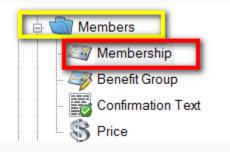
Membership Import Instructions

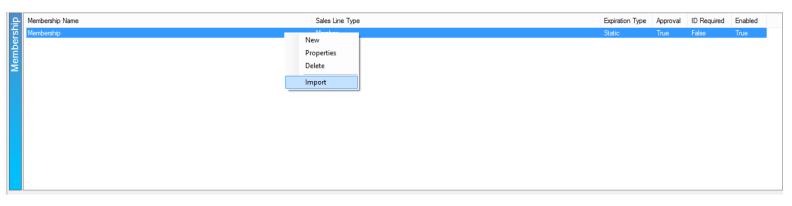
1. Log in to Administration.



3. Select the Membership folder and click the Membership icon.



4.Right click on the Membership Name and select Import.



5. Click the Import Example to save the import spreadsheet.

Sales Line Type	Member			Options	eader row during file imp	ot		
Expiration Type	Static				ate all current member		t set.	
Approval Required	True			_	customer information on			
				Add Bate	ch Label To Membership	0		
				Sales Chan	nel for Price Type	AMS Default		¥
Member #	Me	mbership Level	Membership F		Barcode	Date Joined	Expiration Date	A

6. Save the example to the computer's desktop.

7. Fill out the member information in the spreadsheet.

	А	В	С	D	E	F	G	H	1	J	K
1	Member Number (optional)	Membership Level	Membership Price Type	Barcode (optional)	Join Date	Expire Date	Approval Status	Active	Member Notes (optional)	Customer Number (optional)	Prefix (optional)
2	1234	Friend	Friend	12345677654321	8/5/2014	8/5/2016	TRUE	TRUE		1234	
3		Gold	Gold		8/5/2014	8/5/2016	TRUE	TRUE			
4		Gold	Gold		8/5/2014	8/5/2016	TRUE	TRUE			
5		Gold	Gold		8/5/2014	8/5/2016	TRUE	TRUE			
6		Silver	Silver		8/5/2014	8/5/2016	TRUE	TRUE			
7											

Note: Not all fields are required for the import. Optional columns are marked in the

header.

8. Save and close the completed spreadsheet.

9. When you are ready to import your members, go back to the membership program, right

click on the Membership program and select Import.

9. Click on the **Load File** button and select the completed spreadsheet to import the membership information.

8		Membership Import: N	Membership		_ 0	×
Members						
Sales Line Type	Member	Options	1			
Expiration Type	Static		eader row during file import ate all current members r		set	
Approval Required	True		customer information on cu			
, ibbi o la riodanoa	1100	Add Bate	ch Label To Membership			
		Sales Chan	nel for Price Type	AMS Default		~
Member #	Membership Level	Membership Price Type	Barcode Da	te Joined	Expiration Date	Ар
<						>
						-
	Remove Member Load File	Import Example		OK	Cancel A	ply

10. All of your member information will appear within the window. You can scroll through to make edits and check for any errors.

Expiration Type Static Approval Required True					Ignore header row during file import. Deactivate all current members not in the import set. Update customer information on current memberships. Add Batch Label To Membership			
				Sales Chan	nel for Price Type	AMS Default		¥
Member #		ership Level	Membership F	Price Type	Barcode	Date Joined	Expiration Date	4
1	1234 Friend Gold		Friend Gold		12345677654321	8/5/2014 8/5/2014	8/5/2016 8/5/2016	
3	Gold		Gold			8/5/2014	8/5/2016	
4	Gold		Gold			8/5/2014	8/5/2016	
5	Silver		Silver			8/5/2014	8/5/2016	
۲								;

Note: If you do see any errors you can make the necessary corrections on the Member Import page. Simply click the field that needs to be changed and type in the changes. 11. Make sure that you have the correct **Sales Channel for Price Type** selected in the drop down.

Sales Line Typ Expiration Typ			✓ Ignore header ro Deactivate all o		t. not in the import set.	
Approval Requ	ired True		_		urrent memberships.	
spprovar nequ				I To Membership		
			Sales Channel for	Price Type	AMS Member AMS Default	~
	Membership Level	Membership Price Ty	Barcode	Date Joined	AMS Group AMS Member	
1 16485	5 Friend	Friend	12345677654321	8/5/2014	Web Group	
2 4853		Friend		8/5/2014	Web Member Web Standard	
3 4985		Friend		8/5/2014	0/3/2010	
	4 Gold	Friend		8/5/2014	8/5/2016	~
5 5678	3 Silver	Friend		8/5/2014	8/5/2016	~

12. Once everything is correct click on Apply and OK.

A		Ν	/lembership	Import: N	Membership		- 5	×
Members								
Sales Line Type	Membe	er		Options	eader row during file im			
Expiration Type	Expiration Type Static				ate all current membe		set	
				Update customer information on current memberships.				
Approval Required	True				ch Label To Membersh			
					Sales Channel for Price Type		AMS Default	
				Sales Chan	nerior Price Type	AMS Default		~
Member #		Membership Level	Membership F	rice Type	Barcode	Date Joined	Expiration Date	Ap
1	1234	Friend	Friend		12345677654321	8/5/2014	8/5/2016	
2		Gold	Gold			8/5/2014	8/5/2016	
3		Gold	Gold			8/5/2014	8/5/2016	
4		Gold	Gold			8/5/2014	8/5/2016	
5		Silver	Silver			8/5/2014	8 16	
< Add Member	5 Silver Silver 8/5/2014 8 16							

13. The progress pop up will appear.

	Progress	
Progress: 100%		
Operation Started Importing/Updating 4 records. Starting import operation. Operation Completed Import operation complete 4 New members imported 4 New customers imported Saving results file		
1		Close

14. Once you have reached 100% the **Save Import Results** pop up will appear. This will tell you about the results of your import (i.e. if there were any errors or if it was successful). Save this spreadsheet to your computer for future reference.

