# Exporting & Importing Records from v.5 into ShelbyNext Membership

Overview: ShelbyNext Membership's free trial will be easier to learn if you have a few records in the database. The following instructions provide a way to export some records out of Shelby v.5 and then import them into ShelbyNext Membership.

Approach: Use the provided ShelbyQUERY report file to select a group of records, then export that set to a .csv file. Open ShelbyNext Membership and using the Import Records screen, simply import the record set.

Use the following steps to create a file that you can import into ShelbyNext Membership

1. Copy the SQRPT - TestNextExport.ado file and save it in a location that you can easily find (i.e. Desktop). The .ado file can be found at:
   community.shelbysystems.com/v5/m/queries/25765
2. Open Shelby v.5
3. Click ShelbyQUERY in the General menu section.
4. Click Utility on the menu bar and choose Import Query & Report From File
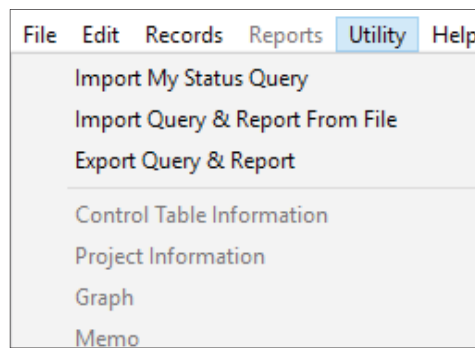
5. Navigate to the location where you saved the file in step 1 above.
6. Select the SQRPT – TestNextExport.ado file
   a. The program will save the report as TestNextExport in ShelbyQUERY and load the grid for you.
   b. *OPTIONAL:* Notice that the program listed your first 50 records from GlobaFILE. You can change the number of records by following the steps below. If 50 records are acceptable, then skip to step 7.
      i. Changing the number 50 in the first line of code will change the number of records exported.
      ii. Removing the phrase, "TOP 50" will return all GlobaFILE records.
      iii. After making a change in the TOP 50 statement, click the Load Grid button located at the top right of the screen.

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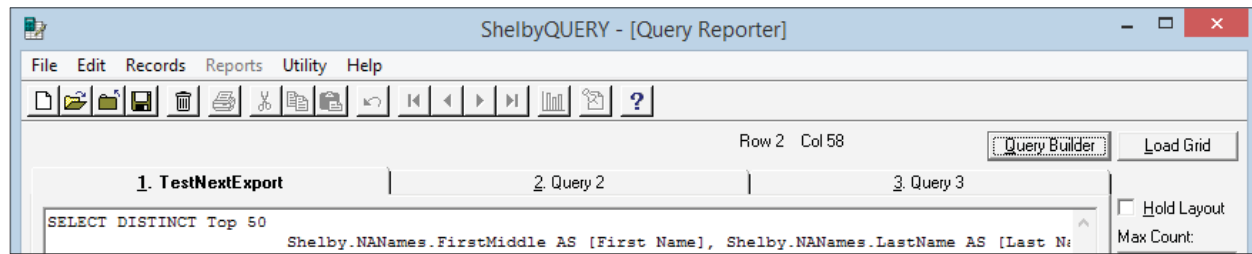
7. Right click in the grid listing of records.
8. Choose Export All To ....
     a. Select a location to save your exported file
     b. Enter a name for your file
     c. Choose Comma Delimited (*.csv) file type
     d. Click Save

Overview: Use the following steps to import records into ShelbyNext Membership. You can also update member information this way. If you are importing a member and the first and last names match a member in the system, that person will be updated with the new information. You can import as much or as little information as you have by entering column names as instructed below. (NOTE: The last column in the file you created in the section above lists the date that the member record was created in Shelby v.5. If you want to include that information, then please contact your Sales Consultant for assistance.)

Approach: Use the steps below to import records into ShelbyNext Membership.

Use the following steps to import a .csv file into ShelbyNext Membership

1. Open ShelbyNext Membership
2. Click Utilities on the menu bar
3. Click Import Individuals in the tabs area
    • *Optional:* you can choose a group to import the list into.
    • *Tip:* If you already have some records in the database and wish to keep this list separate, then create a new Group and select it in the Import to section.
4. Click the Browse button
5. Enter the Column header names from your spreadsheet. If you do not have a column that is asked for, or, if you wish not to import that information, leave it blank.
    • *Tip:* the column headers in your Shelby v.5 file have the exact same name as supplied in the program. *CAUTION:* The program is case sensitive.
6. Click, "Submit", at the bottom.
7. You will now be shown a screen to confirm your import/update. If the member already exists, he/she will have a green check mark, and any changes to their information will be shown in bold. Example: "Address: 123 High Drive -> 456 Low Road". This shows the old information on the left, and the new on the right.
8. If you are satisfied with the purposed changes, click, "Yes", at the top. If not, revise the data in your original spreadsheet and re-import.