

# 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. Utilizing popular features like Calendars, Committees, Documents, Events, Newsfeed, and Amenities offers great value to your members. 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 and generate a CSV file that can be imported. 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 First Name, Last Name, Email Address, 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 be formatted a few different ways (i.e. 123-456-7890, (123) 456-7890, 1234567890). Use of periods in phone numbers will result in an error (i.e. 123.456.7890).

Required fields are highlighted

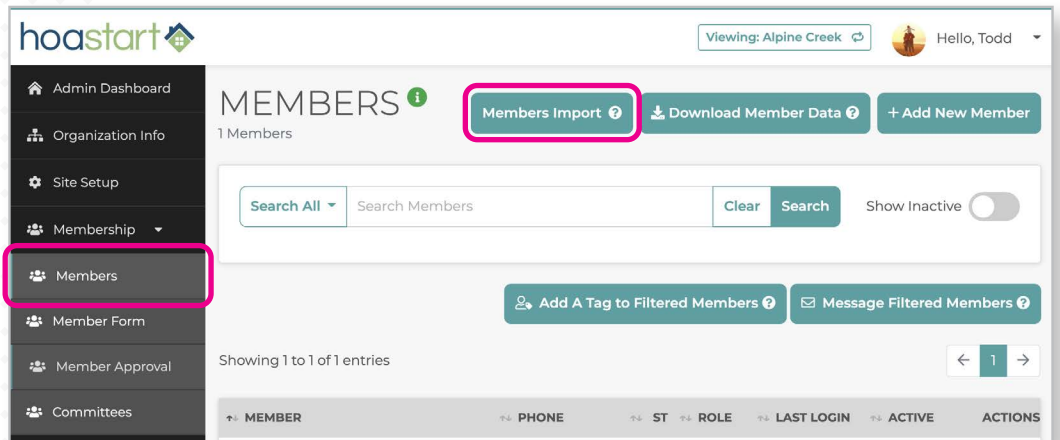
	A	B	C	D	E	F	G	H	I	J
	First Name	Last Name	Email Address	Phone Number	Address Line 1	Address Line 2	City	State	ZIP	
2	Erica	Snowers	Freshkains@gmail.com	234-345-5921	13062 Whitten Drive		San Antonio	Texas	78261	
3	Cloud	Strife	MidgarsElite@gmail.com	234-311-3442	13307 Susser Way		San Antonio	Texas	78261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

If you opt to collect additional information from members by adding Custom Fields on the Member Form, these column headers can be added to the right of the ZIP column (i.e. Number of vehicles, additional household names). It is up to the website administrator whether this information is required or not.

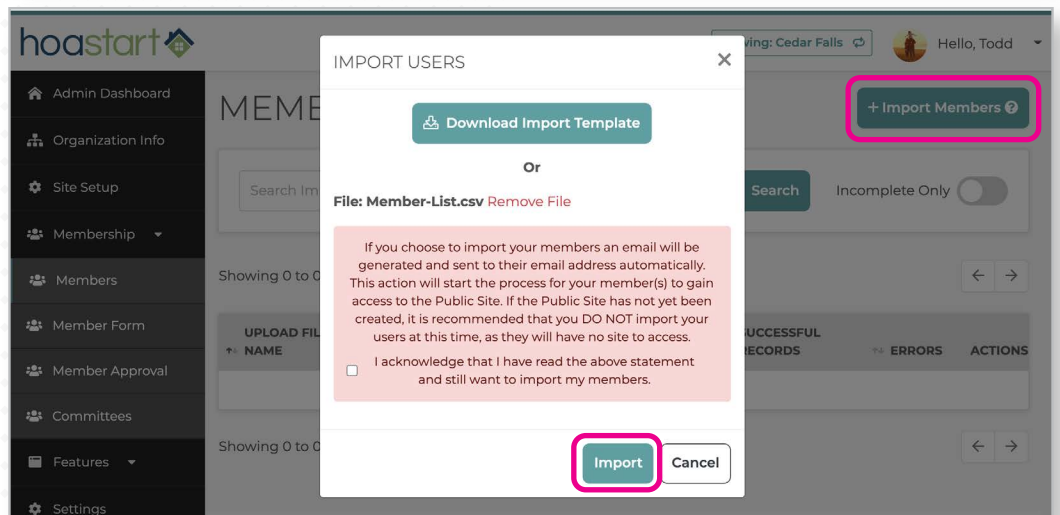
You can also add a "Tags" column. Tags help you group members together for features like online Messaging, or can be used to restrict access to specific areas of the website for certain members. When adding multiple tags, they will need to be separated by commas (i.e. board, social, pool-access). To get started, click on the

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“Member Import” button in the upper part of the window of the Members tab in the Admin Panel. This will take you to the “Member Import” page where you click on the “+ Import Members” button. From the Import Users modal window you can upload your CSV member list.



Once the “Import” button is clicked, it could take several minutes for data to be processed. Under the Progress column you will see the word “Pending” while data is uploading. Refresh the Member Import screen to see if the process has “Completed”, or visit the Members tab to check if the newest members have been entered.



UPLOAD FILE	NAME	UPLOAD START TIME	UPLOAD END TIME	PROGRESS	SUCCESSFUL RECORDS	ERRORS	ACTIONS
Member-List.csv		11:06AM on May 06 2021	11:06AM on May 06 2021	Completed	61	0	

◆ **Please note, imported members will automatically receive an email that will be sent to their personal email address. This starts the process for members to gain access to your community site. Your site should be published before importing members because they must use the site to login.**

After importing your list, the system may have encountered errors if CSV data was not set up correctly. If you see that some members have not been uploaded, double-check their information to make sure it was formatted correctly or that required fields are not missing.

The second way to add new members to your community is to individually (manually) add their information into the system. From the Members tab in the Admin Panel, click on the “+ Add New Member” button in the upper right corner of the window. This will open a separate modal window. Here you will need to provide the required information: name, email, phone number, and address.

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You have the option to grant them admin status by checking the Admin box. Selecting the “Blocked From Newsfeed” option will still allow members to see important information posted to the Newsfeed, but will prevent them from posting or commenting on existing posts.

The Admin can elect to have member information appear in the Member Directory. For additional privacy, an Admin can decide if members email and/or phone are shared in the Member Directory. These settings can also be adjusted once the member has logged in and visits their Member Profile.

Admins can decide who is eligible to receive text message communications, if your membership package includes group texting. This can also be adjusted by the individual members through their Profile link settings.

- ◆ ***Please note, new members can register themselves through the community website by clicking on the Register button at the top of each page. Admins can require that all new member requests be reviewed before being “Approved for membership”, or they can be set to automatically approve. If you would like more information on this topic, you can request a Quick Reference Guide to help explain this process in more detail.***

**If you have any questions about using Importing Member Information, please visit [support.hoastart.com](https://support.hoastart.com) where you can open a support ticket.**

The screenshot displays the 'ADD NEW MEMBER' form within the Hoastart Admin Dashboard. The sidebar on the left shows the 'Members' menu item highlighted. The form contains the following fields and options:

- First Name** and **Last Name** (text input fields)
- Email Address** and **Phone Number** (text input fields)
- Address** and **Address Line 2** (text input fields)
- City** (text input field), **State** (dropdown menu), and **Zip** (text input field)
- Admin**
- Blocked From Newsfeed**
- Appear in Member Directory**
- Receive Text Messages**
- Current Avatar** section with an 'Upload New Avatar' button and a 'Browse' button.

A pink box highlights the '+ Add New Member' button in the top right corner. A red box highlights a disclaimer at the bottom of the form: "If you choose to manually add a member through this screen an email will be generated and sent to their email address automatically. This action will start the process for your member to gain access to the Public Site (or an Admin to your Panel). If you're wanting to add a member and the Public Site has not yet been created, it is recommended that you do not manually add them at this time, as they will have no site to access." Below the disclaimer is a checkbox:  I acknowledge that I have read the above statement and still want to add an admin or member.