

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
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"
16. Check bottom of page for any entries w/o a member # & fix (delete admins, bogus members or assign number if an error was made)
17. Send names, member # & vehicle info for any new members to editor@teae.org
18. Check for any US zip codes missing plus 4 and fix on website
19. Check display names (last column) for duplicated joint member names
 - If any found: Replace "and * and" with "and"
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. Go to Memberships/Orders
24. 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)
25. Export to CSV and move the resulting sheet to the end of the "members" workbook
26. Rename this sheet "orders"
27. Check all of the sheets so far for entries for admin users, e.g. Kim Coleman; Kim White, Kerch and delete them
28. 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.
29. Turn on the plugin called "LH Buddypress Export Xprofile Data"
30. On website control panel go to Users/Export Xprofile Data
31. 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!)
32. Export data (Generate Report – this may take a while – be patient) and move to the end of “members” worksheet and name tab “vehicles”
 33. Verify that all the fields came across (sometimes this plugin gets a little buggy)
 34. Deactivate LH BuddyPress plugin
 35. 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.
 36. Delete the first column “*user_id*” and save the worksheet

II. **Prepare Monthly Letter to Treasurer**

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 strip 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. Save as MMM YYYY.xlsx in Letters to Treasurer folder

17. Open last letter to Treasure and update as required.
18. 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-bounces@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. Open the worksheet from last month to the members tab
5. Copy the red column headings and first row of data from last month to this month (column AN through BY)
6. 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)
7. 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)
8. Copy the first row of red fields to the rest of the sheet.
9. Verify that the formulae give the expected results and any range changes necessary have been made and copy to all rows.
10. Save the spreadsheet
11. Copy the red columns from TEAE # through VIN 5 and paste special - values to a new workbook.
12. Autofit column widths
13. 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
14. Organize the columns in this order, copy column names from last month's Map Data.xls file and save the file as "map data DDMMYY"
 15. 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.
 16. Open a new workbook and cut and paste the lines with a travelers aid entry to the new workbook. Save this as "trav asst DDMMYY"
 17. Go back to the map data worksheet and delete the seven (now empty) travelers aid columns and save the file "map data DDMMYY"
 18. 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".
 19. Delete the first four columns (id, username, firstname, lastname) and insert a blank column to the left of "email".
 20. Move "displayname" to the new first column.
 21. 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.
 22. Delete columns F through L (address columns)
 23. Format column phone as special – phone number
 24. Delete columns (membership through alternate_phone) Then teae_number through pmpro_bemail)
 25. Delete any shading or borders, clean up and obvious errors in names, delete commas in empty address fields, any "none of these" regions
 26. Put the columns in this order:
 - Membership: Forum
 - Name (concatenated)
 - Address (concatenated)
 - Phone
 - Email
 - Region
 27. Save the file as "forum DDMMYY".
 28. Open your web browser and go to <https://www.google.com/maps/> Sign in using the club email (tigerseastalpineseast@gmail.com) (password: [REDACTED]). Click the menu hamburger at the top left of the screen, then "your places". Then select "Maps" and then "TEAE Member Locations", the "open in my maps"
 29. You will see the latest spreadsheet file used for locations and the latest United (or SUNI) hotel location. Click on "open in my maps".
 30. Delete the three files which are to be replaced, "Forum DDMMYY", "Map Data DDMMYY", and Trav Asst DDMMYY"

31. 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.
32. Then click on “select a file from your computer”. Navigate to the latest “Forum DDMMYY” and click open.
33. Select “address” as the column to position placemarks, then click “continue”.
34. Select “unnamed” as the column to title the placemarks. Then click “finish”.
35. 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”
36. 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.
37. Use the default symbol for these locations.
38. 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.
39. 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>
40. Next repeat these steps with the “Trav Asst DDMMYY” file and select the travellers assistance logo special icon.
41. Loading the three files in this order puts the Trav Asst locations in the foreground and the Forum in the background.
42. Adding the files in this order results in the travelers assistance members showing on top, then members, then forum members.
43. Go to the website and update the post where the map is displayed to update the data date under the map.
44. 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 for 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 four reports made from the members spreadsheet to be printed to PDFs and uploaded to the website: by last name; by city and state, by regions and a vehicle report. 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).
 - Last Name is sorted by the member's last name. Columns are:
 1. Member Name(s) (col AQ)
 2. Member # (col AH)
 3. Address (col AR)
 4. Email (col AS)
 5. Phone (col N)
 6. Alternate Phone (col AF) – format as phone number
 7. Region (col AG)
 - City / State is sorted by State, then City. Columns are:
 1. State (col K)
 2. City (col J)
 3. Name(s) (col AQ)
 4. Address (col AR)
 5. Email (col AS)
 6. Phone (col N)
 7. Alternate Phone (col AF)
 8. Region (col AG)
 - Regions are sorted by Region, then by zip code. Regional reps are named at the top of each region. It may be easiest to copy the members sheet for the current month to a separate file and sort that, then delete the unused columns and reorder the columns as required. This means resetting the fonts, and column widths, inserting the rows for the Reps, and resetting the headers and footers. The alternative is to check each region to see if members have changed and adding and subtracting as required – tedious, but simpler. Columns include:
 1. Member # (col AH)
 2. Member Name(s) (col AQ)
 3. Address (col AR)
 4. Email (col AS)
 5. Phone (col N)
 6. Alt Phone (col AG)
 - Vehicles are sorted by member number. This is the same data as in the members map file, so you can copy directly from that. Columns are:
 1. Member #
 2. Name(s)
 3. Cars w/VINs, 1 through 5

3. Headers and footers should be checked to update dates, etc.
4. Save the members DDDMMYY file as scratchpad.xlsx and use this to make the various sorts and copy them into the rosters. Doing this once for each sort will save time.
5. Print each of the four rosters to PDF. Make sure the files are named: name.pdf; state.pdf; vehicles.pdf; regions.pdf;
6. Open <https://panel.dreamhost.com> and login as webmaster@teae.org (password:)
7. Click on Manage Domains then WebFTP under TEAE.org, then “cars”, then “members only”, then “rosters”
8. Click the upload button 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 asking if they forgot, or if they quit, why.