

## Standard File Import<sup>v9</sup>

GrowthZone and ChamberMaster support a standard import file for loading your member data into our software.

The standard procedure is to create an Excel file that contains your data, following the field order, titles, and formatting as directed below. Although we recommend Excel, we can also accept CSV file types.

- 1. File name should be called “std\_import.xls”.** A sample file called “std\_import” should be sent along with this document.
- 2. Field names must remain the same, both the name and order.**
- 3. Additional fields may not be added.**
- 4. Fields may be left blank if information is not present.**
- 5. Every row will be imported as its own company/member record.** Multiple listings of the same company name will result in multiple separate company records.
- 6. “Status” field is used to determine if the user is an Active, Prospect, Courtesy, NonMember, or Dropped.** Any entries not of those five types will be imported as Non-Member.
- 7. “MemberType” can be of any classification you desire.** We recommend not having more than 10 different types.
- 8. States must be in their two letter abbreviation or three letters for international use.** States entries longer than three characters will be ignored, or truncated to three characters.
- 9. Full time and part time employee fields may only contain whole numbers and no ranges, or they will be ignored.**
- 10. Phone and fax number longer than 30 characters will be truncated to 30 characters.**
- 11. “RenewalMonth” must be a whole number, 1-12, or will be ignored.**
- 12. “DuesLevelName” is the name of the fee item assigned to the member from your dues schedule.**
- 13. “AnnualDuesAmount” is the total sum the member is expected to pay annually, regardless of billing frequency.**
- 14. “BillingFrequency” must be a whole number representing the number of invoices the member is to receive annually.** (1 for annual, 2 for semi-annually, 4 for quarterly, etc.) Any non-whole number will be imported as annually (1).

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|--------------------------|---------------------------------|---------------------------------|
| 1. CompanyName           | 25. BillAddr2                   | 49. AdditionalContactTitle1     |
| 2. CompanyFileByName     | 26. BillCity                    | 50. AdditionalContactEmail1     |
| 3. Status                | 27. BillState                   | 51. AdditionalContactPhone1     |
| 4. MemberType            | 28. BillZip                     | 52. AdditionalContactFirstname2 |
| 5. Phone                 | 29. NumFullTimeEmployees        | 53. AdditionalContactLastname2  |
| 6. AltPhone              | 30. NumPartTimeEmployees        | 54. AdditionalContactTitle2     |
| 7. TollFreePhone         | 31. JoinDate                    | 55. AdditionalContactEmail2     |
| 8. Fax                   | 32. DropDate                    | 56. AdditionalContactPhone2     |
| 9. Email                 | 33. BusinessDescription         | 57. AdditionalContactFirstname3 |
| 10. Website              | 34. InternalComments            | 58. AdditionalContactLastname3  |
| 11. MailAddr1            | 35. RenewalMonth                | 59. AdditionalContactTitle3     |
| 12. MailAddr2            | 36. DuesLevelName               | 60. AdditionalContactEmail3     |
| 13. MailCity             | 37. AnnualDuesAmount            | 61. AdditionalContactPhone3     |
| 14. MailState            | 38. BillingFrequency            | 62. AdditionalContactFirstname4 |
| 15. MailZip              | 39. PrimaryBusinessCategory     | 63. AdditionalContactLastname4  |
| 16. PhysAddr1            | 40. SecondBusinessCategory      | 64. AdditionalContactTitle4     |
| 17. PhysAddr2            | 41. ThirdBusinessCategory       | 65. AdditionalContactEmail4     |
| 18. PhysCity             | 42. PrimaryContactFirstname     | 66. AdditionalContactPhone4     |
| 19. PhysState            | 43. PrimaryContactLastName      | 67. MemberCustomField1          |
| 20. PhysZip              | 44. PrimaryContactTitle         | 68. MemberCustom Field2         |
| 21. BillContactFirstName | 45. PrimaryContactEmail         | 69. MemberCustomField3          |
| 22. BillContactLastName  | 46. PrimaryContactPhone         |                                 |
| 23. BillContactTitle     | 47. AdditionalContactFirstname1 |                                 |
| 24. BillAddr1            | 48. AdditionalContactLastname1  |                                 |