

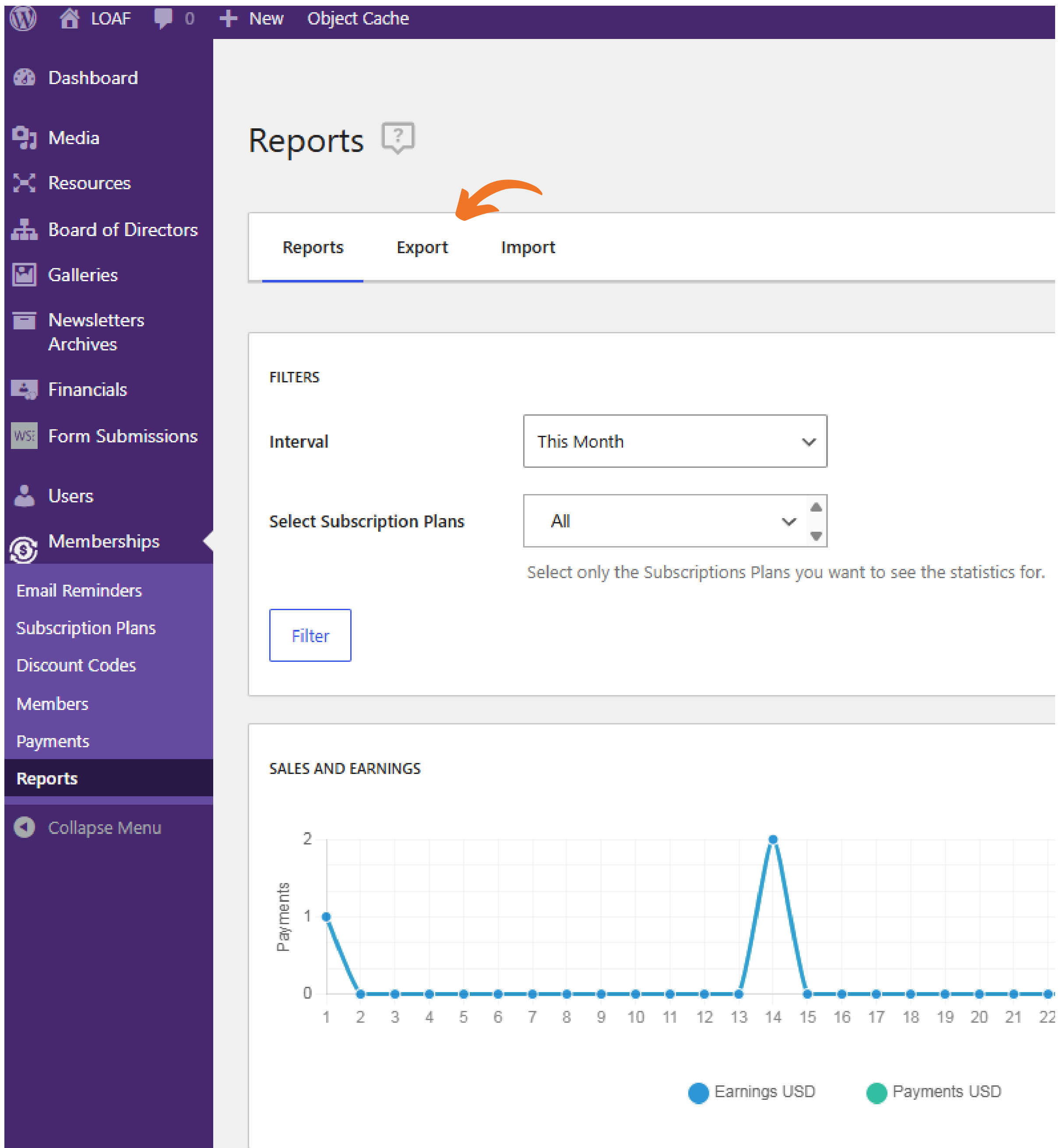


Website Guide

How to Export Membership Data

From the admin panel, under “**Memberships**”, click on “**Reports**”.

Then from the navigation tab select “**Export**”



Here you can customize the report. Since there is only one "Subscription plan" you can leave it at "all subscriptions" or select "Membership".

You can also choose to include all members, or only users with a certain membership status through "Subscription Status". Lastly through "Payment Gateway" options, you can select to include all payment methods or only manual/offline, or Stripe.

Reports

Export

Import

MEMBERS EXPORT

Download a CSV with your user subscriptions (a user with multiple subscriptions will have a record for each individual one).

Subscription Plan

All Subscriptions

Choose the Subscription to export members from

Subscription Status

All Members

Choose the current subscription status

Payment Gateway

All Gateways

Choose the Gateway to export members from

Include sensitive data

☒

For a normal export, this option should be avoided. When used it will include sensitive Stripe Card and Customer data into the export so they can be migrated to another site.

USER DATA

Select Usermeta fields that should be included in the export.

Column title let's you specify the key that you wish this data to use in the export file. This should be left empty if you want to migrate usermeta data from one website to another.

Add User Meta Column



After that, you can customize your report and add any extra data you would like to extract through the “**User Data**” panel.

Step 1: Click on “Add User Meta Column”

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Add User Meta Column



Step 2: Go to the "Column Title" tab. Here, you can name the column—this name will appear in your export for the specific data that you are adding to the report to be extracted.

Here for example we would like to extract user's responses to the **newsletter checklist question** (what information may be shared in the newsletter). So we type "**Newsletter Checklist**" as the column title. You can choose any titles as the column title.

USER DATA

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Column title let's you specify the key that you wish this data to use in the export file. This should be left empty if you want to migrate usermeta data from one website to another.

Column title

Newsletter Checklist

User meta key

...Choose

Add User Meta Column

Generate CSV



Step 3: This is where we specify what information should be displayed under the column title we chose in Step 2.

Click on '**...Choose**' next to '**User meta key**'. A user meta key or meta name is a name or label used to store extra information about a user in database. By finding the correct meta key, we can export this info.

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Column title

Newsletter Checklist

User meta key

...Choose

Add User Meta Column

Generate CSV



Since there is a lot of user meta keys stored in database, the easiest way to find what we need is by searching for keywords. For example, the meta name for the Newsletter checklist question is ***newsletter_checklis***.

Here for example after typing newsletter, the system has filter out all the results and only the meta keys that contain the keyword are displayed. Now we can click on '**newsletter_checklist**' to add it to our export.

USER DATA

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Column title let's you specify the key that you wish this data to use in the export file. This should be left empty if you want to migrate usermeta data from one website to another.

Column title

Newsletter Checklist

User meta key

...Choose

newsletter

newsletter_consent

newsletter_checklist

Meta Column

Generate CSV



Step 4: Now the answers users have provided to the newsletter checklist question—stored under this meta name—will now be included in the report, under the column title you selected.

You click on "Add User Meta Column" again and add select more data to be added to the report.

When you are done customizing the report, click "**Generate CSV**". The system will generate the report and it will be downloaded automatically.

USER DATA

Select Usermeta fields that should be included in the export.
Column title let's you specify the key that you wish this data to use in the export file. This should be left empty if you want to migrate usermeta data from one website to another.

Column title: Newsletter Checklist

User meta key: newsletter_checklist

Add User Meta Column

Generate CSV



The system automatically includes basic account information—such as name and email address—in the report.

For any additional data, we've created a reference sheet of Meta Names that you can search and add to the report, please check the next page.



Information (use this as a reference to find what you are looking for)	Meta Name (search these keywords when exporting data)
Address	address
City	city
State	state
Zipcode	zipcode
Cell Phone	cell_phone
Date of Birth	date_of_birth
Partner First Name	partner_first_name
Partner Last Name	partner_last_name
Are they a member?	partner_membership_status
Do they plan to become a member?	partner_membership_consideration
I wish to receive LOAF's monthly eNewsletter and email reminders	newsletter_consent
Please check what information may be published in LOAF's eNewsletter	newsletter_checklist
Name of a LOAF member who already knows you	member_referral
I may at some time be interested in volunteering with LOAF in the following ways (training is provided):	volunteer_checklist
I am requesting a scholarship	scholarship_request
I am requesting a scholarship for the following reason(s):	scholarship_reason
Would you like to be displayed on our private members directory?	members_directory_filter
Enter your name as you'd like it to appear in the Members Directory	md_display_name
Your preferred contact email	md_email
Bio for my Membership Profile	description
Preferred Address	md_adress
Preferred Contact Phone number	md_phone
Date of Birth	md_dob
Enter your partner's name as you'd like it to appear in the Members Directory	md_partner_name
Upload a Photo for my Membership Profile	md_avatar
Member Since	member_since
Last Login Date	last_login_date
Last Profile Update Date	last_profile_update_date
How did you hear about LOAF?	referral_source

If you want to export only the payment, scroll down to the “**Payments Export**” panel you can generate a CSV with your desired settings.

PAYMENTS EXPORT

Download a CSV with your payments.

Status

All Payments

▼

Choose the payment status

Start Date

mm/dd/yyyy

📅

Choose export data Start Date

End Date

mm/dd/yyyy

📅

Choose export data End Date

NOTE: Leave dates empty for an export of all payments.

Generate CSV

