

Member Maintenance

Member maintenance is done using #5 from CFMNUA or X. The different screens can be blocked out from different users by security codes.

Command options available..

CF 1-End of Job	CF 3-Add't Membership	CF 5-Groups	CF 7-Collections
CF 2-New Member	CF 4-Add't Membship 2	CF 6-Services	
CF 8-Accounting	CF10-A/R Detail	CF13-Credit Rpt	CF15-Search
CF 9-Contributor	CF11-A/R Tranauto	CF14-Sales	
CF16-Media	CF18-Seminar Entry	CF19-Member Individual	

CMD 2 screen of member maintenance. This contains the primary member's information.

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610A  NJ
Member #: 990 SPECIAL      EXP PGO CONSUMER EQUIFAX Next Mbr#: 990
      Customer Type: R      Basic Held By:
      Salesman: 10 Multiple Members:

Basic Company Data
      Name: DATA DESIGN INC      Sort: DATA DESIGN INC
      AKA/DBA: DDI
Mailing Address: P O BOX 697
      City/St: NORMAN OK      Zip: 73070 0697
Street Address: 2408 TEE CIRCLE
      City/ST: NORMAN OK      Zip: 73072 0000
      Attn: NINA JONES      Title: BOSS
2nd Rep: WJF      Referd: YP Yellow Pages      00000
3rd Rep: Ms Kitty      Dear: SOMEONE
E-Mail: ddi@datadesigninc.com
      Phone: 405 321 0354 Ext:      Roster Print: (Y/N)
      Fax: 4053609202      SIC Codes:
Category: SERV      Bus.Type: D Contractors, Service Organizat
      Area: AA      Location: A      National Number:      County:
Resigned:      Date Resigned:      Reason Resigned:
```

CMD 3 screen (contains contract information and passwords)

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610G  NJ
                SPECIAL      EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC                      Next Member:  990

Membership Billing:      Enrolled:  73193  Renewed:  30102
  Freq: M Renew Month:  5      Dues Amount:  2300

Report Contract:      Renewed:
  Freq: M Renew Month:  7  Size:  50  Price Code: 00  Price/Report:  1600
  Contract size:      Supplement:  250  Carry Over:  50
  Carry Over %:      L/Y Size:
  Contract Date:  40904

Experian Contract:  Freq: A  Renew Month:  8  Size:  10  Amount:  2500
OCS Contract:      Freq: A  Renew Month:  1  Size:  20  Amount:  3000
Call Code: A      Terms:
  X=Don't Print Memb#: X      X=No Mnt P=Pvt:      Media Groups: E
  TRW Contributor #:  923456  TRW Subs #:      Equifax #:  324LZ01195
  Password: DDI      UAI Password:      Contributor Type:
X=T/User X  X=D/Sheet  X=L/Sheet X  X=Disclosure  X=D&B X  X=GR Inter
-----
```

CMD 4 screen (Additional member information)

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610B  NJ
                SPECIAL      EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC                      Next Member:  990
-----
                Collections      |      Credit Reporting
njx      Attn njj
405 321 0354 #:      FX 4053609202  Phone 405 321 0354 #:      FX 4053609202
-----
  Officers: Name      Title      Code
  1. officer 1
  2. officer 2
  3. officer 3
-----
General Information:
  general 1

  PO# 123456 Item abcdefg-998877-A
-----
```

CMD 5 screen (Groups) (a member can be in up to 10 groups)

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610C  NJ
                SPECIAL          EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC                      Next Member:  990
Groups
AA TEST GROUP (AA)      Mth Qty Frq Amount Bill Lun Resign-Reason Renewed
AC Test group (AC).      2   1  M   750.00
J TEST GROUP P          3   1  M
                        1

-----
Enter Group Code to Change or Add
```

Maintain a member's group information.

A group can have the primary contact overridden, and 3 additional contacts added.

If the media is specified, this will override the group media delivery selected on the CMD 3 screen.

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610H  NJ
                SPECIAL          EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC
-----
GROUP:  AA TEST GROUP (AA)

Renewal Month:  2      Frequency:  M                      Non-Bill:
Quantity:  1      Override Amt:  75000      Number of Lunches:
Bill Type (C/A):  A      Media:  E                      Renewed Date:
Discount (Y/N/G): Y      Discount Amt:  500      Date Enrolled:  40999
Attention      Name      Phone      Ext      Fax
Override:  Nina Jones      4053219801      14      4053218111
E-Mail:  ddi.groupdat@datadesigninc.com
Additional 1:  1st attn line (roster).      5743219802      1234      4053218222
E-Mail:  willie.roster1@datadesigninc.com      R/E Code:  B
Additional 2:  2nd attn line (roster).      5743219803      4053218333
E-Mail:  test2.roster2@xxxxxxxxxxxxxx.com      R/E Code:  B
Additional 3:  3rd attn line (roster).      5743219804      4053218444
E-Mail:  test3.roster3@xxxxxxxxxxxxxx.com      R/E Code:  B

Resigned Date:      Resigned Reason:

CF12-Return (No Save)  CF13-Delete
```

Assign a member to services (CMD 6 screen).

Services are items set up for billing that are non groups.

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610D  NJ
                SPECIAL          EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC          Next Member:  990
Service                Mth Qty Frq   Amount Bill  Resign Reason Renewed
LS Legal Subscribers      3   1  S    300.00
OR Online Roster          1
-----
Enter Service Code to Change/Add
```

Maintain Service information

```
Date: 9/10/06      Customer Maintenance/Inquiry      MB610H  NJ
                SPECIAL          EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC
-----
SERVICE:  OR Online Roster

Renewal Month:          Frequency:          Non-Bill:
  Quantity:  1          Override Amt:          Number of Lunches:
Bill Type (C/A):  A          Media:          Renewed Date:
Discount (Y/N/G):  Discount Amt:          Date Enrolled:  42705
Attention      Name          Phone      Ext      Fax
Override:
  E-Mail:
Additional 1:
  E-Mail:          R/E Code:
Additional 2:
  E-Mail:          R/E Code:
Additional 3:
  E-Mail:          R/E Code:
  Password:  DDI          Password Last Changed: 052705
Resigned Date:          Resigned Reason:

CF12-Return (No Save)  CF13-Delete
```

Display collection summary and maintain collection codes. (CMD 7 screen)

```

Date: 9/10/06      Customer Maintenance/Inquiry  MB610F  NJ
                SPECIAL      EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC                Next Member:  990

Open Claims:
Number:      183      Jan, 06
Amount: 14249279.77  Feb, 06
                                Mar, 06      1      125.00      14.00
                                Apr, 06
Collection User: X      May, 06
Collections Gross:      Jun, 06
Collections Rate:      Jul, 06
X=Omit from C/Rept:   Aug, 06
X=View Comments:      Sep, 06
                                Oct, 05
                                Nov, 05
                                Dec, 05

-- Submitted -----  Commission
Count      Amount      Amount

```

Display A/R information.

```

Date: 9/10/06      Customer Maintenance/Inquiry  MB610E  NJ
                SPECIAL      EXP PGO  CONSUMER EQUIFAX
Member #:  990  DATA DESIGN INC                Next Member:  990
                DDI
Bill to:
-----
Same:      Billing Address
Addr: TEST BILLING ADDRESS
        NORMAN OK      73070 0697
Attn:
Phone: 405 321 0354 #      Fax 4053609202
EMail: willie@datadesigninc.com
-----
A/R Totals
Current:
1 - 30:
31 - 60:
61 - 90:
+90:
Balance:

Date      Amount      Check
Last Payment: 10/06/06      1.11      12345      X=Detail on Billing:
              9/01/06      10.00      222222
              8/01/06      11.00      333333      MDFS Member #:
              7/01/06      12.00      444444      Final Statement:

```

From the membership screens, the user can exit to:

Contributor maintenance using CMD 9 (CFMNUM #20)
 Accounting detail using CMD 10 (CIMNU1 #8)
 Credit Reporting usage using CMD 13 (CFMNUM #15)
 Sales tracking using CMD 14 (CSMENU #1)

Member search using CMD 15 (CFMNUA #4)

Media override CMD 16

This allows the member to specify how they want to receive different types of media sent by the association.

Options are:

- Print
- Fax
- Email
- None

```
MB630-1                Member Media (Delivery)          Date  9/10/06
NJ                      Maintenance                    Time 15:42:51

DATA DESIGN INC
Type option press enter.
  1=Add   2=Change  4=Delete  5=Display

pt Code/Type Description

  ALT  F   Alert List
  ARS  E   A/R Statement/Invoice
  DSC  E   Discussion List
  GBR  E   Group Book of Reports
  GPA  E   Group Alert List (NSF)
  LGL  E   Legal Bulletin
  MRC  E   Monthly Recap Report
  OFL  F   Online Flash
  PDB  E   Past Due Book
  PDI  E   Past Due Inquiry
  ROS  F   Rosters
  RPT  P   Credit Reports
  TKT  F   Tickets
F3=Exit   F4=Prompt Codes   F12=Cancel
```

```
MB630-2                Member Media (Delivery)          Date  9/10/06
NJ                      Maintenance                    Time 15:44:26
                                           Mode: Change

Member. . . . 00990 DATA DESIGN INC
Media Code. . . LGL Legal Bulletin

Media Type. . . E (P=print, F=fax, E=email, N=none)

Media Attention . . . 990 Legal (MEMMEDIA)
Media E-Mail. . . . willie@datadesigninc.com
Media Fax#. . . . .

Daily/Weekly code . . D (D=daily, W=weekly)

F3=Exit   F12=Cancel
```

Seminar Attendee Maintenance CMD 18

```
SM001-1                Seminar Attendee                Date  9/10/06
NJ                      Entry                          Time 14:59:54
DATA DESIGN INC
Type option press enter.
  1=Add  2=Change  4=Delete  5=Display

pt Seq Attendee Name                Member Rep/Off Name

  01 officer 1                      officer 1
  02 officer 2                      officer 2
  03 officer 3                      officer 3
  04 Buford T. Justice
  R1 NINA JONES                    NINA JONES
  R2 WJF                            WJF
  R3 Ms Kitty                      Ms Kitty
  R4 Mr Ralphie

F3=Exit   F5=Refresh
```

```
SM001-2                Seminar Attendee                Date  9/10/06
NJ                      Entry                          Time 15:34:57
Mode: Change

Member . . . . . 990 DATA DESIGN INC
Sequence . . . . . 01 Officer #1

Attendee name . . . . officer 1
Designation 1 . . . . CPA1
Designation 2 . . . . CPXA
Designation 3 . . . . CPZA
Continuing Ed units . . . . .00
```


Individual Member setup, for multiple members within one membership CMD 19

If an individual member is set up, they have their own password, and sign in to the on line functions with their initials.

Then, their polling requests will come to them instead of the primary member.

```
MB660-1                Member Individual          Date 9/10/06
NJ                    Maintenance              Time 15:49:48

Member#: 00990 DATA DESIGN INC
Initial:

Member
Init  Name
NJ   Nita Jones (NJ Individual)
WJF  Willie (WJF Individual)
```

```
MB660-2                Member Individual          Date 9/10/06
NJ                    Maintenance              Time 15:50:47
                                           Mode: Change

Member#: 00990 DATA DESIGN INC
Initial:  NJ

Name: Nita Jones (NJ Individual)
Address: 987654 Street
City/St: Norman, OK           Zip: 73071 1234
E-Mail: nj@datadesigninc.com
Fax: 4053601234
Password: TEST

Groups:   AA   AC
Preference:      F

Preference:
Credit Report  F   Watch Dog      F   Tickets          F
Legal          F   Online          F   Correspondence  F
Newsletter     F   Flyer          F   Message          F

Preference codes: P=Print, F=Fax, or E=Email

F3=Exit      F12=Return    F23=Delete
```