Marine Corps League

Membership report template instructions

1. Open the spreadsheet

Open the CSV in Excel or another spreadsheet app. Keep the first row of column names. The sample rows are marked example; the importer ignores them until you change row_type.

2. Identify your unit and dates

Change one example row to header. Fill in the unit name and number, state, period dates, and your name, office and email. Use dates like 2026-03-31. The end date cannot be in the future.

3. Add officers and member counts

Use officer rows for current officers. Use one count row per member type. count includes Life members; life_members is the subset. Enter zero when there are none.

4. List completed membership changes

Use change rows for new, renewal, reinstatement, transfer_in, transfer_out, deceased, dropped or life_conversion. Remove reversed changes. Enter names, member type and effective date. Contact details are included only for new and transfer_in.

5. Enter dues in dollars

Use dues_amount such as 28.00 for collected dues. transaction_type is new, new_prorated, renewal, reinstate or life. The header can also include past_due (people), dues_outstanding and owed_to_parent. Leave owed_to_parent blank when it is not set.

6. Save and send the CSV

Save as CSV UTF-8. Send the file to your parent unit's report contact. They can load it through Reports - Import report and review any row errors before saving. Keep a copy for your records.