

THE IMPORT TEMPLATE

DOWNLOAD THE TEMPLATE

Using our standard data import template is mandatory. Get started by [downloading the import template](#).

ADD YOUR DATA TO THE TEMPLATE

Start adding data to the import template and ensure all mandatory data is provided in the specified format (refer to page 2 of this document).

MISSING DATA FIELDS?

Something missing on the template? Create a list of data fields and discuss them with your Success Coach.

TEMPLATE DATA FIELDS EXPLAINED

The following section provides an overview of the key data fields. Note that fields marked with  are mandatory!



PRIMARY KEY - EMAIL ADDRESS

All contact records must have an email address associated to them. If you have members without email addresses, please alert us!



FIRST AND LAST NAME

All contacts identified on the import template must have a first and last name.



MEMBER CATEGORY NAME

Add the name of the member category the contact is to be linked. The category name must match the spelling in the administration setup.

DATA FIELDS EXPLAINED



MEMBER CATEGORY INCEPTION DATE

The inception date is the first date the contact become a member in the category they are assigned. If you do not know what this date is, you will need to assign a date that occurs before the identified renewal date. Please ensure you follow the DD-MM-YYYY format.



MEMBER CATEGORY RENEWAL DATE

The renewal date is the date that the member must submit their renewal form and payment. Please ensure you follow the DD-MM-YYYY format.

MEMBER SINCE DATE

The member since date is the first date a contact become a member. If the contact has been in the same member category since the beginning, the member since data and inception dates are usually the same. If you do not specify a date, the import will use 00-00-0000. Please ensure you follow the DD-MM-YYYY format.

DATA FIELDS EXPLAINED

MEMBER FEE CATEGORY

Have a membership category that has a fee category? You must add the fee category name to the specified column in the import template and be sure to match the fee category spelling as identified in the administration setup.

MEMBER NUMBER

Member365 allows you to import existing member numbers as long as it contains only numbers, is sequential in nature and nobody shares the same number.

GROUP MEMBERSHIP SEAT PACKAGES

if your group membership has seat packages, you must specify the seat package they are to be linked to. The seat package specified must match the spelling of the seat package as per the administration setup.

DATA FIELDS EXPLAINED

GROUP MEMBERSHIP - PRIMARY CONTACT

If you are using group membership this is a mandatory field. The primary contact is the person who will be sent the renewal reminder email and manage portal accounts.

Only one contact can be identified per organization. To indicate a contact as primary, add the word Yes to the appropriate column on the import template.

If more than one person is labelled as the primary, the last contact record imported with Yes in the column will be used as the primary contact.



EMAIL CONSENT SETTINGS

It's important to provide information required to add email consent on contacts imported. Without consent, you cannot send email to your contacts.

DATA FIELDS EXPLAINED



ORGANIZATION NAMES

When importing organization names, be sure to review your list and standardized the spelling when the organization appears more than once. If your data import has numerous spellings for the organization, multiple organization records will be created.

MAIL PREFERENCE

if you have tracked the preference for where snail mail should be sent, indicate the selection with the word residential or business. This will set the preferred mailing address in Member365. If you do not set a preference, it will default to business.

CONTACT TAGS

Do you have contact record tags like VIP, Volunteer, Prospective Member and others? Import tags by adding them to the identified column in the import template. Multiple tags? Add them in comma separated format, do not create another column!

DATA FIELDS EXPLAINED

GENDER

When adding genders to the template, ensure they following the naming convention in the administration setup. Defaults include Male, Female, Other



WEBSITE URLS

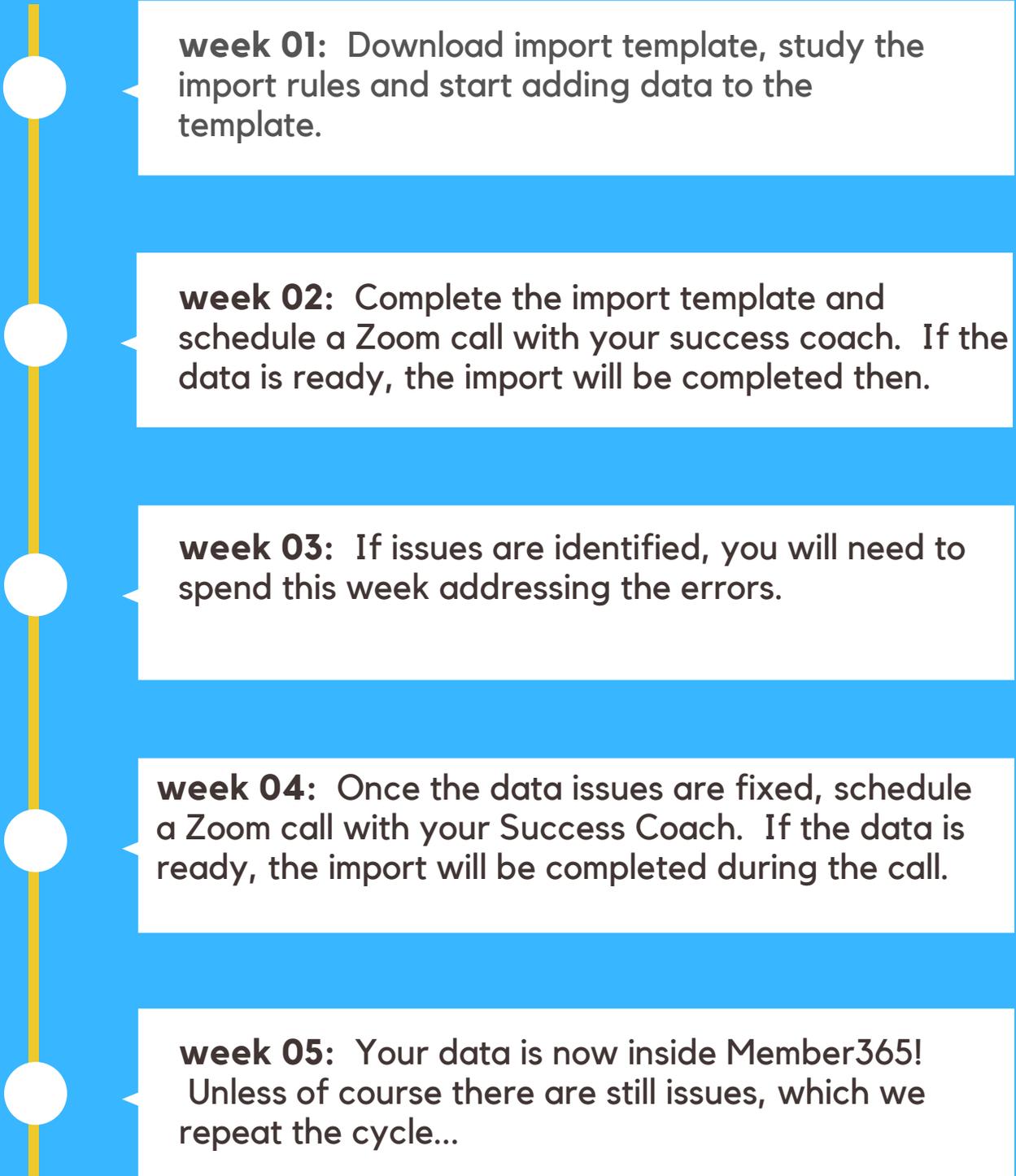
Ensure that all website URLs include either HTTP:// or HTTPS:// in front of them.

LANGUAGE

Language is required if you intend to setup the member portal in both English and French. If so, indicate the contact's preference by specifying English or French (Not EN or FR) in the appropriate column.

Import Timeline

This timeframe assumes your membership management setup is completed.



GET HELP

BOOK TIME WITH YOUR SUCCESS COACH

BOOK A ZOOM CALL WITH YOUR SUCCESS COACH

login to the administrator dashboard and book a setup call here...

The screenshot displays the Member365 administrator dashboard. At the top, there is a navigation bar with the Member365 logo, a search bar for contacts, and menu items for HELP, CONFIGURATION, OPTIONS, and MY ACCOUNT. Below this is a secondary navigation bar with links to Dashboard, Contacts, Membership, Email Campaigns, Events, Lists, Financial, Modules, and Reports. The main content area features a 'Your quick start guide' with three numbered steps: 1. 'Create membership application forms' with a 'Create Now' button; 2. 'Import your data' with an 'Import Now' button; and 3. 'Complete your Setup' with a 'Final Steps' button. A red arrow points from the 'Complete your Setup' step to a 'Book Setup Call' button located in a light blue box at the bottom right. This box also contains the text 'Get help from a Customer Success Coach' and a 'Book Call' button. To the left of this box is a white box titled 'What would you like to do next?' with a dropdown menu for 'Select another setup option'.