5. Create a new contact. Specify the president title and assign someone. Select other options and save.

6. Create a new contact for the membership director, assign someone, select other options and save.

The welcome email is sent "from" the person designated as the club's membership director. After it has been sent, you will receive an email letting you know we have sent it out. This email will include an attachment with names, addresses, user-names and temporary passwords for members that do not have a valid email address so you can get their information to them via a mail merge.

After the Welcome Email is Sent

Don't forget that this is just the beginning. Websites are living and breathing entities; they need to be maintained and updated, adding new event reports and photos, uploading documents, keeping the committee lists and contact lists current, and especially refreshing the home page. When people see a stale website, they stop coming. But if they see a vibrant up-to-date site, they keep coming back and are more likely to join and become actively involved in the club's activities. Active websites also have higher page ranks and more prominence in search engine result pages; prospective members and event attendees are more likely to find your club or association with an active website.

Bulk Load Specifications

Member Database

The simplest format for importing your club's or association's membership database is a Microsoft Excel spreadsheet, with each member on a separate row and each data element described below in a separate column. We also support Microsoft Access, Paradox, dBase, CSV Text and Fixed Length Text formats. Columns can be in any order.

In the following lists, the format or maximum length is shown in the middle column. Please check your values and shrink excessively long entries down to a size that can be imported, otherwise they will be truncated.

The following four columns are required:

Column	Required?	Format/Size	Notes
First_name	Yes	20 chars	
Last_name	Yes	35 chars	
Member_type	Yes		
Date_expired	Yes	MM/DD/YYYY (The default format may dif-fer based on	Must be based on your renewal policies and on the member paid status. We use this value to determine if the imported member will be considered Active or Expired. It must be present for all members and must be a valid date. If you have secondary and tertiary members, be

Column	Required?	Format/Size	Notes
		your location)	sure that they have the same expiration date as their primary member. Note that the last day of a membership is "inclusive". So if everyone renews on Jan 1st in your club or association, specify 12/31/YYYY for the expiration date. Please check that all rows use a valid date format. If you have honorary "life" members, specify a date that's some years into the future (but not too great or the date field will overflow.) We suggest 20 years.
Member_number	No	Alpha - allows letters, dashes, and other non-numeric chars. If you are concerned about sorting, consider using leading zeros.	If your club or association does not have numbers, you can assign them, or we will assign them based on the date joined. They must be unique for each member, including secondary and tertiary members. Be sure that the member numbers in the spreadsheet start after the member numbers already in your online database. If member numbers are not specified, we will add them as sequential numbers starting after the people already in the online database.
Address1	No	50 chars	
Address2	No	50 chars	
City	No	30 chars	
State/Province	No	5 chars	Use standard abbreviations
Zip/PostalCode	No	10 chars	
Country	No	3 chars	Use standard abbreviations
Email_address	No	100 chars	Not required but strongly recommended
Phone	No	24 chars	
Cell_phone	No	24 chars	
Fax	No	24 chars	
Website	No	100 chars	Personal or company website address
Date_joined	No	MM/DD/YYYY	
Date_of_birth	No	MM/DD/YYYY	Can be hidden, visible and optional, or visible and required.
Salutation	No	6 chars	Dr., Rev., etc.

Column	Required?	Format/Size	Notes
Middle_initial	No	1 char	No period after the letter
Nickname	No	20 chars	Enable this field on the People Options screen
Gender	No	1 = male 2 = female 3 = other/non-binary	If this column is included, blank values are not allowed.
Spouse_first_name	No	30 chars	Can be used when you have not set up spouses or partners as secondary or tertiary members. This is enabled on the People Options screen.
Spouse_last_name	No	35 chars	
Spouse_date_of_birth	No	MM/DD/YYYY	Can be configured to hide the year, even though a year must be provided for importing a valid date.
Anniversary	No	MM/DD/YYYY	Can be configured to hide the year, even though a year must be provided for importing a valid date.
Printed_news-letter	No	Yes/No	See the People Options screen
Metro_area	No		If you are using this feature a member can be assigned to a single metro area.
Bio	No	250 chars	Remove embedded line and paragraph breaks
Directory_visibility	No	0-7	Corresponds to the values shown in the Profile - Membership Directory Visibility option (where 0 means "Not visible" and 7 means "Everything is shown").

Member Database Requirements

If the Alt_address columns are specified, be sure to enable this panel on the People Options screen.

Column	Format/Size	Notes
Alt_address1	50 chars	
Alt_address2	50 chars	
Alt_city	30 chars	

Column	Format/Size	Notes
Alt_state/province	5 chars	Use standard abbreviations
Alt_zip/postalcode	10 chars	
Alt_country	3 chars	Use standard abbreviations
Alt_phone	24 chars	

Member Database Requirements - Alt Address

For clubs and associations that people join through their personal lives, you can enable a panel to collect a member's work information. For clubs and associations that people join through their business/professional lives, these fields appear by default.

Column	Format/Size
Work_company	100 chars
Work_title	100 chars
Work_phone	24 chars
Tollfree_phone	24 chars

Member Database Requirements -

Work Information

If the Emergency Contact columns are specified, be sure to enable this panel on the People Options screen.

Column	Format/Size
Emergency_contact_name	55 chars
Emergency_contact_relationship	50 chars
Emergency_contact_phone	24 chars
Emergency_contact_email	100 chars

Member Database Requirements - Emergency

Contact Info

Additional (but Important!) Notes

If any column is completely blank (no values for any members), it should be left out of the spreadsheet. Only include columns that have data.

For associations where members join as part of their business or professional lives, use the Work… and primary address fields for the business address; the alt-address fields can be used for a home address if you have this information. Put the work phone in the Phone field and not in the Work Phone field.

The import process generates a login name and temporary password. If you have login names, you may provide them but if we detect duplicates, we won't be able to use them. Do not provide existing passwords; because of how they are encrypted in our system, new temporary passwords will always be generated. Members will be able to change both their login name and password when they first log in.

Do not combine data elements (for example, city and state) into a single column. Also, please check that the phone number and email columns have only one phone number and one email address; extras must be moved or removed. Also remove any extraneous words in these columns. The phone number column can contain extensions in the form "x.123". Phone numbers should also be consistently formatted with parentheses, hyphens, periods, etc.

It is important to remove members from the spreadsheet who are already loaded into the system. This will ensure that they are not listed twice! If this is not done, you may end up with duplicates.

You should include members whose membership expired in the last 18-24 months or so. We can import them and send them a welcome email, which might encourage them to rejoin. The system understands when Expired members try to log in and will take them to the Renewal Wizard where they must renew.

Don't include members who have passed away or moved out of the area or who you know will never rejoin. (Note that we only charge based on your Active membership, so there is no charge for these expired members.

Please double check date fields to be sure that they are defined as actual dates and not as strings. Otherwise, they will not be imported.

Please also verify that everything is properly aligned. It can be very frustrating to find one person's email address beside another person's name and contact information.

Finally, once you have sent us the database, please don't add or remove members through the website until after the database has been loaded. This will avoid potential conflicts with members in the online database vs. the one we are loading.

<u>Additional Member Data</u>

If your club or association has additional member data (questions) that are asked of each member, the answers should also be listed in individual columns, with the column header clearly linked to a question defined within ClubExpress, on the Control Panel – People tab – Setup section – Additional Member Data screen. This will allow us to import these answers and link them to each member. Otherwise, member answers to additional member data will not be imported.

Be sure that the values in the spreadsheet exactly match the values entered for each question.

> **Example:** If you defined a True/False question with values of "Yes;No", be sure that the spreadsheet column contains the values of "Yes" and "No" only (not "Y" and "N", or "True" and "False" or "YES" and "NO" – case is important!)

This is also true of Select List questions; the values in the spreadsheet must exactly match the list items defined online for them to show up in a member's Profile.

If you are using Check Box or Multi-Text Box questions, each value should be in a separate column of the spreadsheet.

> **Example:** Assume a list of favorite colors and members can check more than one. These should be entered in the spreadsheet as follows:

Member	Color_1	Color_2	Color_3	Color_4	Color_5
Member	Color_1	Color_2	Color_3	Color_4	Color_5
John Smith	Red	Blue	Purple		
Mary Brown	Green	Red			
Dave Chen	Blue	Purple	Yellow	Green	White

Member Database Requirements - Miscellaneous Questions

Values can be in any order but must exactly match the allowable values defined for the Check Box or Multi-Text Box question. They should also fill each column from left to right.

It is important to predefine in the online database each Additional Member Data question referenced in the spreadsheet before you send it to us.

In general, if you define an additional member data question that matches a built-in column (for example, date_of_birth), we will use the built-in column unless we receive explicit instructions otherwise.

Interests, Chapters and Committees

If you track interest, chapter assignments or committee membership for members, this information can also be imported.

Use one column for each interest, chapter or committee, with the column heading matching an interest group or chapter defined in your ClubExpress website. If a member has that interest or belongs to that chapter or committee, put "Yes" in that column, otherwise leave the column blank.

Be sure to respect the chapter settings defined for your member types.

> **Example:** If secondary and tertiary members must be in the same chapter as their primary member, this should be specified in the spreadsheet.

Secondary and Tertiary Members

If your club or association supports secondary and/or tertiary memberships (family or business members linked to the primary account), it is best if these are listed as separate rows in the spreadsheet below the primary member.

Recall that secondary and tertiary members are both attached to the primary. Secondary members have a username and password and can login to the website, while Tertiary members cannot login.

- Create a separate column called "Level" then put a 1 for primary and solo members, 2 for secondary, and 3 for tertiary. This column cannot be blank.
- Create another column called "Temp_Primary_Member_Number". Leave this column blank for primary and solo members but for secondary and tertiary members, enter the member number of that person's primary member.

This will allow us to import these secondary and tertiary members and link them to the correct primary membership. Otherwise, they will not be imported.

Example: For family memberships:

Member Type	Member#	First_Name	Last_Name	Level	Temp_Primary_Member_Number
Family	110	John	Smith	1	
Family	111	Mary	Smith	2	110
Family	112	Paul	Smith	3	110

Member Database Requirements - Family Memberships

Example: For corporate/business memberships:

Member Type	Member#	First_Name	Last_Name	Level	Temp_Primary_Member_Number
Corporate	110	John	Smith	1	
Corporate	111	Mary	Jones	2	110
Corporate	112	Paul	Brown	2	110
Corporate	113	Alice	Chen	3	110

Member Database Requirements - Corporate Memberships

For family memberships, everyone generally has the same address and often the same last name (though this is not necessary). For corporate or business memberships, everyone generally works for the same company, although the names and sometimes the addresses will be different. We use these guidelines to verify the data as it's being imported.

We will import this data as best we can, but we cannot guarantee that it will be perfect. If changes are necessary, you can make them once the import is done, by going into the Member Manager and clicking the Primary/Secondary Changes button.