



Website Guide

How to Import and Export Users

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Importing User Data



To import users, you need to upload a CSV file that is formatted in a certain way, containing the meta names that we have on the website's database. Here is an example:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	user_login	user_email	first_name	last_name	address	city	state	zipcode	cell_phone	date_of_birth	partner_first_nar	partner_last_nar	member_since
2		test@loaftx.org	Test	User	123 Test	City	TX	12345	1111111111	1/1/1970			01/2020

The first column must be titled `user_login`, which corresponds to WordPress usernames.

This field isn't critical, as users can log in and manage their profiles using their email addresses on the current website. You can either import the usernames from the old website's WordPress database or leave this field empty — the system will generate usernames automatically if none are provided.

The second column must be titled `user_email`. This is the most important field and must contain valid email addresses.

The remaining columns should be named according to the meta name reference page we previously provided.

Ensure that all date fields follow the format MM/DD/YYYY (for the 'date of birth' column for example) or MM/YYYY (for the 'Member Since' column) etc. Phone numbers can be in any format, as long as they include exactly 10 digits. Please refer to the meta key reference document we shared earlier to ensure all column titles match the appropriate meta keys. The reference can be found inside the "Guides" folder within the shared Google Drive folder. If you need to include any new metadata that isn't currently listed (any new user info that is not implemented on the current website), please let us know. We'll add the new meta key and update the reference document accordingly.

If you are not importing passwords from the old website, the system will generate a password for them automatically. Users then can use the password reset tool to create a new password. Overall, the safer and more future-proof recommendation is not to import passwords and encourage users to set a new, strong password using the password reset tool.

Please make sure to refer to the color-coded guide included in the "Meeting Agenda" document. This will help ensure that the data in your database can be accurately mapped to the corresponding fields on the new website, based on the application form questions.

If you want, we can set up an automatic email to be sent to these new users after their accounts are imported to the new website. In that case please provide the wording for the email. If you prefer to send an email blast yourself or inform users in any other way, we can skip this step.

Please refer to the sample import file attached to this email to see an example of how to structure the file. The placement of the first two columns is important.

After structuring the file, please share a test CSV file with us containing just one user entry (preferably using placeholder/test information), so we can test the import process and ensure everything is working correctly.

If everything works correctly then we know the file is structured properly and you can use it to import all the users. However, please do not import any users before coordinating with us. We need to ensure the website is properly backed up beforehand!

How to Import Users

1. Login and navigate to your WP admin panel
2. From the admin panel, click on “Tools”
3. Click on “Import and Export Users and Customers”
4. Go to “Import” tab



First, click on “**Choose**” file to upload the file.

Make sure “**Registered**” user role is selected (if you wish these users to access the website right away)

You don't need to change any other settings. You can navigate to the bottom of the page and click on “**Start Importing**”. The system will import the users then it will give you a report of all imported users (or in case there has been any errors).



Import Export Frontend Recurring import Recurring export (PRO) Extra profile fields Meta keys Mail options Document

Start importing Save options without importing

File

File must contain at least 2 columns: username and email. These should be the first two columns and it should be placed in this order: username and email. Both data are required unless you use [this addon to allow empty emails](#). If there are more columns, this plugin will manage it automatically.

Please, read carefully how passwords are managed and also take note about capitalization, this plugin is case sensitive.

CSV file (required) No file chosen or you can choose directly a file from your host or from an external URL [click here](#).

Click the button to upload the CSV file

Roles

Default role 

Make Sure "Registered" user role is selected here

Options

What should the plugin do with empty cells?

Send email

Do you wish to send an email from this plugin with credentials and other data? [\(email template found here\)](#)

Do you wish to send this mail also to users that are being updated? (not just to the one which are being created)

Force users to reset their passwords? If a password is set to a user and you activate this option, the user will be forced to reset their password at their first login
Please, [read the documentation](#) before activating this option

Update users

Update existing users?

Update emails?

What the plugin should do if the plugin find a user, identified by their username, with a different email

Update roles for existing users?

Never update passwords?

Users not present in CSV file

Delete users that are not present in the CSV? Administrators will not be deleted anyway. After deleting users, you can choose if you want to assign their posts to another user. If you do not choose a user, their content will be deleted.

Change role of users that are not present in the CSV? After importing users from a CSV, users not present in the CSV can have their roles changed to a different role.

Apply only to users with the same role as imported users No, apply to all users regardless of their role

Sometimes, you may want only the users of the imported users' role to be affected and not the rest of the system user.

Start importing Save options without importing

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Exporting User Data



1. Login and navigate to your admin panel
2. From the admin panel, click on “Tools”
3. Click on “Import and Export Users and Customers”
4. Go to “Export” tab

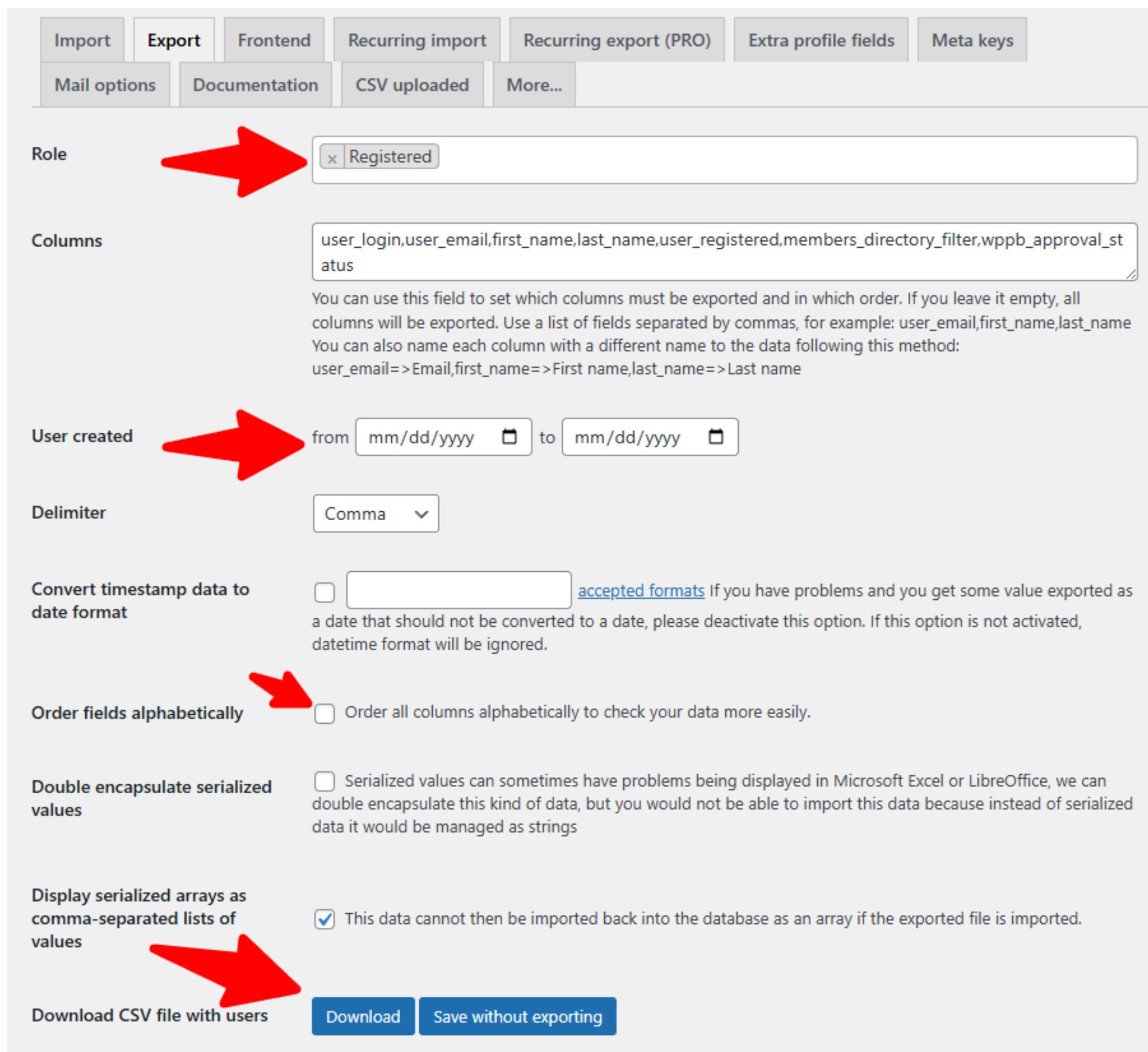


If you want to include all users, make sure “**Registered**” role is selected.

You can select a date range to export only users who have created an account during this period.

You can also order all fields to be displayed alphabetically if it helps.

Lastly to download the report, click the “**Download**” button at the bottom.



The screenshot shows a configuration interface for exporting user data. The top navigation bar includes: Import, Export (highlighted in red), Frontend, Recurring import, Recurring export (PRO), Extra profile fields, and Meta keys. Sub-navigation tabs include: Mail options, Documentation, CSV uploaded, and More... The main configuration area includes:

- Role:** A dropdown menu showing "Registered" with a red arrow pointing to it.
- Columns:** A text input field containing "user_login,user_email,first_name,last_name,user_registered,members_directory_filter,wppb_approval_status". A descriptive note below explains: "You can use this field to set which columns must be exported and in which order. If you leave it empty, all columns will be exported. Use a list of fields separated by commas, for example: user_email,first_name,last_name. You can also name each column with a different name to the data following this method: user_email=>Email,first_name=>First name,last_name=>Last name".
- User created:** A date range selector with "from mm/dd/yyyy" and "to mm/dd/yyyy" fields, with a red arrow pointing to it.
- Delimiter:** A dropdown menu set to "Comma".
- Convert timestamp data to date format:** A checkbox with a red arrow pointing to it, followed by a note: "If you have problems and you get some value exported as a date that should not be converted to a date, please deactivate this option. If this option is not activated, datetime format will be ignored".
- Order fields alphabetically:** A checkbox with a red arrow pointing to it, followed by the text: "Order all columns alphabetically to check your data more easily".
- Double encapsulate serialized values:** A checkbox with a red arrow pointing to it, followed by the text: "Serialized values can sometimes have problems being displayed in Microsoft Excel or LibreOffice, we can double encapsulate this kind of data, but you would not be able to import this data because instead of serialized data it would be managed as strings".
- Display serialized arrays as comma-separated lists of values:** A checkbox with a red arrow pointing to it, followed by the text: "This data cannot then be imported back into the database as an array if the exported file is imported".
- Download CSV file with users:** A button with a red arrow pointing to it.
- Buttons at the bottom:** "Download" and "Save without exporting".

