

ClubExpress – Bulk Load Specifications

Version 1.6 – 3/18/2009

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.

The following four fields are required:

- First name
- Last name
- Membership Type. These types must match the ones defined within ClubExpress, under "*Control Panel – Member Types*".
- Date Expired – 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.

The following additional fields are suggested:

- Member number. If your club or association does not have numbers, you can assign them, or we will assign them based on the date joined.
- Address1
- Address2
- City
- State
- Zip code
- Country (if not USA)
- Email address (not required, but strongly recommended)
- Phone (not required, but strongly recommended)
- Cell phone

The following fields may also be appropriate and are supported:

- Salutation (Dr., Rev., etc.)
- Middle initial
- Nickname
- Gender (1 = "Male"; 2 = "Female")
- Spouse first name
- Spouse last name
- Alt-address1
- Alt-address2
- Alt-city
- Alt-state
- Alt-zip
- Alt-country
- Alt-phone
- Work company
- Work title
- Work phone
- Fax
- Toll-free phone

- Personal website
- Date joined
- Date of birth
- Spouse date of birth
- Anniversary date
- Bio (up to 2000 characters)

Additional (but Important!) Notes

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. Always put the primary phone number in the “phone” field, whether or not it’s work or home.

The import process generates a login name and temporary password, both of which members can change when they login the first time. If you have login names, by all means provide them, but new temporary passwords will be generated.

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 removed. Also remove any extraneous words in these columns. The phone number column can contain extensions in the form “x.123”.

It’s important to remove members from the spreadsheet who are already loaded into the system. This will ensure that they are not listed twice!

You should include members whose membership expired in the last 15 months or so. We can import them and send them a welcome email, which might encourage them to rejoin. 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 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.

Club-specific Questions

If your club or association has club-specific questions that are asked of each member, the answers should also be listed in individual columns, with the column header clearly linked to a club-specific question defined within ClubExpress, on the “*Control Panel – Questions*” screen. This will allow us to import these answers and link them to each member. Otherwise, member answers to club-specific questions will not be imported.

Primary, Secondary and Tertiary Members

Secondary and tertiary members are both linked to the primary member, who has responsibility for their accounts.

- Secondary members have a username and password and can login to the system. They appear in the member directory and can register themselves for events as members. Use secondary members when the member needs to be able to login to the website, perhaps because he or she is participating in discussion forums or registering for events, or joining committees or interest groups.
- Tertiary members cannot login to the system. They do not appear in the member directory and cannot register themselves as members. In clubs where people join through their personal lives, use tertiary members to track children who need to be in the database under a parent. In clubs where people join through their business or professional lives, use tertiary members for additional contacts at a company who should not be considered as paying 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.

Create a separate column called "Level" then put a "1" for the primary member, "2" for the secondary, and "3" for the tertiary. Then create another column called "primary_member_number". For secondary and tertiary members only, put the member number of their primary member in this column. This will allow us to import these secondary and tertiary members and link them to the correct primary membership. Otherwise, secondary and tertiary members will not be imported.

Example for family memberships

Member Number	Member Level	First Name	Last Name	Level	Primary_member_number	Address
110	Primary	John	Smith	1		123 Winding Lane
111	Secondary	Mary	Smith	2	110	123 Winding Lane
112	Child	Paul	Smith	3	110	123 Winding Lane
113	Child	Sue	Smith	3	110	123 Winding Lane

Example for corporate/business memberships

Member Number	Member Level	First Name	Last Name	Level	Primary_member_number	Company Name
110	Primary	John	Smith	1		ABC Corp.
111	Associate	Mary	Jones	2	110	ABC Corp.
112	Associate	Paul	Brown	2	110	ABC Corp.
113	Add'l. Contact	Alice	Chen	3	110	ABC Corp.

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 is being imported.

We will import this primary/secondary/tertiary 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. Tertiary members are added or removed by selecting Member Details in a member's Profile screen.

Non-Member Database

ClubExpress also includes a non-member database, for other people with whom you want to stay in contact. For example:

- Prospective members
- Meeting attendees
- Donors
- Local government or public safety officials
- Local or national press
- District, state or national officers of your club

You can organize these non-member entries into categories for mailing labels or email blasts. See the Administration Manual for more information.

If you want to send us a non-member database, we are happy to import that as part of the data load. The following fields are supported:

- First name
- Last name
- Title
- Organization
- Address1
- Address2
- City
- State/Province
- Zip/Postal Code
- Country
- Phone
- Fax
- Cell Phone
- Email Address
- Notes
- Date_added
- Category (If you don't specify a category, we will use the system category "Interested Persons". If you do specify categories in the list, they should match the categories you have created on the Control Panel – Non-Member Database – Non-Member Categories screen.)

Please call us toll-free if you have any questions: (866) HLP-CLUB (457-2582)