

Get Started with Cornerstone Connect

Cornerstone Connect is the hosted web companion to Cornerstone Membership Suite. It gives staff and volunteers read-only access to your membership data from any browser, without installing the desktop suite. This guide takes an administrator from sign-up to a working site with users in about 30 minutes.

How it works

Your data stays in Cornerstone Membership Suite on your office computer. When you run an export, the Cornerstone Sync utility packages a copy of that data and uploads it to your secure Cornerstone Connect site. Connect shows whatever was in the most recent export, so how current the web data is depends on how often you export.

```
Membership Suite (desktop) --export--> Cornerstone Sync --upload--> Cornerstone Connect (web)
```

Before you begin

You need:

- A computer with Cornerstone Membership Suite 6.0 or later installed. Sign-up and every export must run from this computer.
- Your Membership Suite administrator username and password.
- Windows 10 or later and a current version of Microsoft Edge, Google Chrome, or Mozilla Firefox.
- A firewall or proxy that allows outbound HTTPS (port 443) to *.cornerstoneconnect.example.
- An email address for the Connect administrator. Login details are sent there.

Note: Close Cornerstone Membership Suite on this computer before you sign up or run an export. The Sync utility cannot read the database while the suite has it open.

Setup order

Complete these tasks in order. Only a user with administrator rights can complete them.

1. Sign up and create your site
2. Sign in
3. Export data from Membership Suite
4. Import data into Connect
5. Add users

Sign up and create your site

1. Sign-up creates your **Connect** account and installs the Sync utility that publishes your data.
2. Close Cornerstone Membership Suite.
3. In a browser, go to the **Cornerstone Connect** dashboard and select **Sign up**.
4. When prompted, select **Yes** to download and run the Sync installer.
5. Enter your Membership Suite username and password, then select **OK**. Your site number and site name appear.

6. Select **Continue** to go to the online sign-up.
7. Enter the administrator's first name, last name, and email address, then select **Create site**.

Your site is created within a few minutes. The administrator receives an email with the site address, site number, and sign-in details.

Verify: You received the welcome email. If it hasn't arrived after 15 minutes, check the spam folder before signing up again.

Sign in

1. Go to your site address from the welcome email.
2. Enter your **Site number** and select **Continue**.
3. Enter your **Username** and **Password**, then select **Sign in**.

Verify: The Connect dashboard opens and shows your site name in the top-left.

Export data from Membership Suite

Exporting creates a snapshot of your Membership Suite database and uploads it to your Connect site. Run this task from the computer where Membership Suite is installed, and repeat it whenever you want Connect to reflect new changes.

1. Close the Cornerstone Membership Suite.
2. In Connect, select **Config**.
3. Select the **Import/Export Data > Open Sync utility**.

Note: The first time you open the **Sync utility**, your browser asks to install the **Cornerstone Sync** component. Select **Install**.

4. Enter your Membership Suite username and password, then select **OK**.
5. Under **Export selections**, choose the modules to include (for example, People, Organizations, Attendance).
6. Select **Export**. A progress bar shows the upload.
7. When **Upload complete** appears, select **OK**.

Verify: In Connect, **Import/Export Data** shows the export with today's date and a status of **Ready to import**.

Import data into Connect

Importing loads the most recent export into your Connect site. Data isn't visible on the site until you import it.

1. In **Connect**, select **Config > Import/Export Data**.
2. On the **Import Data** tab, select the export you just uploaded.
3. Select **Refresh database**. Wait for the **Import complete** message, then select **Close**.

Verify: Select **Import history**. The top entry shows today's date, the modules you exported, and a status of **Complete**. Open **People** and search for a name you know is in Membership Suite.

Add users

Membership Suite users aren't added to Connect automatically, and **Connect** users don't need a Membership Suite account. Create a Connect user for each person who needs web access.

1. In **Connect**, select **Config > Add/Edit Users**.
2. Select **Add user**.
3. Enter a **Username**.
4. Enter and confirm a **Password**.
5. Under **Administrator rights**, select **Yes** only if this person will run imports or manage users. Leave it as **No** for everyone else.
6. **(Optional)** Enter the user's **Email address** so they can reset their own password.
7. Select **Add**, then **Close**.

Verify: The new user appears in the user list. Ask them to sign in with the site number, username, and password you created.

Troubleshooting

Problem	What to do
Sign-up or export fails with "database in use"	Close Cornerstone Membership Suite on this computer, including any minimized windows, and try again.
Export stalls at 0% or fails with a network error	Ask your IT administrator to allow outbound HTTPS (port 443) to <code>*.cornerstoneconnect.example</code> through the firewall or proxy.
Data on the site is out of date	Connect shows the last import. Run Export and then Import .
A user can't sign in	Confirm they are entering the site number first, then the username. Usernames are case-sensitive.
The welcome email never arrived	Check the spam folder. If it's not there after 15 minutes, contact support with your site number.

Next steps

- Set an export schedule. Weekly is typical. Export daily during registration or pledge season.
- Give each user only the rights they need. Most staff and volunteers don't need administrator rights.
- See the *Cornerstone Connect Administrator Guide* for user roles, module permissions, and password policies.