

# Your Membership 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:

1 Manage Fields 2 Manage Entity Joins 3 Manage Criteria 4 Results & Report Options

Area of Interest: Directory

Member/Non-Member (84 fields)

<input type="checkbox"/> Anniversary Date	<input type="checkbox"/> Employer Country	<input type="checkbox"/> IM Type	<input type="checkbox"/> Middle Initial
<input type="checkbox"/> Approved?	<input type="checkbox"/> Employer Fax	<input checked="" type="checkbox"/> Last Name	<input type="checkbox"/> Middle Name
<input type="checkbox"/> Birthday	<input type="checkbox"/> Employer Fax Area Code	<input type="checkbox"/> Lost?	<input checked="" type="checkbox"/> Mobile Phone
<input type="checkbox"/> Constituent ID	<input type="checkbox"/> Employer Location	<input type="checkbox"/> Maiden Name	<input type="checkbox"/> Mobile Phone Area Code
<input type="checkbox"/> Date Approved	<input checked="" type="checkbox"/> Employer Phone	<input type="checkbox"/> Marital Status	<input type="checkbox"/> Name Prefix
<input type="checkbox"/> Date Last Dues Transactio...	<input type="checkbox"/> Employer Phone Area Code	<input type="checkbox"/> Master Website ID	<input type="checkbox"/> Name Suffix
<input type="checkbox"/> Date Last Event Registrat...	<input type="checkbox"/> Employer Postal Code	<input type="checkbox"/> Member API ID	<input type="checkbox"/> Nick/Screen Name
<input type="checkbox"/> Date Last Login	<input type="checkbox"/> Employer Website	<input type="checkbox"/> Member Preferred Address	<input type="checkbox"/> Non Member?
<input type="checkbox"/> Date Last Purchase	<input checked="" type="checkbox"/> First Name	<input type="checkbox"/> Member Preferred Address...	<input type="checkbox"/> Organization
<input type="checkbox"/> Date Last Renewal Reminde...	<input type="checkbox"/> Gender (M/F)	<input type="checkbox"/> Member Preferred City	<input type="checkbox"/> Personal Comments
<input checked="" type="checkbox"/> Date Membership Expires	<input type="checkbox"/> Has Purchased Online?	<input type="checkbox"/> Member Preferred Country	<input type="checkbox"/> Personal Website
<input type="checkbox"/> Date Modified	<input type="checkbox"/> Has Registered for an Eve...	<input type="checkbox"/> Member Preferred Location	<input type="checkbox"/> Primary Group Code
<input type="checkbox"/> Date Registered	<input type="checkbox"/> Home Address	<input type="checkbox"/> Member Preferred Phone	<input type="checkbox"/> Profession
<input type="checkbox"/> Date Subaccount Membershi...	<input type="checkbox"/> Home Address Line 2	<input type="checkbox"/> Member Preferred Phone Ar...	<input type="checkbox"/> Professional Title
<input type="checkbox"/> Deceased?	<input type="checkbox"/> Home City	<input type="checkbox"/> Member Preferred Postal C...	<input type="checkbox"/> Self Employed?
<input checked="" type="checkbox"/> Email	<input type="checkbox"/> Home Country	<input checked="" type="checkbox"/> Member Type	<input type="checkbox"/> Spouse Name
<input checked="" type="checkbox"/> Email (Alternate)	<input type="checkbox"/> Home Location	<input type="checkbox"/> Member Type Code	<input type="checkbox"/> SS Number
<input type="checkbox"/> Email Bounced	<input checked="" type="checkbox"/> Home Phone	<input type="checkbox"/> Member Username	<input type="checkbox"/> Sub-account Seats
<input type="checkbox"/> Employer Address	<input type="checkbox"/> Home Phone Area Code	<input type="checkbox"/> Member?	<input type="checkbox"/> Suspended for Non-Payment
<input type="checkbox"/> Employer Address Line 2	<input type="checkbox"/> Home Postal Code	<input checked="" type="checkbox"/> Membership	<input type="checkbox"/> Suspended?
<input type="checkbox"/> Employer City	<input type="checkbox"/> IM Handle	<input type="checkbox"/> Membership Expires	<input checked="" type="checkbox"/> Website ID

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?

**Publish/Schedule Report**  
 Yes  No

**Require login to view published report**  
 Yes  No

**Query is real-time**  
 Yes  No

Proceed to configure report email schedule after saving

**Save** **Cancel**

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...

Members Only

Members Only

**Members and Non-Members**

Non-Members Only

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.

**Export This Record**

- Standard Export (faster, recommended) (Unicode)
- Complete Export (slower, includes custom fields) (Unicode)**
- Email List Export (Unicode)
- Phone List Export (Unicode)
- Name Badge List Export (Unicode)

### 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: