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:

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

<table>
<thead>
<tr>
<th>NAHB/WMS Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NAHB Company ID:</strong></td>
</tr>
<tr>
<td><strong>Primary Business Activity Code:</strong> M1 Architecture</td>
</tr>
<tr>
<td><strong>Primary Business Activity Code:</strong> 22 OTHER</td>
</tr>
<tr>
<td><strong>HBA Number:</strong> 12547</td>
</tr>
<tr>
<td><strong>Secondary Business Activity Code:</strong></td>
</tr>
<tr>
<td><strong>Tertiary Business Activity Code:</strong></td>
</tr>
<tr>
<td><strong>Dollar Volume Code:</strong> Less than $500,000</td>
</tr>
<tr>
<td><strong>Number of Units Code:</strong> 26-100 Units Started</td>
</tr>
</tbody>
</table>

NAHB Provided # for this Member
NAHB Provided Activity Codes
NAHB Provided # for this Tenant
Terms

Rep Info

NAHB Provided # for this Member

NAHB Provided # for this Membership

NAHB Provided Name for this Membership Type

NAHB PIN for the person sponsoring this Member

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.
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.
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: 0

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

Many associations report a renewal to WNS 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 these 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: Strategy 1


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

The following issues were found when examining this transaction and should be reviewed and corrected before export:

- 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

New Member:
- Loyd's Concrete
- Loyd Allen
- Take No Action

New Member:
- Loyd's Concrete
- Gale Allen
- Take No Action

Renewal:
- Jones Construction Co., Inc.
- Laura Marson
- Take No Action

Process Queue

Set All To:
- Add to Batch...

Name Batch
Creating the Export File

Or Name Batch
Export File for WMS

Process Queue
Find Batch
Export for WMS
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.
Import Batch to WMS Errors

Find Batch
You can remove the offending line to re-export. WMS errors are straightforward.
You may have to compare the member records in WMS and MZ and update appropriately.
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

<table>
<thead>
<tr>
<th>Personal Information for Tony Lane</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix:</td>
</tr>
<tr>
<td>First Name: Tony</td>
</tr>
<tr>
<td>Middle Name:</td>
</tr>
<tr>
<td>Last Name: Lane</td>
</tr>
<tr>
<td>Suffix:</td>
</tr>
<tr>
<td>Contact Preference: eMail</td>
</tr>
<tr>
<td>Address: 1245 South Street</td>
</tr>
<tr>
<td>City: Anywhere</td>
</tr>
<tr>
<td>State: MN</td>
</tr>
<tr>
<td>Zip: 56441</td>
</tr>
<tr>
<td>Country: United States</td>
</tr>
<tr>
<td>Comments: Created during a data import via the WMS Import Tool</td>
</tr>
</tbody>
</table>

| Greeting: |
| Job Title: |
| Rep is currently active with this member. |

| Phone Preference: Work Phone |
| Work Phone: (218) 546-5413 |
| Home Phone:                 |
| Cell Phone:                 |
| All Phone:                  |
| Fax:                        |
| General CC eMails:          |
| Billing CC eMails:          |
Member Record Updates Report

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