

Import Guide

Importing member and non-member records

YourMembership.com allows you to import member and non-member records into your site's database. The following steps will assist you with the import process; however, should you need assistance please submit a support ticket to the customer support team.

1. Determine Your Import Type

What is a Member Record? Most records imported into YourMembership.com are imported as member records. When you import a record as a member, you are creating an actual member account in the member database. When a member signs into this account with his/her username and password, he/she will be able to manage their member profile and gain access to members-only areas of the site. The Member Type of the member can be configured to make these accounts visible or hidden to other site visitors.

What is a Non-Member Record? When you import records as non-members, they serve as inactive placeholder records in the database that are pending individual activation. Non-member records are for individuals that are not yet members of your website, but are associated with your organization. After an organization imports its members into the non-member database, these "members" are associated with the membership site, however, they are not registered with active member accounts [as described above]. When they do register on the site, their non-member records are converted to member records by the user through non-member matching or by a site administrator during the registration approval process.

When considering a non-member import, please know that non-member records are always visible in the directory and cannot be hidden; however, only limited information displays to other members. Non-member imports are less common than member imports so you may want to contact support by submitting a support ticket to help determine the best import option for your organization.

NOTE: The non-member database is not intended for ad-hoc emailing and has minimum field requirements. Also, you can provide non-member individuals specific registration codes to further simplify and speed registration and account activation.

2. Obtain Your Database Records

Export your records from your existing database into a spreadsheet or comma separated format (CSV) file. If your database is already in a spreadsheet format or you are starting from scratch, there is no need to export so please proceed to the next step. Exporting from your existing database is beyond the scope of support of YourMembership.com's customer services. Please consult your database manager or database provider for any required product support.

3. Complete Your Import Template

For YourMembership.com to import your data, you must arrange the data into a standard format compatible with YourMembership.com's import system. To make the process easier, we created templates for you to follow when performing this step. The import system requires certain fields be imported. Listed below are the minimum fields that are required and optional fields that we highly recommend are imported.

Member

Required: Member Type Code, First Name, Last Name, Username, Password (at least five fields are required)

Recommended: Constituent ID, Email, Primary Group Code, Member Approved, Membership/Membership Expires, Membership Expiration Date (if using dues)

Non-Member

Required: First Name, Last Name, Email or Registration Verification Data (at least three fields are required)

Recommended: Constituent ID, Email, Primary Group Code, Registration Verification Data

Examples of Completed Templates

Member

Non-Member

The Raiser's Edge Member

The Raiser's Edge Non-Member

4. Review Your Import File

After you have filled out your template, please review the data in each column to ensure that it meets our field constraints. Common issues may include:

- Dates not properly formatted. Dates must be in MM/DD/YYYY format, even for international customers.
- Member Type Code is not given. Use the code as the value for this field, not the member type name.
- Primary Group Code is not given. Use the code as the value for this field, not the primary group name.
- Membership name is not given. Use the name as the value for this field, not membership code.
- Usernames are not unique.
- Titles are too long.
- Website URLs do not include "http://"
- Address lines split into multiple columns. All lines should be in one column separated by a "/n". Three lines must be condensed into two.
- Professions do not exist in professions list (under control panel).
- Groups do not exist. Please verify that group codes have an associated group that exists.
- Registration verification data do not match how the system is configured.

5. Send Us Your Import File

Once your import template is complete, please upload it to YourMembership.com via a support ticket for review and to be imported. We will review the file, import your data and notify you of its completion by closing the ticket.