



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. Ie St. ____ Census Report.
5. Click **View Report** and then print.

Directory REPORTS:

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 – often used when working with a directory company:

1. Click **Families** and change the view to **Directory Export - active contacts by household**
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. 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 column c.
- B. Highlight column b
- C. Click the Data ribbon and choose Text to columns
- D. Put a dot next to Delimited and click Next
- E. Check mark Comman and click Next and then Finish.
- F. The wife will be in column B.
- G. The husband will be in Column C. Column D 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 column f.
- III. Highlight column e
- IV. Click the Data ribbon and choose Text to columns
- V. Put a dot next to Delimited and click Next
- VI. Check mark Comman 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.