

Save Valuable Time with StarChapter's Membership Data Sync



Are you interested in giving your chapters an easy way to keep membership data in sync? Set up StarChapter's Membership Data Sync between your association management system (AMS) and each chapter's StarChapter service to maintain accurate and consistent data. This automation saves board members' valuable time.

Here are 4 things to consider when setting up StarChapter's Membership Data Sync:

1. Prepare your AMS to Extract your Association's Membership Records

You will need to have the ability to export member records from your AMS. The data format of the files that is acceptable for the StarChapter system to import is Comma Separated Values, or CSV for short.

The CSV formatted file must have column labels in the first row (known as "headers"), followed by member data with one member record per line. Member data should at minimum include columns for the following:

	A	B	C	D	E	F	G	H	I	J
1	Member ID	First name	Last name	Street address	City	State	Zip code	Email	Join date	Expiration date
2	123456	Jane	Doe	123 StarChapter LN	Chapter Success	MD	21117	sample@starchaper.com	1/1/2017	12/30/2017
3										
4										
5										
6										

Each chapter must have its own file, and must use a standardized naming convention. Naming your files by chapter code is an easy, consistent way to standardize the file naming convention. For example, the New York City chapter's spreadsheet may be named NYC.csv. It must always be named NYC.csv to ensure things are properly associated to the StarChapter service.

File name:	NYC
Save as type:	CSV (Comma delimited)

Next Steps:

- Please provide the list of chapter codes to us to update the StarChapter system.

2. Set up a Location to Share the Membership Files with StarChapter

You will need to set up an SFTP location to store the CSV files for StarChapter to easily retrieve the data.

This retrieval process can happen once or multiple times a day. This typically happens during off-peak hours.

3. How StarChapter Syncs Member Records

StarChapter uses a pre-defined set of rules to map the fields in the CSV file to the member profile in StarChapter. Every chapter uses the same mapping rules.

Here is how StarChapter processes the CSV file:

- New members are added to the chapter's member roster.
- Existing member records are updated with changes. Note, the Member ID must remain consistent, as this is the unique identifier for each member.
- Members who are not in the CSV file are moved to the non-member area and marked as former members.

Depending on the chapter's configuration, StarChapter can automatically send customizable welcome messages to new members.

4. How your Chapters Opt In to use StarChapter's Membership Data Sync

Once StarChapter's Membership Data Sync is configured and tested by your team and the StarChapter's technical support team, then the next step is mutual approval to go live.

We will send a message to the board with instructions about enabling StarChapter's Membership Data Sync on their StarChapter service. This only takes a couple of clicks!

If board members have any questions about enabling the sync, or any trouble moving forward, then StarChapter's technical support can help them. This is included in their service. Board members can submit a support ticket to our team for further assistance.

About StarChapter

StarChapter is a member-friendly association software company serving local chapters of professional and trade associations in the United States and Canada. StarChapter's mission is to help local leaders grow their chapter's attendance, membership, and revenue. The software combines event registration, membership management, email communication, responsive website layouts, web services, and eCommerce tools. New and transitioning board members have access to dedicated StarChapter specialists, 24/7 online support, phone support, and ongoing board training webinars.