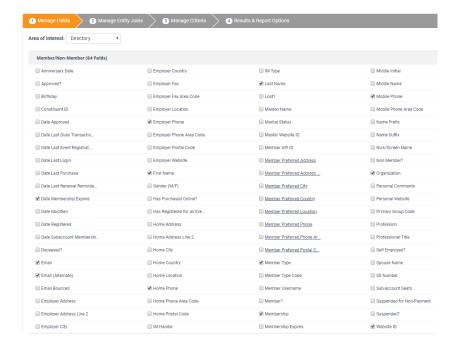
YourMembership Data Backup

It's always a good idea to have basic contact information about your members, if anything happens to make your YM site unavailable at least you can use some other means to let your members know what's happening.

One great feature of YM reporting (Exports & Reporting -> Build a Query or Report) is that you can schedule a report to be emailed to multiple addresses on a daily, weekly or monthly frequency. I would suggest scheduling these member data fields to be emailed to your membership team weekly:



Website ID

Member Type

First Name

Last Name

Organization

Email

Email (Alternate)

Optional Fields:

Employer Phone, Home Phone,

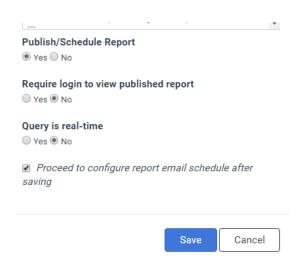
Mobile Phone

Criteria

You could just limit the report to members (by member type code, use the "is in list" to keep it simple) or you could do a weekly report on members and a separate monthly report on non-members, guests etc.

Info: you can also publish reports to a YM webpage, not appropriate for this use case but maybe useful for some other report/output that you might want to share, it can be password protected as well?

Helping you with technology.



Then "Publish/Schedule Report" tick the box to "configure the email schedule" hit Save and enter your email addresses, one per line, (make sure you configure the "Send Frequency" and mark the schedule as active.

There you go, you'll have a weekly email containing your vital member contact details "Just in Case".

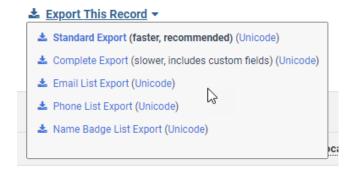
Now you could do the same to create a full data dump out of YM, but my recommendation would be to do that manually in "Directory & CRM", on a monthly schedule.

Search for...



Change the "Search for...." to Members and Non-Members and hit "Search" then you'll literally get everything.

Especially if you combine it with the "Complete Export" option.



Other Data Backup

Depending on your situation you could also consider a schedule report of your event attendees as you approach any time sensitive event or feature taking place?

If you'd like clarification on anything in this document or help with anything, please drop me a line:

