

Providing the Club Membership Data

Before being able to create the CSV containing your current membership data, you first need to supply us with the following information:

- What you want to use the two member enterable custom fields that are labelled 'modelled' and 'occupation' for.
- What the year entered in the field labelled 'meritorious' will mean (if you are going to use it).
- A list of your membership types.
- A list of the ways that people discover your club (if you track that information for new members).
- A list of your branches.
- Which country is your default. This will determine which addresses can be validated and the validation to use.
- What you want to call the suburb, state and postcode fields in addresses (and whether you need the state field at all) eg. USA city, state,zipcode or Canada city,province,postalcode

Once you have given us that information we will provide information on what you need to put in the discover, meritorious, modelled, occupation, member_type and member_branch columns.

The other fields need to contain the following information with respect to each of your current members.

- member_number: their membership number (no duplications allowed). If you have never allocated membership numbers before or have lost track of what membership number was issued to who and the members themselves can't remember then you will need to allocate new numbers to all the members where you don't know their number. Member numbers must be positive integers.
- senior_member: this will contain 0 except for family members. For family members this will be the member number of the member the family members are attached to.
- initials: the initials of the member (except for their last name) for example for member Phil Martin Bristow you would enter 'P M'. This is used in place of the member's first name with addressing.
- last_name: The member's last name.
- first_name: The member's first name or the name by which they are best known.
- sex: M for male, F for female or C for any other type of member (eg. other clubs)
- dob: blank except for student members and student family members where it contains the member's date of birth in dd/mm/ccyy format. This will be used with the renewal processing to determine when the member needs to upgrade their membership.
- spouse: N except for family members where the family member is the spouse of the member identified in the senior_member field or where special circumstances apply where the field will then contain Y. All family members must either have Y in this field or a DOB.
- start_date: the date the member's application to join the club was processed (if known – otherwise use an estimate).
- email: the member's email address if known (otherwise leave blank)

- optout: Normally N, this field will only contain Y if the member has opted to never receive communications from the club via email.
- nfp: normally N, if you provide membership lists to members and a given member opts out of being included on that list then Y.
- mailings: normally N, if you post out your club magazine and a member opts to not receive it by post then Y.
- end_date: the date to which the member is currently financial or blank for life members.
- missing: normally N, will be Y if mail has been returned when sent to their latest known postal address.
- address: the first one or two lines of their postal address.
- suburb, state, postcode: the rest of the address. For the default country these will be validated according to the available validation for that country.
- country: the country the member is in. Note the prior fields will not be validated when this is not the default country.
- phone: the member's phone number