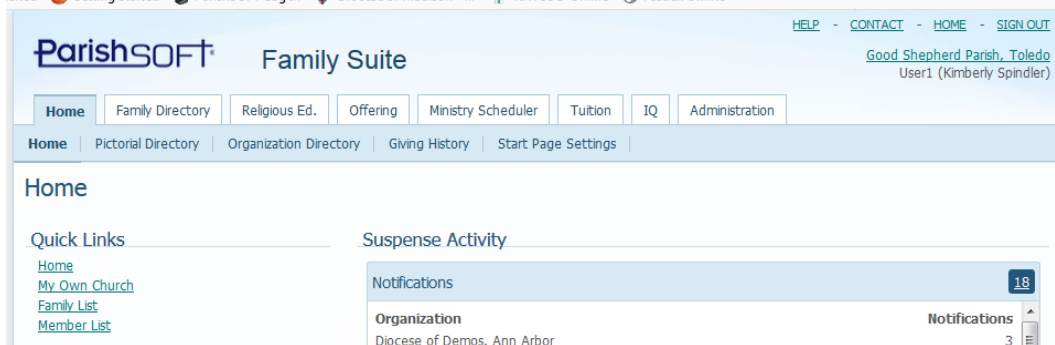
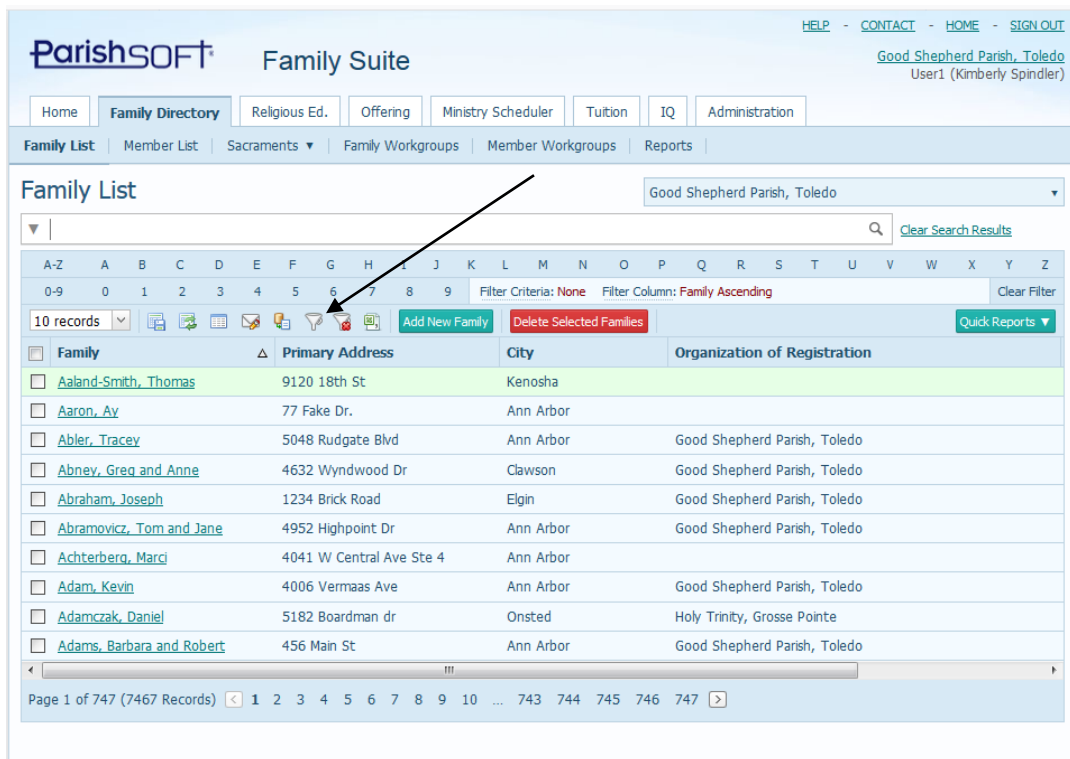


## Exporting Members or Family Workgroup lists

1. After logging into your ParishSOFT site. You will see a screen similar to below



2. Click on the **Family Directory** tab and you will be on the **Family List** (if you wish to filter on a Member Workgroup, then instead click on the **Member List**) Next, click the **filter** icon as seen below:



3. On the filter page, select your workgroup, making sure to leave the **Registration** and **Family Group** areas set to as broad of a category as possible, if you do not wish to restrict your workgroup by those criteria. In the example below, the search is for all the **School families**, and the Membership to **Both** and the Family Group to **All Groups**, to indicate that not all the school families are registered at the parish.

**Filter**

Membership:

Family Group:

Send Envelopes:

**Family Work Groups**

- System Work Groups
- Family Workflow Groups
- Pictorial Directory
- School Families

**Advanced Options**

Filter By ID:

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date:

E-Mail Address:

E-Mail:

Postal Code:

City:

State/Region:

Show 'Send No Mail' Families:

Show 'Do Not Publish' Families:

Show Families With E-Mail:

Exact Search:

- Click **Apply** and your screen will refresh to filter on that criteria. In the example below, there are 308 families that are in our “School Families” that want to receive mail.

ParishSOFT® Family Suite

St Martin De Porres Parish, Toledo user23 (Kimberly Spindler)

Home | **Family Directory** | Religious Ed. | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Family List St Martin De Porres Parish, Toledo

Filter Criteria: None Filter Column: Family Ascending

10 records

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abramovicz, Tom and Jane	4995	<a href="mailto:Abramovicz@demoemailaddress">Abramovicz@demoemailaddress</a>	555-2222	4952 Highpoint Dr	Ann Arbor
<input type="checkbox"/> Adams, David and Jen	2545	<a href="mailto:Adams@demoemailaddress.com">Adams@demoemailaddress.com</a>	555-2222	1910 Chalice Way	Ann Arbor
<input type="checkbox"/> Adams, Todd and Jane	1129		555-2222	6059 Needle Rock Ct	Ann Arbor
<input type="checkbox"/> Auer, Brian and Suzie	5439	<a href="mailto:Auer@demoemailaddress.com">Auer@demoemailaddress.com</a>	555-2222	3452 Chapel Dr	Ann Arbor
<input type="checkbox"/> Austin, Mariann	203		555-2222	7213 Whispering Oak Dr	Ann Arbor
<input type="checkbox"/> Baehr, Michael	4993	<a href="mailto:Baehr@demoemailaddress.com">Baehr@demoemailaddress.com</a>	555-2222	7246 Twin Canyon Dr	Ann Arbor
<input type="checkbox"/> Bahun, Scott and Bobbi	8623	<a href="mailto:Bahun@demoemailaddress.com">Bahun@demoemailaddress.com</a>	555-2222	4510 Woodbriar Dr	Ann Arbor
<input type="checkbox"/> Barden, James and Michele	5597		555-2222	4639 Cinnamon Ln	Ann Arbor
<input type="checkbox"/> Barinka, Jim and Mary-Beth	5122	<a href="mailto:Barinka@demoemailaddress.com">Barinka@demoemailaddress.com</a>	555-2222	4152 Stannard Dr	Ann Arbor
<input type="checkbox"/> Barkley, Randy and Debra	2495		555-2222	2315 Castlewood Dr	Ann Arbor

Page 1 of 31 (308 Records)

- If you wish to export the information to Excel, click the green Excel icon, as seen in the image below:

The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation links: HELP, CONTACT, HOME, and SIGN OUT. Below that, the user is identified as St Martin De Porres Parish, Toledo, user23 (Kimberly Spindler). The main menu includes Home, Family Directory, Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. The Family List section is active, showing a search bar for St Martin De Porres Parish, Toledo and a search icon. Below the search bar is a table with columns A-Z and 0-9. The table contains 10 records. An arrow points to the green Excel icon in the table's toolbar. Other icons include a printer, a mail icon, a refresh icon, and a search icon. The table has buttons for 'Add New Family', 'Delete Selected Families', and 'Forget Selected Family'. A 'Quick Reports' button is also visible.

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
Abramovic, Tom and Jane	4995	Abramovic@demoemailaddress	555-2222	4952 Highpoint Dr	Ann Arbor
Adams, David and Jen	2545	Adams@demoemailaddress.com	555-2222	1910 Chalice Way	Ann Arbor
Adams, Todd and Jane	1129		555-2222	6059 Needle Rock Ct	Ann Arbor
Auer, Brian and Suzie	5439	Auer@demoemailaddress.com	555-2222	3452 Chapel Dr	Ann Arbor
Austin, Mariann	203		555-2222	7213 Whispering Oak Dr	Ann Arbor
Baehr, Michael	4993	Baehr@demoemailaddress.com	555-2222	7246 Twin Canyon Dr	Ann Arbor
Bahun, Scott and Bobbi	8623	Bahun@demoemailaddress.com	555-2222	4510 Woodbriar Dr	Ann Arbor

- The document will open in MS Excel, as seen below:

The screenshot shows Microsoft Excel with the Family List data imported into a spreadsheet. The spreadsheet has columns A through T. The data is organized into rows, with the first row being the header. The data includes family names, envelope numbers, email addresses, phone numbers, addresses, and cities. The spreadsheet is titled 'FamilyList (7) - Excel'.

Family	Mailing N	Envelope	E-Mail Ad	Primary P	Primary A	City	State/Reg	Postal	Coc	Plus 4	Registere	Family Gr	Map	Code	Registere	Organizati	Diocesan	Diocesan	Family ID	Family DU	Family Group
Abramovi, Mr. Thom	4995	Abramovi	555-2222	4952 High	Ann Arbor	MI		48108			Yes	Active	B		3048	St Martin De Porres	18824300	1143	471734	1998	
Adams, Dc Mr. David	2545	Adams@d	555-2222	1910 Chall	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres Parish, Tol		3847	473391	1998	
Adams, Tc Mr. Todd	1129		555-2222	6059 Neec	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	18238600	253	470846	1998	
Auer, Bria Mr. Brian	5439	Auer@de	555-2222	3452 Chap	Ann Arbor	MI		48108			Yes	Active	B		3048	St Martin De Porres		3770	473329	1998	
Austin, Mi Mrs. Maria	203		555-2222	7213 Whis	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres Parish, Tol		2312	472903	1998	
Baehr, Mi Mr. Micha	4993	Baehr@d	555-2222	7246 Twin	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	8440400	1142	471733	1998	
Bahun, So Mr. Donal	8623	Bahun@d	555-2222	4510 Woo	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	19479400	1996	472587	1998	
Barden, Jc Mr. James	5597		555-2222	4639 Cinn	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	9409900	1291	471882	1998	
Barinka, Ji Mr. James	5122	Barinka@	555-2222	4152 Stani	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	18971000	1172	471763	1998	
Barkley, R Mrs. Debr	2495		555-2222	2315 Castl	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres Parish, Tol		586	471177	1998	
Bemowski, Mr. Thom	1819	Bemowsk	555-2222	4045 Cleg	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres Parish, Tol		3661	473232	1998	
Bernarde, Mr. Rober	8647		555-2222	4741 S Arv	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	17971300	2005	472596	1998	
Blanchard, Mr. Jeffry	3005		555-2222	2840 Wilt	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	8220400	703	471294	1998	
Borski, Jc Mr. Jeff B	8195	Borski@d	555-2222	10216 Cral	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	19311200	1901	472492	1998	
Borski, Jc Mr. Jord	8250	Borski@d	555-2222	7221 Saint	Ann Arbor	MI		48108			Yes	Active			3048	St Martin De Porres	17970500	1913	472504	1998	

- Click **File** < **Save As** and save the file to a location to reference the document. If you wish to format this document (underline, bold, color, etc.) then you will need to change the format of the file that you are saving, by clicking on the **Save as Type** and select Excel Workbook.

