Creating a Transaction Export Template

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Quick Steps: Subscriptions > Transaction > Export Templates

1. Within the Management Console, select **Subscriptions** from the top menu, then **Transactions** from the left menu

2. Select **Export Templates** from the expanded left menu, then click on **Add** at the top of the page

3. Give the template an appropriate title and then define the fields. Selecting Yes on any field will ensure that the field any data within that field will appear in the export

4. Click **Save** to create the template

5. Use the Template button in any of the Transactions menu to use this template to export transaction information into Excel

Important Notes:

This will open the data in Excel as a HTML page, click Save As to save the document as an Excel file

Similar to export templates in the Members menu, export templates can be created to draw specific information about the transactions and the members' information

The Export Templates created in this area can be utilised accross menu options within the Transactions category.

Export Templates are a great way of customising your reports so that they only pull the information that you need for a member and their transaction