

MEMBER ADDITIONAL PEOPLE LOAD FROM CSV GUIDELINES

The purpose of this utility is to allow the loading of Additional People to existing Members from a CSV file. Each Additional Person is represented by a row in the CSV/Spreadsheet 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 Additional People details on existing member records.
- Link 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)
- Allow up to 5 Attribute/Attribute types to be added to the person created.
- Allow you to link a person to a Standard member Address already set up on MemNet.
- Allow one Organisation (and its relationship) to be added to the person created. 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 Person 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 people 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 not 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.
PERSON DETAILS	
HonoraryPositionTitle	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	Optional. Company name to be recorded against the Person

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SameAddressAsMainPerson (M)	Mandatory, cannot be blank must be 'Y' or 'N'. Y sets the new person's address the same as the main person on the membership
MemberAddressLabel	Optional, must match a Standard Address Label maintained against that Member if entered. If it matches it will link the person to that Standard Address. NOTE: You cannot create a Standard Address through this routine, you will have to set them up in MemNet prior to loading this file. If this field is not blank and the label does not match a Standard Address for this Member then an error will be displayed.
StreetAddressLine1	Cannot be blank if SameAddressAsMainPerson is 'N' and MemberAddressLabel is blank.
StreetAddressLine2	Optional
StreetAddressLine3	Must be blank if Address Line 2 is blank
StreetAddressCity (M)	Cannot be blank if SameAddressAsMainPerson is 'N' (it will be capitalised as it is loaded)
StreetAddressPostcode (M)	Cannot be blank if Country is blank or Australia, otherwise optional
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.

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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	Both can be blank otherwise has to be numbers in at least the Number field.
HomePhoneNumber	Cannot be blank if Preferred Phone Number Type is ‘Home’.
BusinessPhoneNumberAreaCode	Both can be blank otherwise has to be numbers in at least the Number field.
BusinessPhoneNumber	Cannot be blank if 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 Preferred Phone Number Type is ‘Mobile’.
FaxPhoneNumberAreaCode	Both can be blank otherwise has to be numbers in at least the Number field.
FaxPhoneNumber	Cannot be blank if Preferred Phone Number Type is ‘Fax’.
BusinessDirectPhoneNumberAreaCode	Both can be blank otherwise has to be numbers in at least the Number field.
BusinessDirectPhoneNumber	Cannot be blank if Preferred Phone Number Type is ‘Business Direct’.
TollFreePhoneNumberAreaCode	Both can be blank otherwise has to be numbers in at least the Number field.
TollFreePhoneNumber	Cannot be blank if Preferred Phone Number Type is ‘Toll Free’.
Attribute1	Optional. If not blank both must be not blank and the combination must exist as an Attribute/Attribute Type
AttributeType1	
Attribute 2	Optional. If not blank both must be not blank and the combination must exist as an Attribute/Attribute Type
AttributeType2	
Attribute3	Optional. If not blank both must be not blank and the combination must exist as an Attribute/Attribute Type
AttributeType3	
Attribute4	Optional. If not blank both must be not blank and the combination must exist as an Attribute/Attribute Type
AttributeType4	
Attribute5	Optional. If not blank both must be not blank and the combination must exist as an Attribute/Attribute Type
AttributeType5	

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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 in the Organisation Relationship Table in MemNet
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