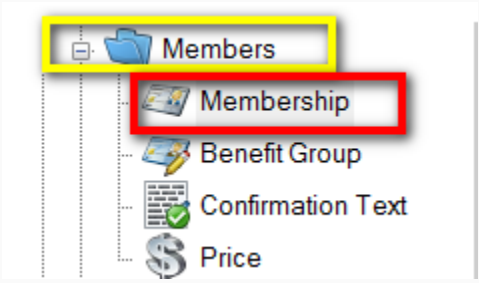
Membership Import Instructions

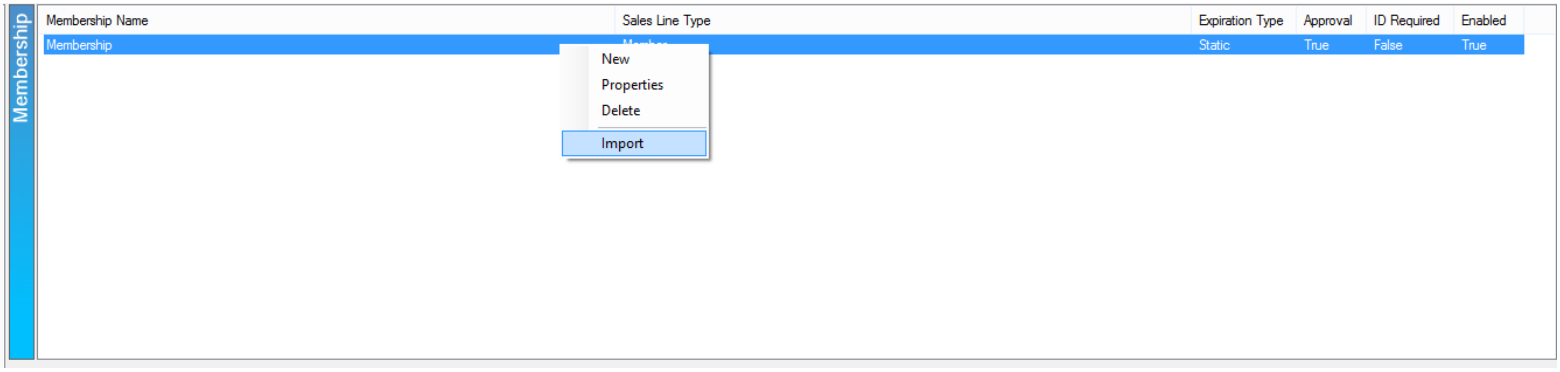
1. Log in to **Administration.**

2. Click on the **Corporate Organization** icon.

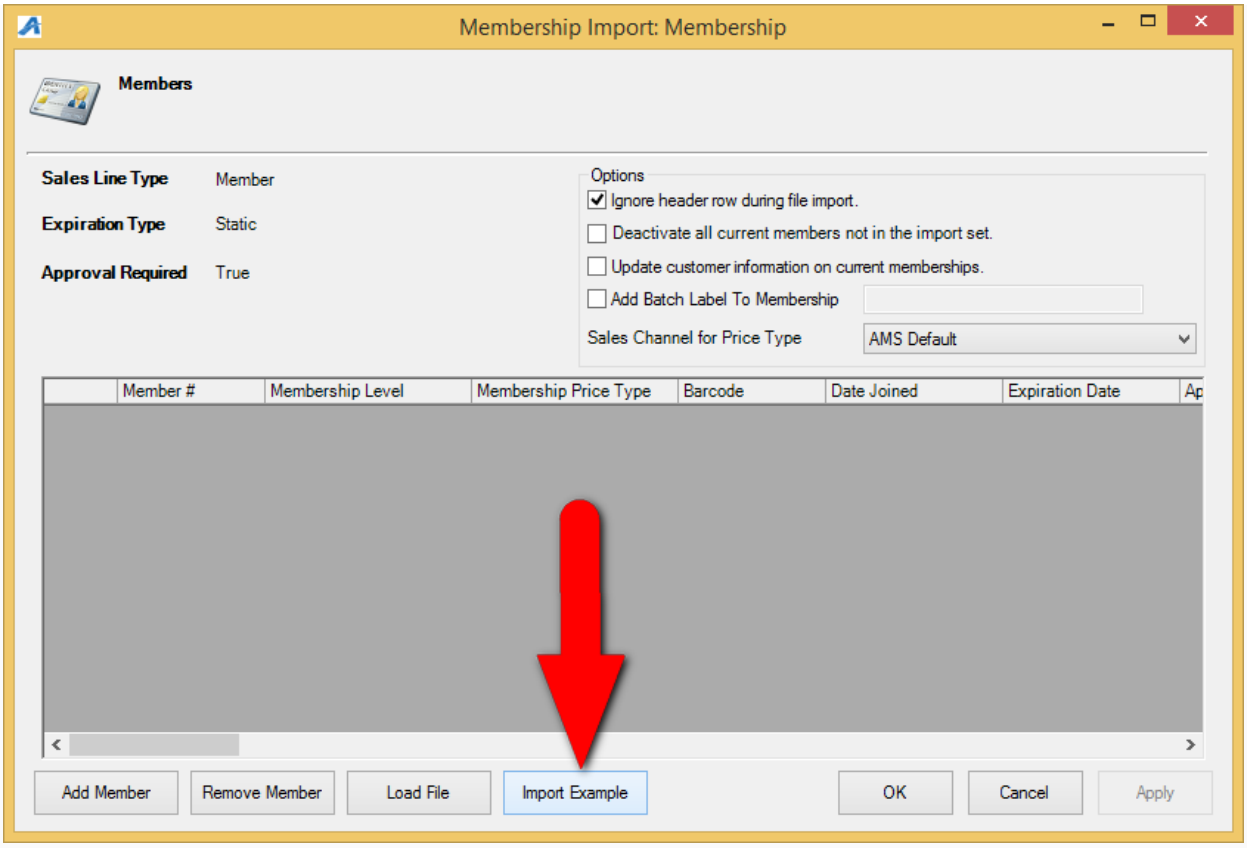
3. Select the **Membership** folder and click the **Membership** icon.



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



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



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

7. Fill out the member information in the spreadsheet.

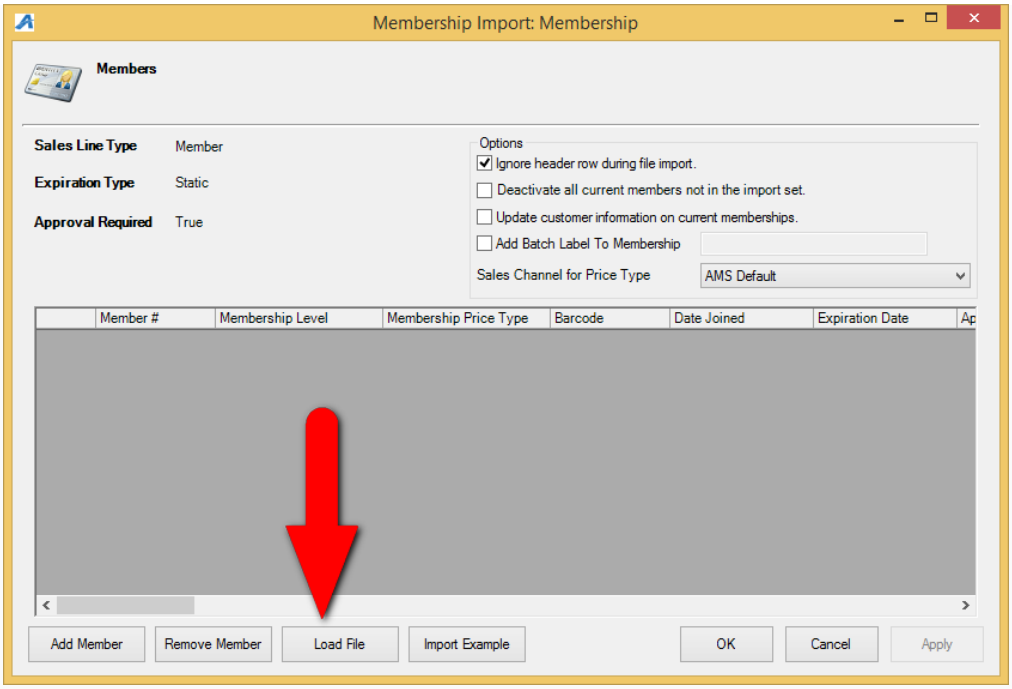
	A	B	C	D	E	F	G	H	I	J	K
1	Member Number (optional)	Membership Level	Membership Price Type	Barcode (optional)	Join Date	Expire Date	Approval Status	Active	Member Notes (optional)	Customer Number (optional)	Prefix (optional)
2	1234	Friend	Friend	12345677654321	8/5/2014	8/5/2016	TRUE	TRUE		1234	
3		Gold	Gold		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.*

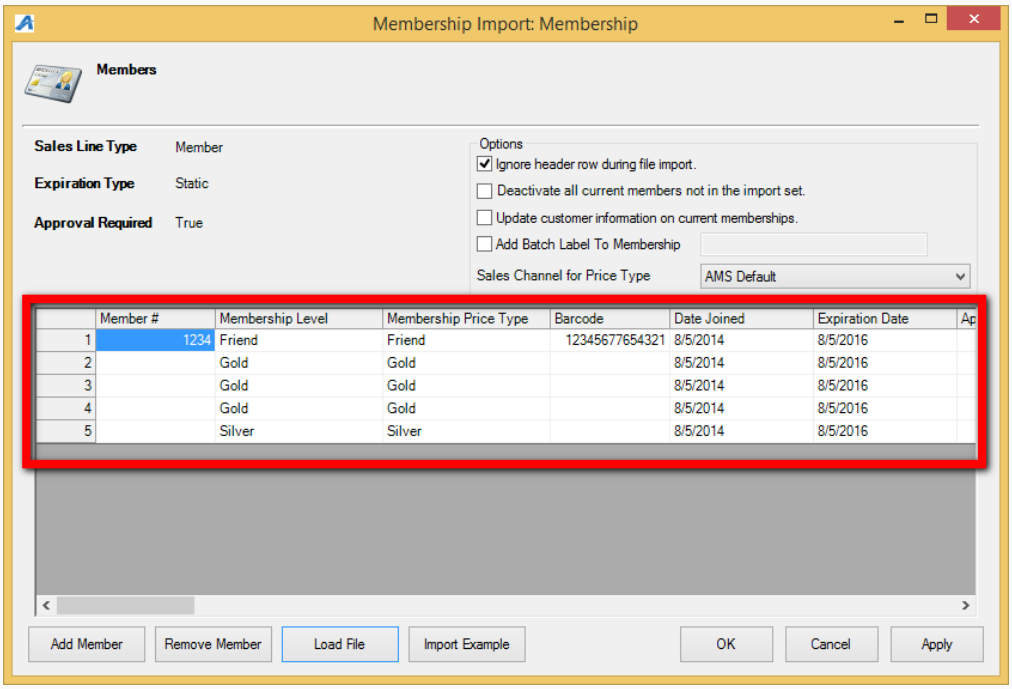
8. Save and close the completed spreadsheet.

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.

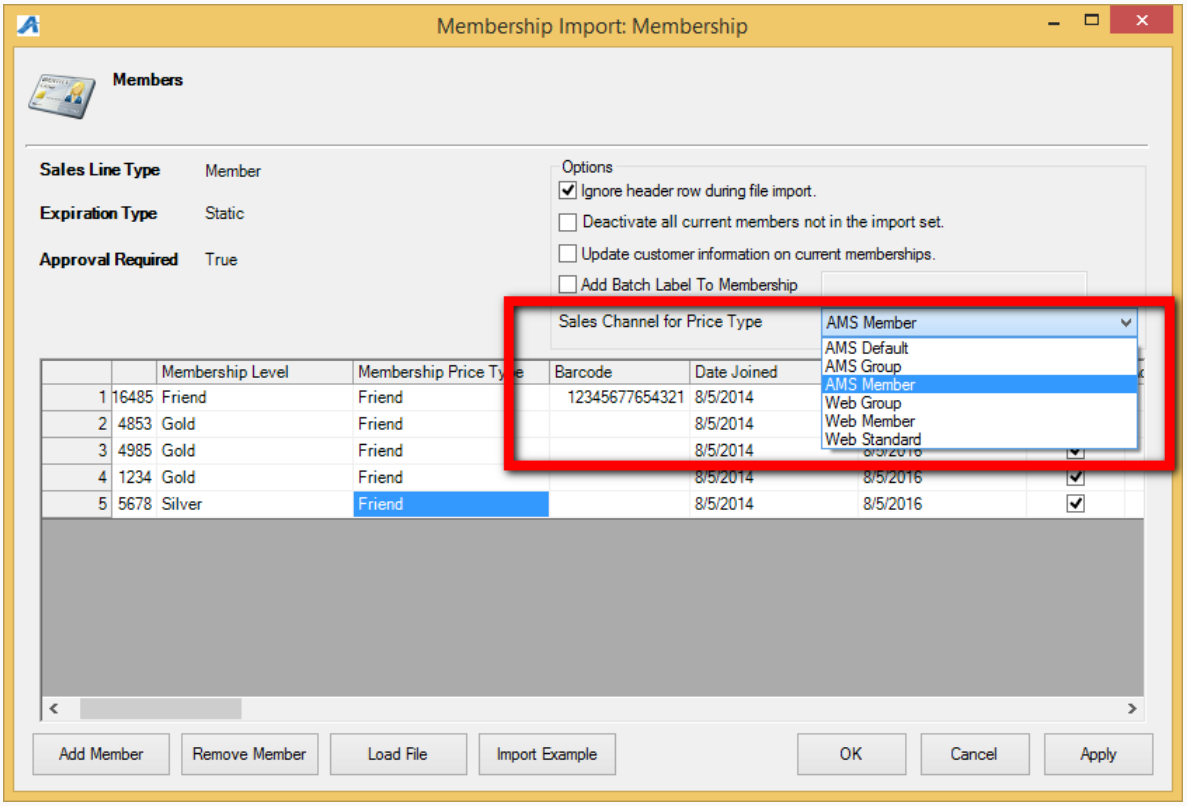


10. All of your member information will appear within the window. You can scroll through to make edits and check for any errors.

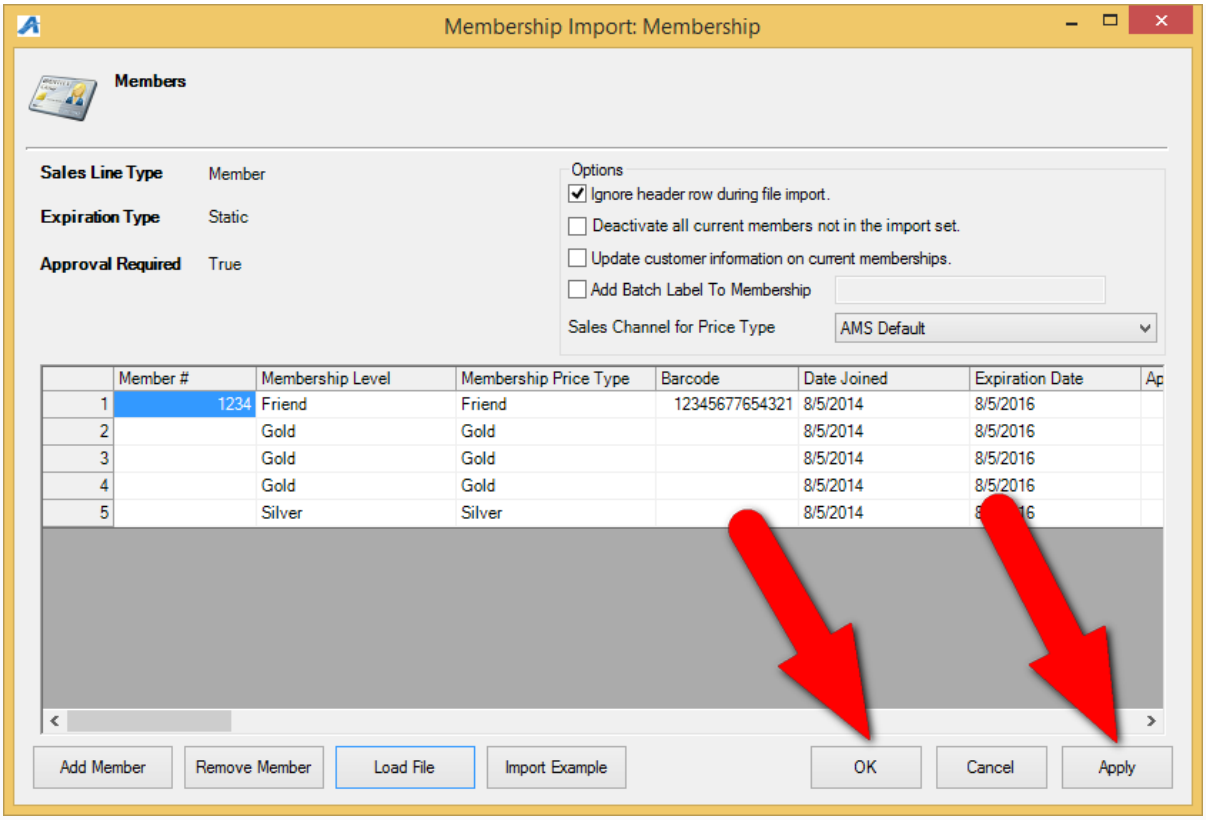


Note: If you do see any errors you can make the necessary corrections on the Member Import page. Simply click the field that needs to be changed and type in the changes.

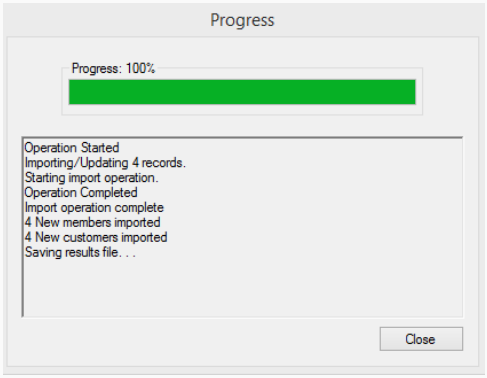
11. Make sure that you have the correct **Sales Channel for Price Type** selected in the drop down.



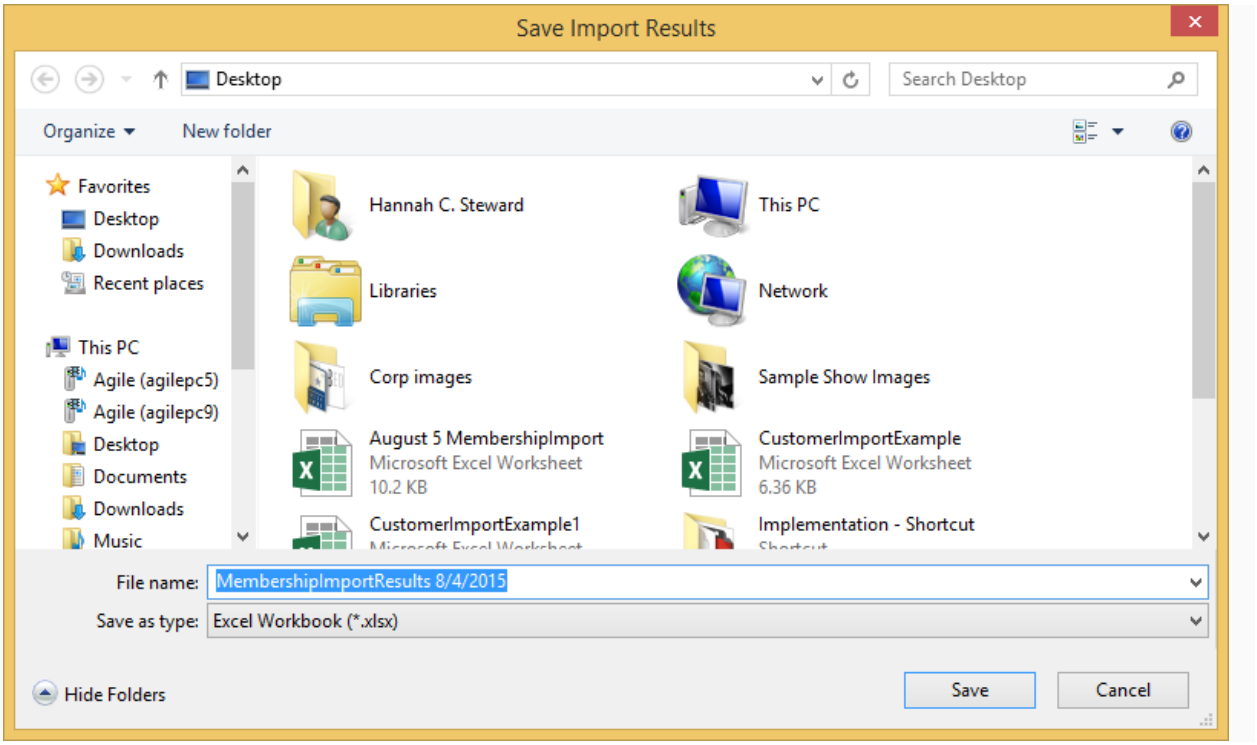
12. Once everything is correct click on **Apply** and **OK.**



13. The progress pop up will appear.



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.


Save Import Results
Desktop
Search Desktop
Organize
New folder
Favorites
Desktop
Downloads
Recent places
This PC
Agile (agilepc5)
Agile (agilepc9)
Desktop
Documents
Downloads
Music
Hannah C. Steward
This PC
Libraries
Network
Corp images
Sample Show Images
August 5 MembershipImport
Microsoft Excel Worksheet
10.2 KB
CustomerImportExample
Microsoft Excel Worksheet
6.36 KB
CustomerImportExample1
Implementation - Shortcut
File name:
MembershipImportResults 8/4/2015
Save as type:
Excel Workbook (*.xlsx)
Hide Folders
Save
Cancel