



Data Import FAQs

	Page
How do I import members to GoMembership?.....	2



How do I import members to GoMembership?

Once you have logged in, in the Club Area click the Data Import tile from either your Home page or from the Menu

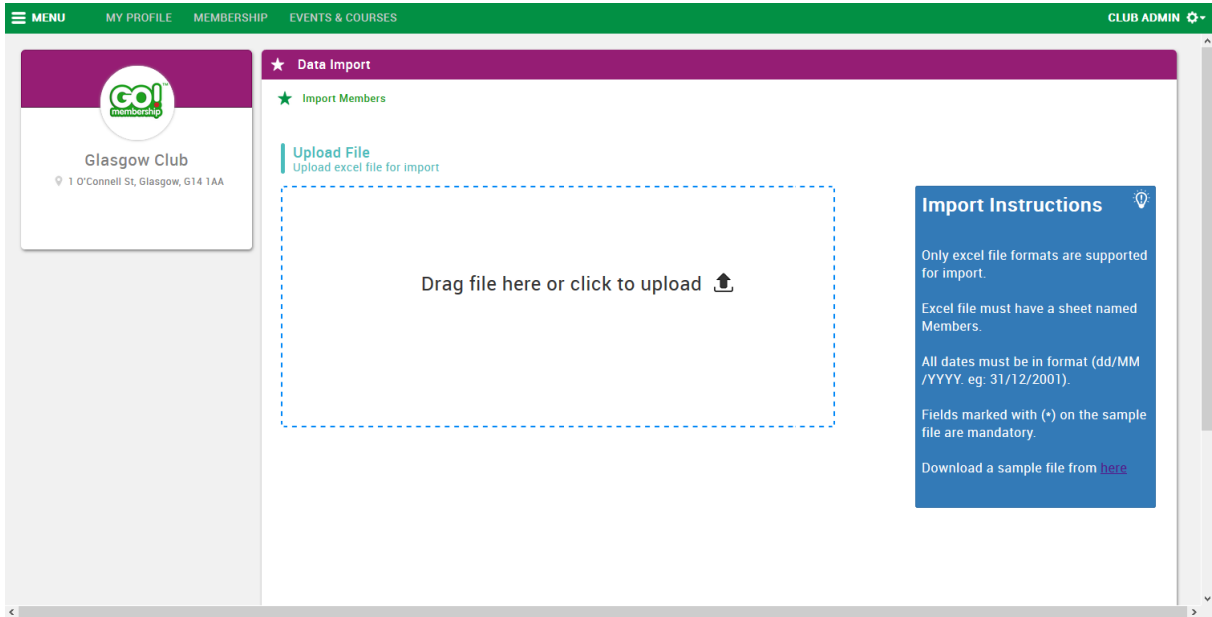


Home Page



Menu

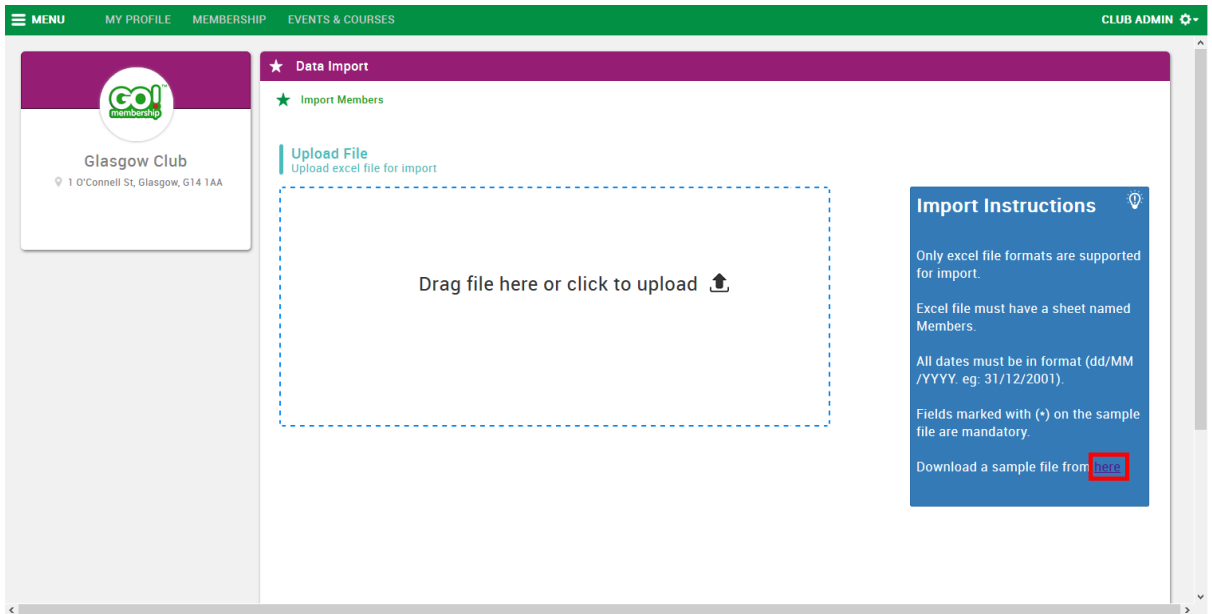
The Data Import pages is displayed and shows where to drag in the import file and an instruction box with guidance on how to import your data.



Data Import

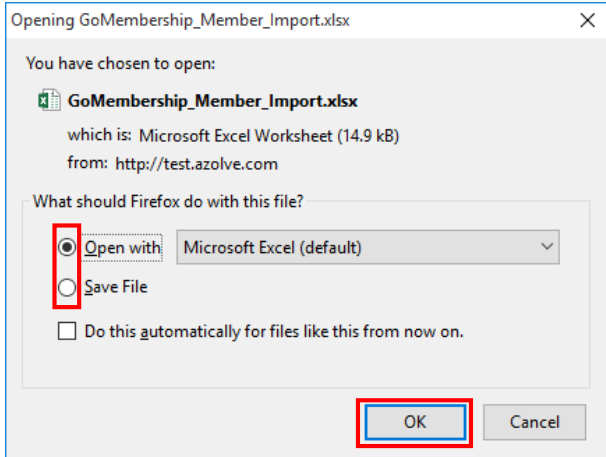
It is recommended that you download the sample file to ensure that you are using the latest format in case from one year to the next your Governing Body's data requirement has changed.

Click the download link.



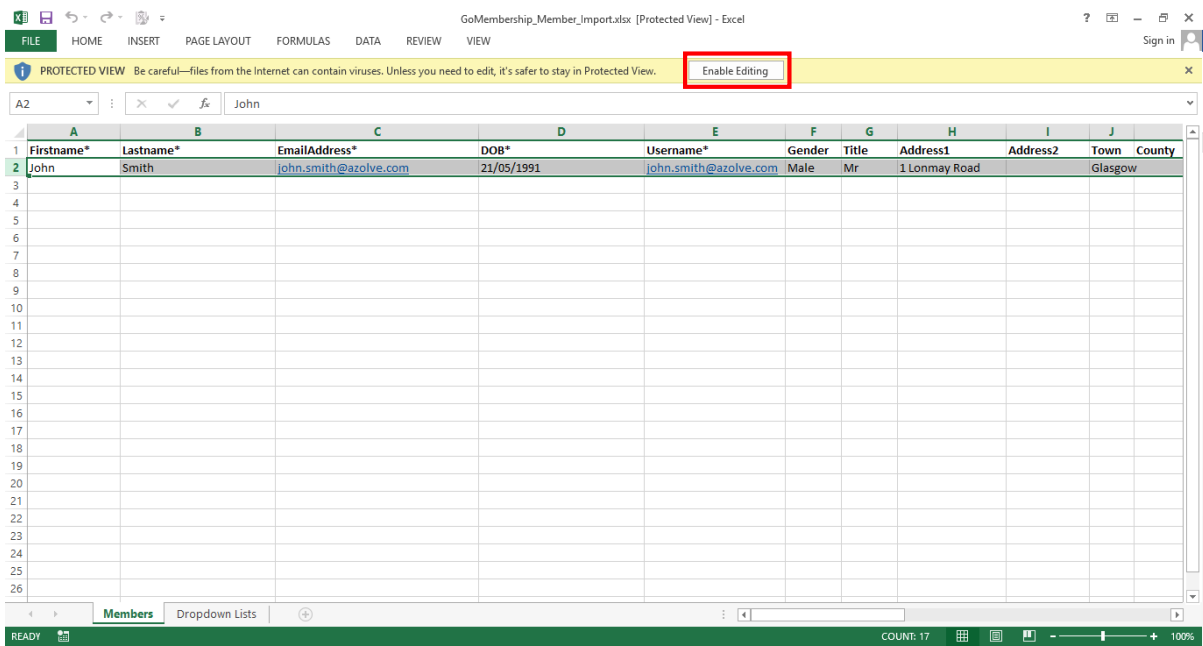
Data Import

A standard download will be initiated – this can vary from browser to browser, this example is using Firefox. Choose whether to Open or Save the file, ultimately you will have to save it with the member data prior to import. Note that you will not see this box if you have previously used “Do this automatically for files like this from now on.” when doing a previous Excel download from your browser.



Opening Dialog Box

The Excel file will open in Protected View, you need to click Enable Editing.

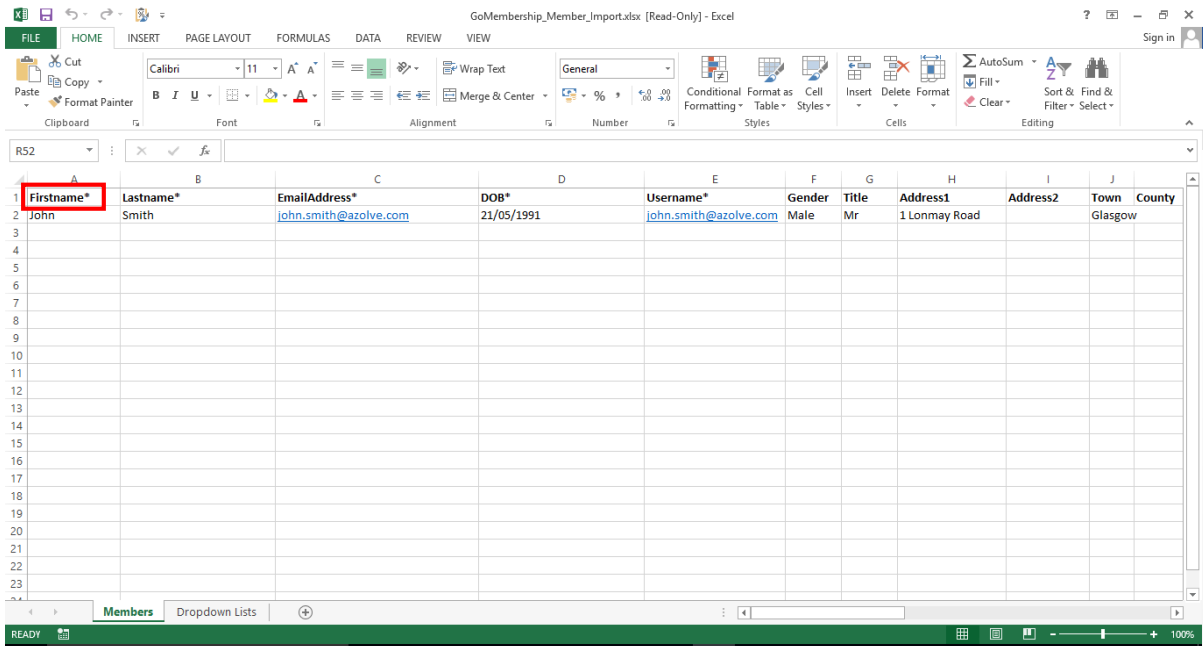


Excel – Download

When you have clicked Enable Editing you are now able to update the spreadsheet named Members. The first row is an example and should be removed. It has been provided to give you guidance on the format required for the data you enter.

Mandatory fields are marked with an asterisk in the header for that column – if you leave any of these blank in your data the data import will fail.

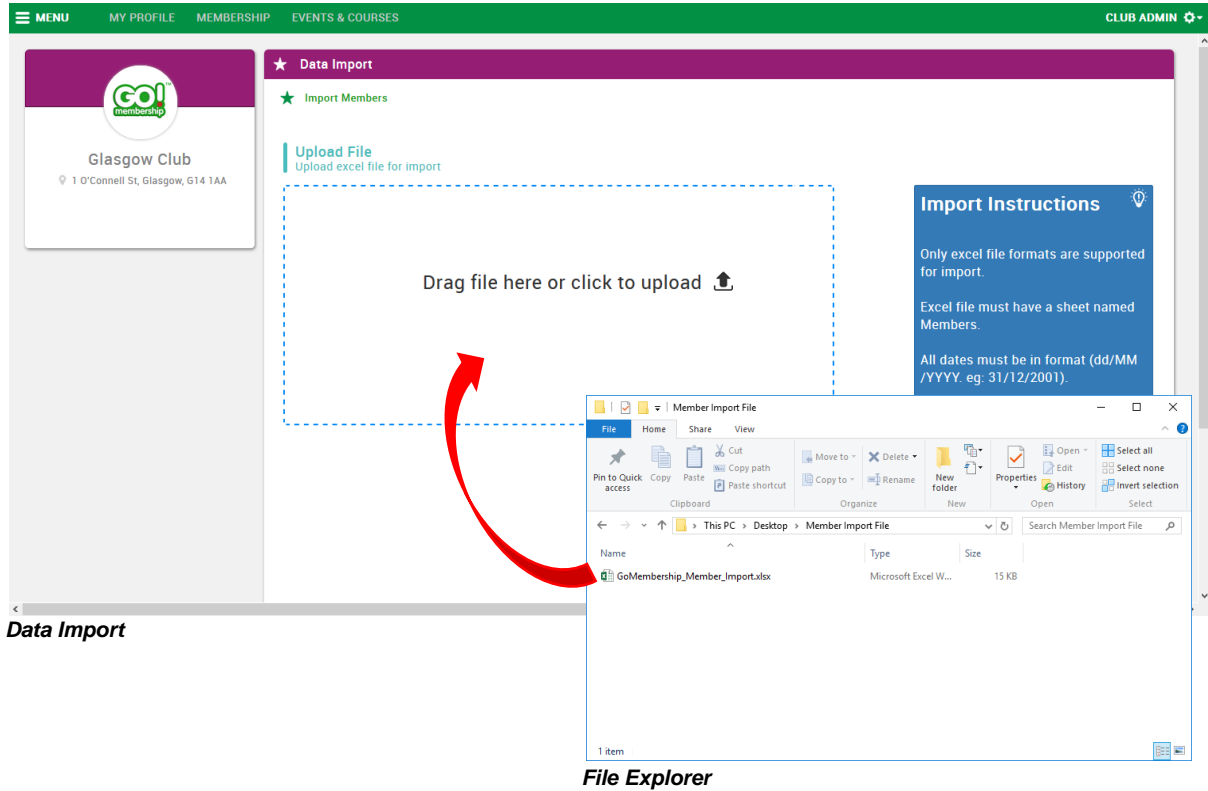
Note that the mandatory fields in this file are the core system mandatory fields and this import is intended to get the minimum system data populated. Your Governing Body may have additional information they require as mandatory and this will be validated when you work with the member records within your club.



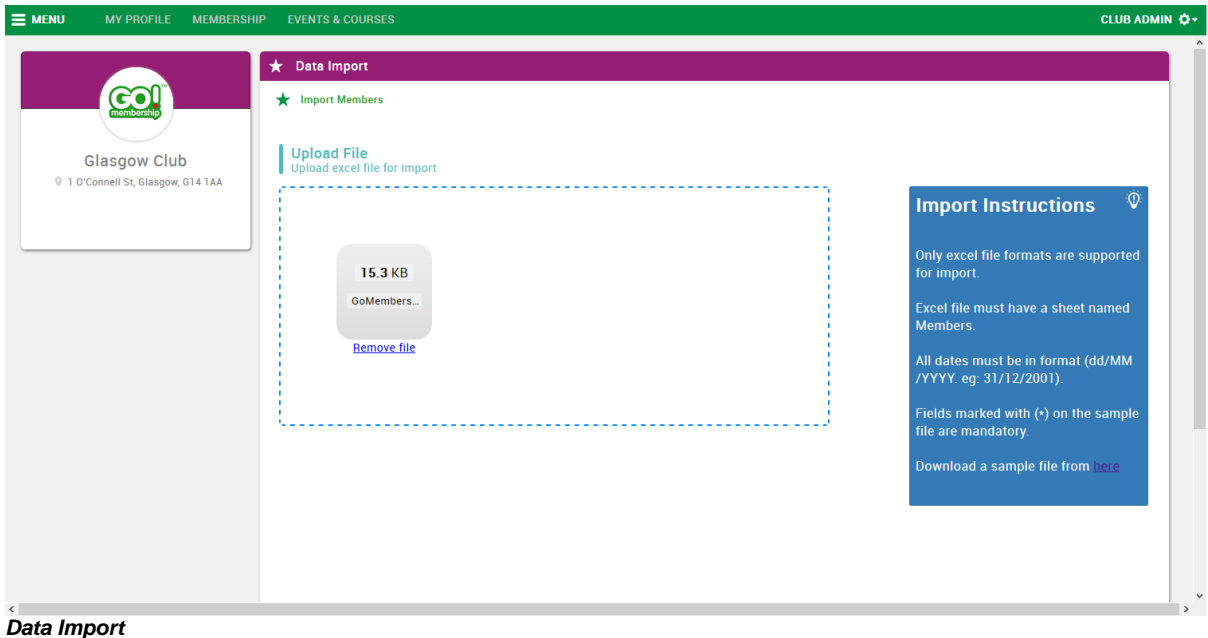
Excel – Editable

When you have completed your member list save the Excel file. The name of the file does not matter, but the sheet must be named Members so do not edit the sheet name.

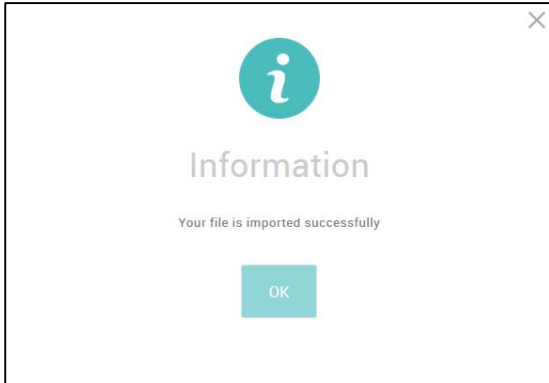
Locate the file in your file explorer and drag and drop it into the area shown.



When you have let the file drop in place you will see it displayed as an icon within the container and a progress bar will show progress of the import. If it is a short list of members this may be very quick to import.



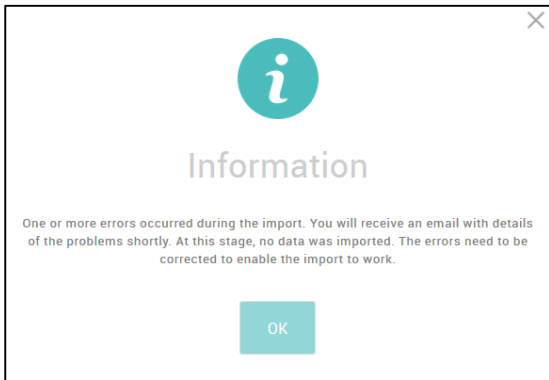
If your import is successful you will see a confirmation message.



Data Import – Successful

The file remains displayed in the import area, on refresh this will disappear. You do not have to manually remove it.

If your import has failed you will see a message that advises it has failed



Data Import – Successful

You will receive an email with the details of the failure. No data from this file has been imported, and the whole file needs to be resubmitted once the errors have been resolved.