

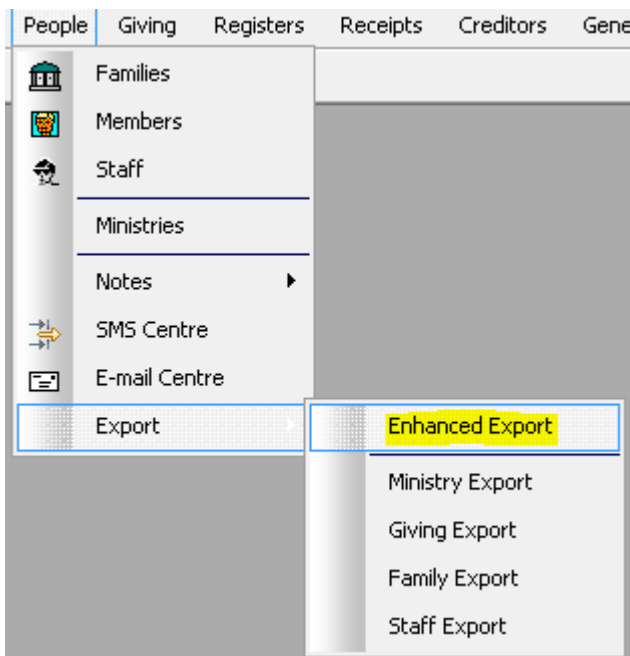
Enhanced Exports

Example Mobile and Email listing.

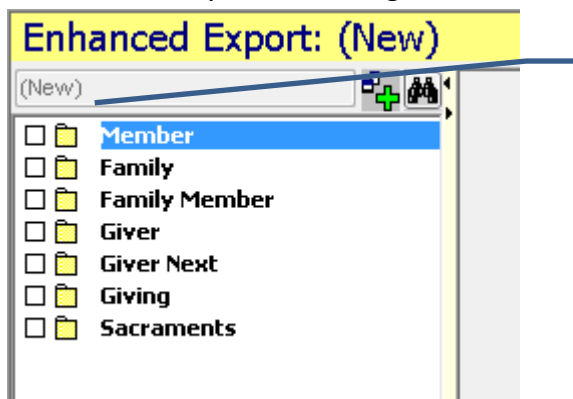
Enhanced exports allow you to pull out customised information from PACS in excel format and then apply filters. It is suitable for mail merges. It is the only place in PACS where you can export information from all different areas of PACS, such as Families, Givers, Members, Sacraments and Giving Data. You must remember that enhanced exports actually pull out both archived and active givers, so you must filter on Active Only, this is detailed in the following instructions.

To find your exporting options, please go to;

1. People
2. Export
3. Enhanced Export (in this example) other exports available are Ministry, Giving, Family and Staff Exports.

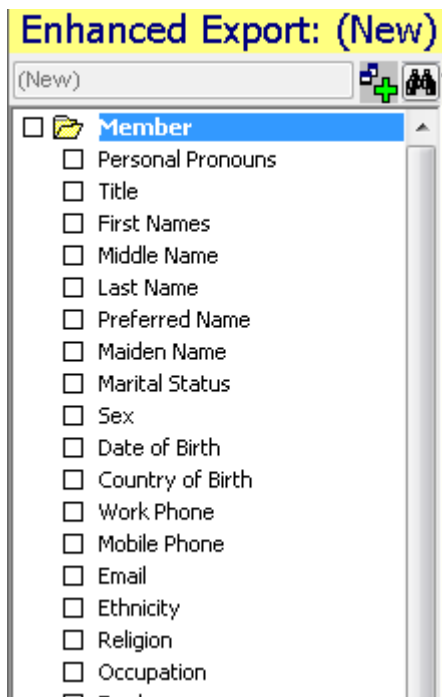


4. The screen opens up to display what is below, these screens have each field that you find on the Member, Family, Giver, Giving, Sacraments forms in PACS.

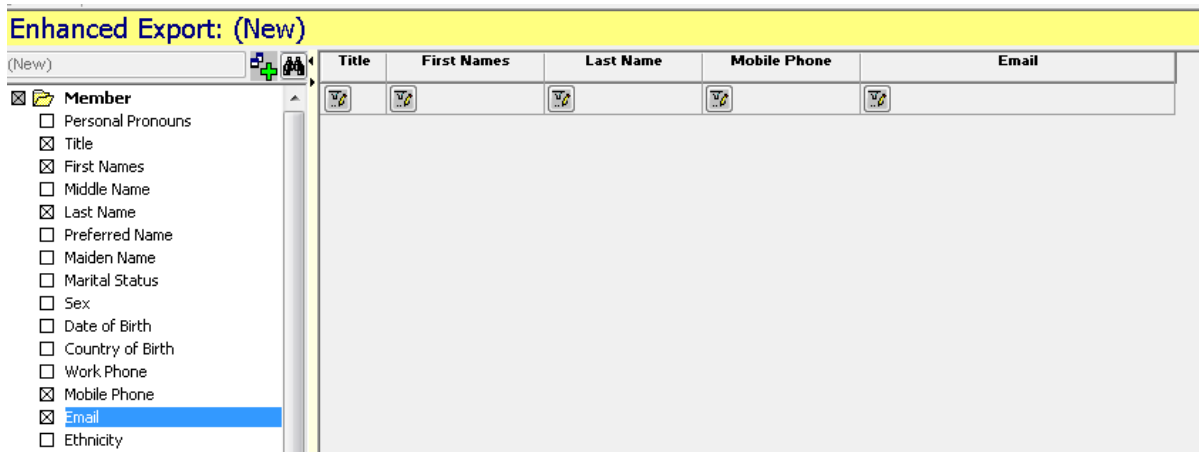


Click here to expand the folder

5. Each of the yellow folders expands to let you make your selections. Click on the yellow folder.

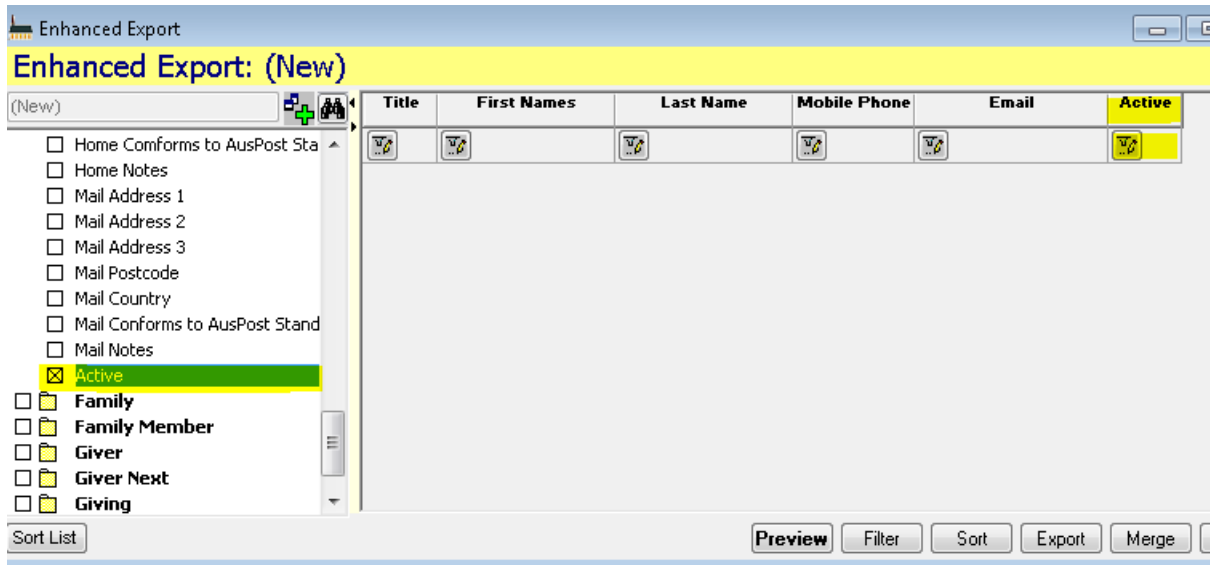


- Put an "X" in the boxes that you want to export. For example, the parish needs a list of all members with an email and mobile number.

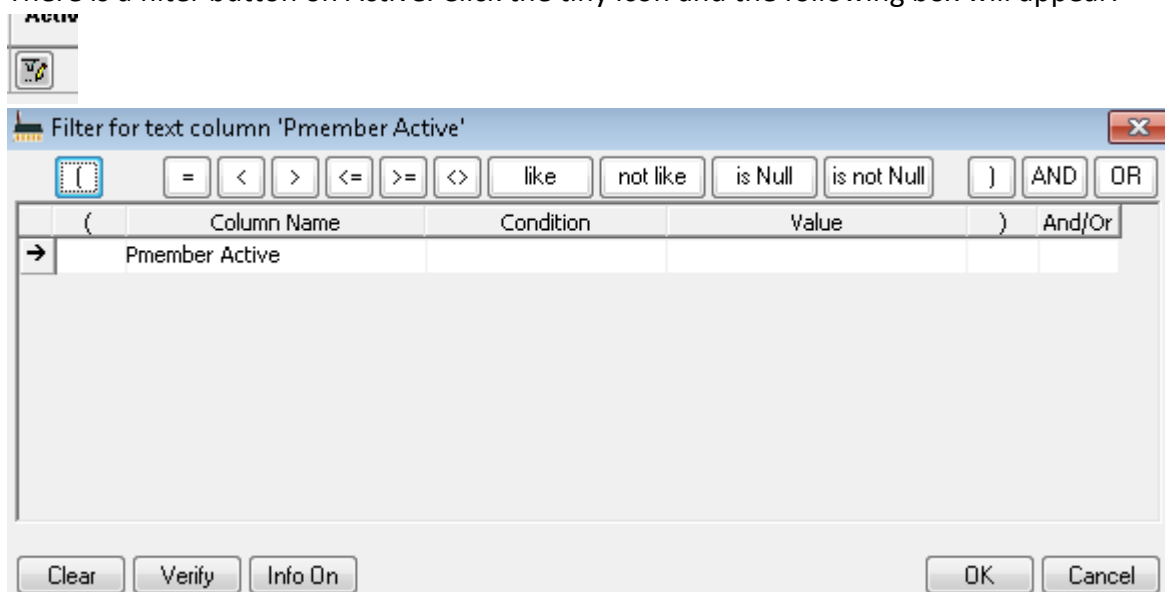


In the picture above, the boxes Title, First Name, Last Name, Mobile and Email are ticked and have appeared across the front of the screen.

- As enhanced export allows me to view ALL records (archived and active) I need to tell PACS that I only want to see Active or Inactive members. In this case for my mobile and email listing, I only want active members:
- At the bottom of each of the yellow folders is box called "Active" – put an X in this for all of your exports.



9. There is a filter button on Active. Click the tiny icon and the following box will appear:



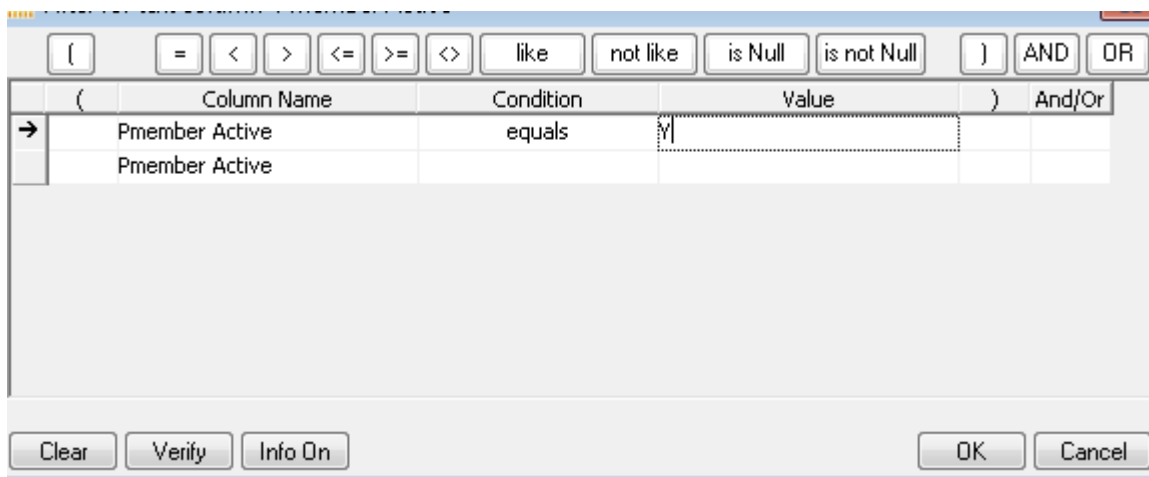
10. If I only want to see ACTIVE parishioners, I need to enter a Condition and Value.

Condition – equals

Value – Y

(means ACTIVE person = YES).

Click OK



11. Once a filter is applied, the box will turn beige.

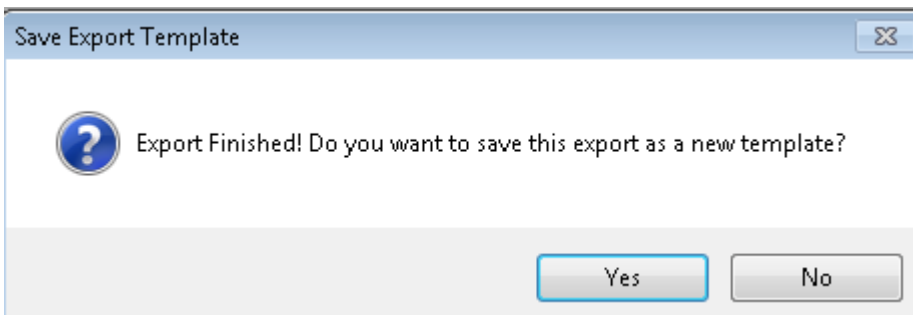


12. Click Preview to view your results.

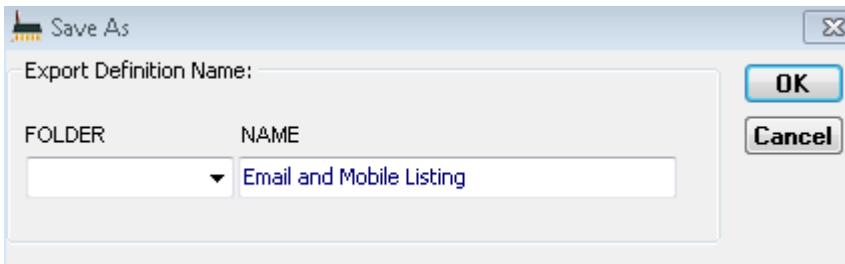


13. Export if you need to see the results in Excel.

Once you save the export somewhere, PACS will ask you if you want to save it as a template, so you can redo the export at any time without putting the X's in the boxes again.



14. Type in a name for your export, this one I will call Email and Mobile Listing



15. Now that I have saved the export as a template, I can click the Tiny Binoculars and view my export at any time. As long as I update my records in PACS this list will keep refreshing and updating too.

Enhanced Export: Email and Mobile Listing (Administrator)

