

A. Creating a New Master Roster

1. This file is an Excel spreadsheet containing all pertinent information for each club member. The format of this file must be in the column order **First Name**, **Last Name**, and **Email Address** as shown in the picture below. This header line must be the first line in the file. For the purpose of importing the information in this file into the Contacts and Signup Genius databases, no other columns are significant. However, this roster is used for other purposes, so it may contain other information such as telephone numbers, home addresses, dues paid date, GVR number, fulltime resident status, talents/interests, and notes.

Note: The data in the Contacts tab and the Signup Genius email list are herein referred to as databases.



1	FIRST	LAST	EMAIL ADDRESS	PHONE	NOTES
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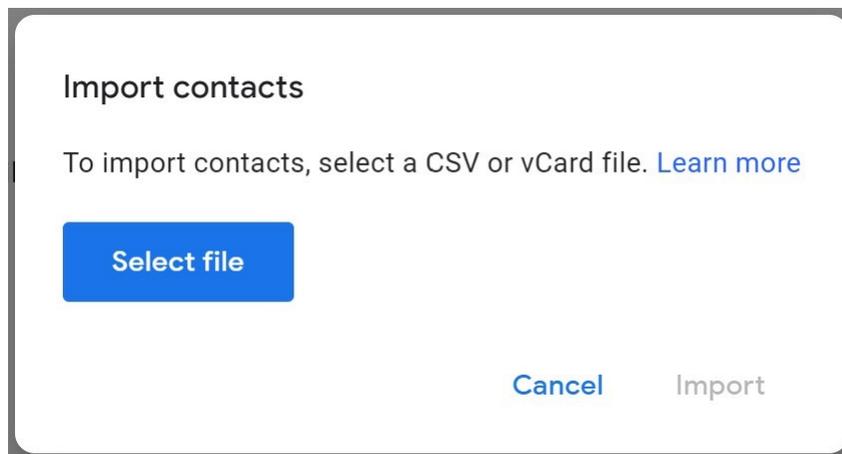
2. Because many current members pay their dues without submitting a membership application form, this process **MUST** begin by copying the old **Master** roster to a new one.
3. For posterity, the old file should be renamed with the year in the name. The records of this new but unfinished file is then edited to produce the **Master** roster.
4. This editing process must culminate in the removal of members who have not paid their dues by the deadline as specified in the club Bylaws.
5. When a new member's application and membership fee is received, the member's information will be entered into the **Master** roster as described above.
6. The member's application is then marked to indicate that the member's information has been entered into the **Master** roster.
7. At the completion of the creation of the **Master** roster, e.g. all received membership information has been entered into this file, the next step is to create the **Comma-Separated-Values (CSV)** file that will be used to update the secondary databases, e.g. Google Contacts and the Signup Genius email list. These procedures are discussed following.

B. Updating The Contacts Database

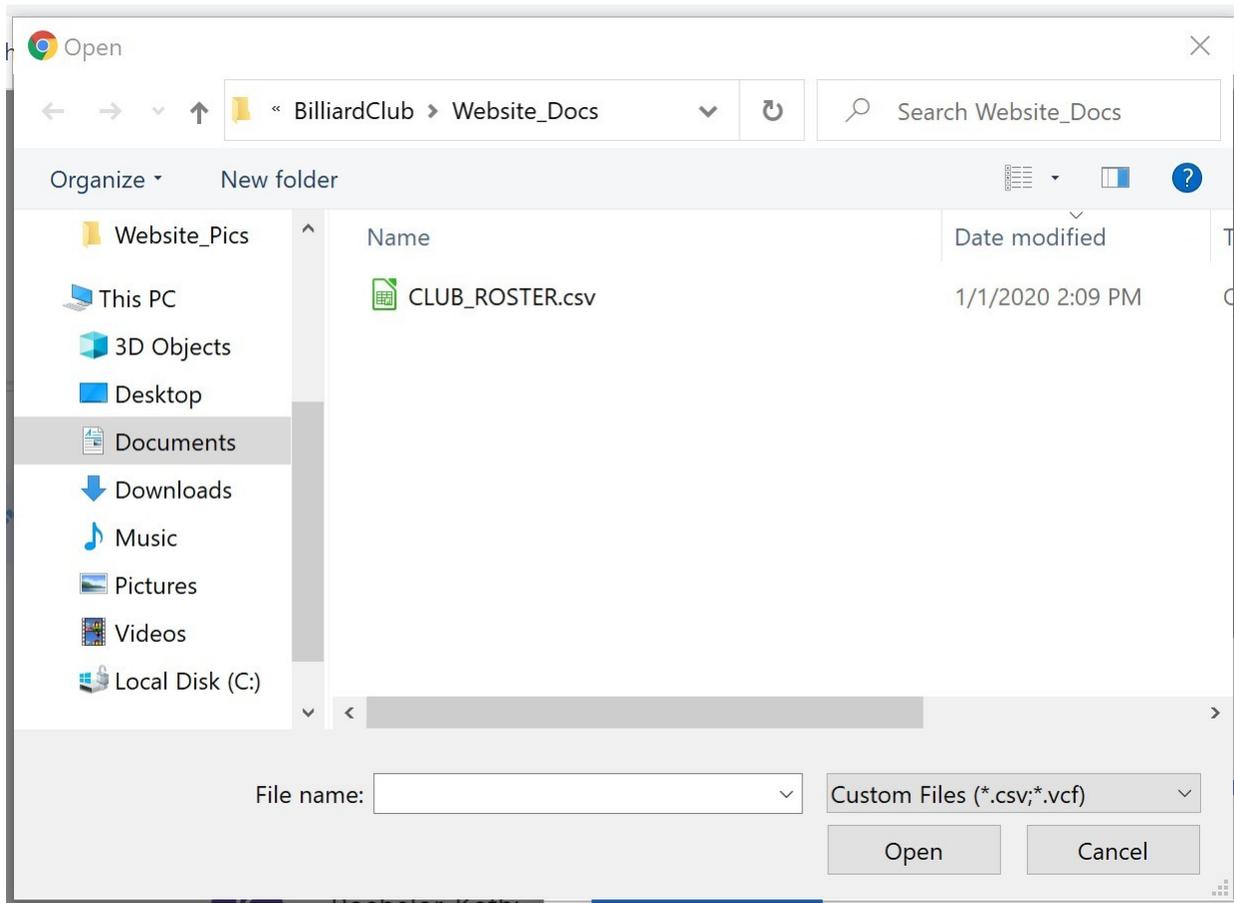
1. Open the Google Contacts tab in the browser.
2. From the Menu, open the Import dialog (see picture below).



3. On the Import dialog (see picture below), click the Select File button and navigate to the Comma-Separated-Values (CSV) file that has been created by exporting the **Master** roster, as described above.



4. The file selection window will look something like the following:

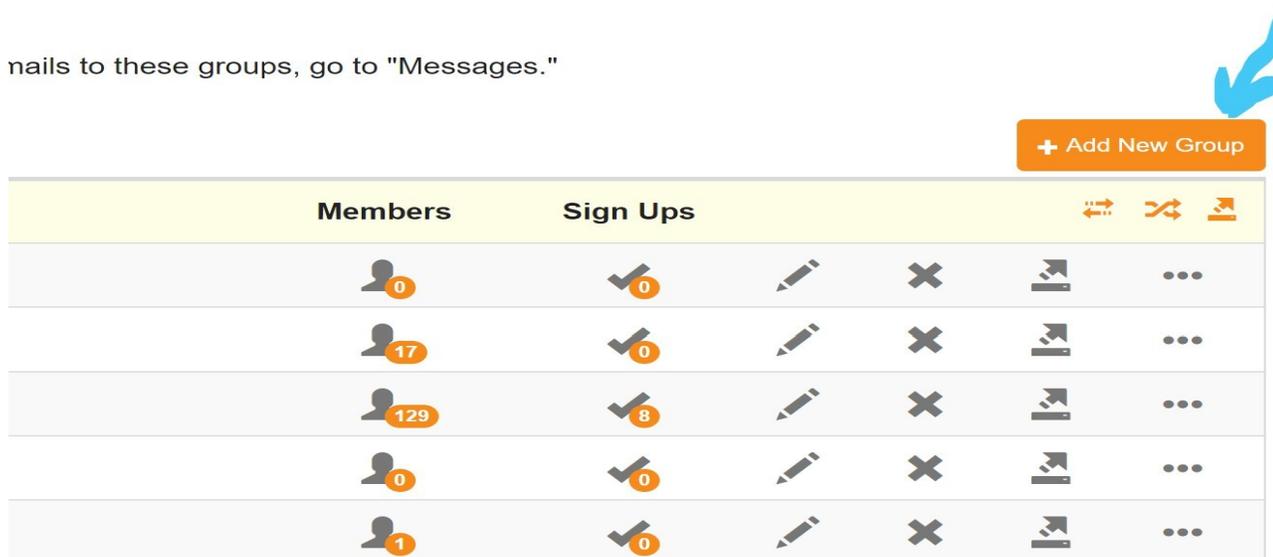


5. Upon selection of a CSV file in this dialog, the information in this file will be imported into the Contacts tab.

C. The Signup Genius Email List

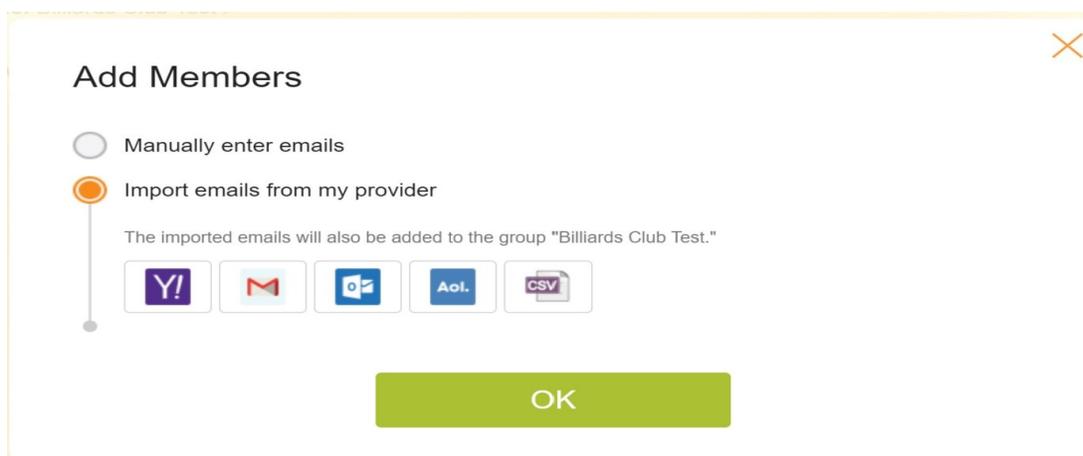
1. Open the Signup Genius website at <https://www.signupgenius.com/securelogin>.
2. After logging into the club account, select the **Groups** page via the button on the left of the screen.
3. Click the Add New Group button on the right side of the screen. See picture below.

nails to these groups, go to "Messages."



Members	Sign Ups				
0	0				
17	0				
129	8				
0	0				
1	0				

4. The Add New Group dialog will appear into which the name of the new group should be entered, preferably with the current year in the filename.
5. Click Create and the name of the new group will be shown in the list of groups.
6. The new group will not contain any members, so to add members, click the pencil.
7. This will invoke the Add Members dialog. See picture below.



Add Members ✕

Manually enter emails

Import emails from my provider

The imported emails will also be added to the group "Billiards Club Test."

OK

8. Select the “Import emails from my provider” radio button which will cause various options for importing to appear.
9. Select the CSV item.
10. This will cause the CSV Import window to appear. No information is typed into this window.
11. Click the Upload File button at the bottom of this window to select the CSV file.
12. This will invoke a dialog something like the following:

CSV Email Import
Follow these steps to import your contacts:

1. Export your contacts to a CSV file from your program of choice. Make sure that the first row of your CSV file includes the titles of the columns.
2. Enter the exact column titles used in your CSV file in the form below. The order of your columns or having extra columns doesn't matter - we use the titles to identify your data.
3. Upload your file!

If you prefer to start from scratch, you can also [download a blank CSV template](#).

Column Titles in the File	Advanced File Options
First Name <input type="text" value="First Name"/>	Delimiter <input type="text" value="Comma"/>
Last Name <input type="text" value="Last Name"/>	Qualifier <input type="text" value="Double Quote"/>
Email <input type="text" value="Email"/>	

13. On the CSV Email Import dialog, click the Upload File button and navigate to the **Comma-Separated-Values (CSV)** file that has been created by exporting the **Master** roster, as described above.
14. As described in paragraph **A.1** above, the records of this file **MUST** be in the column order First Name, Last Name, Email Address. This column order **MUST** be specified in the header (first line) of the file. Any columns after this are ignored.