Enhanced Exports

Example Mobile and Email listing.

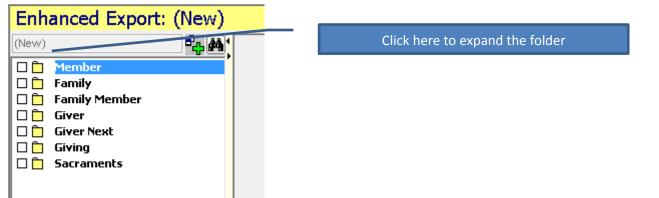
Enhanced exports allow you to pull out customised information from PACS in excel format and then apply filters. It is suitable for mail merges. It is the only place in PACS where you can export information from all different areas of PACS, such as Families, Givers, Members, Sacraments and Giving Data. 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.

Peopl	le Giving	Registers	Red	eipts	Creditors	Gene
m	Families					
- 1	Members					
춼	Staff					
	Ministries					
	Notes	•				
	SMS Centre	,				
=	E-mail Cent	re				
	Export	×		Enhar	nced Export	
				Minist	ry Export	
				Givinç) Export	
				Family	y Export	
				Staff	Export	

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.



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

Enh	anced Export:	(Nev	N)
(New)		- Pro-	ÅÅ)
	Member		*
	Personal Pronouns		
	Title		
	First Names		
	Middle Name		
	Last Name		
	Preferred Name		
	Maiden Name		
	Marital Status		
	Sex		
	Date of Birth		
	Country of Birth		
	Work Phone		
	Mobile Phone		
	Email		
	Ethnicity		
	Religion		
	Occupation		
	F l		

6. 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.

Enhanced Export: (New)							
New)	- <mark>-</mark>	Title	First Names	Last Name	Mobile Phone		Email
🛛 🖻 Member		20		20	T.	70	
Personal Pronouns			<u> </u>				
🛛 Title							
🛛 First Names							
Middle Name							
🛛 Last Name							
Preferred Name							
🔲 Maiden Name							
Marital Status							
🗆 Sex							
Date of Birth							
Country of Birth							
Work Phone							
🖾 Mobile Phone							
🖾 Email							
Ethnicity							

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.

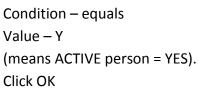
- 7. As enhanced export allows me to view ALL records (archived and active) I need to tell PACS that I only want to see Active or Inactive members. In this case for my mobile and email listing, I only want active members:
- 8. At the bottom of each of the yellow folders is box called "Active" put an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

่ Enhanced Export						
Enhanced Export: (New)						
(New)	Title	First Names	Last Name	Mobile Phone	Email	Active
Home Comforms to AusPost Sta Home Notes Mail Address 1 Mail Address 2 Mail Address 3 Mail Postcode Mail Country Mail Conforms to AusPost Stand Mail Notes Active Family Family Giver Giver						
Giver Next Giving						
Sort List			Pre	view Filter	Sort Export	Merge

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

📥 Filter f	or text column 'Pmember Ad	:tive'		— ×
	= < > <= >=	like not li	ke is Null is not Null) AND OR
(Column Name	Condition	Value) And/Or
→	Pmember Active			
<u> </u>				
1				
Clear	Verify Info On			OK Cancel

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



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(= < > <= >=	<> like no	ot like is Null is not Null) AND OR
(Column Name	Condition	Value) And/Or
→	Pmember Active	equals	Y	
	Pmember Active			
1				
Clear	Verify Info On			OK Cancel

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.

Save Export Template
Export Finished! Do you want to save this export as a new template?
Yes No
Tune in a name for your avaart, this and Lwill call Empil and Mahila Li

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

📥 Save As		23
Export Definitio	n Name:	OK
FOLDER	NAME	Cancel
	 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.

