

Office - Importing Member Charges

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Overview

In this article, learn how to import member charges into Office from an Excel spreadsheet using the Member Charge Wizard. This method can be used for any charges that occur on a third party system.

Use Case

- Importing member charges from an excel spreadsheet.
- Importing member charges from a third party system.

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Accessing the Member Charge Wizard

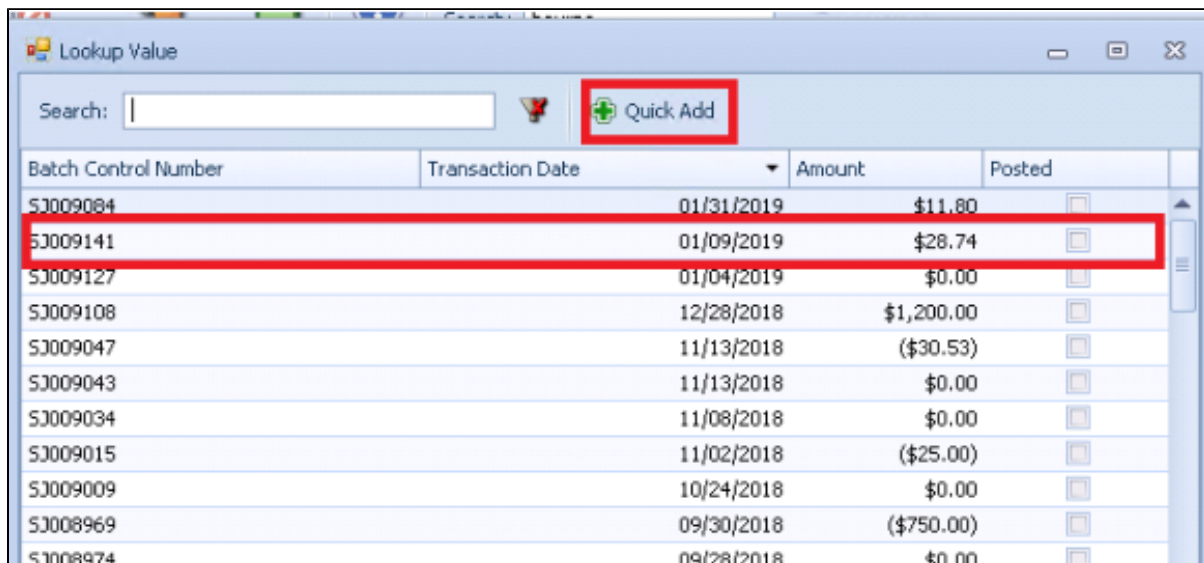
First you will want to sign into CMA and go to the Membership module.

From here you can use the Member Charge wizard to apply the charges.

Once you launch the Member Charge wizard, on the second page is an option to import charges from an excel sheet. This would allow you to take the charges from your third party system and import them to CMA.

Adding Charges to an Existing Batch

Add to an existing batch by selecting from the rows below or choose to use the Quick Add.



Batch Control Number	Transaction Date	Amount	Posted
53009084	01/31/2019	\$11.80	<input type="checkbox"/>
53009141	01/09/2019	\$28.74	<input type="checkbox"/>
53009127	01/04/2019	\$0.00	<input type="checkbox"/>
53009108	12/28/2018	\$1,200.00	<input type="checkbox"/>
53009047	11/13/2018	(\$30.53)	<input type="checkbox"/>
53009043	11/13/2018	\$0.00	<input type="checkbox"/>
53009034	11/08/2018	\$0.00	<input type="checkbox"/>
53009015	11/02/2018	(\$25.00)	<input type="checkbox"/>
53009009	10/24/2018	\$0.00	<input type="checkbox"/>
53008969	09/30/2018	(\$750.00)	<input type="checkbox"/>
53008974	09/28/2018	\$0.00	<input type="checkbox"/>

In the next window choose "Next".

Member Charge Wizard

Create Member Charges

Select a transaction date, charge type, and any additional options.

Select a Transaction Date

1/31/2019 Today

Select a Charge Type

Members

Groups

Select Additional Options

Show Dependent Members

Use Price Scheduling to Determine Price

1/14/2019 4:53 PM

Use Items

Use Combos

This window is where you can opt to import the charges. You can open the file in Excel but for the system to read it the file will need to be saved as a CSV not a XLS.

Member Charge Wizard

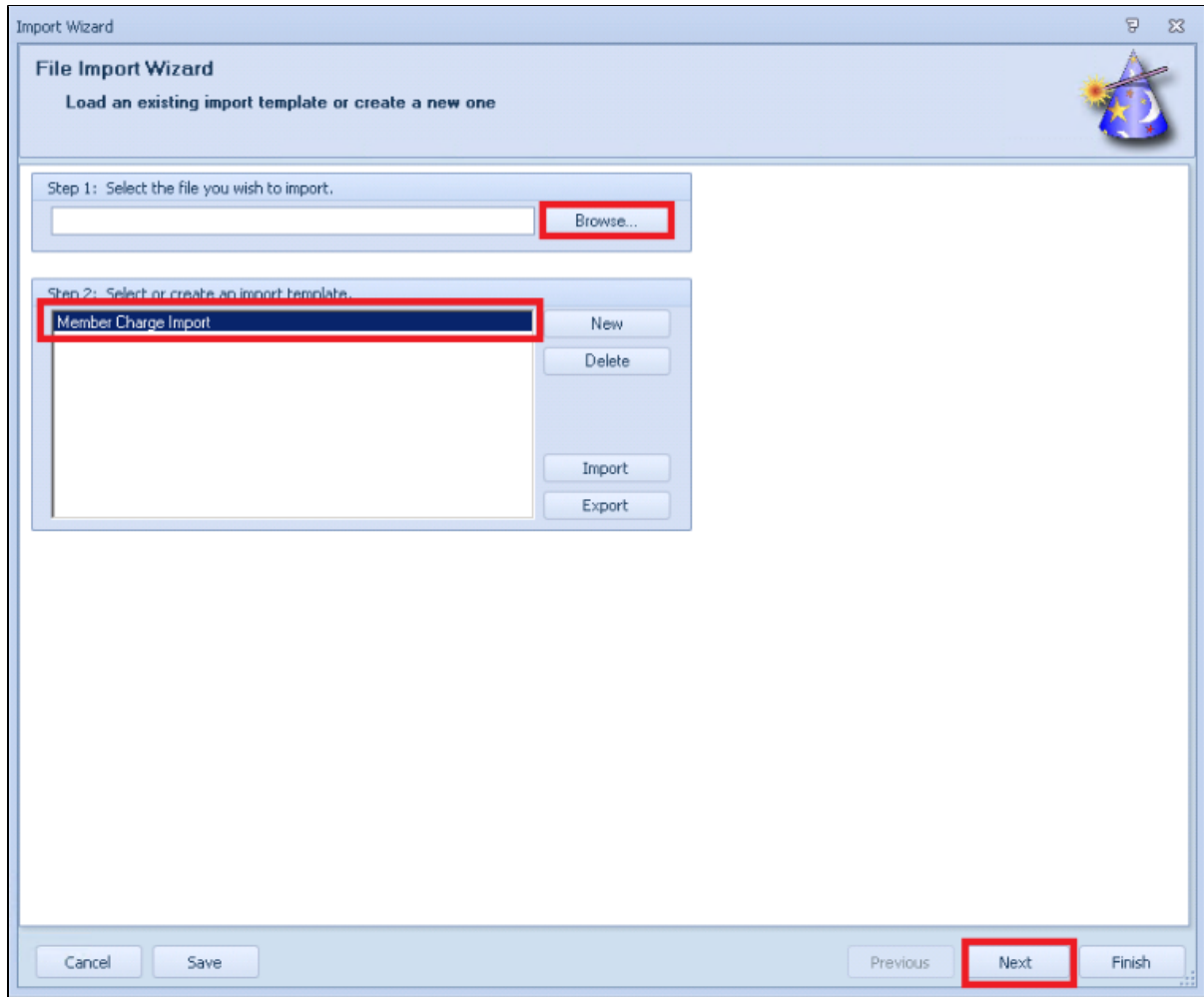
Create Member Charges

Enter charges that will impact a member's account.

Member	Area	Item	Description	Quantity	Price	Tax	SC	Grat	Total	Employee	No Tax	No SC
*											<input type="checkbox"/>	<input type="checkbox"/>

Q: 0 | P: \$0.00 | T: \$0.00 | S: \$0.00 | G: \$0.00 | T: \$0.00

A new window will appear. From here you can select the file you would like to import and select the Member Charge Import and choose Next.



You will review what is being imported, and once the import is complete, the member charge will reflect the charges from the import. Once you see the charges in the Member Charge window, you will choose finish and the system will place those charges in a batch for you. Once the batch is posted, the charges will go to the member's accounts and appear on their next statement.

Downloadable Guide