

## On the first of the Month:

### I. Export data file from website

1. Log in as administrator userid: [REDACTED] password: [REDACTED]
2. Go to Memberships/Members
3. Show "All Levels"
4. Export CSV of all active members
5. Open the file in Excel
6. Save as "members DDMMYY.xlsx" in Member List folder
7. Rename sheet as "members"
8. Select all – auto fit column width / freeze top row (typ for all sheets)
9. Sort by "membership"
10. Add a new sheet, copy first row to new sheet
11. Select all forum only members and cut, then paste into the new sheet
12. Rename sheet "forum"
13. Return to "members" sheet
14. Select all and sort by "teae\_number"
15. Format the phone columns as "special – phone" and center text
16. Check bottom of page for any entries w/o a member # & fix (delete admins, bogus members or assign number both in the database and spreadsheet if an error was made)
17. Send names, member # & vehicle info for any new members to [editor@teae.org](mailto:editor@teae.org)
18. Check for any US zip codes missing plus 4 and fix on website and spreadsheet
19. Check display names (last column) for duplicated joint member names
  - First replace any *&amp;* with *and*
  - If any found: Replace "*and \* and*" with "*and*"
  - You may have to do the second step more than once
20. On website control panel Memberships/Members, Show "Expired Members"
21. Export to CSV and move the resulting sheet to the end of the "members" workbook
22. Rename this sheet "expired"
23. Sort by field "expires" newest to oldest
24. Go to Memberships/Orders
25. Select show within a date range and then filter for a date range corresponding to the reporting period (usually first to end of the previous month)
26. Export to CSV and move the resulting sheet to the end of the "members" workbook
27. Rename this sheet "orders"
28. Check all of the sheets so far for entries for admin users, e.g. Kim Coleman; Kim White, Kerch and delete them
29. Log in to Stripe (userid [REDACTED]. PW [REDACTED]) and PayPal (userid [REDACTED]. PW [REDACTED]) and download reports for the reporting period. These will be in csv format. Add the two resulting files to the members workbook.
30. Turn on the plugin called "LH Buddypress Export Xprofile Data"
31. On website control panel go to Users/Export Xprofile Data
32. Select fields:
  - Member no.

- local repair shops
  - motels, B&B's, or restaurants
  - tools and a helping hand
  - use of my lift
  - bedroom for the night
  - chat and a beer
  - my sympathy
  - Vehicle 1
    1. Marque 1
    2. Model 1
    3. Sub-model 1
    4. VIN 1
  - (repeat for Vehicles 2 through 5 – be careful!)
33. Export data (Generate Report – this may take a while – be patient) and move to the end of “members” worksheet and name tab “vehicles”
  34. Verify that all the fields came across (sometimes this plugin gets a little buggy)
  35. Deactivate LH Buddypress plugin
  36. On the “vehicles” tab, sort by Member Number
    - The vehicles list includes all historical data, not just active members
    - The list has to be in order smallest to largest member number to allow the matching we need to do later to work.
  37. Delete the first column “*user\_id*”
  38. Copy the red column headings and first row of data from last month to this month (column AN through BY)
  39. Highlight the second row of red text and change the reference to last month’s file to this month. I.e replace [members 01MMM.xlsx] with (nothing). (Use search and replace)
  40. Check that the ranges in the formulae extend to the bottom of the vehicles data in the new month spreadsheet. If not replace the reference with the correct one in all fields on the first row. (Use search and replace)
  41. Copy the first row of red fields to the rest of the sheet.
  42. Verify that the formulae give the expected results and any range changes necessary have been made and copy to all rows.
  43. Save the spreadsheet

## II. Prepare Monthly Letter to Treasurer

(it may be easier to open the spreadsheet from last report and duplicate it with data for this report.)

1. Go to “orders” tab of worksheet
2. Make a copy of this sheet as a new workbook
3. Save it as MMM YYYY.xlsx in Letters to Treasurer folder
4. Sort by “*last name*”
5. Examine any duplicates to remove any “token” transactions

6. Delete any Forum Only entries
7. Flag any dues that show up as “free” in the ‘gateway’ column. Copy the transaction number from the notes on the members profile (see day to day instructions) into the transaction column. Change “free” to paypal or stripe as applicable.
8. Verify that you have a check for every entry identified as by check – delete any pending transactions if a check has not yet been received. (Note that if a member renews online and signifies that they will pay by check, the system assumes they paid and increments their expiration date. Make a note to verify that the check is actually received.)
9. Make sure the status entry for all remaining entries is “success”. If not, try to reconcile any that are not – could be a check is still in the mail, a PayPal transaction failed, etc.
10. Insert a column after last name and concatenate *first name* and *last name*, then copy, paste values
11. Delete columns to left of concatenated names
12. Delete *user\_email* through *membership\_id*
13. Delete *subtotal* and *tax*
14. Format *total* as \$
15. Make sure Payment type includes the proper payment type for each record, then delete the rest of the field to the right.
16. Copy paypal and stripe sheets from members spreadsheet
17. Delete columns not used
18. .... ad steps next month
19. Save as MMM YYYY.xlsx in Letters to Treasurer folder
20. Open last letter to Treasure and update as required.
21. Print letter, MMM YYYY spreadsheet and mail with checks to Treasurer

### III. Prepare Monthly Report to Leadership

1. Open report from last month and save as “Membership Report Month Year”
2. Using the excel file, update the numbers and other entries in the report
3. Save and send to leadership@lists.board.teae.org

### IV. Prepare Map Data

1. There are three files needed for the map: members, forum members, and travelers aid members
2. Go back to the “all members” worksheet to the members tab
3. Sort by “teae\_number” smallest to largest
4. Copy the red columns from TEAE # through VIN 5 and paste special - values to a new workbook.
5. Autofit column widths verify phone column is formatted properly and save in folder map data as MAP DATA DDMMYY.
6. The map needs the following fields:
  - TEAE (member #)
  - Name
  - Address
  - Phone
  - Email
  - Region

- local repair shops
  - motels, B&B's, or restaurants
  - tools and a helping hand
  - use of my lift
  - bedroom for the night
  - chat and a beer
  - Car 1
  - VIN 1
  - Car 2
  - VIN 2
  - Car 3
  - VIN 3
  - Car 4
  - VIN 4
  - Car 5
  - VIN 5
7. The columns should be in this order, if correct any errors. Copy column names from last month's Map Data.xls file and save the file as "map data DDMMYY"
  8. Sort using multiple levels – all seven of the travelers aid fields (a to z). This will put them all at the bottom of the sheet.
  9. Open a new workbook and cut and paste the lines with a travelers aid entry to the new workbook. Delete the column "sympathy only". Save this as "trav asst DDMMYY".
  10. Go back to the map data worksheet and delete the seven (now empty) travelers aid columns and save the file "map data DDMMYY"
  11. Go back to the members workbook and copy the worksheet of forum only members to a new spreadsheet. Save it in the maps folder as "Forum DDMMYY".
  12. Delete the first four columns (id, username, firstname, lastname) and insert a blank column to the left of "email".
  13. Move "displayname" to the new first column.
  14. Insert a column to the left of address 1 and label it "Address", concatenate the address fields or go to concat names.xlsx and copy cell G2 to the second line in Address, then copy this to the end of the data, copy the entire column and paste special-values.
  15. Delete columns F through L (address columns)
  16. Format column phone as special – phone number
  17. Delete columns (membership through alternate\_phone) Then teae\_number through pmpro\_bemail)
  18. Insert a new first column on the left and insert "Forum Only" for each forum member
  19. Delete any shading or borders, clean up any obvious errors in names, delete commas in empty address fields, any "none of these" regions
  20. Put the columns in this order:
    - Membership: Forum
    - Name (concatenated)
    - Address (concatenated)
    - Phone

- Email
  - Region
  - Vehicle (if listed)
21. Save the file as “forum DDMMYY”.
  22. Open your web browser and go to <https://www.google.com/maps/> Sign in using the club email ([tigerseastalpineseast@gmail.com](mailto:tigerseastalpineseast@gmail.com)) (password: [REDACTED]).
  23. Click the menu hamburger at the top left of the screen, then “Saved”. Then select “Maps” and then “TEAE Member Locations”, under “open in my maps”
  24. You will see the latest spreadsheet file used for locations and the latest United (or SUNI) hotel location in the column on the left. Click on “open in my maps”.
  25. Delete the three files which are to be replaced, “Forum DDMMYY”, “Map Data DDMMYY”, and Trav Asst DDMMYY”
  26. Click on “add layer”. A new “untitled layer appears at the bottom of the menu panel. Click on “import”. Layers should be added in the order given below: forum, then members, then trav aid. This puts trav aid at the top, forum at the bottom on the map.
  27. Then click on “select a file from your computer”. Navigate to the latest “Forum DDMMYY” and click open.
  28. Select “address” as the column to position placemarks, then click “continue”.
  29. Select “unnamed” as the column to title the placemarks. Then click “finish”.
  30. There will most likely be a message that pops up and tells you that some rows couldn’t be shown on the map. If so, click on “open data table”
  31. If the address is blank (some forum members didn’t provide this info), right click that row in the data table and select delete. There are many random things that google’s software doesn’t like. First try just double clicking on an address it doesn’t like. That typically resolves most issues. If that doesn’t work try eliminating any space before a comma. Fix any of these. If the red triangle with an exclamation point disappears, you’ve fixed that record. If it doesn’t sometimes adding a second space before the zip code works. So does adding a comma where one seems to be missing. When you’ve fixed all you can, close the database window.
  32. Use the default symbol (red) for these locations.
  33. Next repeat the above steps: “add layer” “select file form computer” and add “Map Data DDMMYY” using “address” for locations and “TEAE” for identification, and correcting any locations that google can’t resolve.
  34. Next click the diamond at the right of the default map symbol and select the TEAE logo instead. If it isn’t there click more icons and scroll to the bottom of the selections. If it still isn’t there (it usually is) you have to re-add it: <https://teae.org/cars/wp-content/uploads/2015/09/rootes-badge.png>
  35. Next repeat these steps with the “Trav Asst DDMMYY” file and select the travellers assistance logo special icon.
  36. Loading the three files in this order puts the Trav Asst locations in the forground and the Forum in the background.
  37. Adding the files in this order results in the travelers assistance members showing on top, then members, then forum members.

38. Go to the website and update the post where the map is displayed to update the data date under the map.
39. When the new location for the United or Suni is identified, create a small Excel file with the name United ##, the hotel address and a link to the hotel site and/or registration page

## V. Reminders for Dues

1. Reminders are sent automatically by the system if we have email addresses. Some 30 members do not have or have not given us email addresses. In these cases, they are given an address @teae.info. This is forwarded to the membership chairman; in which case a postcard must be prepared and sent to the member. There are also notices sent when membership expires, and these are handled the same way.
2. We are supposed to send another email one month after expiration – did you forget? And another 4 months after expiration – if you don't intend to renew – why? The Regional Reps should be contacting these people already from the data they get with the monthly report.

## VI. Rosters

1. Open the last Rosters.xlsx file and save as Rosters DDMMYY. Using the old files will help save the formatting for printing.
2. There are five reports made from the latest Members spreadsheet to be printed to PDFs and uploaded to the website: by last name; by city and state, by regions, a vehicle report, and a listing of members offering traveler assistance. Sort the file as indicated then copy the columns indicated (use concatenated data wherever it is available) into a new file. (use a separate tab for each of the sorts). Note column numbers reference below were correct at time of publication. Software updates may shift these somewhat.
  - Last Name is sorted by the member's last name. Columns are:
    1. Member Name(s) (col AH)
    2. Member # (col AG)
    3. Address (col AJ)
    4. Email (col AK)
    5. Phone (col AJ)
    6. Alternate Phone (col U) – format as phone number
    7. Region (col AL)

Sorting by last name is complicated by the way BuddyPress appends the joint member first name, and sometimes first and last names to the member's last name. This requires that the last name field be manually adjusted to contain only the member's last name (somewhat tedious). Sometimes the member's last name will be the last word in the string, and other times the first. Some few names even put the member's last name at another point in the string. I'm sure that the column can be processed with an excel formula or visual basic routine, but I haven't found it yet.

- City / State is sorted by Country, then State, then City. Columns are:
  1. Country (col AC)
  2. State (col AA)

3. City (col Z)
  4. Name(s) (col AH)
  5. Address (col AI)
  6. Email (col AK)
  7. Phone (col AJ)
  8. Alternate Phone (col U)
  9. Region (col AL)
- Regions are sorted by Region, then by zip code. Regional reps are named at the top of each region.
  - To update each region It is easiest to first sort the Members sheet for the current month by region, then go through the roster region by region first counting the number of members in the region in both files. If they are the same updates can be done column by column for the region. If the numbers are different, add or delete a row to the file to be updated. Columns are:
    1. Member # (col AG)
    2. Member Name(s) (col AH)
    3. Address (col AI)
    4. Email (col AK)
    5. Phone (col AJ)
    6. Alt Phone (col U)
  - Vehicles are sorted by member number. The Members sheet is sorted by member number and the columns updated. Columns are:
    1. Member # (Col AG)
    2. Name(s) (Col AH)
    3. Cars w/VINs, 1 through 5 (Col at through BC)
  - The latest Members worksheet is sorted by each of the assistance categories then region then those members are copied to the Rosters columns.
3. Headers and footers on each sheet should be checked to update dates, etc.
  4. Save each sheet (roster sort) updated files as:
    - Name.pdf
    - Regions.pdf
    - State.pdf
    - Vehicles.pdf
    - Trav-assist.pdf
  5. Print each of the four rosters to PDF. Make sure the files are named as above
  6. Open <https://panel.dreamhost.com> and login as [webmaster@teae.org](mailto:webmaster@teae.org) (password: )
  7. Click on Manage Domains then WebFTP under TEAE.org, then “cars”, then “members only”, then “rosters” (or use Filezilla) – ***This needs to be rewritten with step by step instructions.***
  8. Click the upload bottom on the bottom of the screen and upload the four files. Make sure the names are the same and click upload and replace. Also select do this for all files.

## **VII. Reminders**

1. Using the expired members list, each month send members that expired one month ago an email (or postcard) reminding them that their dues have expired. (std email text and postcards exist.)
2. Again, using the expired members list send members that expired 4 months ago an email or postcard asking if they forgot, or if they quit, why.