

Standard File Import

MicroNet, Inc. supports 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, Non-Member, 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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List and order of fields that should be present

1. CompanyName
2. CompanyFileByName
3. Status
4. MemberType
5. Phone
6. AltPhone
7. TollFreePhone
8. Fax
9. Email
10. Website
11. MailAddr1
12. MailAddr2
13. MailCity
14. MailState
15. MailZip
16. PhysAddr1
17. PhysAddr2
18. PhysCity
19. PhysState
20. PhysZip
21. BillContactFirstName
22. BillContactLastName
23. BillContactTitle
24. BillAddr1
25. BillAddr2
26. BillCity
27. BillState
28. BillZip
29. NumFullTimeEmployees
30. NumPartTimeEmployees
31. JoinDate
32. DropDate
33. BusinessDescription
34. InternalComments
35. RenewalMonth
36. DuesLevelName
37. AnnualDuesAmount
38. BillingFrequency
39. PrimaryBusinessCategory
40. SecondBusinessCategory
41. ThirdBusinessCategory
42. PrimaryContactFirstname
43. PrimaryContactLastName
44. PrimaryContactTitle
45. PrimaryContactEmail
46. PrimaryContactPhone
47. AdditionaContactFirstname1
48. AdditionalContactLastname1
49. AdditionalContactTitle1
50. AdditionalContactEmail1
51. AdditionalContactPhone1
52. AdditionaContactFirstname2
53. AdditionalContactLastname2
54. AdditionalContactTitle2
55. AdditionalContactEmail2
56. AdditionalContactPhone2
57. AdditionaContactFirstname3
58. AdditionalContactLastname3
59. AdditionalContactTitle3
60. AdditionalContactEmail3
61. AdditionalContactPhone3
62. AdditionaContactFirstname4
63. AdditionalContactLastname4
64. AdditionalContactTitle4
65. AdditionalContactEmail4
66. AdditionalContactPhone4
67. MemberCustomField1
68. Member Custom Field2
69. MemberCustomField3