



## Census Report, Roster Report, Merge List or Directory Export



### Census REPORT

1. Click Families to view all ACTIVE families.
2. Check mark any family or the check box in the bottom to select all active families.
3. Click **Reports** and choose **\*Selected Household Facts**. It's at the very top of the list.
4. You can enter any text you want to appear as the Report Title. Example: St. \_\_\_\_ Census Report.
5. Click **View Report** and then print.

### Directory REPORT:

1. Click **Contacts**
2. Select all of your active contacts (or filter for a specific group)
3. Click **Reports** and choose one of these reports.
  - **Selected Call List Enhance**
  - **Selected Directory – 3 col**
  - **Selected Directory Households**

**Merge List:** The merge list makes for a nice list because it has most contact information and opens in Excel so you can remove/reorder columns as you see fit

1. Click **Contacts**
2. Select all of your active contacts (or filter for a specific group)
3. Click **Reports** and choose **Selected Mail Merge: 1 per family - Erie V2**

**Directory EXPORT** –used when working with a directory company. Includes Active, Inactive & Deceased.

1. Click **Families** and change the view to **Directory Export - Active/INactive w/offertory**
2. If you only want people who are Active
  - a. Check the box in the bottom left to select all.
  - b. Type **Inactive** in the search box under **Contact Status**.
  - c. Uncheck the first inactive person.
  - d. Scroll down using the scroll wheel on your mouse or the scroll bar on the screen
  - e. Hold down the **shift** on your keyboard and uncheck the last checkbox in the list. That should uncheck all the Inactive people.
3. Click **Actions** and choose **Export**. It should open into Excel. If not, you'll find it in your downloads folder.
4. Put a dot next to **Selected** if you unchecked **Inactives** or **Current View** if you want everyone.
5. Delete the first 4 columns. They are always garbage.

6. Use Excel's **Text to Columns** feature to split the **Heads first names** column into two columns (Steps A-G below) and to split the **Minor Children first names** column into separate columns (Steps I-VII).

**To split the Heads first names into separate columns:**

- A. Insert 2 blank columns BEFORE the Contact Status column.
- B. Highlight the **Heads first names** column.
- C. Click the b ribbon and choose **Text to columns**
- D. Put a dot next to **Delimited** and click **Next**
- E. Check mark **Comma** and click **Next** and then **Finish**.
- F. The wife will be the first blank column. You can rename that column **Spouse**.
- G. The husband will be in the first column. The third column will probably be blank but I always insert an extra. Check it over. If it is blank trash it.

**To split the Minor Children first names into separate columns:**

- I. Scroll down to find the family with the most kids.
- II. Insert that many blank columns Plus 1 before the **Main/Home\_Phone** column.
- III. Highlight the **Minor Children first names** column
- IV. Click the **Data** ribbon and choose **Text to columns**
- V. Put a dot next to **Delimited** and click **Next**
- VI. Check mark **Comma** and click **Next** and then **Finish**.
- VII. The kids will be in the columns that you just added. One of the columns will probably be blank. Check it over. If it is blank trash it.

**Exporting ANY view in MP to Excel** –Any view in MP can be exported to Excel.

1. Open your favorite view.
  - a. If you've rearranged columns in the view, you may wish to put them back in the default order: Click **Actions** and choose **Reset Grid Defaults**.
2. Click **Actions** and choose **Export**. It should open into Excel. If not, you'll find it in your downloads folder.
3. Delete the first 4 columns. They are always garbage.
4. Delete unneeded columns and rearrange as needed.