New MA Online reports:

Below are brief descriptions from the designs of the new MA online reports that will go live with WEF's new AMS – Personify.

MA Address Label File

The purpose of this report is to give the MA the ability to push a button and produce a file output of their members. This report should display all active members who are not flagged with a bad address The report will be developed as an online report with a output that has the ability to be saved into multiple formats (excel and .csv). Fields are:

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address 1
8	Address 2
9	Address 3
10	Address 4
11	Salutation
12	Nickname
13	City
14	State
15	County
16	Country
17	Zip Code

MA Address Label Query File

The purpose of this query is to retrieve a listing of current active members of the MA. The query will be manipulated by each of the MA's to provide the information required per MA. While the MA Address Label File gives you all of your members, this one gives set of parameters that you can use to create subsets of your data. The output is the same as the MA Address Label File. You could use this report to select all student members or all members how joined or expired in the last month.

Parameters:
- Member begin date
- Member end date
- Membership category

MA Membership Campaign Report

The purpose of this query is to retrieve customer and membership demographic information for the MA's to conduct marketing efforts. You will be able to select a combination of parameters to create a report.

Parameters:
- Organization code
- Job Function code
- Key Focus Areas
- Gender
- Education Level
- Concentration codes

Output fields:

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address Type
8	Address 1
9	Address 2
10	Address 3
11	Address 4
12	City
13	State
14	County
15	Country
16	Zip Code
17	Organization Code
18	Job Function
19	Key Focus Areas
20	Number of Years in Industry
21	Date of Birth
22	Gender
23	Education Level
24	Concentration Area

MA Demographic Report

The purpose of this query is to retrieve customer demographic and membership related information on the MA members.   This report is very similar to the MA Membership Campaign Report above but instead of having to select parameters that will return a specific subset of your membership, the report will have all of your active membership and provide you with filters so that you can view subsets of your information. For example, if you want to see all of your members who have told WEF that they work for ABC company, you will be able filter based on that name. You will be able to save your results in an excel or .csv file format. The report will filter on each of the client report fields that are available in the MA Membership Campaign report.

MA Negative Change Report

The purpose of this query is to retrieve groups of changes associated to the members on the MA. This query will list the following status:

- Members with Bad Addresses
- Members who are Deceased
- Members who have Transferred Out of the MA
- Members who are in Grace Status
- Members who are in Expired Status

Output Fields:

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address 1
8	Address 2
9	Address 3
10	Address 4
11	Nickname
12	City
13	State
14	County
15	Country
16	Zip Code
17	Membership Category
18	Status

MA Address Change Report

The purpose of this online report is to retrieve address change information associated to the members on the MA and display the old address and new address.

Parameters:
- Begin date for report
- End date for report

Output Fields:

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address Type
8	Address 1
9	Address 2
10	Address 3
11	Address 4
12	Nickname
13	City
14	State
15	County
16	Country
17	Zip Code
18	Last Address Change Date

MA Email Query

The purpose of this query is to retrieve an email listing of current active members of the MA.

Parameter:
- Membership category

Output Fields:
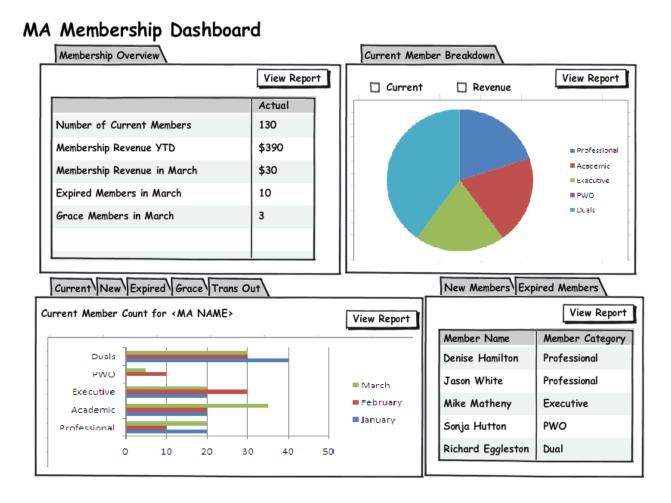
Client Report Field Number	Field Name
1	Customer ID

Client Report Field Number	Field Name
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Salutation
8	Nickname
9	Email Address

MA Membership Dashboard

The purpose of this report is to provide in an overview of information to the MA representative on current information related to their members. This dashboard will be interactive where each MA will be able to click on specific information and drill down to the details of the charts/information that is displayed.

Sample Membership Dashboard:

MA Membership Dashboard

Membership Overview

View Report

	Actual
Number of Current Members	130
Membership Revenue YTD	$390
Membership Revenue in March	$30
Expired Members in March	10
Grace Members in March	3

Current Member Breakdown

View Report

☐ Current   ☐ Revenue

- Professional
- Academic
- Executive
- PWO
- Duals

Current | New | Expired | Grace | Trans Out

Current Member Count for <MA NAME>

View Report

- March
- February
- January

(Duals, PWO, Executive, Academic, Professional — 0 to 50)

New Members | Expired Members

View Report

Member Name	Member Category
Denise Hamilton	Professional
Jason White	Professional
Mike Matheny	Executive
Sonja Hutton	PWO
Richard Eggleston	Dual

Committee Roster

The purpose of this report is to provide each MA with a listing of their members and which WEF committees they serve on and in what position.

Output Fields:

Client Report Field Number	Field Name
1	Customer ID
2	Label Name
3	Committee Name

Client Report Field Number	Field Name
4	Committee Position

Membership Roster

The purpose of this report is to provide MAs with an appealing roster of their members.

Output Fields:

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address 1
8	Address 2
9	Address 3
10	Address 4
13	Nickname
14	City
15	State
16	County
17	Country
18	Zip Code
19	Email Address
20	Membership Paid Through date
21	Primary Phone
22	Membership Category

Sample file:

```
┌─ Membership Roster ──────────────────────────────────────────────────┐
│                                                                      │
│  ────────────────────────────────────────────────────────────────    │
│  Customer ID                          Primary Email: <Email          │
│  First Name Middle Name Last          Address>                       │
│  Name, Suffix                         Primary Phone: <Phone          │
│  Company                              Number>                        │
│  Address1                                                            │
│  Address 2                            Membership Category:  <Rate     │
│  Address 3                            Code Description>              │
│  Address 4                            Member Paid Through Date:       │
│  City, State, Zip Code                <Date>                         │
│  ────────────────────────────────────────────────────────────────    │
│  ────────────────────────────────────────────────────────────────    │
│  12345678                             Primary Email:                 │
│  Denise M Hamilton                    dhamilton@tmaresources.com      │
│  TMA Resources, Inc.                  Primary Phone: 703-564-5240     │
│  1919 Gallows Road                                                   │
│  Vienna, VA 20124                     Membership Category:           │
│                                       Professional                   │
│                                       Member Paid Through Date:       │
│                                       08/17/2010                     │
│                                                                      │
│  ────────────────────────────────────────────────────────────────    │
│                                                                      │
└──────────────────────────────────────────────────────────────────────┘
```

Membership Data Dump

The purpose of this report is to provide the Member Association the ability to push a button and produce a flat file of customer and order detail information on their members. Typically this file is uploaded into the MA's database – or this file of data acts as the Membership Roster for that MA. This report excludes members with cancelled, deceased and transferred out status. There is another file that details the file layout and definition of each field.

Client Report Field Number	Field Name
1	Customer ID
2	First Name
3	Middle Name
4	Last Name
5	Suffix
6	Company
7	Address 1
8	Address 2
9	Address 3
10	Address 4
11	Address Type
12	Salutation
13	Nickname
14	City
15	State
16	County
17	Country
18	Zip Code
19	Record Type
20	Primary Job Title
21	Organization Name
22	Contact Name
23	Label Name
24	Address Status Code
25	Home Phone
26	Business Phone
27	Home Fax
28	Business Fax
29	Email Address
30	Address Change Date
31	WEF Join Date
32	Paid Through Date
33	Delinquent Date
34	Reinstate Date
35	Education Code
36	WEF Membership Product
37	WEF Membership Rate Code
38	MA Membership Rate Code
39	Primary MA Flag

Client Report Field Number	Field Name
40	Status Flag
41	Last Payment Date
42	Last Rebate Amount
44	Employer Code
45	Position Code
46	Concentration Area
47	Sponsor Name
48	Bad Address Date
49	Key Focus Areas
50	Gender
51	Birth Date
52	Order Method