

Clubtec Export for Roster Sync

2016 - Winter Edition

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Overview

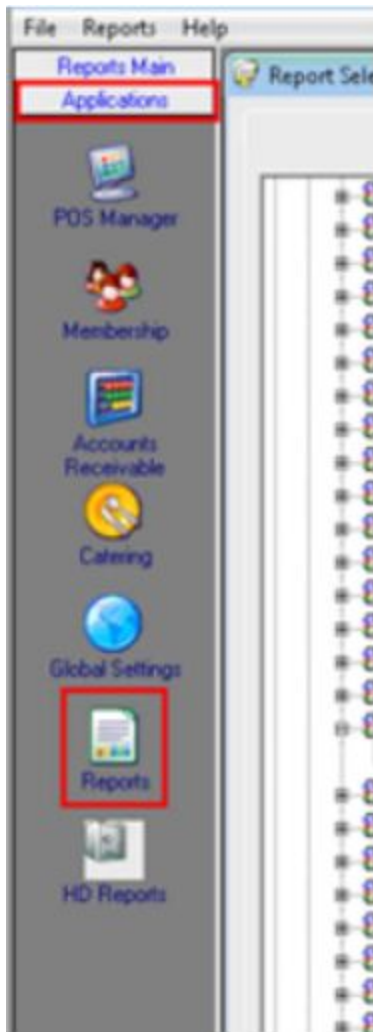
This guide reviews how to pull a **member roster file** from **Clubtec** to import it into the website **Directory** using **Roster Sync**.

Use Case(s)

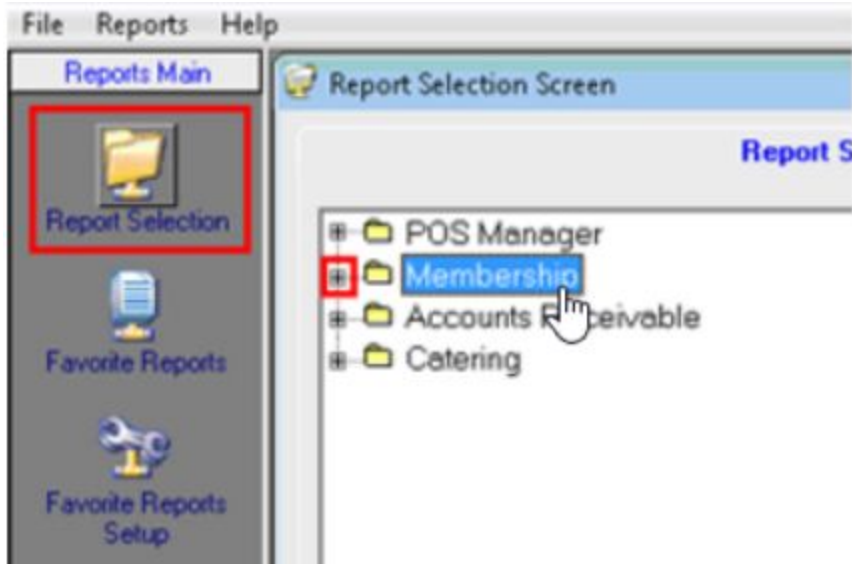
Each time your **online member directory** needs to be updated, the **member roster file** must be pulled from **Clubtec** and uploaded to the website using **Roster Sync**.

Pulling Clubtec Member File

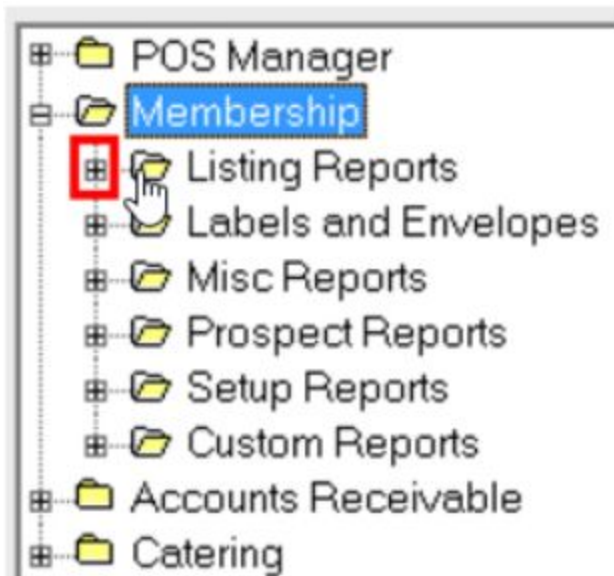
First, open the ClubTec Manager and then select **Applications > Reports**.



Next, click **Report Selection > Membership** (click the + sign to expand the options).



Click **Listing Reports** (click the + sign to expand the options).



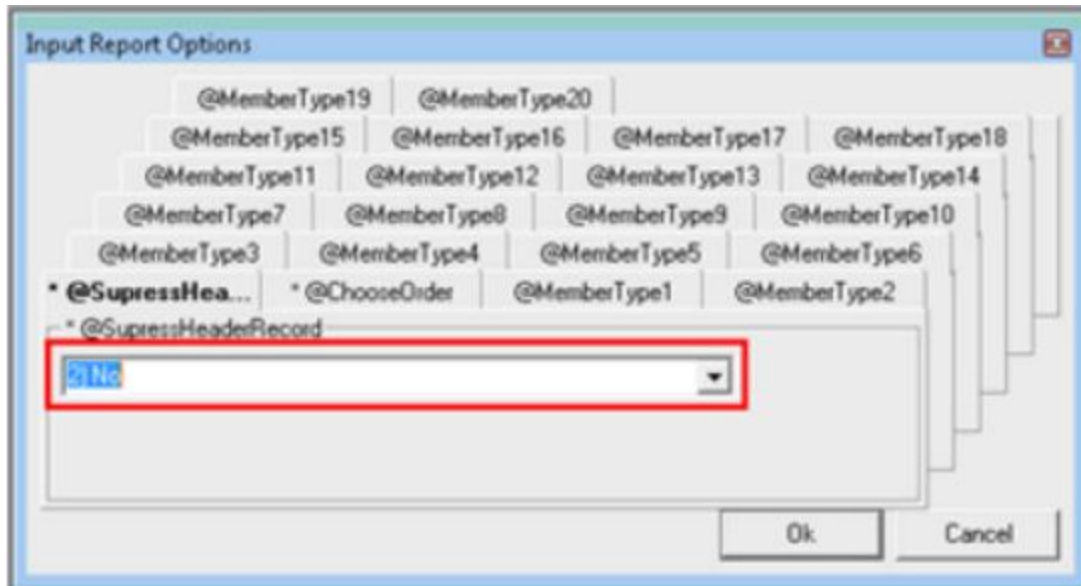
Click Roster Export > Click rptMemListRosterExport.



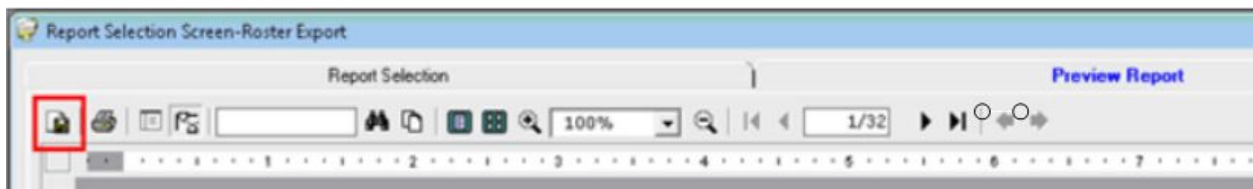
Once you have clicked **rptMemListRosterExport**., click the “**Preview Report**” tab at the top.



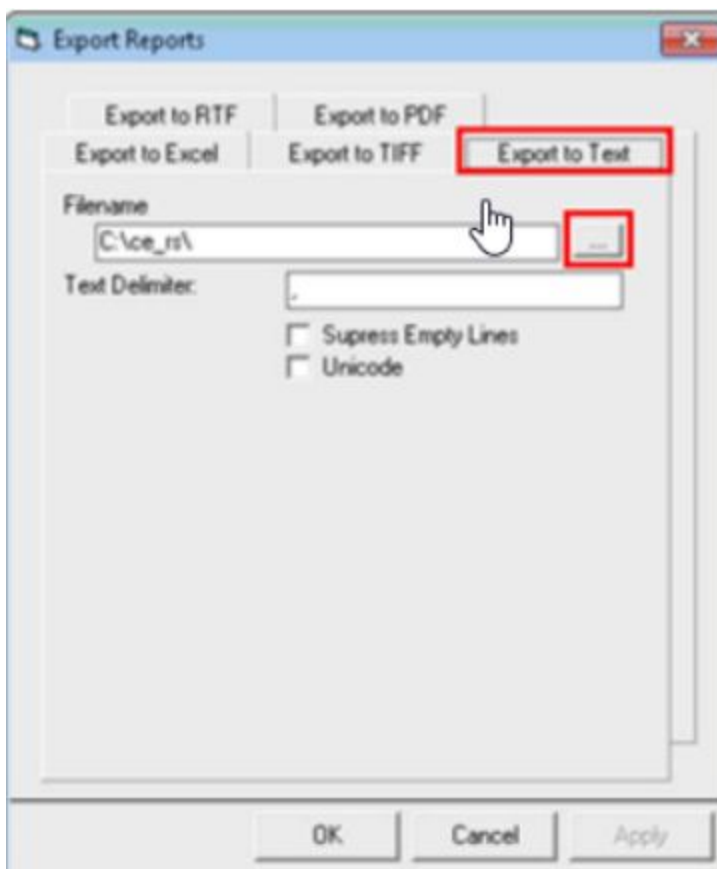
Change the **Supress Header** option to **NO**, then click **OK**.



Click the **Disc icon** on the top left hand toolbar (this could take 1-2 minutes for the disk to appear).



Click the **Export to Text** tab and click the '...' to **browse** for the destination file path.



The location to **export** should be set to **c:\ce_rs** (or where the ce_rs folder is located on the computer).

Name the file **memberroster**.

FAQs

Q: My statements aren't up to date on the website.

A: This is because with Club Tec, statements have to be manually generated then ran through Sync Client. Please contact Clubessential Support for more information on running statements.