

Etail Systems Tip Sheet

Objective: To add a member(s) using a CSV file.

The following tells you how to achieve this;-

Members are people who have an account with your website, so they have a login area, & some of their details are stored on our system (e.g. name, address, telephone number etc). They may also have signed up to your newsletter (people who have **only** signed up to your newsletter are subscribers.)

To complete your Member CSV, please ask for a copy of the spec & a copy of the Member CSV file if you haven't got them. Please refer to the spec if for explanations on each of the columns.

The only required fields in the CSV are:

- Email
- Email Type
- Surname
- AddressLine1
- Town
- Del_AddressLine1
- Del_Town

NB: If you're using a courier, some require more information than what is here to despatch your orders. Please check with them to see what information you need.

The screenshot shows the 'Members Import Validation' page. At the top is a navigation bar with links: Orders, Products, Members (highlighted), Sites, Site Admin, New Site, Admin, Reports, Home, Partner, Sign out. Below this is a sub-navigation bar: Members, Members Import (highlighted), Subscribers, Messages. A breadcrumb trail reads: You are here > Client: Etail Demo (ID: 287899650) > Members > Members Import. The main content area has tabs: Member Import Validation (active), Import Export, Log Files. Under the active tab, there is a 'Member CSV import' section with a 'Choose File' button (labeled 'No file chosen') and a 'Validate' button. A message states: 'Validate files meeting the 'Member CSV Import Specification' before uploading.'

tab 'Member Import Validation'.

Once you've saved your CSV (as a 'CSV (Comma Delimited)' format), you'll need to go to Members > Members Import & the mini

Check the log file that will automatically download to see if there are any errors. If there are, you'll need to edit the file & re-validate it. Once everything is fine, click the 'Import Export' mini tab.

The screenshot shows the 'Import Export' page. It has tabs: Member Import Validation, Import Export (active), Log Files. Under the active tab, there is a section 'Import Members and process'. It contains a 'Select site:' dropdown menu (labeled 'Select Site'), a 'Select File to Import' section with a 'Choose File' button (labeled 'No file chosen'), and an 'Import' button.

Select your site (if you have more than one), choose your file, & click 'Import'.

Member Import Validation	Import Export	Log Files
Log type: Member Import		
Date		
03/10/2012 15:51:00		

Once that's imported, you'll need to check the 'log files' mini tab. Make sure the 'Log type' dropdown is set to 'Member Import', & click 'Search'. All the member imports you've ever done will appear here. Click 'Open' on your desired file.

If anything comes up as '**Warn:**', this means the member has been run in, but you should edit their information. '**Error:**' means that there's an issue with that member/information, & it won't have run in.

Any issues at this stage are usually easily solved by editing the member in COMS. Please ask if you need a walkthrough for this.

Downloading Members

There are 2 options when downloading members: Short CSV & Long CSV. They contain the following fields:

Short CSV - Title, First name, Surname, Email, Subscribe, Telephone, Mobile, Address company name, Address line 1, Address line 2, Address line 3, Address town, Address county, Address postcode, Address country, Address telephone number, Address mobile, Order count, Order value, Last order (date), Points (if loyalty points enabled), Registration date, (membership) Role.

Long CSV – includes all of the above plus: Delivery name, Delivery company name, Delivery line 1, Delivery line 2, Delivery line 3, Delivery town, Delivery county, Delivery postcode, Delivery country, Delivery telephone number, Delivery mobile, Form fields, Source.

If you need any help with importing your members, please call 0844 842 0908 or email support@etailsystems.com.