

IMPORT MEMBER SUBSCRIPTIONS FROM CSV GUIDELINES

The purpose of this utility is to allow the loading of Member Subscriptions for import into a member account within the MemNet Members module.

The details imported can be:

- Multiple subscriptions for a member
- Imported for Subscription names that have already been set up in the Subscriptions facility in MemNet Administration
- Linked to existing Members via either the Member Code or by matching to an Alternate Member ID (the latter would likely be used where you have just loaded the Member using the Member Import facility as your data take-on)

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:

- Load Member Subscriptions against a Member by using the Member Code, or if the Member Code is blank by matching the Alternate ID and Alternate ID Type. Alternate IDs may be the member's unique identifier in an external system that would link them back to a Member in MemNet (note that to be able to record Member Alternate IDs to a member you need to set the Activate Alternate Member IDs to 'Active' within the Company Maintenance screen in Administration).
- 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 Subscription 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 Member Subscriptions 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.

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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 non-blank it must exist in MemNet. If blank, then you must have an AlternateIDType and AlternateID on this row.
AlternateIDType	If MemberCode is blank, then an AlternateIDType must exist.
AlternateID	If MemberCode is blank, then an AlternateID must exist. This AlternateID (along with the Alternate ID Type above) must exist as a unique combination against a Member in MemNet.
MEMBER SUBSCRIPTION DETAILS	
SubscriptionName (M)	Must be a valid Subscription Name found in the Subscriptions Table in MemNet Administration. It must also not exist as an existing Subscription Name on the Member.
Frequency (M)	The frequency must exist for the Subscription Name found in the Subscriptions Table in MemNet Administration. This field is entered as a code and translates to the MemNet name (MemNet name in brackets): Y (Annual) 2Y (Two Years) 3Y (Three Years) 4Y (Four Years) 5Y (Five Years) M (Monthly) 3M (Quarterly) 6M (Six Monthly) W (Weekly) 2W (Fortnightly) 1 (One Off)
Amount	Optional. Ignored unless the Subscription Name relates to a variable price Subscription. If it does, then this must be non-blank and be in the format of 99999.99.
Tax	Optional. Ignored unless the Subscription Name relates to a variable price

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	Subscription. If it does, then this must be non-blank and be in the format of 99999.99.
PriceReviewPeriod	Optional. If entered must be in the range 1-12. The numbers represent the month that the price of this subscription is reviewed, 1=Jan, 2=Feb etc...
SubscribedStartDate	Optional. Can be blank otherwise a valid date in the format dd/mm/yyyy and cannot be greater than the SubscribedUntilDate. If blank it will be set to the SubscribedUntilDate.
SubscribedUntilDate (M)	Must be non-blank and be a valid date in the format dd/mm/yyyy. Please note this is the date you wish the next subscription period to include, it would usually be the first of the month (e.g. 01/07/2025)
StopDate	Optional. This, if entered, must be a date in the format dd/mm/yyyy. This date is used if you know of a predetermined date that the subscription should stop. It is expected that the date will be equal to or greater than the SubscribedUntilDate
StopReason	One word text to describe the reason for the Subscription being stopped. Should be blank if StopDate is blank.