IMPORTING MEMBER INFORMATION

It is important to customize your public website and populate it with useful information that will capture the attention of your members. Popular features such as Calendars, Committees, Documents, Events, Newsfeed, and Amenities offer your members great value.

Once you have published your site, you are ready to onboard your community members. Whether you are starting from scratch or migrating members from an existing community website, we make it easy to bulk upload existing member information into the system database, using a Comma-Separated Values (CSV) file.

Microsoft Excel, Google Sheets, and Apple's Numbers are great applications to organize your member data in a CSV file. It is very important that the column header titles be formatted correctly for spelling and letter case. The Member Form tab is where you will find the information that will be collected for each member. The required fields are Email Address, First Name, Last Name, Phone Number, Address Line 1, City, State, and ZIP. Under the "State" field, you can either correctly spell out the name or use the 2-digit abbreviation (i.e. Texas or TX). The "Phone Number" field is not required for upload, but can enter it in a few different ways (i.e. 123-456-7890, (123) 456-7890, 1234567890).

Email Address	First Name	Last Name	Phone Number	Address Line 1	Address Line 2	City	State	ZIP
FreshRains@gmail.com	Erica	Snowers	234-345-5921	13062 Whitten Drive		San Antonio	Texas	78261
MidgarsElite@gmail.com	Cloud	Strife	234-311-3442	13307 Susser Way		San Antonio	Texas	78261
mendacho@gmail.com	Cristian	Lopez	234-324-9631	12984 Walbeck Drive		San Antonio	Texas	78261
rockaroundtheclock@aol.com	Frederick	Flint	234-897-3242	13048 Minden Dr		San Antonio	Texas	78261
seoefforts@yahoo.com	Simon	Goulding	832-456-7890	6756 Elm Street		San Antonio	Texas	78261
starcraftgeneral@gmail.com	James	Raynor	406-291-6782	72355 Wilkinson St		San Antonio	Texas	78261
jgwentworth@yahoo.com	Jaime	Gonzales	234-345-5271	13498 Templin Avenue		San Antonio	Texas	78261
roundouttheteam@gmail.com	Heath	Barret	234-324-500	13083 Saxony Blvd		San Antonio	Texas	78261
toweringbuildings@yahoo.com	Mina	Tiras	406-291-6782	72355 Wilkinson St		San Antonio	Texas	78261
clocktherun@gmail.com	Angelique	Fernandez	234-324-3242	13052 Whitten Drive N		San Antonio	Texas	78261

Required fields are highlighted

If you add Custom Fields to your Member Form (e.g., number of vehicles, additional household names) to collect additional information from members, these column headers appear to the right of the ZIP column. It is up to the website administrator to determine whether this information is required.

You also can add a "Tags" column. Tags help you group members together on the basis of shared roles in committees, on your board, and so on. Use tags to designate who can and who can't access specific website features. When you add multiple tags, separate them with commas (i.e., board, social, pool-access).


hoastart

IMPORTING MEMBER INFORMATION - CONTINUED

To get started, click on the "Members Actions" dropdown menu at the top right and choose "Member Import." Next, click on the "+Import Members" button in the "MEMBER IMPORT" window. Upload the CSV file with your member data from the "Import Users" window. You also can download the CSV template from here.

After you browse your computer and locate your upload file, click on the "View Summary" button to see the outcome of your upload. If the system identifies any records with errors, it shows you what you need to correct before all your data will upload.

Before you actually finalize member import, the "MEMBERS IMPORT SUMMARY" window shows you what will happen when you add the data from your CSV fie. If any of the information in the file doesn't meet the import criteria, the "Failed Rows" tab will appear to explain what you need to correct. For best results, always correct the CSV file before you actually import it.

◆ *Once you're ready to announce the launch of your site, you can message your members directly through the MEMBERS window. From the "Members Actions" button, "Message Filtered Members" enables you to contact everyone or just the members you've selected through running a search.*
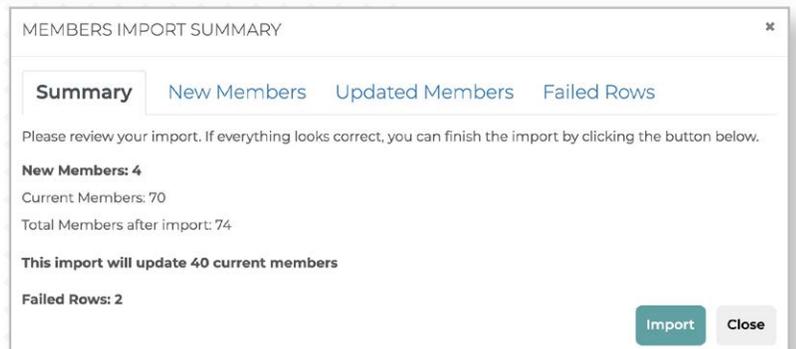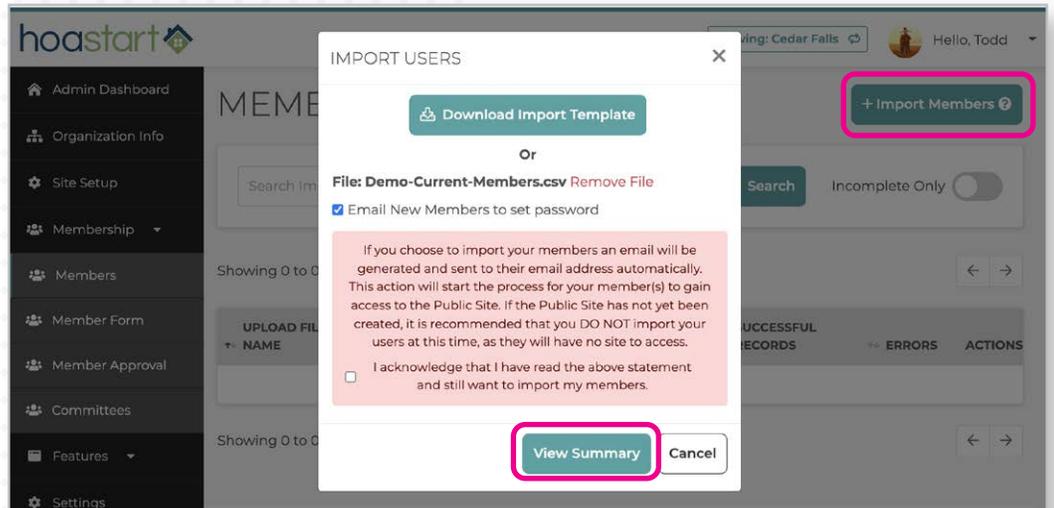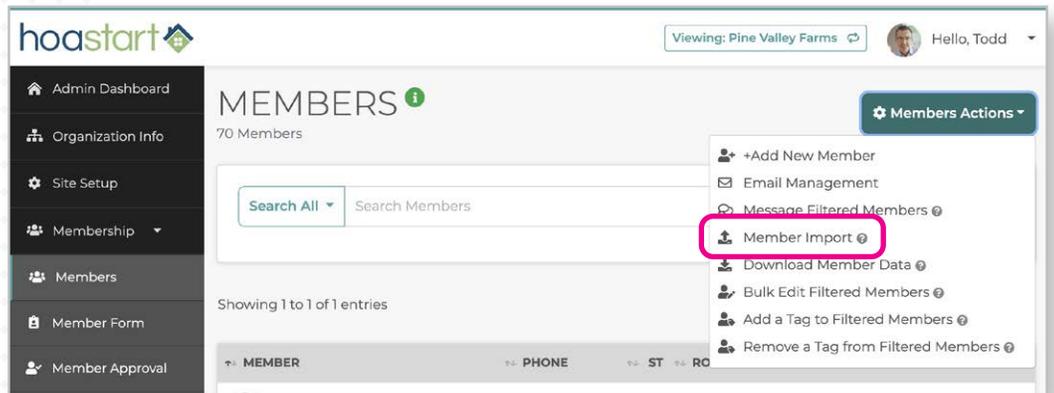
IMPORTING MEMBER INFORMATION - CONTINUED

Once you click on the "Import" button, data processing may take several minutes. The "PROGRESS" column in the "MEMBER IMPORT" window shows the status of your upload, from "Pending" to "Completed." Refresh the window to check the upload status, or click on the "Members" tab and check for your new members.

You also can add new members manually. From the "Members" tab of the Admin dashboard menu, open the "Members Actions" dropdown menu and choose "+Add New Member." Type in the member information in the "ADD NEW MEMBER" window that opens.

You can grant and deny access to various website features in the "ADD NEW MEMBER" window.

You also can set Member Directory preferences for the member, including whether they're listed and how much of their personal information appears. Members can adjust these settings once they log in and visit their Member Profile.

You also can designate who receives text messages through your website, if your membership package includes group texting. Members can adjust this setting as well. To invite your members to create an account password and get started using your site, use the same "Message Filtered Members" window to send a system message.

◆ *Please note that new members can register directly through your website. Each site page includes a "Register" link. Admins can approve these new member registrations automatically or (more typically) require review of every prospect's application. For more information on this topic, request a Quick Reference Guide that provides more details.*

If you have any questions about using Importing Member Information, please visit support.hoastart.com and open a support ticket.

hoastart