

Importing

Introduction

Quick Answer

- Login to your **Club Control Panel**.
- Click **Site Membership**.
- Select **Import** from the left-hand menu.

In this guide, you will learn how prepare a spreadsheet ready to upload, edit existing member data, and import the data into your website database.

Preparing a Spreadsheet

The Import tool allows clubs to upload the data of multiple members via a single Excel .CSV file, saving you the time and effort of adding members individually.

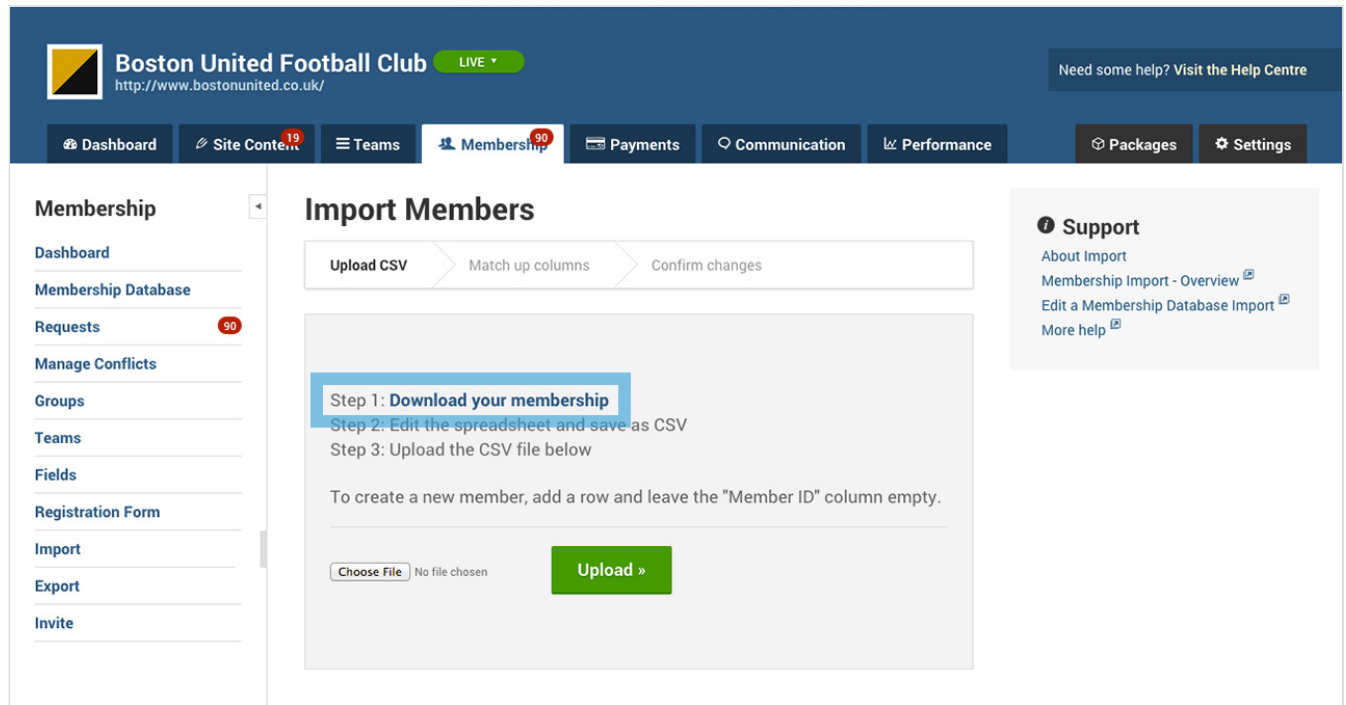
To import members, access your Club Control Panel and click the 'Membership' tab, then select 'Import' from the left-hand menu.

You will see a list of three steps on how to import members.

The screenshot displays the Club Control Panel for Boston United Football Club. The top navigation bar includes the club logo, name, and website URL. A secondary navigation bar contains tabs for Dashboard, Site Content, Teams, Membership, Payments, Communication, and Performance. The 'Membership' tab is selected and highlighted with a blue box. On the left, a sidebar menu under 'Membership' lists options like Dashboard, Membership Database, Requests, Manage Conflicts, Groups, Teams, Fields, Registration Form, Import, Export, and Invite. The 'Import' option is highlighted with a blue box. The main content area is titled 'Import Members' and shows a three-step process: 'Upload CSV', 'Match up columns', and 'Confirm changes'. Below this, instructions guide the user through downloading a membership spreadsheet, editing it, and uploading it. A 'Choose File' button and an 'Upload' button are visible. A 'Support' sidebar on the right provides links for 'About Import', 'Membership Import - Overview', 'Edit a Membership Database Import', and 'More help'.

Step 1

First, if you already have members listed in your club website database, download your existing database by clicking 'Download your membership', and open the file in Excel.



The screenshot shows the Boston United Football Club website interface. The top navigation bar includes the club logo, name, and URL, along with a 'LIVE' status indicator and a 'Need some help? Visit the Help Centre' link. Below this is a main menu with options like Dashboard, Site Content, Teams, Membership, Payments, Communication, Performance, Packages, and Settings. The 'Membership' section is active, showing a sidebar with links to Dashboard, Membership Database, Requests (90), Manage Conflicts, Groups, Teams, Fields, Registration Form, Import, Export, and Invite. The main content area is titled 'Import Members' and features a three-step process: 'Upload CSV', 'Match up columns', and 'Confirm changes'. A blue box highlights 'Step 1: Download your membership'. Below this, instructions state: 'Step 2: Edit the spreadsheet and save as CSV' and 'Step 3: Upload the CSV file below'. A note says 'To create a new member, add a row and leave the "Member ID" column empty.' At the bottom, there is a 'Choose File' button (labeled 'No file chosen') and an 'Upload »' button. A 'Support' sidebar on the right contains links for 'About Import', 'Membership Import - Overview', 'Edit a Membership Database Import', and 'More help'.

Step 2

Scroll down to the very last member in the spreadsheet and add the first member you are importing to a new row. You will see that each column in the spreadsheet has its own field (first name, last name, e-mail address, etc.). Make sure you add the data to the correct columns.



Key things to remember when adding data to your spreadsheet:


IMPORTANT - Please Note

- The first column in the spreadsheet, 'Member ID', should be left blank. Pitchero will automatically assign a new member ID.
- Where possible include an email address, as this will allow you to send an email invite to the member.
- Any data fields (columns) that you wish to import must already exist as a field within your membership database. {Learn more}.

Step 3

Finally, save the spreadsheet as a .CSV file.

Go back to your Club Control Panel, and within the 'Import' section click 'Choose File' to select the file from your computer and click 'Upload'.



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Import Members

Upload CSV

Match up columns

Confirm changes

Step 1: Download your membership

Step 2: Edit the spreadsheet and save as CSV

Step 3: Upload the CSV file below

To create a new member, add a row and leave the "Member ID" column empty.

Choose File

No file chosen

Upload »

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Importing the Data

After the upload has completed, the first thing you need to do is match the columns in your spreadsheet to the columns in your database.

Provided you have not added, removed or renamed any of the columns in your spreadsheet, the spreadsheet should always match. You can then move to the next step.

If however the columns do not match, click the column title and from the drop-down select the matching field from your database.



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Import Data - 2. Match Up Columns

Upload CSV
Match up columns
Confirm changes

Match up the columns in your CSV file to the correct member fields. You'll need to correct any fields which are marked in red.

☒ The first row of the CSV contains titles (not data)

	Men	Firs	Last	Gen	Date	Ema	Addi	Addi	City	Regi	Sele	Sele
	A	B	C	D	E	F	G	H	I	J	K	L
2	1	Pitc...		Male								Unit...
3	333...	Brad		Male								Unit...
4	574...	Jon...	Van...	Male								Unit...
...

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Import Data - 2. Match Up Columns

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	Men	First	Last	Gen	Date	Em	Add	Add	City	Regi	Pos	
	A	B	C	D	E	F	G	H	I	J	K	
2	1	Pitc...		Male								
3	333...	Brad		Male								
4	574...	Jon...	Van...	Male								

Select field...

- Member ID
- First name
- Last name
- Gender
- Date of birth
- Email address
- Address line 1
- Address line 2
- City
- Region
- Postcode
- Country

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Next Step

If all columns between the spreadsheet and database match, they will be highlighted green. Once they are green, click 'Next Step'.

Then you will need to take a minute to review each row of data that will be imported.

Green triangles in the top right corner of a cell indicate new data will be uploaded.

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Import Data - 3. Confirm changes

Upload CSV
Match up columns
Confirm changes

The output below displays rows which will be affected by the import. To skip a row by select the checkbox in the "Skip?" column.

☒ This row will be imported

	Info	Skip?
<input checked="" type="checkbox"/> 1583	Example <input checked="" type="checkbox"/> This member will be added	<input type="checkbox"/>

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Import Data

If you spot an error, you can click the grey 'Back' button, or use the 'Skip?' tick box to remove a row from the import. This means the data in that row will not be uploaded.

When you are happy with the data that will be uploaded, click the green 'Import Data' button.

Editing Existing Membership Data

In some instances, you may need to update membership data for a (group of) member(s) already in your database.

This can be done following the same 3 step process described above. However, instead of adding the member information as a new row at the bottom of the spreadsheet, you should find the relevant member(s) within the spreadsheet and edit the appropriate fields in their row.

After editing the necessary data, follow the remaining 'Import' steps as described above to complete the process.



Top Tips

- Rather than downloading your entire membership database, use the filters on the Membership Database page to download the members you need to update (e.g. 1st Team Players). [{Learn More}](#)
- To quickly locate data in Excel, press 'CTRL' and 'F' together on your keyboard to bring up the 'Find and Replace' box.
- Select **News**, **Events** or **Polls** from the left-hand menu.

Please Note

- You cannot edit the standard fields for a registered member, these include: Member ID, First name, Last name, Date of birth, Email address, Address, and Gender.