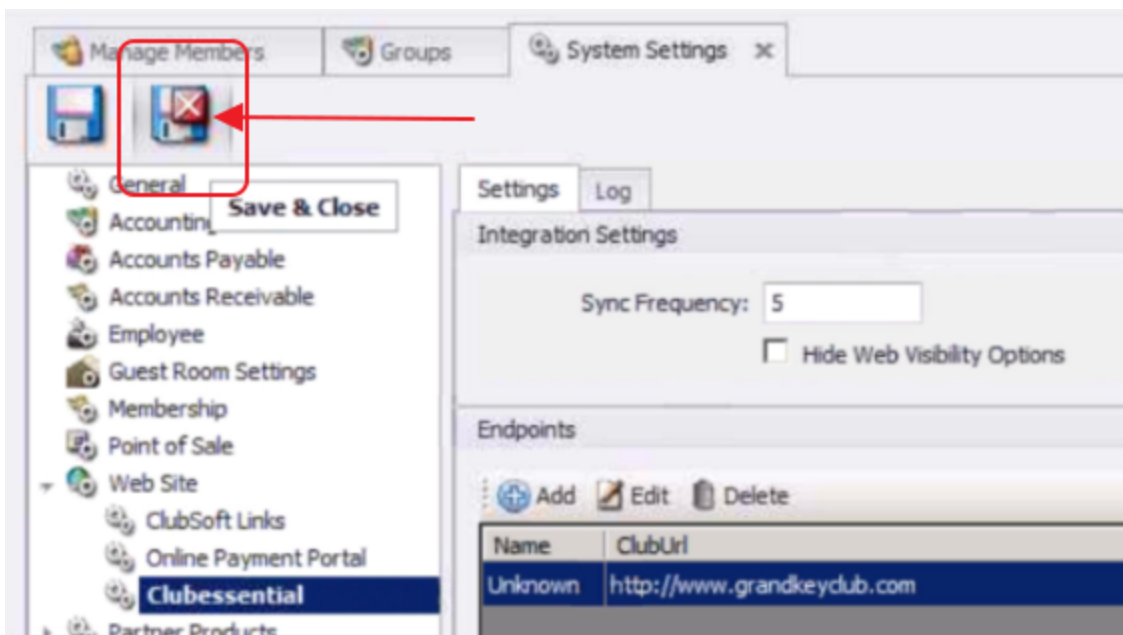


Once finished, click the Accept Changes (Green Checkmark) in the top left corner of the screen.



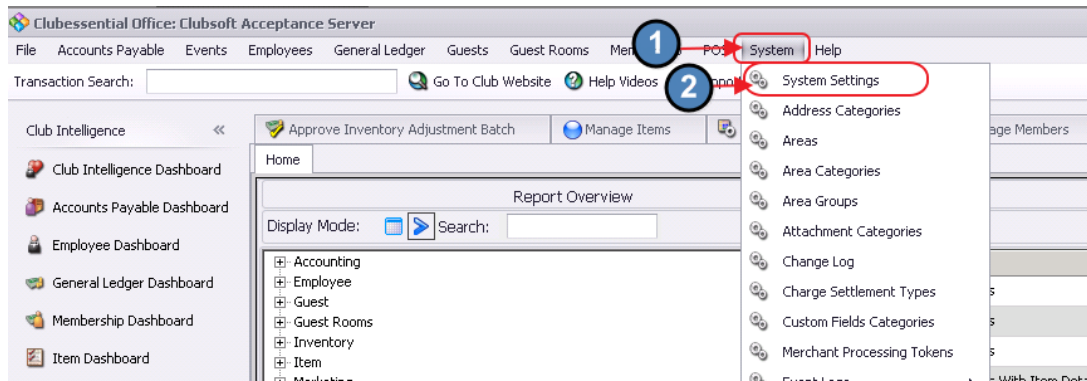
Then, click the Save and Close icon on the System Settings Screen to save changes.

**Note:** This save must be done, or changes on the prior screen will be lost!

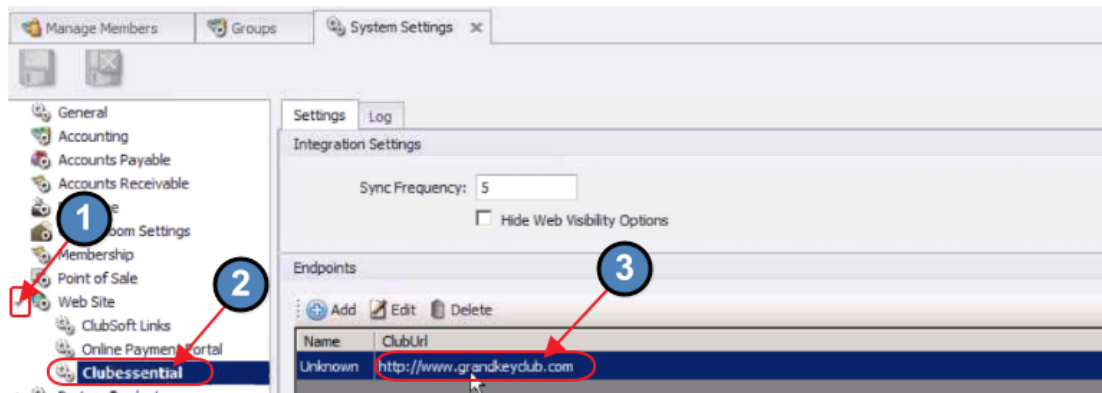


Once changes have been saved, the Sync will automatically run every (5) minutes.

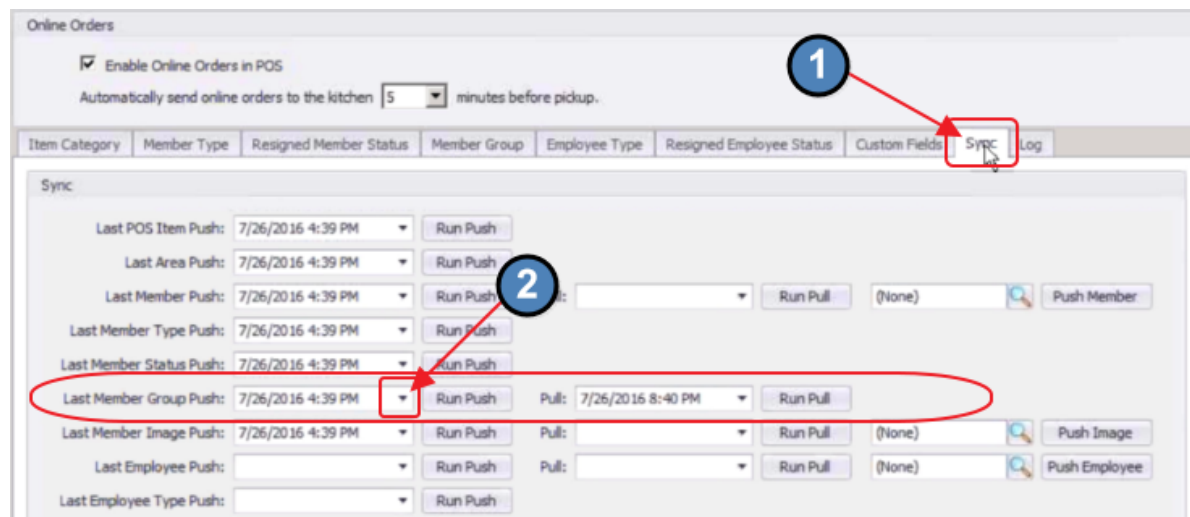
To force a Sync sooner than the auto-sync runs, go back into **System, System Settings**.



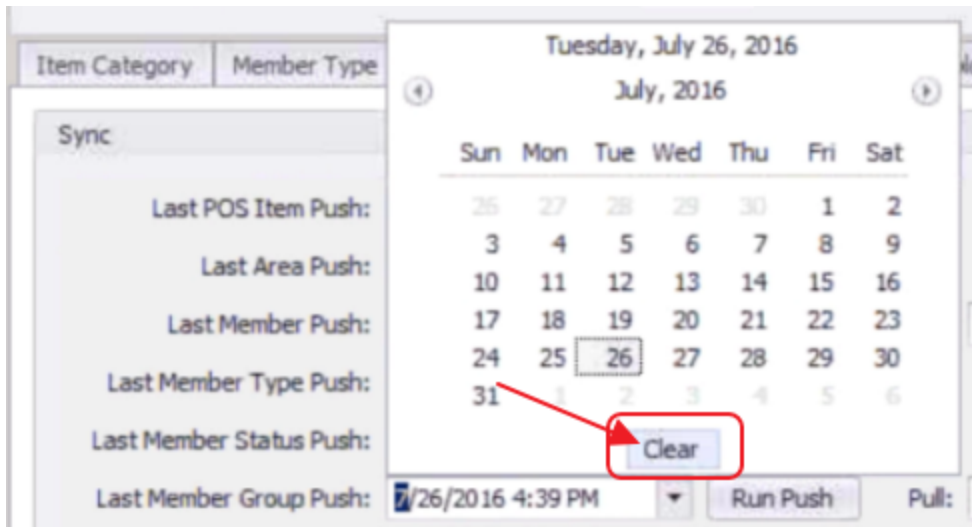
Click to expand the Web Site section, click on Clubessential, and then double-click on the Cluburl link.



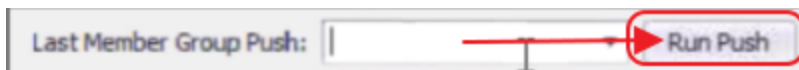
Click on the Sync tab. The times of the latest Member Group Push (from Office to the Website), and Pull (from Website to Office), are listed. Click on the arrow next to the time to launch a Calendar with the Clear button. (Note: Same process could be done for Pull Option).



Click, "Clear" to empty the date and time field.

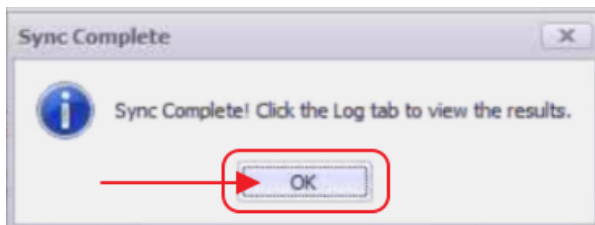


Once date has been cleared, click the "Run Push" button to initiate the Sync from Office to the Axis-Website.

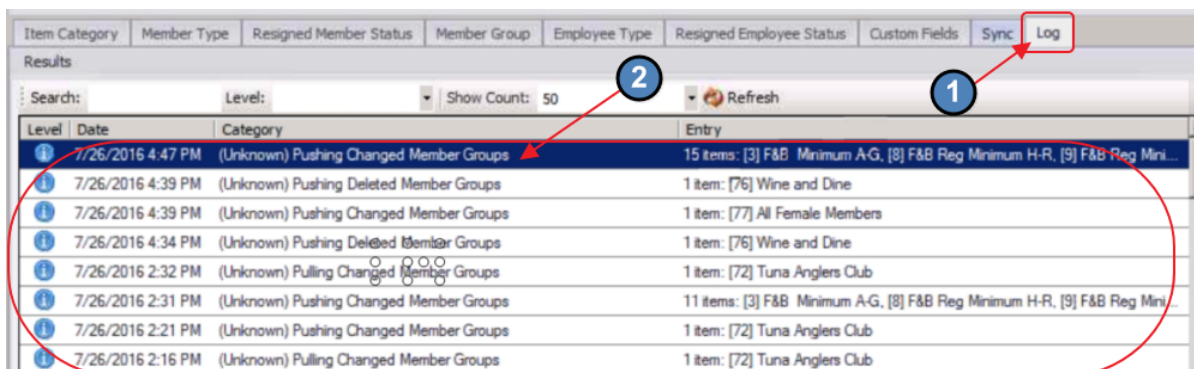


The Sync process could take a couple of minutes depending on the number of Groups set to Sync.

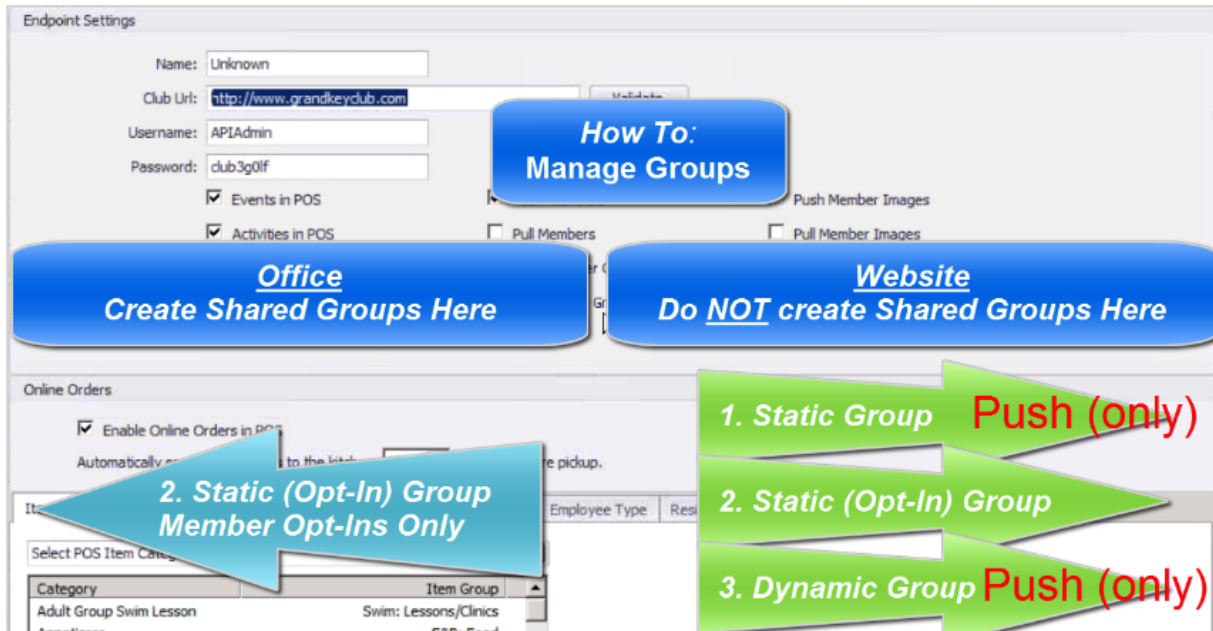
A Confirmation message will appear upon Sync completion. Click "OK" to continue.



Click the Log Tab to review the results of the Sync. Double-click on the line in the detailed grid for more information on the Sync.



**Important Note:** The only information that will be pulled from the Website back to Office, is the Membership tied to Members who join/opt-in to a Static Opt-In Group from the Website. All other Group data will be pushed from Office to the Website.



The screenshot shows the 'Endpoint Settings' and 'Online Orders' sections of a software interface. Annotations include:

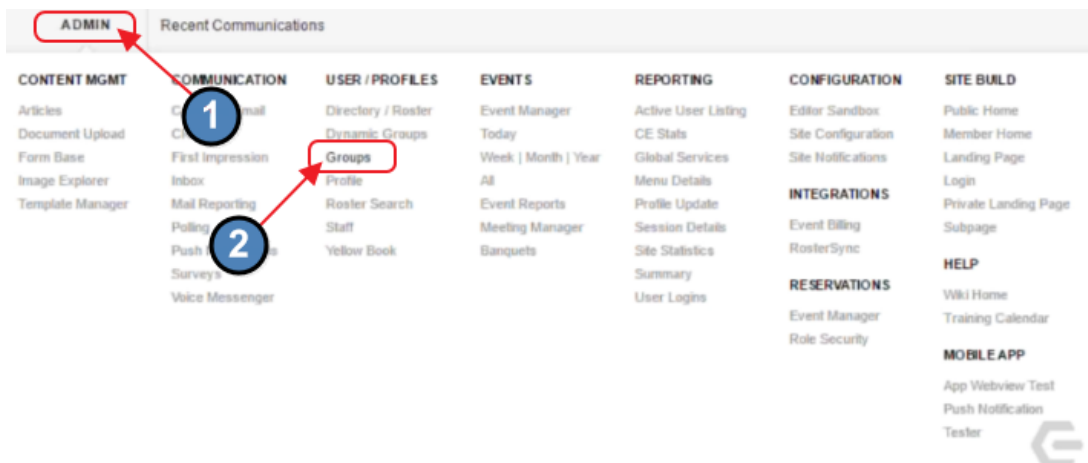
- How To: Manage Groups** (blue box) pointing to the 'Website' field.
- Office Create Shared Groups Here** (blue box) pointing to the 'Office' field.
- Website Do NOT create Shared Groups Here** (blue box) pointing to the 'Website' field.
- 2. Static (Opt-In) Group Member Opt-Ins Only** (light blue arrow) pointing to the 'Online Orders' section.
- 1. Static Group Push (only)** (green arrow) pointing from the 'Online Orders' section to the 'Website' field.
- 2. Static (Opt-In) Group** (green arrow) pointing from the 'Online Orders' section to the 'Website' field.
- 3. Dynamic Group Push (only)** (green arrow) pointing from the 'Online Orders' section to the 'Website' field.

## Axis-Website

### View Groups in Website

#### As an Administrator (View Groups and Send Emails)

Once logged in to the Website as an Administrator, click the Admin Toolbar, and choose the Groups option.



The screenshot shows the 'ADMIN' toolbar with various menu items. Annotations include:

- 1** (blue circle) pointing to the 'COMMUNICATION' menu item.
- 2** (blue circle) pointing to the 'Groups' option under the 'USER / PROFILES' menu.
- A red box highlights the 'Groups' option.

The Groups tab will display all Groups in the system.



All Groups Synced from Office will show "Office" in the Synced tab. The other Groups listed are Website only Groups, and are not shared with the Office system. Remember that Office Groups cannot be managed from the Website. All changes to the setup or Membership (other than Members opting in to a Static Opt-In Group) must be made in Office.

Inclusion Groups		Exclusion Groups		Included Count	Opt In?	Synced?
Group Name	Description					
		0				
		0				
		0				
		0				
2013 New Residents		0				
2013-2014 New Golf Members		0				
Activities Tab View		0				
All Female Members		1420				Office
All Female Members		99				Office
Bridge Club		60				Office
Committee Members	committee members	3				
Dynamic group test-Males age 30-40		118				Office
F&B Minimum A-G		208				Office
F&B Assoc/Jr. Minimum		58				Office

Additionally, Opt-In Groups are designed with a check in the "Opt In" column, like the Wine and Dine Group below. For Groups shared with Office, this feature must also be managed from Office.

Inclusion Groups		Exclusion Groups		Included Count	Opt In?	Synced?
Group Name	Description					
		0				
Wine and Dine		2		<input checked="" type="checkbox"/>		Office

To send an email to all Members of a Group, click on the Group name.

F&B Reg Minimum S-Z	Members with Childred	119	⌵	Office
Family Members		0	⌵	
Hole In One		640	⌵	Office
Junior Golf Camp 2015	All children who participated in Junior Golf Camp in 2015	12	⌵	

Notice the Group Name and Group Members are returned. Click "Send Group Email" to launch the Email Composing screen.

INBOX Mail Reporting

**Inbox** Compose Drafts Filed Sent Scheduled Groups Dynamic Groups Phone

Edit Disclaimer Text

« Back To Static Groups

Group Name: Hole In One 1

Description

Group Type: Office

640 total members included in this group are shown below Show All | Export Group

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
Last Name		First Name		Email												Secondary Email		Expired							
Aaron		Duane																⌵							
Abbott		Rusty																⌵							
Abrams		Mandy																⌵							

2 [Send Group Email](#) | [Edit Group Info](#) | [Group Update Log](#) | [Delete Group](#)

Compose Email.

INBOX Mail Reporting

**Inbox** Compose **Drafts** Filed Sent Scheduled Groups Dynamic Groups Phone

Edit Disclaimer Text

Recipients

- Members <Click to Add Members>
- Staff <Click to Add Staff>
- Static Groups Hole In One
- Dynamic Groups <Click to Add Dynamic Groups>
- Events <Click to Add Events>

Subject

Body

HTML Plain Text Text Message

## As a Member (Opt-In to a Group)

When a Member enters the site, navigate to “My Profile” to view available Opt-In Groups.

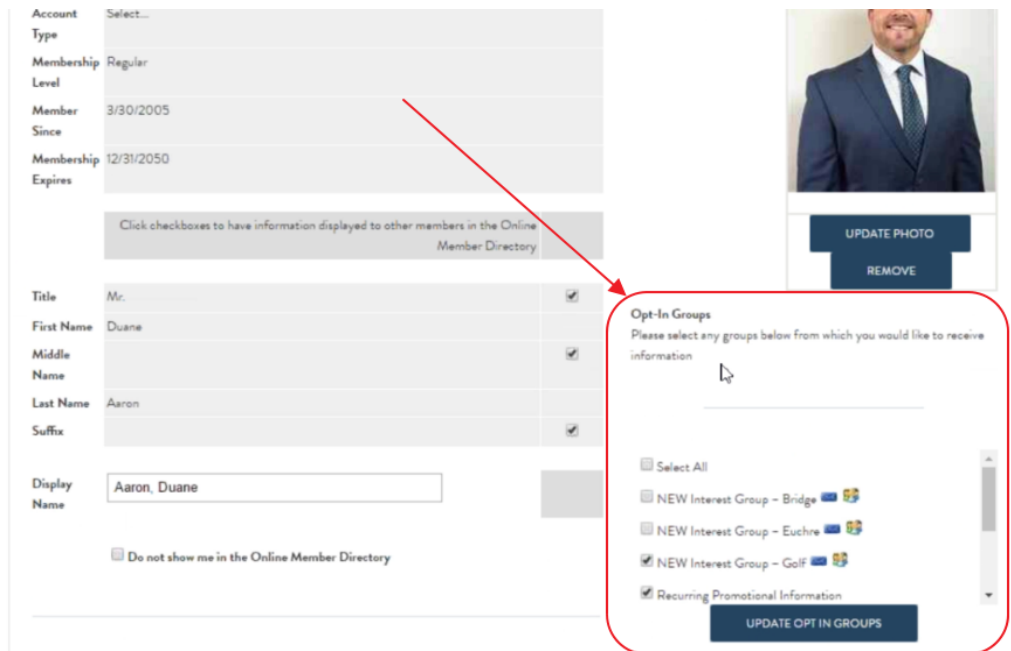


Member will land on “My Profile” tab.

## DIRECTORY



Opt-In Groups will appear under the Member Profile Picture.





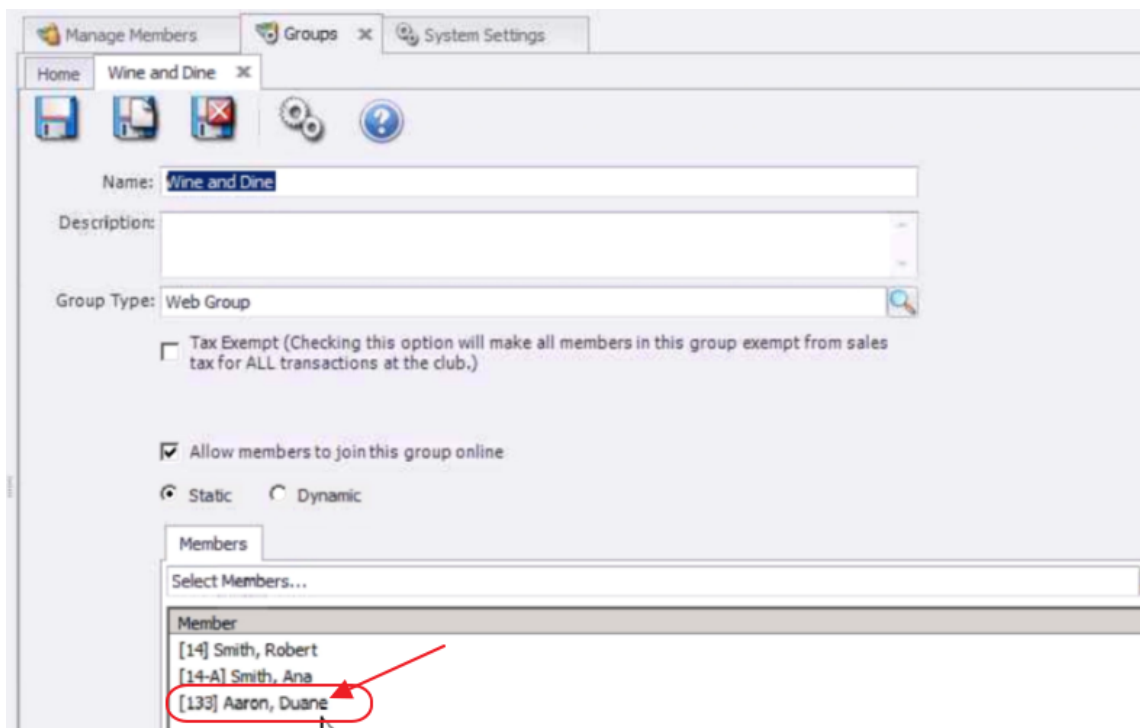
To opt-in to a Group, click the box next to the Group name (so that a checkmark appears in the box), and click, "Update Opt In Groups."



Upon next Sync, Member will be added to the Group within Office.

**Reminder:** This is the only data that is pulled back to Office.

Once synced, Member appears in Group in Office.



## Common Questions and Concerns

Why aren't the changes I made to a Group on the Website showing up in Office?

Other than Membership Adds of Static Opt-In Groups, all Groups must be created and administered from Office to ensure all changes sync appropriately with the Axis-Website.

## Best Practices

Create and Administer all Shared Groups in Office to ensure proper syncing with the Website.