Reference Guide

Importing Member Information to the Core

INSIDE THIS GUIDE:

Imagine being able to import new member information directly into the core. This newer option for this feature allows you to do this with one easy step after uploading the file to CBX.

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Security Requirements

Special authority is required to upload files from a PC onto the CBX system. Start by completing the **iShield Security Access Request for CBX Uploads** form, available at the website shown below, to request access privileges (select the "MBRIMPORT" table):

https://www.cuanswers.com/wp-content/uploads/iShieldRequestForm_Upload.pdf

Supported File Types

Supported File Types only include comma delimited files.

- **User-defined comma-delimited format** *(also referred to as CSV or comma-separated values)* – The most commonly used, this is the format typically created by spreadsheet program such as Microsoft© Excel.

Following are rules for field type and length and where the date will populate:

Field Name	*Specifications, Comments, etc.*	*Populate to*
Member #	**Required** – Assign based on *Member # to assign* field (use from file vs. auto-prefix) Up to 9 characters	MASTER/MASTRL/ PCMBRCFG
SSN	**Required** Excel format is 123-45-6789 Note: SSN's can start with zeroes.	MASTER
First name	**Required** 14 characters available – beyond that will be truncated	MASTER
Last name	**Required**	MASTER

Field Name	***Specifications, Comments, etc.***	***Populate to***
	15 characters available – beyond that will be truncated	
Nighttime phone	**Required** 14 numeric characters. Excel phone number format is required (555) 555-5555	MASTPH – Phone sequence 1
Daytime phone	Not required 14 numeric characters. Excel phone number format is required (555) 555-5555	MASTPH – Phone sequence 2
Email address	Not required 100 characters allowed – beyond that will be truncated	PCMBRCFG – EMAIL1
Birth date	**Required** Excel birthdate format required MM/DD/CCYY	MASTER
Address 1	**Required** 25 characters allowed – beyond that will be truncated	MASTER
Address 2	Not required 25 characters allowed – beyond that will be truncated	MASTER
City	**Required** 20 characters allowed – beyond that will be truncated	MASTER
State	**Required** 2 characters allowed	MASTER
Zip	**Required** Note: Zip codes can start with zeroes. 5 digits – beyond that will be truncated	MASTER
Member Open Date	Not required in import file – populate the current date if blank in import file Excel birthdate format MM/DD/CCYY	MASTER

Step 1: Upload the File to the Core

Prepare Your File for Upload

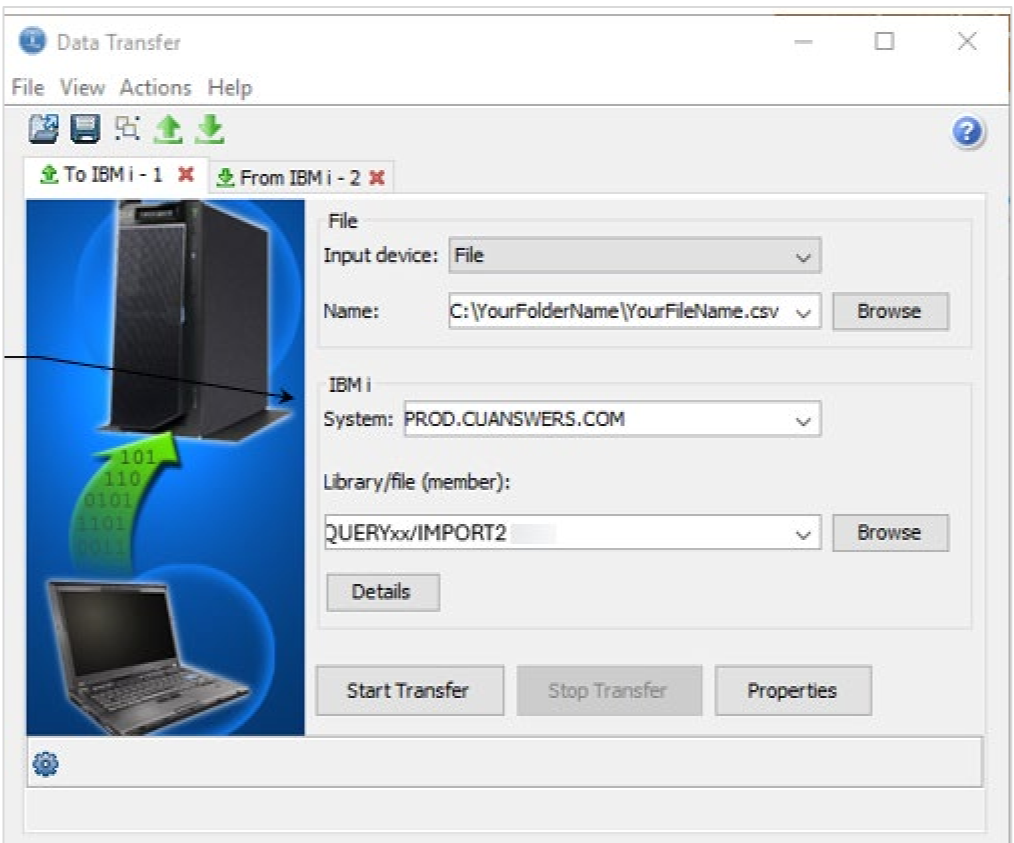
In this step you will upload your file from your PC to the IBM i so that it can be imported by the pending membership requests tool.

Once you have created your file, save it to your C:\ drive or a network location. (Either location works fine for the file upload process.)

Because of how a System i works, you will be pulling data into an existing file on CBX (basically a big, empty file that is large enough to contain the data you're uploading).

Upload Your File

1. To upload your prospective membership list, use **Tool #1375 *Data Transfers (Upload or Download)***.
2. The upload screen will appear:



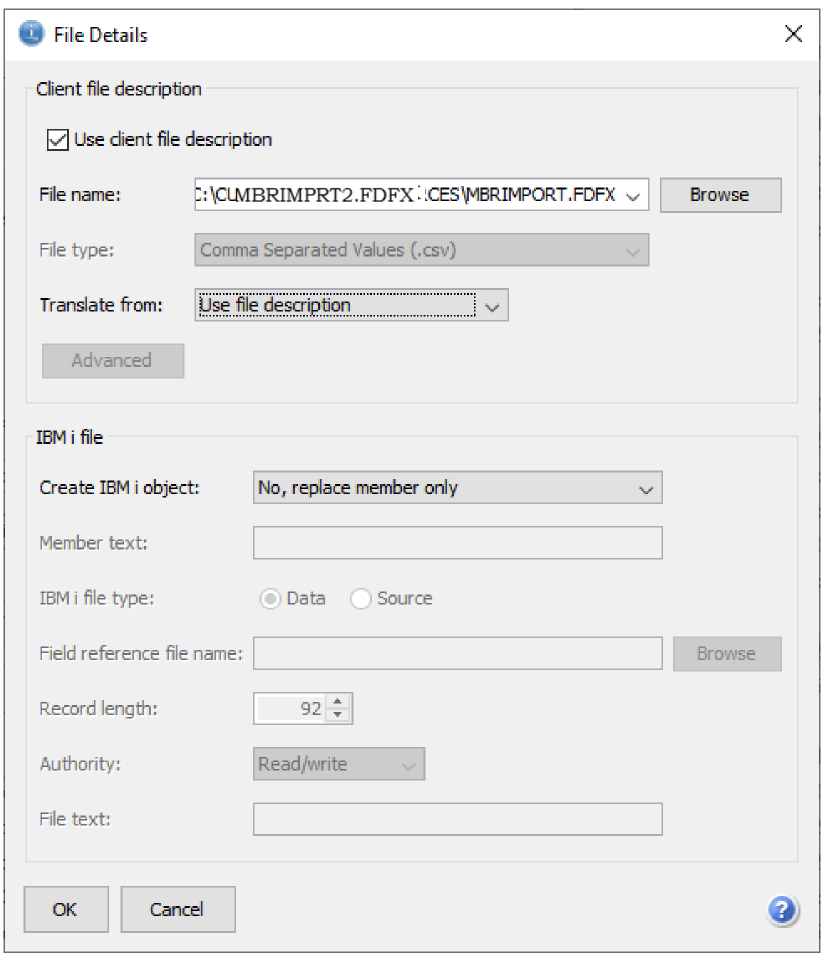
*The system name is dependent on which system you are on. Site-Four credit unions (CU*NorthWest and CU*South) will use PROD.SITEFOUR.COM.*

3. Fill in as shown in the above sample, using these rules:

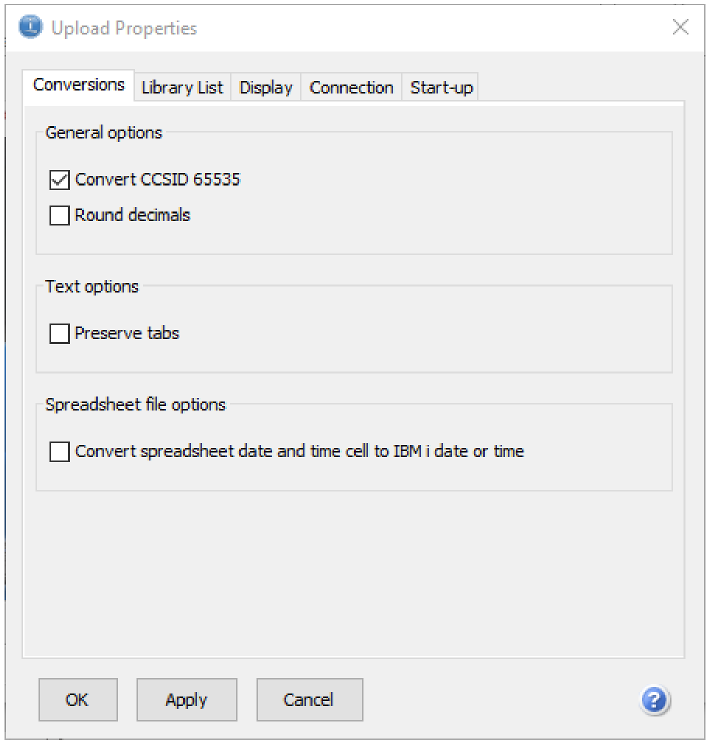
Field Name	***Description***
File	These settings refer to where the data is coming from.

Field Name	***Description***
Name	Enter the path (the storage location, both drive and folder) and file name where the file is stored on your PC. Use backslashes between the folder name and the file name, as in the sample above (or better yet, use the Browse button to locate the file).
IBM i	These settings refer to where the data will be going.
System	This designates the iSeries system from to which the files will be uploaded. • ***Online Clients:*** PROD.CUANSWERS.COM ***Site-Four Clients:*** PROD.SITE-FOUR.COM
Library/File (Member)	Enter your credit union's Query library name, a <u>forward</u> slash, then the name of the file that holds records to be imported: **QUERYxx/MBRIMPRT2** *(For the xx, fill in your credit union's two-character credit union ID)*

4. Click **Details**
5. Enter **C:\CUBASE\CUBASE\RESOURCES\MBRIMPRT2.FDFX** in the screen as shown below (casing doesn't matter):



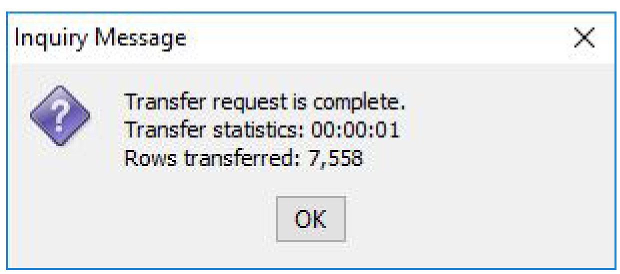
6. Click **OK** to save and return to the Data Transfer window
7. Select **Properties** on the Data Transfer window and check ***Convert CCSID 65535*** then click ***OK***.



8. To begin the transfer process, click **Start Transfer**. A series of messages will appear to report on the progress of the transfer.

   If you experience problems uploading, it may be because you have not been authorized to upload data. If you receive the error: "Data in this field is incorrect or does not match the PC data type," make sure to set the properties as shown in #8 above.

9. When the transfer is complete, the following message will appear: Click **OK** and the Data Transfer dialog box will reappear. Click *Close* [**X**] to exit. (See below for details on saving the transfer request.)



   This number should match the number of individual figures in your original source file.

10. The file is now uploaded to the MBRIMPRT2 file definition and is ready for import into your pending membership database.

Step 2: Create/Post Membership Records

This process will pull data directly from the import file and create the following membership records:

- MASTER*, MASTRL, PCMBRCFG, MASTPH**
- “000” accounts will be created in MEMBER1
- Enroll all memberships in new household

*Fields to default that are required for a new membership:

- Corp ID=01
- Membership type = MI
- Membership designation = MI
- Preferred contact method = NP (MASTRL)
- Employee ID who processed the import (MASTRL)
- Note: Other fields like *DL#* and *State*, *Reason code* and *Mothers maiden name* can be blanks. These items can be filled in after the fact manually.
- Should populate both birth date (mmddyy) and birth year (ccyy) using the birth date field from the incoming file

**In MASTPH, default the Y/N flags to N:

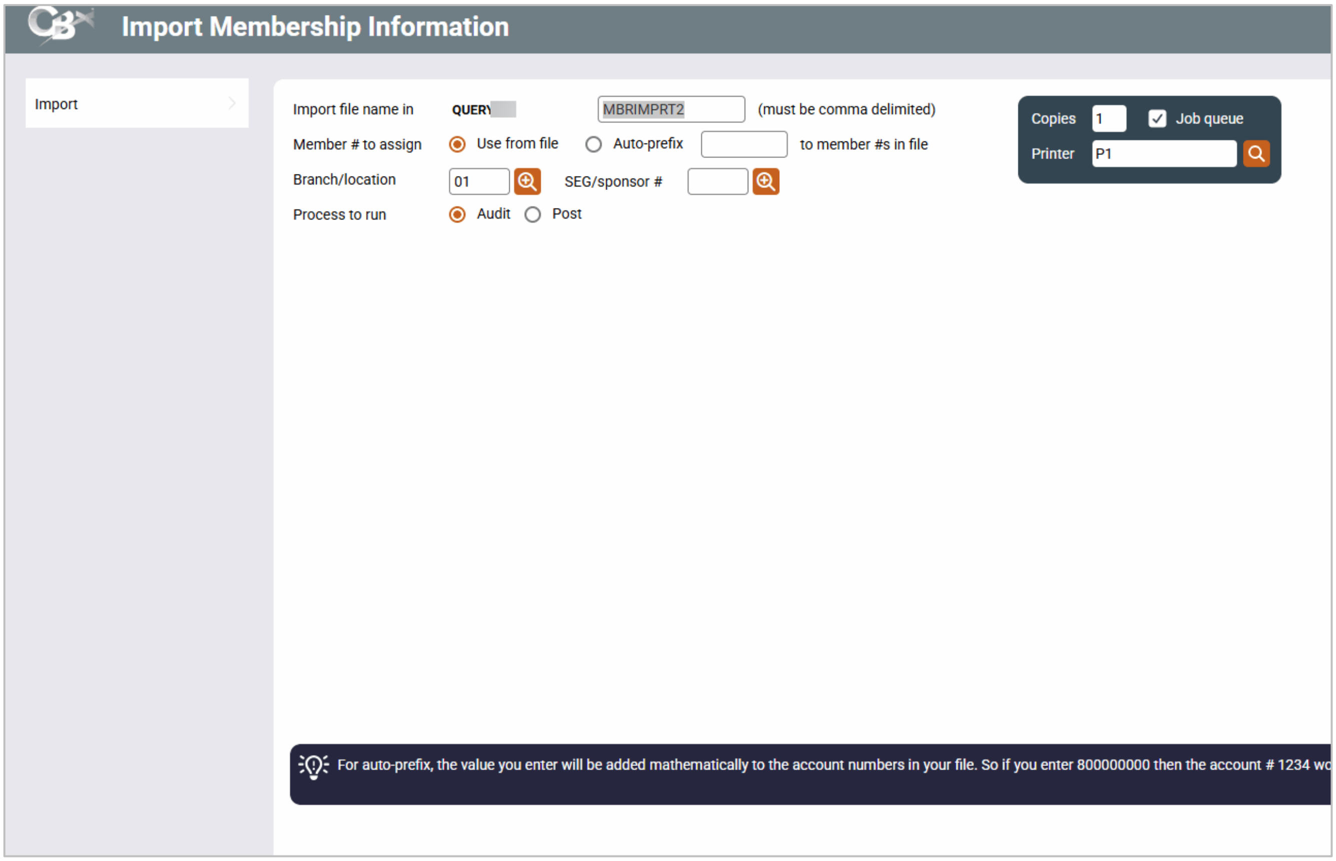
- Allow text message=N
- Mobile=N
- International=N
- Wrong Number=N

In MASTER, defaults set to:

- Allow audio banking = Y
- Allow internet banking = N

Importing the File

Use **Tool #1070 *Import Membership Information***.



Field Name	***Description***
Import file name in QUERYxx	Default to MBRIMPRT2 which is the membership import file created per this project. Required
Member # to assign	1=Use from file, 2=Auto-prefix by adding 123456789 (usually something like 100000000 or 800000000) to member #s in file, required. Default is N.
Branch/location	Single select lookup of branch. Default to 01. Required.
SEG/Sponsor #	Single select lookup of SEG/Sponsor numbers configured via Tool #786. Use the standard LRPTSEL-01 lookup. Not required.
Process to run	A=Audit, P=Post. Default to A. When run in Audit mode, then an “Audit” version of the reports on the next page are generated (nothing gets posted/created). When run in “Post” mode, report on next page is generated and the membership records get created.

Fill in the fields. Then use **Import**.

Here are some exceptions during the audit/post run:

- Empty data in required fields
- Incompatible data for any fields (i.e., birthday has to be a valid date, email address has to follow existing email edits, SSN and member # must be (up to) 9 digits, phone/ZIP must be digits, etc.). SSNs and ZIP codes can start with 0.
- Member in blocked persons database BLOCKMST (blocked from creating new memberships)
- Duplicate member to what is already in MASTER
- Duplicate member to what's in MSHIST if closed membership record has a close date in the current or prior calendar year
- If auto-prefixing, any accounts where adding the designated amount will cause a duplicate or 10-digit number

> *Note: Duplicate SSNs are okay, since a separate MASTER record will be created (sometimes the same person belongs to both of the CUs who are merging, and will therefore end up with two separate memberships at the same CU.*

Reports

This is an example of an audit version. The posting version looks the same except heading will note 'POSTING'.

```
 6/30/26  09:39:15                    L CREDIT UNION                 PIMPMBRI       PAGE
    RUN ON   6/30/26                  NEW MEMBERSHIP IMPORT                          USER
                                          AUDIT VERSION
   BRANCH 01
                                                         PRIMARY        BIRTH       ACCT. OPEN
   SSN/TIN      ACCOUNT     FIRST NAME       LAST NAME          PHONE          DATE          DATE
            55          3   Daniel           Ta                        7868  02/03/1967  06/30/2026
            59          5   Andrea           He                     56  02/18/1919  06/30/2026
   # of records in import file        7
   # of exceptions      5
   # of new members to be created         2
                                      ***END OF REPORT***
```

Exception Report Sample. The accounts can have several exceptions.

6/30/26 09:39:15 FEDERAL CREDIT UNION PIMPMBRI PAGE

RUN ON 6/30/26 NEW MEMBERSHIP IMPORT - EXCEPTIONS USER

AUDIT VERSION

SSN/TIN	ACCOUNT	FIRST NAME	LAST NAME	PRIMARY PHONE	BIRTH DATE	EXCEPTION MESSAGE
51	9952		Marquez	(081 148-5693	06/05/1921	INVALID PRIMARY PHONE NUMBER
						FIRST NAME CANNOT BE BLANK
						INVALID FORMAT - PHONE 1
46		Matthew		8130	07/28/1923	MEMBER RECORD ALREADY EXISTS
						INVALID STATE CODE
55		Kevin		5579	06/03/1929	IMPORTED MEMBER RECORD IS A DUPLICATE
22		Laura		8861	12/27/1945	IMPORTED MEMBER RECORD IS A DUPLICATE
						ADDRESS 1 CANNOT BE BLANK
51	7	Laura		5693	06/05/1921	MEMBER RECORD ALREADY EXISTS

# of records in import file 7

# of exceptions 5

END OF REPORT