

# Working with MemberZone Home Builders Edition and WMS

# Introduction

- MemberZone Home Builders edition allows HBA's to manage their HBA Members from New Membership to Cancellations
- The WMS export tool assists the Home Builders Associations with exporting data from MemberZone to the National Home Builders Association to synchronize register new membership, renewals, cancellations and updates

## “Standard” Membership Types

**Builder Members:** Builders are the heart and soul of NAHB. Builder members are directly involved in building homes. They include small-volume builders, production builders, light commercial builders and remodelers

**Associate Members:** These are the people who sell lumber, windows, appliances, etc. or offer services such as mortgage finance.

**Affiliate Members:** This category enables the employees of builder and associate members to reap the rewards of NAHB membership at a fraction of the cost

# NAHB Council Memberships

## Examples:

50+ Council: Is the voice of the 50+ seniors housing industry and a leading source of information and research on the active adult, independent living, service-enriched, and assisted-living markets.

Remodelers Council: Represents more than 53,000 NAHB members who are involved in the remodeling industry. Helps members strengthen and protect their businesses through access to education, resources, information, discounts and networking opportunities

Multifamily Council: Represents NAHB members who construct, develop, own and manage market-rate and affordable rental apartment buildings, condominiums for sale, student rental housing and mixed-use development projects

## Learn More:

<https://www.nahb.org/en/industry-professionals/how-to-join/membership-types/join-a-council.aspx>

## Adding Member/Reps

Both Member and Rep information are needed to identify the new member as one that should be exported to NAHB

For the Member: Enter either the NAHB Company ID **OR** at a minimum complete address information, and the Primary Business Activity Code

For the Rep: Contact Person ID and Membership Type **OR** complete address information and the Membership Type

*State and Country must be abbreviated per the data dictionary (i.e 2 letter abbreviations for states)*

# Terms

## Company Info – Identifies this Member Organization as an NAHB

NAHB Provided # for this Member

NAHB Provided Activity Codes

NAHB Provided # for this Tenant

**NAHB/WMS Information**

NAHB Company ID:

Primary Business Activity Code:

Primary Business Activity Code - OTHER:


HBA Number:

Secondary Business Activity Code:

Tertiary Business Activity Code:

Dollar Volume Code:


Number of Units Code:



# Terms

## Rep Info

**NAHB/WMS Information**

Contact Person ID (PIN):	<input type="text" value="56898"/>	NAHB Provided # for this Member
Subscription ID (MSN):	<input type="text" value="65442"/>	NAHB Provided # for this Membership 
NAHB Membership Type:	<input type="text" value="Associate"/>	NAHB Provided Name for this Membership Type
Spike Person ID:	<input type="text"/>	NAHB PIN for the person sponsoring this Member
Spike HBA Number:	<input type="text" value="12345"/>	NAHB Company ID of the person sponsoring this Member

# Groups

Group “Memberships” are defined by belonging to a group and invoicing for the group assigned fee

## Joey Lake

### 50+ Council

This record is associated with **Joey Lake** (Lakes Homes Construction).

**Company:** Lakes Homes Construction

**Phone:** (218) 546-5413

**Fax:**

**eMail:** lakes@mailinator.com

Disabled in group

**Mailing Address:** 21748 S Raider Court  
Nisswa, MN 56468

**Group Role:**

**Notes:**

Fee Items for Joey Lake				
Name	Description	Frequency	Next Billed	Amount*
There are no fee items associated with this group.				

\*The annual amount due is listed in the **Amount** column for recurring fee items.

#### Custom Fields

[▶ Add/Edit Custom Fields](#)

#### Additional Information

50+ Council Subscription ID (MSN) :

50+ Council Spike HBA Number :

50+ Council Spike Person ID :

Save Changes

Close



# New Member/Renewal Fees

- In order for the system to properly recognize new members, and which have paid their renewals (and in turn need to be reported as renewals to NAHB/WMS) the fee items need to be identified on the WMS Settings tab
- If fees are to be split (i.e. local, state, national) set up Bundled Fees – allows for reporting income properly

## Fees for New Memberships and Renewals:

### For Builder, Associate, and Affiliate Memberships

Select any/all fee items that are used when billing members for renewals. The transaction queue will monitor for invoices containing the

- 1/4 Page Ad in Chamber Magazine
- 50+ Council Fee Item
- Brick at Veteran's Park
- Bundled Membership Fee
- CP - Membership Dues Fee
- CP - Training Fee
- CP - Training Fee Item
- Diamond Membership Package
- Gold Membership Package
- HBA Fee Item
- KR Membership Dues
- Membership Setup
- MJ - Membership Dues
- New Membership Fee
- Platinum Membership
- Renewal Membership Fee Item
- Silver Membership Package
- State Membership Dues
- Training Bundle
- Training Bundle

# Identifying New Member/Renewals

- Members will be exported as a New Member if:
  - The Member is currently marked with 'Active' or 'Courtesy' member status.
  - The Member must have one Representative with a paid invoice (containing the fee items identified on the WMS Settings tab)
  - The Member data field for 'HBA Number' must have a value
  - EITHER the Member data field for 'NAHB Company ID' must have a value OR All the Members General tab info is filled out as thoroughly as possible
-

# Export Criteria – Renewal

## Select Renewal Strategy on the Settings tab

### Additional Transaction Finder Settings:

Some associations manage multiple HBAs and record which HBA a membership belongs to individually on the General tab of the Members module. If your association manages only one HBA you can enter the HBA# here and leave the HBA# blank in the General tab and the value entered in this field will be the assumed HBA# for all transactions put into the export file.

Default HBA Number:

Some associations have differing definitions of what constitutes a "Renewal" for NAHB Membership.

Many associations report a renewal to WMS in the month that the appropriate fee item has been paid. When this setting is set to **Strategy 1** the queue/transaction finder will look for invoices in the given month that have paid fee items matching your selections in the "Fees for New Memberships and Renewals" section below and report those as renewals (or new members if they have no MSN# currently.)

**Strategy 2** differs slightly such that renewals will be triggered when appropriate fee items have been paid in recent months and the current/given month matches the member's assigned renewal month. Under Strategy 2 if a member pays their renewal invoice in January but their renewal month is February then the renewal transaction record will be put into the February queue (instead of January).

Renewal Search Strategy:


## New Member/Renewal Strategies

**Strategy 1** the system looks for invoices in the given month that have paid fee items matching selections in the "Fees for New Memberships and Renewals" section

**Strategy 2** the system looks for appropriate fee items, "Fees for New Memberships and Renewals" section, that have been paid in recent months and the month selected for the export matches the member's assigned renewal month

# Export Criteria – New Member

## New Member

<b>New Member:</b>	JJ Contractors	Take No Action
 <a href="#">Less</a>	Jane Pellier	
Notes:	<input type="text"/>	<input type="button" value="Save"/>
<b>The following issues were found when examining this transaction and should be reviewed and corrected before export:</b>		
Missing Contact (Rep) Address Line 1		
Missing Contact (Rep) City		
Missing or Invalid Contact (Rep) State/Province		
Missing Contact (Rep) Postal Code		
Missing Company Address Line 1		
Missing Company City		
Missing Company State		
Missing Company Postal Code		
Missing Company Primary Business Activity Code		

## Export Criteria – Renewal

Members will be placed into this section of the export if they meet the following criteria:

- The Member data field for 'HBA Number' must have a value
- The Member data field for 'Subscription ID (MSN)' must have a value
- Must have a paid invoice for the renewal fees in the report range

***THERE MUST BE APPROPRIATE FEES SELECTED FOR THE SYSTEM TO IDENTIFY RENEWALS***

## Export Criteria – Cancellation

Members will be placed into this section of the export if they meet the following criteria:

- The Member data field for 'HBA Number' must have a value
- The Member data field for 'Subscription ID (MSN)' must have a value
- The member must have been marked as Dropped during the **report date range**
- The member must currently have a status of "Dropped/Inactive"

### HBA Example 2

## New Contact

This transaction will associate a new owner with a membership

The owner of the membership, has either a Business or Associate Membership

If the person who should serve as the new owner contact already exists with NAHB, then their PIN can be provided in the Person ID field. If they do not exist, then all of the required contact information fields must be populated with information about the new person



## Company Info

Update the information for the existing company associated with a membership

To confirm the company that should be modified, NAHB requires the Company ID field to be populated with the identifier for the company to be modified

The WMS will compare the provided company ID with the company associated with the membership to confirm that they match. Additionally, all required company information fields must be populated since this company's information is being updated

## Contact Information Change

This transaction will update the information for the existing contact for a membership

To confirm the contact that should be modified, NAHB requires that the Person ID field be populated with the contact's PIN

The WMS will compare the provided PIN with the contact on the membership to confirm that they match. Additionally, all required contact information fields must be populated since this person's information is being updated

# Creating the Export File

<input checked="" type="checkbox"/>	<b>New Member:</b> More	Loyd's Concrete Loydd Allen	Take No Action ▼
<input checked="" type="checkbox"/>	<b>New Member:</b> More	Loyd's Concrete Gale Alan	Take No Action ▼
<input checked="" type="checkbox"/>	<b>Renewal:</b> More	Jones Construction Co., Inc. Laura Marson	Take No Action ▼


**Process Queue**


Set All To: Add to Batch... ▼

**Set** [ ] ▼

→ Name Batch

# Creating the Export File

Need Help?  [Add transaction manually](#)

 <b>Renewal:</b> <a href="#">More</a>	Jones Construction Co., Inc. Laura Marson	<input type="text" value="Add to Batch..."/>
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**Process Queue** Set All To:



Or Name Batch

# Export File for WMS

Process Queue

Find Batch

Export for WMS

←
**Batches**

Batch Name:  Find Batch

Reload

Need Help? [?](#) [Add transaction manually](#)

Line 1	Johnson Associates	<input type="checkbox"/>
<b>New Member:</b>	Mark Johnson	
<a href="#">More</a>		
Line 2	HBA Example 1	<input type="checkbox"/>
<b>New Member:</b>	Joe Gotham	
<a href="#">More</a>		
Line 3	HBA Example 1	<input type="checkbox"/>
<b>New Member:</b>	Joe Gotham	
<a href="#">More</a>		
Line 4	HBA Example 3	<input type="checkbox"/>
<b>New Member:</b>	Ramone Louise	
<a href="#">More</a>		
Line 5	Gretna Example	<input type="checkbox"/>
<b>Renewal:</b>	Kara Alexander	
<a href="#">More</a>		
Line 6	Gothams	<input type="checkbox"/>
<b>Cancellation:</b>	Joe Gotham	
<a href="#">More</a>		
Line 7	Gothams	<input type="checkbox"/>

Download CSV
Export for WMS

Return Selected Transactions to the Queue

# Import Batch to WMS Errors

If errors occur when the file is imported to WMS – the errors will refer back to “error on line x”. Most errors are “missing” or “invalid” data

**WMS will reject the entire file if there is an error**

- **Batches**

Batch Name:

Need Help? [?](#) [Add transaction manually](#)

<div style="text-align: center; color: green; font-weight: bold; font-size: 20px;">✓</div>	Line 1	Loyd's Concrete Loydd Allen	<input type="checkbox"/>
<div style="font-weight: bold; font-size: 16px;">New Member:</div> <div style="color: blue; font-size: 14px;">More</div>			
<div style="text-align: center; color: green; font-weight: bold; font-size: 20px;">✓</div>	Line 2	Loyd's Concrete Gale Alan	<input type="checkbox"/>
<div style="font-weight: bold; font-size: 16px;">New Member:</div> <div style="color: blue; font-size: 14px;">More</div>			

# Import Batch to WMS Errors

## Find Batch

You can remove the offending li  
straight forward.

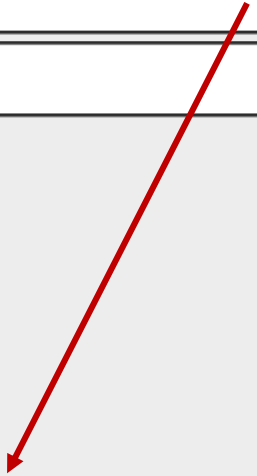
You may have to compare the m  
appropriately

- Batches

Batch Name: April Batch

Need Help? [?](#) [Add transaction manually](#)

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>Line 1</p> <p><span style="color: green;">✔</span> <b>New Member:</b> Loyd's Concrete</p> <p style="color: blue; font-size: small;">More</p> </div> <div style="text-align: left;"> <p>Loydd Allen</p> </div> <div style="text-align: right;"> <input checked="" type="checkbox"/> </div> </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="text-align: left;"> <p>Line 2</p> <p><span style="color: green;">✔</span> <b>New Member:</b> Loyd's Concrete</p> <p style="color: blue; font-size: small;">More</p> </div> <div style="text-align: left;"> <p>Gale Alan</p> </div> <div style="text-align: right;"> <input type="checkbox"/> </div> </div>



## Import Data from NHBA

Login to WMS and select Export Member Data. Select the members to download. Choose the comma-separated value (CSV) data format.

ChamberMaster “requires” nothing from the export from WMS, however, the import file must contain all columns, whether or not they are populated

On the WMS Import tab, you can click into an example file to view what columns must be present in the import file and in which order (MUST BE LOGGED IN AS ADMN)



## MZ File Processing

When the file is imported, choices can be made on how MemberZone will handle the incoming data:

- **If Blank:** ChamberMaster will only populate the field in MZ if the field is empty.
- **Don't Over-write:** If there is information in the field in MZ ChamberMaster will not replace the field with new information
- **Always:** ChamberMaster will write the information from the import file regardless of whether the field is populated or not

## How does MZ evaluate Incoming Data?

Multiple passes are made over the import rows looking at them in different ways to attempt to successfully match them to an existing record. An overview of the matching passes:

- Records with exact MSN number (Subscription ID) , FirstName, LastName, Email, and HBA number match
- CompanyName match, rep first/last match and HBA number match
- CompanyName match, mail address match, company phone match and HBA number match
- If after all matching attempts, the import record still doesn't line up with an existing record, it is assumed to be a new member and will be set to have a new record created. NOTE: Records with issues are sorted to the top of the preview list for evaluation

# Import Data from NHBA

**Personal Information for Tony Lane** [copy business information](#)

Prefix:  [edit prefixes](#)

First Name:\* Tony

Middle Name:

Last Name:\* Lane

Suffix:  [edit suffixes](#)

Contact Preference:\* eMail

Address: 1245 South Street

City: Anywhere

State: MN

Zip: 56441

Country: United States

eMail:

Comments: Created during a data import via the WMS Import Tool

Greeting:

Job Title:

Rep is currently **active** with this member. ([History](#))

Primary Contact

Billing Contact

Phone Preference:\* Work Phone

Work Phone: (218) 546-5413

Home Phone:

Cell Phone:

Alt. Phone:

Fax:

General CC eMails:

Billing CC eMails:

# Member Record Updates Report

- Records changed by System Administrator reflect changes made by the import file

**Member Update Activity**

[Clear Filters](#)

**Filter Options**

Member: [KK Contracting, LLC](#)

From:

To:

Change Type:

Changed by:

Dates listed below are based on the date recorded on the Central time zone server (GMT-06:00).

entries 1 - 8 of 8 Display  results per page.

Member Update Activity Report					
Member Name	Field Changed	Old Value	New Value	Date Changed	Changed By
<a href="#">KK Contracting, LLC</a>	MemCreated		Member Created by WMS Import Tool	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	Rep		Rep Created by WMS Import Tool	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	MemCustomField	HBA Number:	HBA Number:	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	MemCustomField	NAHB Company ID:	NAHB Company ID:	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	MemCustomField	NAHB Membership Type:	NAHB Membership Type: Builder	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	MemCustomField	Contact Person ID (PIN):	Contact Person ID (PIN):	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	MemCustomField	Subscription ID (MSN):	Subscription ID (MSN):	2/9/2018 - 04:07PM	System Administrator
<a href="#">KK Contracting, LLC</a>	Rep		Rep Created by WMS Import Tool	2/13/2018 - 11:01AM	System Administrator

[Print](#) [Download](#)

## WMS Export Transaction Types

- 1 - New Member
- 2 - Renewal
- 3 - Cancellation
- 4 - Contact Information Change
- 5 - New Contact
- 6 - Company Information Change
- 7 - New Spike
- 8 - Member Type Change

# WMS Export Membership Types

1 - Builder

2 - Associate

3 - Affiliate

27 - Sales & Marketing Council

31 - Commercial Builders Council

35 - Multifamily Council

39 - Remodelers Council

43 - 50+ Council

47 - Women's Council

## WMS Export Membership Status

Blank - Active

A - New Member

B - Reinstated

C - Cancelled

D - Cancelled

X - Expired

- I - Requested Cancellation
- J - Requested Cancellation
- Y - Requested Cancellation
- Z - Expired
- E - Pre-Paid
- F - Renewal
- G - Cancelled