How to import members

Michael C. - 2023-02-02 - Membership

Using the **Import** functionality allows you to add or update multiple records at a time. Follow the steps below on how to import members.

Importing Members

1. Click **Settings** or the **Gear** icon on the left.

2. In the **Import & Export** section, click **Import Members**.

3. You will see a list of past imports. Click **Import**.

4. Please enter the information into the fields on the page to upload the data:

   - **Record Type** - Where the data will be imported into.

   - **File to import** - Select the CSV file to upload.

   - **Encoding** - The type of encoding used in the CSV file. (**Default** recommend)

   - **File Description** - The description of the import file.

1. **Section 1** displays a sample of the imported data for you to review.

2. **Section 2** allows you to map the fields of the imported data to the fields in the Entity.

Note
You can click the **X** on the field mapping to remove the field if it is not needed.

1. Click **Next** to import the file.

2. The **Import Data** page will display again, but with a progress bar on the right to show the progress of the import. To see the updated progress, please refresh the page.

3. Once done, you can review the data imported.

Related Content

- [How to add a member](#)
- [How to add a member](#)