

# Importing Members in Bulk

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This addendum explains how to add many members at once from a spreadsheet using the **Import Members** tool, instead of entering each member by hand. It is intended to be read alongside the main Membership Pro User Guide.

## A.1 Overview

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The bulk import tool reads a CSV or Excel file, checks every row, lets you **preview** the results, and then adds the valid members in a single step. It is designed to be safe: nothing is saved until you confirm, existing members are never overwritten, and if anything goes wrong during the import, no changes are made at all.

The import creates **member records only**. Households, groups, contributions, attendance, and dues are not created by the import — see *A.10 Limitations*.

## A.2 Before you begin

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- **Administrator access.** Bulk import is restricted to administrators. If **File** → **Import Members...** is greyed out, your account does not have the Import permission — ask an administrator to grant it or to run the import for you.
- **Supported files.** Comma-separated values (**.csv**) and Excel workbooks (**.xlsx**).
- **Take a backup first.** Before importing a large file, use **File** → **Backup** so you can restore if you change your mind.
- **Open the tool.** Choose **File** → **Import Members...** to open the import window.

## A.3 Step 1 — Download the import template

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In the Import Members window, click **Download Template** and choose CSV or Excel. The template arrives with the correct column headers already in place.

### Always start from the template

The importer matches columns by their exact header names. Renaming, removing, or reordering the header row will cause the file to be rejected or columns to be misread. Type your data underneath the headers provided and do not change the first row.

## A.4 Column reference

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The template contains the following columns. Only **FirstName** and **LastName** are required; every other column may be left blank.

Column	Required	Notes
<b>FirstName</b>	Yes	The member's given name. A row with no first name is rejected.
<b>LastName</b>	Yes	The member's family name. A row with no last name is rejected.
<b>MiddleName</b>	No	Optional middle name.
<b>PreferredName</b>	No	The name the member prefers to be called, if different.
<b>MembershipNumber</b>	No	Leave blank to have one generated automatically (format M-0001, M-0002, ...). Supply a value only when migrating existing numbers; it is also used to detect duplicates.
<b>MembershipType</b>	No	Must match the name of an existing membership type exactly. A name that does not match still imports the member, but leaves the type unset and flags the row in the preview.
<b>Gender</b>	No	Optional.
<b>DateOfBirth</b>	No	Use the format YYYY-MM-DD (for example, 1985-03-14).
<b>MaritalStatus</b>	No	Optional.
<b>Email</b>	No	Optional. Used together with the name to detect duplicates.
<b>Phone</b>	No	Optional.
<b>AddressLine1</b>	No	Street address, line 1.
<b>AddressLine2</b>	No	Street address, line 2.
<b>City</b>	No	Town or city.
<b>StateRegion</b>	No	State, province, or region.
<b>PostalCode</b>	No	Postal or ZIP code.
<b>Country</b>	No	Country.
<b>JoinDate</b>	No	Date the member joined. Use YYYY-MM-DD.
<b>BaptismDate</b>	No	Use YYYY-MM-DD. (Shown where relevant to your organisation.)
<b>IsActive</b>	No	Yes or No. If left blank, the member is treated as active (Yes).
<b>Notes</b>	No	Free-text notes about the member.

An asterisk is not needed in the file itself — the “Required” column above simply tells you which fields must be filled in for a row to import.

## A.5 Step 2 — Fill in your member data

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- Keep the header row exactly as downloaded, and enter **one member per row**.
- Write all dates as **YYYY-MM-DD** (for example, 2026-06-16).
- Leave **MembershipNumber** blank unless you are migrating existing numbers — the system assigns one automatically.
- For **MembershipType**, type the type name exactly as it appears under **Settings** → **Membership Types**.
- For **IsActive**, enter **Yes** or **No** (blank counts as Yes).
- Save the file as **.csv** or **.xlsx**.

## A.6 Step 3 — Preview and review

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Click **Browse** to choose your file, then **Preview**. The importer reads every row and shows a table with **Row**, **Status**, **Name**, and **Details**. This is a dry run — **nothing is saved yet**.

Each row is given one of three statuses:

<b>Ready</b>	The row is valid and will be imported.
<b>Duplicate</b>	The member already exists (see A.8). The row is shown in grey and will be skipped — never overwritten.
<b>Error</b>	Something is wrong with the row — for example a missing first or last name, or an unreadable date. The row is shown in red, the <b>Details</b> column explains why, and the row is not imported.

Fix any errors in your spreadsheet, save, and **Preview** again. Repeat until every row you intend to add shows **Ready**.

## A.7 Step 4 — Run the import

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When the preview looks right, click **Import** and confirm when prompted. The import runs as a single, all-or-nothing operation: if an unexpected problem occurs partway through, **no members are added** and your data is left exactly as it was.

On success you will see a summary of how many members were **added**, **skipped** as duplicates, and **rejected** as errors. The import is written to the **Audit Log**, and the preview refreshes — rows you just imported now appear as **Duplicate**, which confirms they are in the system.

## A.8 How duplicates, types, and numbers are handled

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- **Duplicates.** A row is treated as a duplicate when its **MembershipNumber** matches an existing member. If no membership number is supplied, the importer compares the member's **full name together with the email address**. Duplicates are skipped, never updated or overwritten.
- **Membership types.** Each **MembershipType** value is matched by name against your existing types. A value that matches nothing does not stop the import — the member is created with no type set and the row is flagged, so you can assign the type afterwards on the Members screen.
- **Membership numbers.** Rows left blank are given the next number automatically (**M-0001**, **M-0002**, and so on). Numbers you supply yourself are kept as written and used for duplicate checking.

## A.9 Troubleshooting

Symptom	What to do
<b>Import Members...</b> is greyed out	Your account is not an administrator, or lacks the Import permission. Ask an administrator to grant it.
A row shows <b>Error: first/last name required</b>	Fill in the FirstName and LastName cells for that row.
A row shows an <b>Error</b> about a date	Make sure dates are written as YYYY-MM-DD (e.g. 1990-07-02).
A row is flagged for membership type	The type name doesn't match an existing one. Check the exact spelling under Settings → Membership Types, or import without it and set it later.
The whole file won't read	Confirm it is the downloaded template, saved as .csv or .xlsx, with the header row unchanged.
Everyone shows as <b>Duplicate</b>	You are likely re-importing a file whose members are already in the system. This is harmless — the duplicates are simply skipped.

## A.10 Limitations and notes

- **Members only.** Households and household links, groups, contributions, attendance, dues, and member photos are not created or updated by the import.
- **No overwrites.** Existing members are never modified by the import; matching rows are skipped as duplicates.
- **Adding, not editing.** The tool adds new members. To change members already in the system, use the Members screen.