MEMBER DETAILS LOAD FROM CSV GUIDELINES

The purpose of this utility is to allow the loading of Member and Person details and optionally an Organisation relationship from a CSV file. Each Member and Main Person is represented by a row in the CSV under column names.

The full list of column names can be found in the instructions below and in the template file that can be downloaded by clicking on the link 'Download Template' on the first screen of the utility.

CSV FILE TYPE AND FILE SIZE WARNING
Please note that you must Save the import file(s) as a CSV file. Please ensure the correct file format is used. For performance reasons, this utility will only process up to 1000 rows at a time after 4 pm. Between 9 am and 4 pm AEST, this utility will process 200 rows. Please break your file into smaller sizes if the number of rows exceeds the limit at the time.

The utility will:
- Create new member record(s) and allocate a Member Code automatically if a Member Code is not provided.
- Create the main person details against the new member.
- Allow the recording of an alternative unique identifier for the member.
- Allow up to 5 Classification/Classification types to be added to the member.
- Allow up to 5 Attribute/Attribute types to be added to the main person.
- Allow one Organisation (and its relationship) to be added to the main person. This may be an existing organisation or a new organisation can be created. Note: Organisations can be renamed in MemNet, however, the import file will still refer to them as an organisation
- Process the file in full or not at all. The first 10 errors detected will be displayed on the screen for correction before you are asked to resubmit.
- When valid it will display a list of the Member information that it will create if you then select 'Commit Changes'. Otherwise, you can Cancel and no update will have been performed.
- If you select 'Commit Changes', you will receive a success message with a count of the number of Members added.

In using the template, you can:
- Delete columns of optional data so that fields that you do not use do not cause your input data to be spread out and difficult to read.
- Reorder the columns for the same reason above if it makes the spreadsheet more useable.
- The golden rule is that the column names remain unchanged as the utility recognises the column based on that value.

MEMBER DETAILS LOAD FROM CSV GUIDELINES

The field (column) validation is as follows. Column names with an (M) alongside them mean that the column name must exist in the CSV file.

Column	Validation
MemberCode	If blank, then you must have your MemNet system set up to auto-generate Member Codes. If non-blank it must not already exist in MemNet or elsewhere in the same import file. NOTE: leading zeros will be stripped off if you specify a MemberCode and it is all numeric. You will get the option to add these back in when you update the valid file. You will be prompted to say how long each numeric MemberCode should be padded out with leading zeros.
MEMBERSHIP DETAILS	
AlternateIDType	With AlternateID below this provides you with the option of recording an alternative unique reference for this Member. This is important during an initial data load where you do not currently know the Member Code and you want to use this reference for the member to load other data using the other import facilities (i.e. subscriptions, transactions etc.). It is optional and can be blank, but if not blank this AlternateIDType field must already exist in MemNet.
AlternateID	Optional but a non-blank value must exist if AlternateIDType has been entered above. This must be a unique AlternateID, meaning for this AlternateIDType the AlternateID must not be in use for any other Member. Please NOTE: Leading zeros will be stripped off if you specify an all numeric AlternateID.
MembershipType (M)	Must exist in Membership Types and be not blank
Status	Optional will default to Active. Can be 'A' (meaning Active)', 'P' (Pending), or 'N' (Inactive)

MEMBER DETAILS LOAD FROM CSV GUIDELINES

Financial	Optional. Blank or 'F' means they are Financial, 'N' means they are Unfinancial
GroupName	Can be blank if the name of the Membership is to be the first person's name
LegalEntity	Optional
ABN	Optional
Branch	Can be blank if branches are not activated but must be Branch Name in MemNet if not blank
ParentMemberCode	If you wish to link this Member to another with a parent-child relationship, you can optionally specify the Member Code of the parent Member.
ParentAlternateIDType	Similar to the AlternateIdType for this Member, if you have an Alternate Id for the parent Member, you can use it to specify the parent Member instead of a Member Code. The same rules for AlternateIdType apply to the ParentAlternateIdType.
ParentAlternateID	Optional but a non-blank value must exist if the ParentAlternateIDType has been entered above. The same rules for AlternateId apply to the ParentAlternateID.
AccountReference	Optional. Would usually contain the Members accounting system code if you intended to link the systems at the Accounts receivables level.
Reference	Optional
BPAYReference	Optional
MemberSince	Can be blank otherwise a valid date in the format dd/mm/yyyy
Website	Optional
TaxableStatus	Must be S or blank (Standard) or E (Exempt)
Classification1 ClassificationType1	Optional. If not blank both must be not blank and the combination must exist as a Classification/Classification.
Classification2 ClassificationType2	Optional. If not blank both must be not blank and the combination must exist as a Classification/Classification.

MEMBER DETAILS LOAD FROM CSV GUIDELINES

Classification3 ClassificationType3	Optional. If not blank both must be not blank and the combination must exist as a Classification/Classification.
Classification4 ClassificationType4	Optional. If not blank both must be not blank and the combination must exist as a Classification/Classification.
Classification5 ClassificationType5	Optional. If not blank both must be not blank and the combination must exist as a Classification/Classification.
PERSON DETAILS	
HonoraryPositonTitle	Optional
Title	The value must be in the Title drop-down list if not blank (refer to MemNet person screen for valid values)
FirstName (M)	Cannot be blank
MiddleName	Optional
LastName (M)	Cannot be blank
PostNominals	Optional
Salutation	If left blank it will default to the setting format for Salutation in Company Settings.
Gender	Optional, 'M', 'F' or 'X'
PersonsRole	If not blank it must exist as a Person Role in MemNet
JobTitle	Free format
EmailAddress	Valid format for an email address and must not be blank if preferred correspondence is email
PreferredCorrespondence	Optional. 'Email' or 'Post'. Will default to Email if an email address is provided or to 'Post' if the email address is blank
Notes	Optional
DateOfBirth	Optional. If entered it must be less than the current date and be in the format dd/mm/yyyy.
Company	Company name to be recorded against the Person
StreetAddressLine1 (M)	Cannot be blank
StreetAddressLine2	Optional
StreetAddressLine3	Must be blank if Address Line 2 is blank
StreetAddressCity (M)	Cannot be blank (it will be capitalised as it is loaded)
StreetAddressPostcode (M)	Cannot be blank if Country is blank or Australia, otherwise optional

MEMBER DETAILS LOAD FROM CSV GUIDELINES

StreetAddressState	If an Australian address must be a valid State else free format. Blank for New Zealand addresses.
StreetAddressCountry	If the default country is set in the system, then it can be left blank and we will put in AUSTRALIA or NEW ZEALAND, otherwise needs to be non-blank and we will capitalise
PostalAddressLine1 PostalAddressLine2 PostalAddressLine3 PostalAddressCity PostalAddressPostcode PostalAddressState PostalAddressCountry	If left blank Postal Address fields will be set as the same as Street Address, otherwise if not blank validation is the same as Street Address.
PreferredPhoneNumberType (M)	'Home', 'Business', 'Mobile', 'Fax', 'Business Direct' or 'Toll Free', At least one phone number must also be present. At a minimum, you must have a number for the preferred type specified.
HomePhoneNumberAreaCode HomePhoneNumber	Both can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Home'.
BusinessPhoneNumberAreaCode BusinessPhoneNumber	Both can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Business'.
MobilePhoneNumber	Can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Mobile'.
FaxPhoneNumberAreaCode FaxPhoneNumber	Both can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Fax'.
BusinessDirectPhoneNumberAreaCode BusinessDirectPhoneNumber	Both can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Business Direct'.
TollFreePhoneNumberAreaCode TollFreePhoneNumber	Both can be blank otherwise has to be numbers in at least the Number field. Cannot be blank if the Preferred Phone Number Type is 'Toll Free'.

MEMBER DETAILS LOAD FROM CSV GUIDELINES

Attribute1	Optional. If not blank both must be not
AttributeType1	blank and the combination must exist as an Attribute/Attribute Type
Attribute 2	Optional. If not blank both must be not
AttributeType2	blank and the combination must exist as an Attribute/Attribute Type
Attribute3	Optional. If not blank both must be not
AttributeType3	blank and the combination must exist as an Attribute/Attribute Type
Attribute4	Optional. If not blank both must be not
AttributeType4	blank and the combination must exist as an Attribute/Attribute Type
Attribute5	Optional. If not blank both must be not
AttributeType5	blank and the combination must exist as an Attribute/Attribute Type

ORGANISATION DETAILS
This section allows you to either add a new Organisation or link to an existing Organisation if required.   To Add a New Organisation: - ExistingOrganisationCode would be blank.   - NewOrganisationCode would either be specified or blank (blank would create a new one if set to create codes automatically in Administration/Company Settings). If specified it must not exist in MemNet.   - OrganisationName would be not blank.   - OrganisationRelationship must exist in a valid Organisation Relationship Type.   To link to an Existing Organisation   - ExistingOrganisationCode would be not blank and must exist in MemNet.   - NewOrganisationCode would be blank.   - OrganisationName will be ignored.   - OrganisationRelationship must exist in a valid Organisation Relationship Type.   To not Add or link to an existing Organisation, all four fields should be blank.

ExistingOrganisationCode	Optional.
NewOrganisationCode	Optional
OrganisationName	Optional
OrganisationRelationship	If any of the three fields above are not blank, then this must exist as an Organisation Relationship in MemNet

MEMBER DETAILS LOAD FROM CSV GUIDELINES

OrganisationEmailAddress	Optional
OrganisationContactName	Optional
OrganisationStreetAddressLine1	Optional
OrganisationStreetAddressLine2	Optional
OrganisationStreetAddressLine3	Optional
OrganisationStreetAddressCity	Optional
OrganisationStreetAddressPostcode	Optional
OrganisationStreetAddressState	Optional
OrganisationStreetAddressCountry	Optional
OrganisationBusinessPhoneNumberAreaCode	Optional
OrganisationBusinessPhoneNumber	Optional
OrganisationMobilePhoneNumberAreaCode	Optional
OrganisationMobilePhoneNumber	Optional
OrganisationFaxPhoneNumberAreaCode	Optional
OrganisationFaxPhoneNumber	Optional