



# Importing Members into Menumate POS - **HOW TO**

## Importing Members and Reporting Errors

Menumate has the functionality to receive members into the Point of Sales via a third party database using the csv file format called **members.csv**

When the members.csv file is put into **c:\program files\menumate\import\** the menumate POS system will automatically import it.

Once the file has been imported the file will be copied to **c:\program files\menumate\import\old\**.

If there are any members in the file that did not import due to a formatting issue in the member.csv file then they will be reported in an error log which is located in **c:\program files\menumate\import\failed\failedmembers.csv**.

The error will be reported as follows (excluding the colour)

**Error on Line Number 0 ' 16/03"ABCD"/2010' is not a valid date and time**

2, Michael D Bushby, 03 7411012, 021 021 25252,703, michaelb@menumate.com, P.O Box 23972, MDB,,?1234,;100, 007, -  
1, Michael, Douglea, Bushby, Male, TRUE, 01, 14/6/1974, Michael, 16/03/2010, **16/03"ABCD"/2010**,, Templeton, Christchurch, New Zealand,, 198 Halkett Rd, West Melton, Christchurch, New Zealand,

## Members.csv File Format

**File Name:** Members.csv

**File Location:** c:\program files\menumate\import\

**Important:** Do not escape any fields or encapsulate any field in quotes or speech marks. Items in **Red** are mandatory. Items marked as **Not Used** should be left blank.

| Field Number | Field Name         | Format                    | Sample   |
|--------------|--------------------|---------------------------|--|
| 1            | Type               | 2 = member<br>3 = deleted | 2  |
| 2            | Name               | Text (Max 50)             | John Smith   |
| 3            | Phone              | Text (Max 25)             | 033657301  |
| 4            | Cell Phone         | Text (Max 25)             | 0294369588   |
| 5            | Phone Ext          | Text (Max 8)              | 701  |
| 6            | Email              | Text (Max 50)             | <a href="mailto:sales@menumate.com">sales@menumate.com</a> |
| 7            | Mail Address 1     | Text (Max 50)             | P O Box 33225  |
| 8            | Initials           | Text (Max 5)              | JS   |
| 9            | Pin                | <i>Not Used</i>           |  |
| 10           | Card               | Text (Max 128)            | ;12345678?   |
| 11           | Adjustment         | + or – or blank **        | +  |
| 12           | Total Spent        | Decimal                   | 150.00   |
| 13           | Member Number      | Text (Max 10)             | 12345678   |
| 14           | Site ID            | Fixed Value               | -1   |
| 15           | First Name         | Text (Max 20)             | John   |
| 16           | Middle Name        | Text (Max 20)             | Lee  |
| 17           | Last Name          | Text (Max 20)             | Smith  |
| 18           | Sex                | Male or Female            | Male   |
| 19           | Tab Enabled        | Fixed Value               | False  |
| 20           | Payroll ID         | <i>Not Used</i>           |  |
| 21           | Date of Birth      | OS Date Format            | 18/11/1969   |
| 22           | Known As           | Text (Max 50)             | John   |
| 23           | Date Created       | OS Date Format            | 20/10/2009   |
| 24           | Last Modified      | OS Date Format            | 22/3/2010  |
| 25           | Account Name       | <i>Not Used</i>           |  |
| 26           | Account ID         | <i>Not Used</i>           |  |
| 27           | Mail Address 2     | Text (Max 50)             | Barrington   |
| 28           | Mail Address 3     | Text (Max 50)             | Christchurch   |
| 29           | Mail Address 4     | Text (Max 50)             | New Zealand  |
| 30           | Mail Address 5     | Text (Max 50)             | 8024   |
| 31           | Physical Address 1 | Text (Max 50)             | 25 Carlyle Street  |
| 32           | Physical Address 2 | Text (Max 50)             | Sydenham   |
| 33           | Physical Address 3 | Text (Max 50)             | Christchurch   |
| 34           | Physical Address 4 | Text (Max 50)             | New Zealand  |
| 35           | Physical Address 5 | Text (Max 50)             | 8023   |

*\*\* If a + is enter the total spend will add to the members current balance, - will reduce the balance and leaving the field blank will overwrite the balance.*

## Membership.csv File Example

2,Michael D Bushby,037411012,02102125252,703,michaelb@menumate.com,P.O  
Box 23072,MDB,,;1234?;,+100,007,-1,Michael,Douglas,Bushby,Male,TRUE,  
01,14/6/1974,Michael,16/03/2010,16/03/2010,,,Templeton,Christchurch,New  
Zealand,, 198 Halkett Rd,West Melton,Christchurch,New Zealand,