Member record migration checklist

Move an agreed set of records carefully, then check the result before moving the rest. Use this with any member system or spreadsheet.

Record decisions, field names and counts here. Keep actual member records, contact details and private notes in the church's approved storage and systems.

Church or team:

Target date:

1 Prepare the move

Migration owner role:

Reviewer role:

Current system:

Destination system:

- ☐ Agree which records and fields belong in this move; exclude unused details.
- ☐ Save a dated original export and confirm it can be opened again.
- ☐ Decide who may access the files and where they will be stored.
- ☐ Review likely duplicates; do not merge different people just because names match.

2 Map before importing

Keep source identifiers when available. Agree how blanks, formats and duplicate matches will be handled.

Current field	Destination field	Mapping or review decision

3 Start with a small test

Agreed test size:

Test review date:

- ☐ Preview the mapping and review accepted, duplicate and rejected counts.
- ☐ Import only the agreed test records after review.
- ☐ Compare the saved records with the original, including contact fields and counts.
- ☐ Agree how to correct or undo mistakes before importing more.
- ☐ Review records before sending any account invitations.

Go or pause decision and next action:

Who checks directory accuracy after seven days:

Using TheFaithApp

Start from Members > Import members. Map name and at least one email or phone column, then Validate and preview before Import accepted rows. Import history supports review and undo of records created by that import. Invitations are a separate action.

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