Saving Grid Layout Preferences for Family Directory Screen

1. Log into ParishSOFT and you should be at the main **Home** screen. Click on the **Family Directory** tab. Your screen should appear similar to below:


2. If you wish to save a different layout of the grid you see here in this view, you should first move or change the order of the columns, then hit the **Save Grid Layout** button.

3. First Click the **Select Grid Columns** icon , seen here below to view what column names you can add or remove as your default:

In the example below, un-check those columns you do not wish to see on this screen. Please note that IF you remove a column it will also remove it from

any Export to Excel functions that you do later. If you think you'll need the column, keep it.
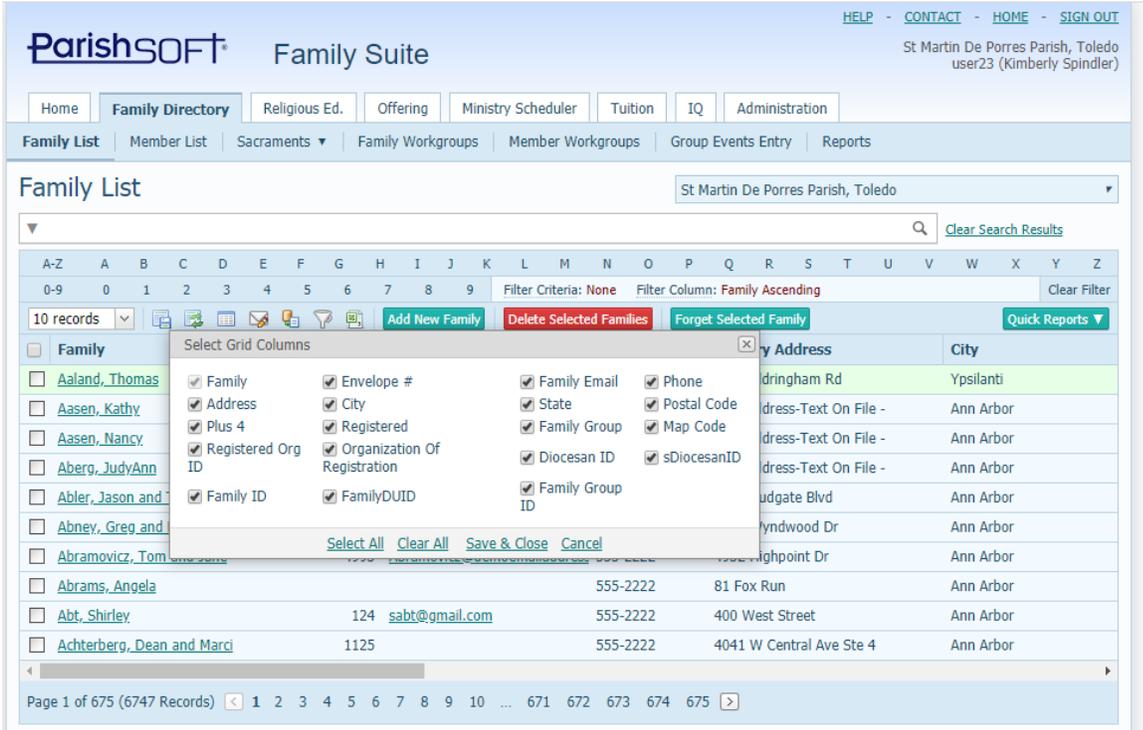

In the example below, we removed those columns that were not neded, then selected **Save & Close**

4. Next, consider how your columns are organized on your screen. Each column has a drag and drop option to move them to different locations, if you click and hold the header of each column. In the screen shot below, if you wish to have the envelope number column show prior to the Family name then click on the **Envelope #** column header and "drag" it to the area in front of the Family column, as seen below:
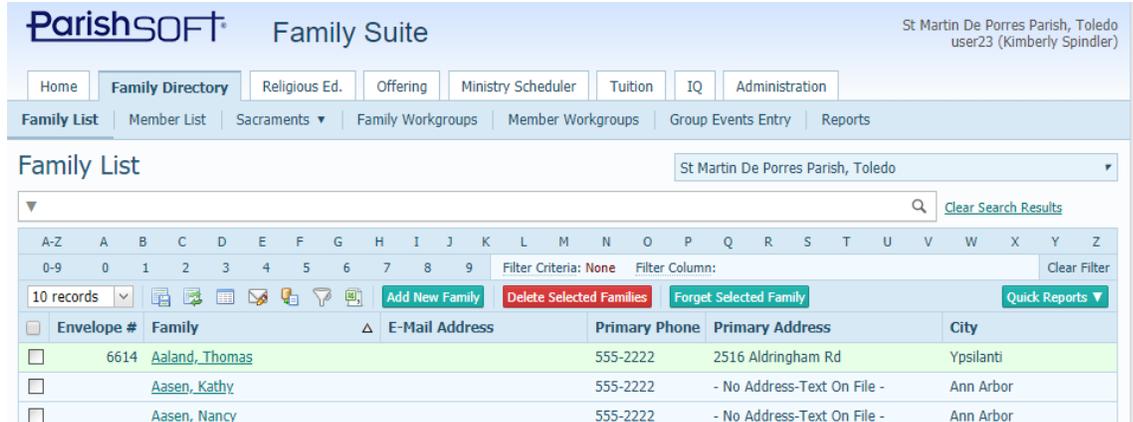
5. Finally, we'll look at the last section where we can designate our default grid layout. Look at the "family records" number and set them to whatever you'd like. Please note that when you set it to a greater number of records, it will take longer for the screen to open when clicking back and forth between tabs.
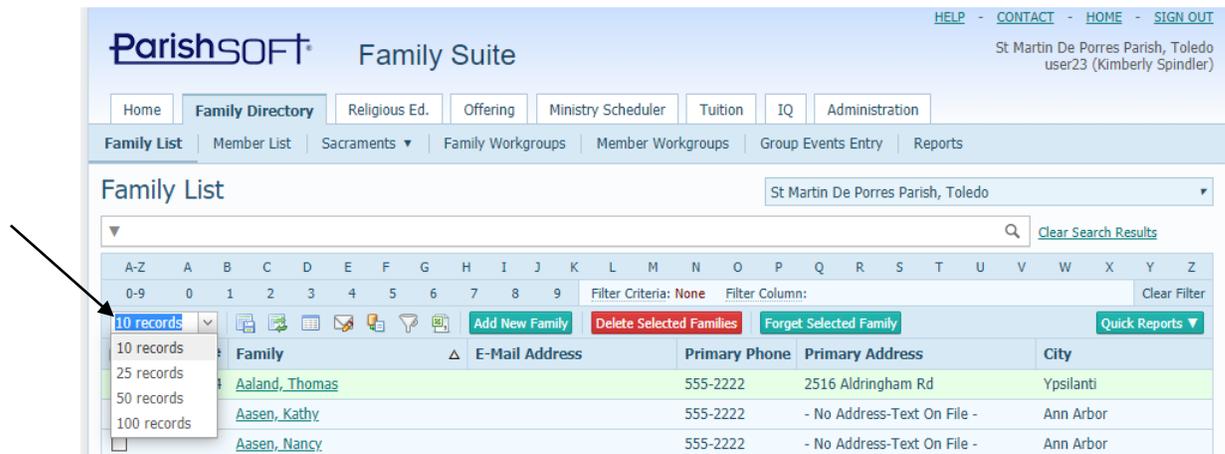
6. To save the layout as you've arranged it, click on the **Save Grid** icon seen below:
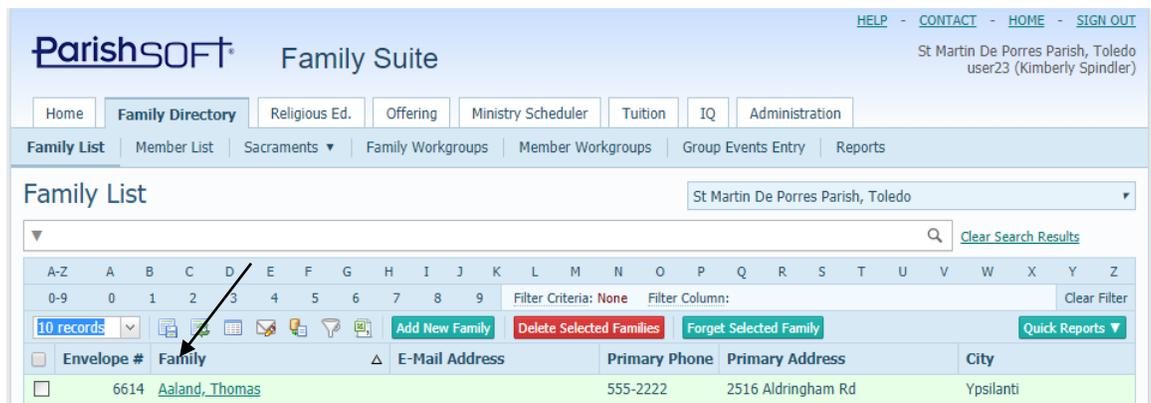
7. If you need to re-set the layout, click the **Reset Grid Layout** icon directly to the right of the **Save Grid Layout** icon.