

**Initial setup steps for creating an advanced export process.**  
**Only needs done one time.**  
**PDS Version 6.0.**

The screenshot shows the 'Parish Data System - Church Office' interface. The main window displays the family record for 'Van Loon, Jeff(Jeane), M/M'. The interface includes a top menu bar with options like 'Information', 'Setup / Admin.', 'Backup / Restore / Test / Fix', 'Data Sync.', 'Online Resources', and 'Help / Support'. A left sidebar contains navigation options such as 'Dashboard', 'Families', 'Members', and 'Contributions'. The main content area is divided into sections for 'Data Entry', 'Other Tasks', 'Listing Screen', and 'Quick Posting Processes'. A callout box with the text 'From the family screen, click on Reports.' points to the 'Reports' link in the 'Listing Screen' section of the sidebar.

**Family Information:**

- ID/Envelope: 1 (Avail?) 2nd ID: 84828-21 (Avail?)  Inactive
- Family Name: Van Loon, Jeff(Jeane), M/M
- Registered: 10/05/1995  Envelope User  Synchronize with Diocese
- Status: Married Left Parish: [ ]
- Street Addr: 14430 N 19th Ave Apt 30
- City/State: Phoenix, AZ Zip/Postal: 85023-6707
- E-Mail: jjvanloon@PDSDemo.com  Send E-Mail Instead of Mail when Possible

**Phones:**

Phone Number	Description	Unl.	Insert	Delete	Reorder
(602) 278-9932	Home	<input type="checkbox"/>			
(602) 344-2334	Cellular	<input type="checkbox"/>			
(602) 398-4324	Alternate Address	<input checked="" type="checkbox"/>			

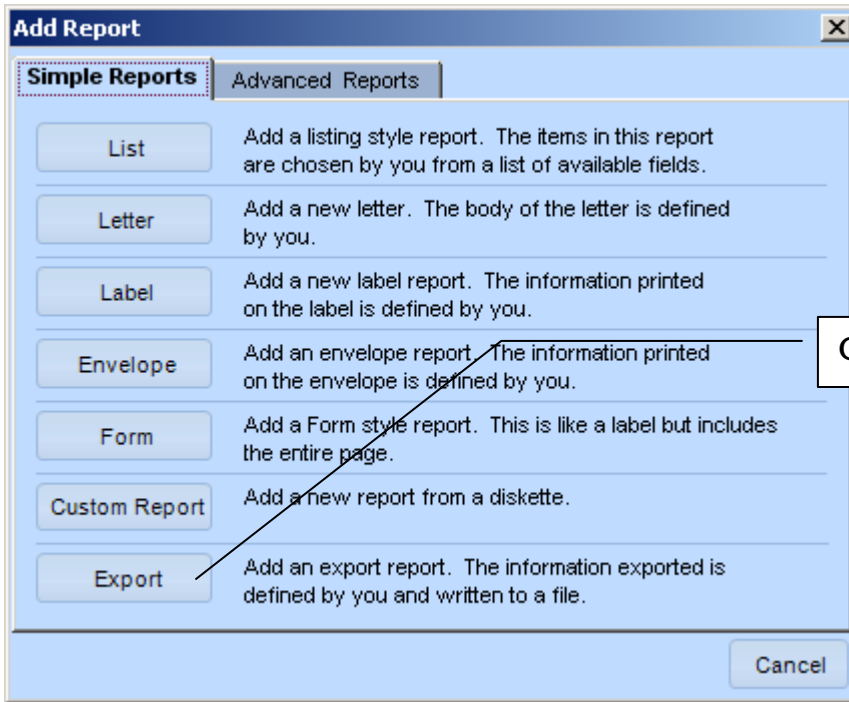
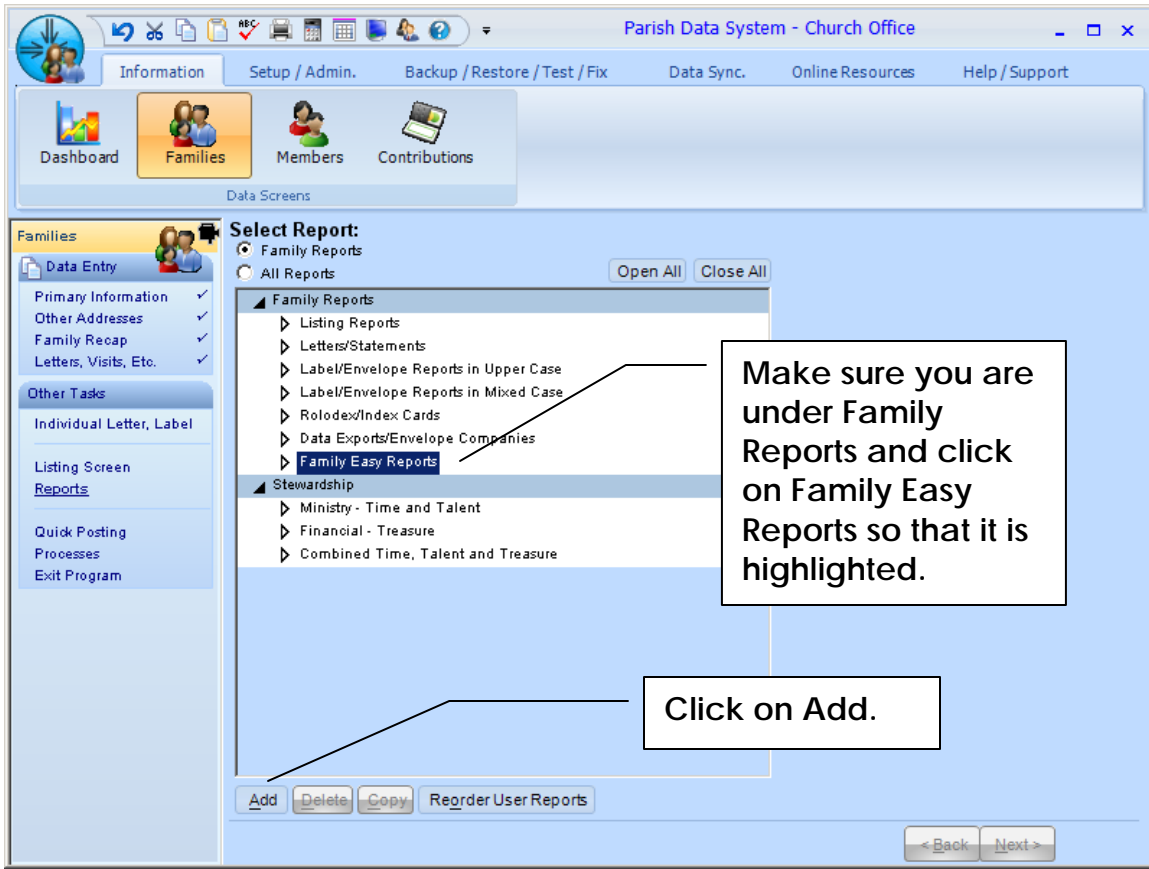
**Remarks:**

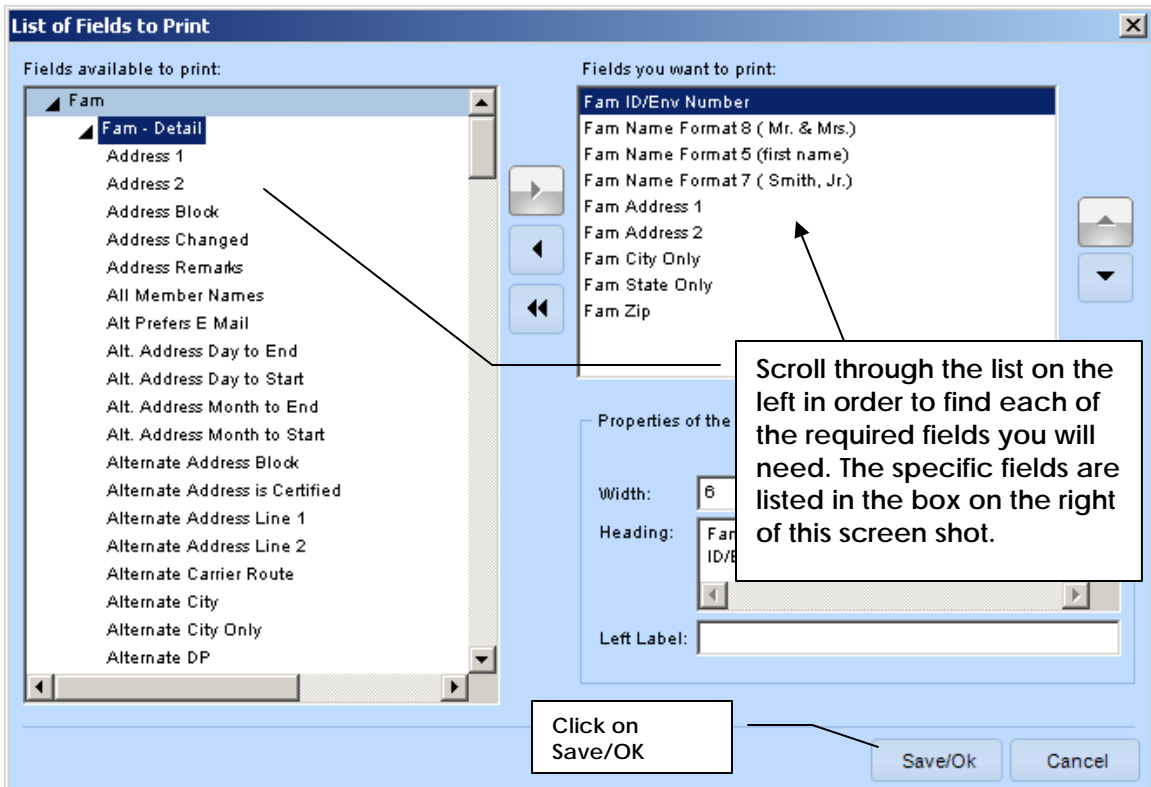
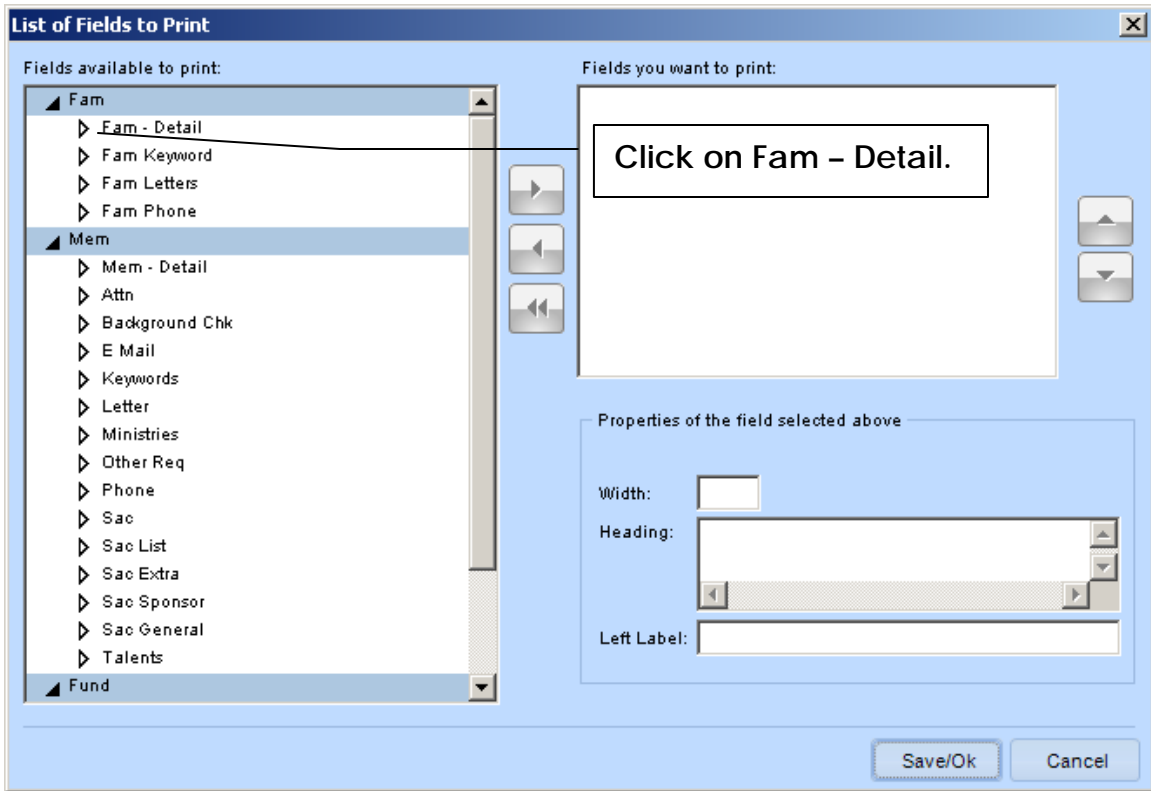
Originally from From Akron, OH. Jeane's parents were founding members of the parish. They are always willing to assist with fund raisers and volunteering their time whenever possible.

**Family Keywords:**

- Founding Family
- Gone In Summer
- Census Card Returned
- Active In Block Watch

**Footer:** Funds Used by this Family: 1, 2, 3, 4, 6, 9 Number of Members: 7 Screen Changed: 02/03/2009





Parish Data System - Church Office

Information Setup / Admin. Backup / Restore / Test / Fix Data Sync. Online Resources Help / Support

Dashboard Families Members Contributions

Data Screens

Families

Reports

Return to Families  
Select a Different Report

Overview

Export Setup  
Select Families

Build Export File  
Cancel the Report

Exit Program

**Overview:**

Name: New Export Edit Edit

Description:

Export: Filename: G:\TEMP\mkEXPORT TEST.csv  
File format: Comma Separated Values (CSV) Print Detailed Overview

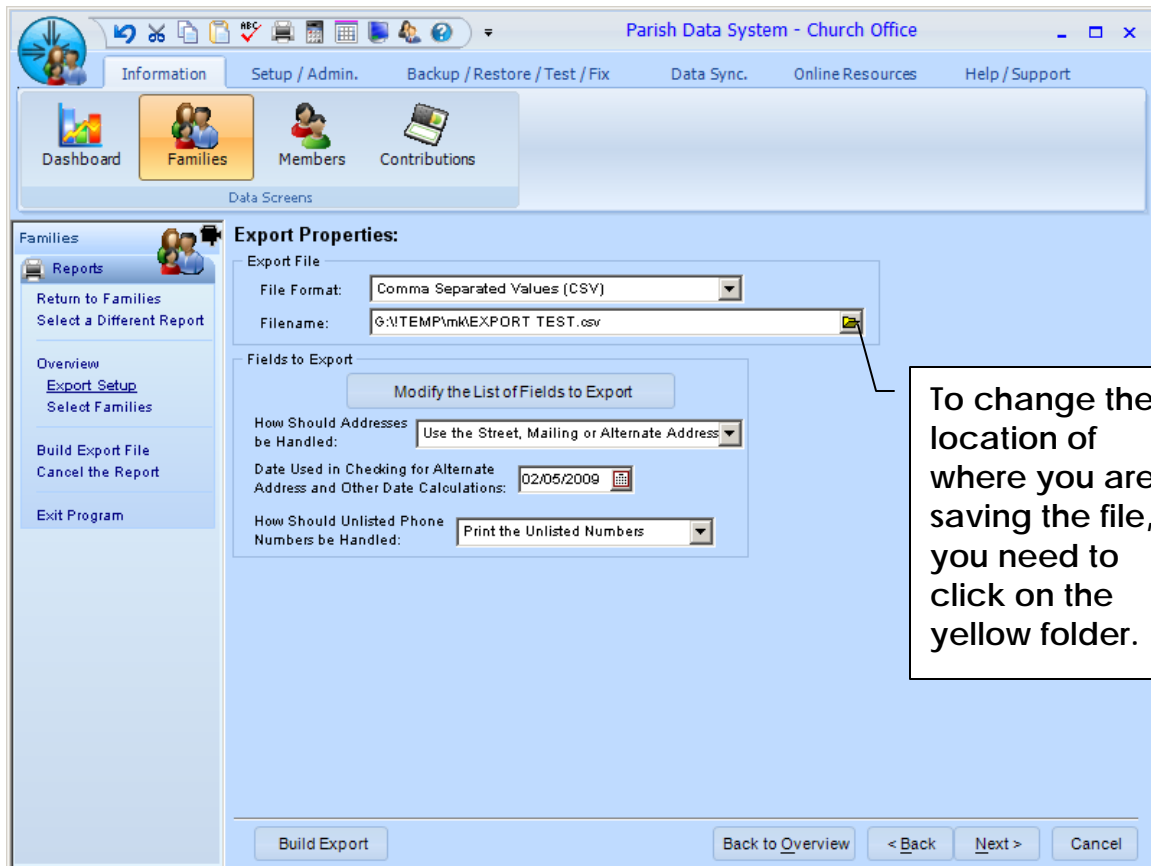
Selection: Sort by: ID Number

Comma Separated Values (CSV) should be the format.

To change the name of your export, you can click on Edit and change it.

Click Next.

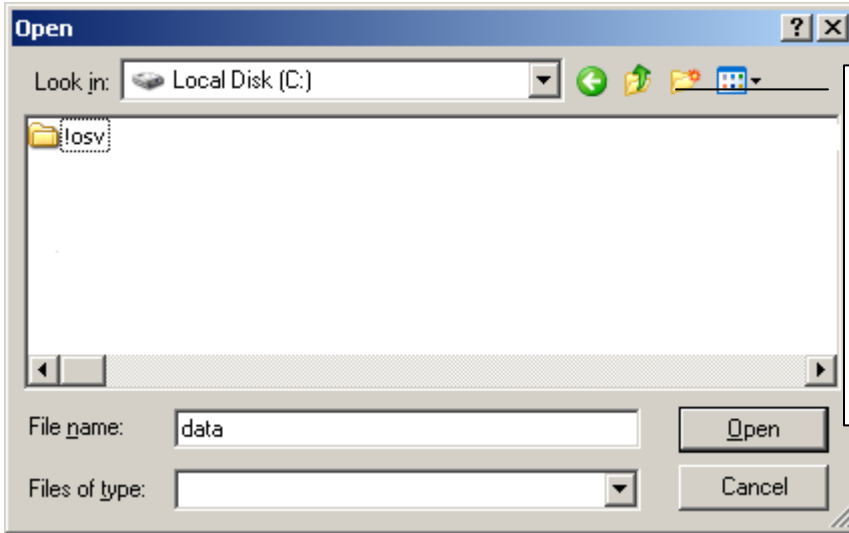
Build Export < Back Next > Cancel



You can save your parishioner file to any location on your computer. The example is showing a specific drive. You can save it to any other directory that works best for your individual parish. (example: C:\ local drive)

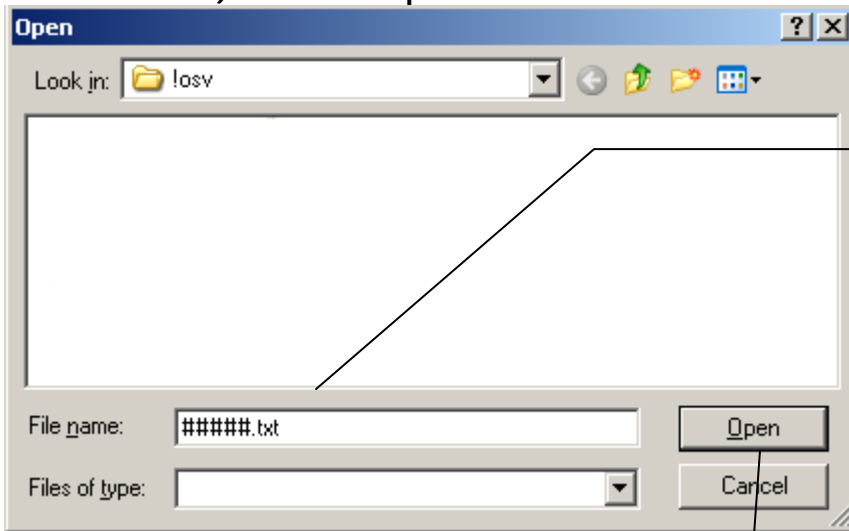
View the next step to see how to set up saving your parishioner list.

You can create a specific folder on the C:\drive specifically for Our Sunday Visitor.



Click on the New Folder button to create a new folder. Then you will need to name that folder with a name that works best for you. We suggest that you use !OSV. When you go to attach the file to your email, it will be easy to find.

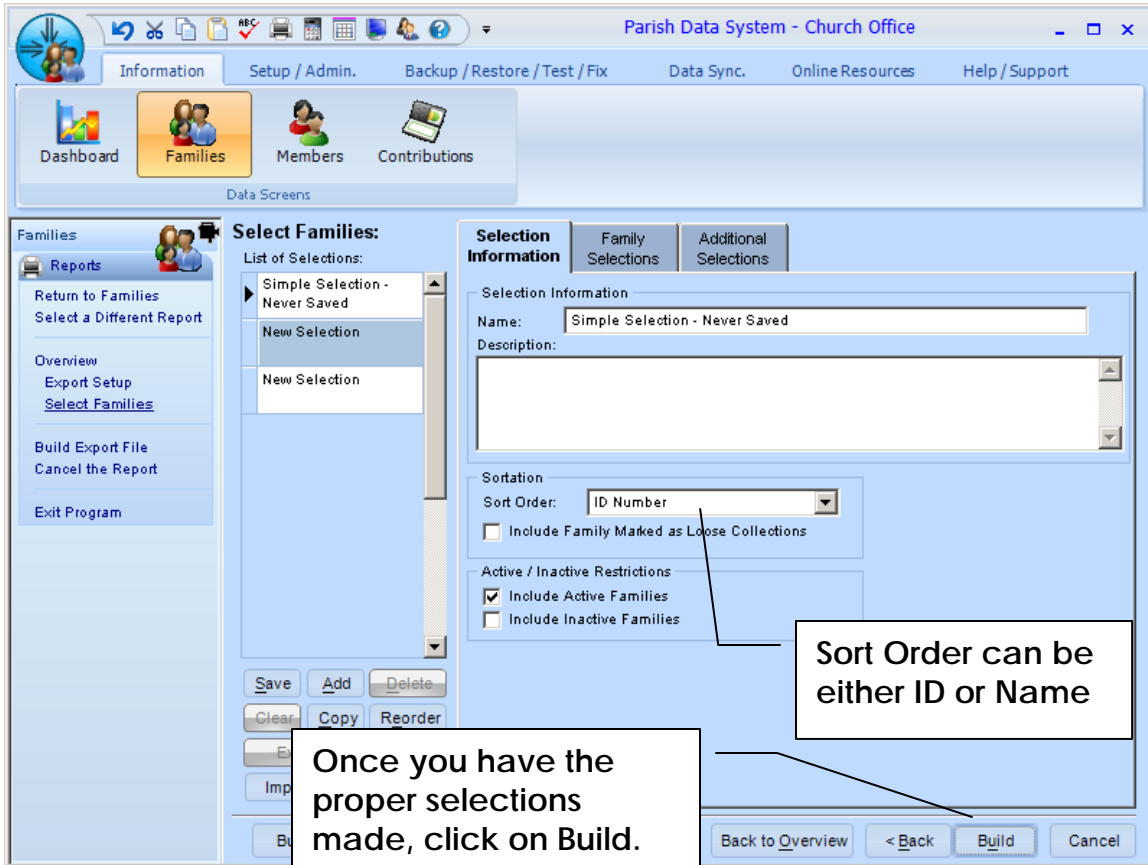
When naming your parishioner list, please reference your 6 digit account number\_your 5 digit list number. (List number currently represents your order number) See example below.



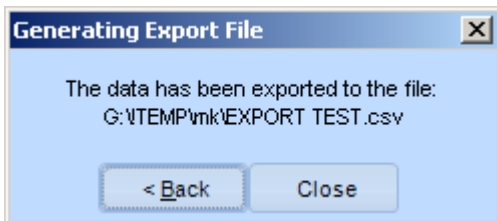
Required Filename  
123456\_11111.txt

Click on Open when done.

The step below may need to be changed to accommodate your individual parish needs. (Example: If you use keywords for snowbirds or other parishioners that are temporarily away, then there is an additional step that needs to take place.) Please contact OSV or PDS for assistance with this extra step.



Once the file is done building you should get this prompt.



Email the file to Our Sunday Visitor. Create new message or reply to the email reminder. Send file to [envprocessing@osv.com](mailto:envprocessing@osv.com). Include your parish Order number and/or Account number in the subject line. Attach the parishioner file. We suggest that you include a contact name and phone number so that we can contact you if needed.

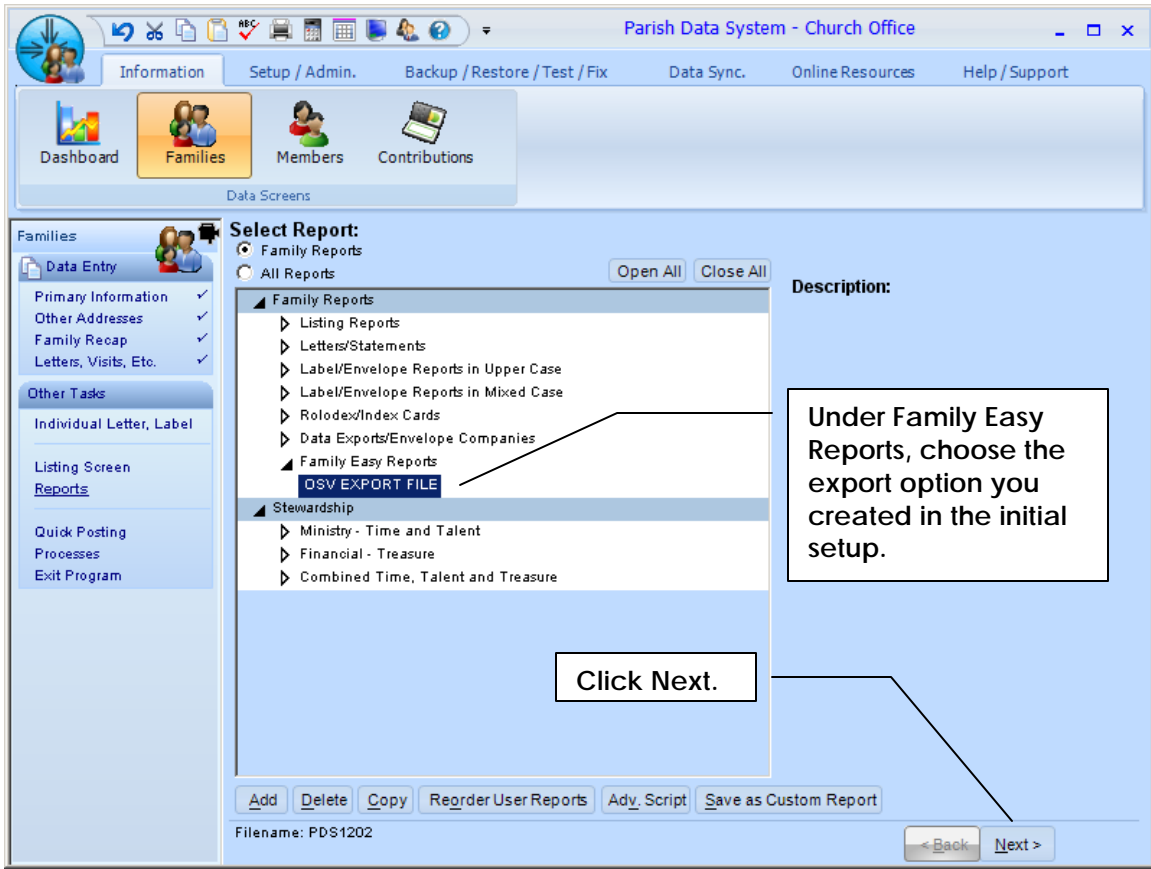
**\*\*Please note that these instructions were created using a Demo of PDS version 6.0. For further inquiries or questions, please contact Our Sunday Visitor.**

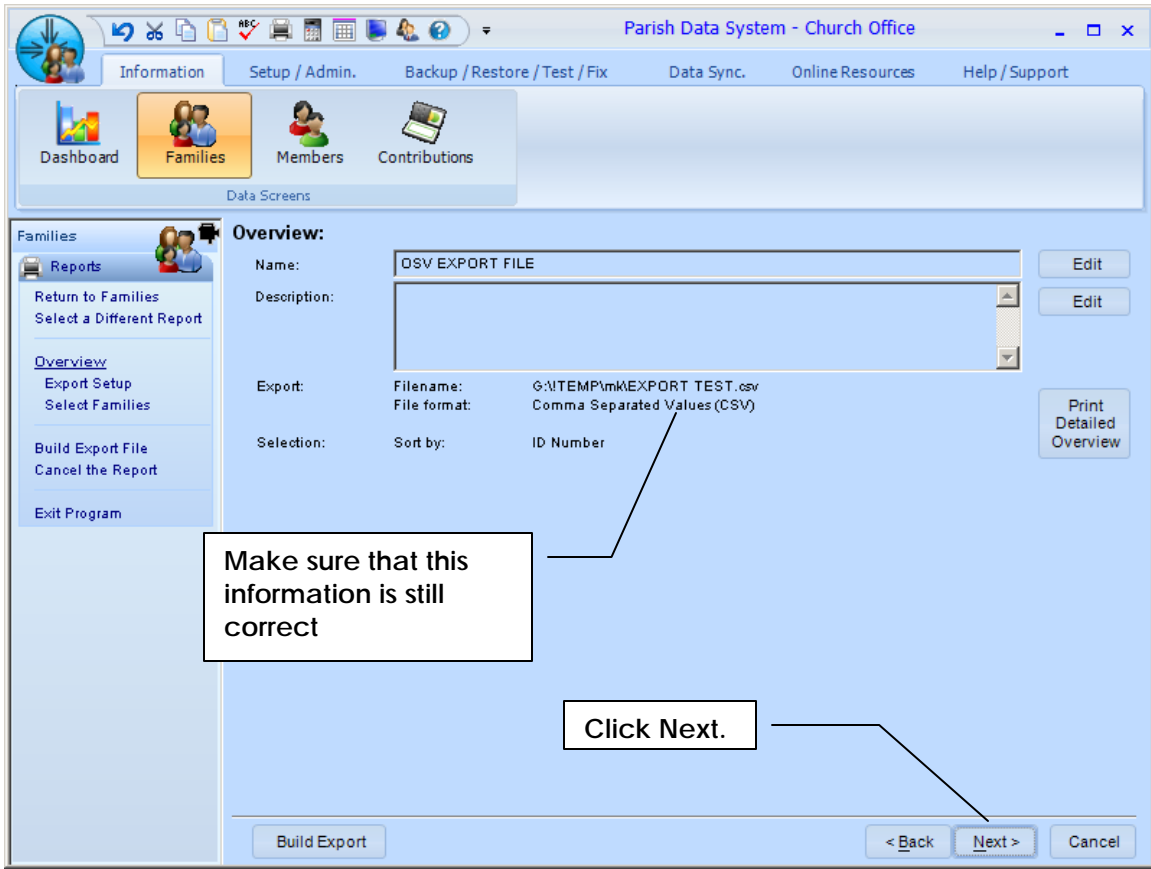


This is what your screen should look like the next time you have to export your list to Our Sunday Visitor. For PDS version 6.0.

The screenshot shows the Parish Data System - Church Office interface. The main window displays the details for a family named 'Van Loon, Jeff (Jeane), M/M'. The interface includes a top menu bar with options like Information, Setup / Admin., Backup / Restore / Test / Fix, Data Sync., Online Resources, and Help / Support. A sidebar on the left lists various tasks such as Data Entry, Primary Information, Other Addresses, Family Recap, Letters, Visits, Etc., Other Tasks, Individual Letter, Label, Listing Screen, Reports, Quick Posting, Processes, and Exit Program. The main area contains fields for family information, including ID/Envelope, Family Name, Registered date, Status, Street Address, City/State, Zip/Postal, E-Mail, and Phones. A 'Remarks' section contains text about the family's origin. A callout box with a white background and black border points to the 'Reports' option in the sidebar, with the text 'From the family screen, click on Reports.'

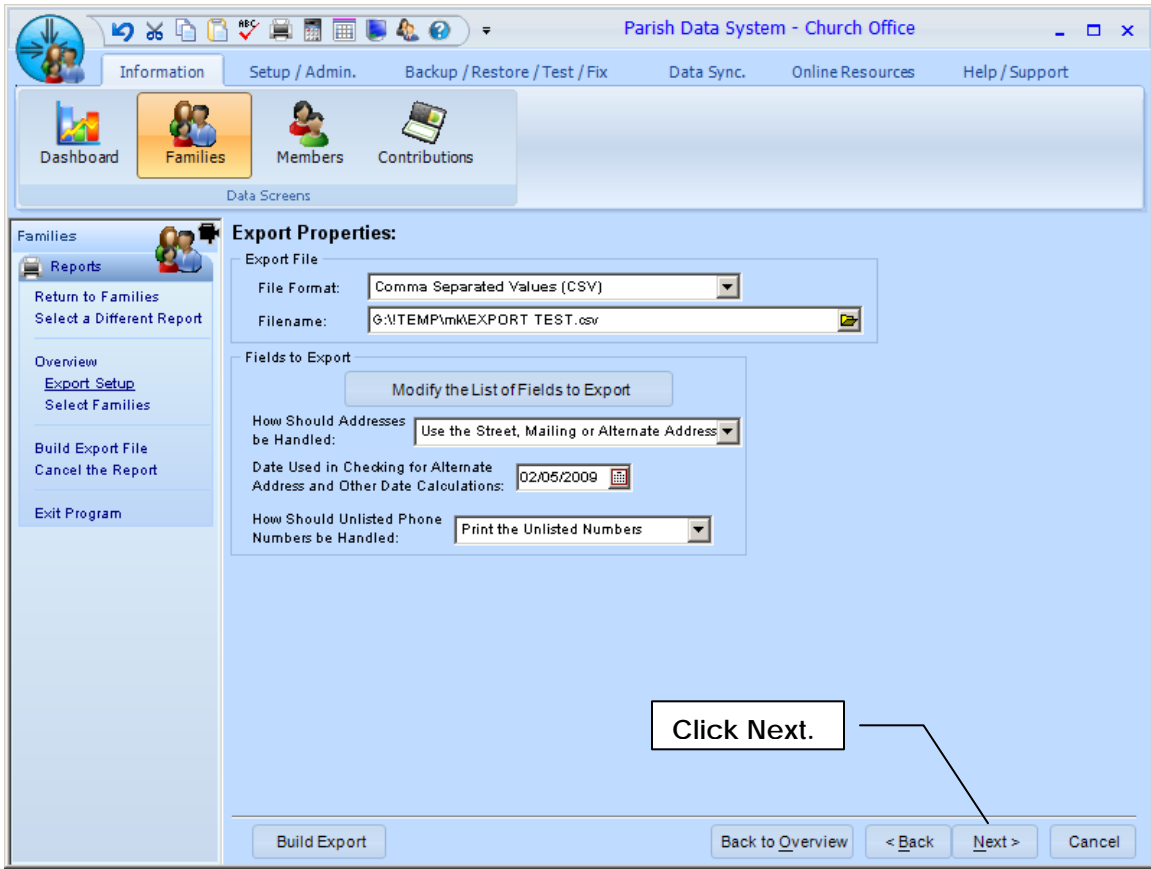
From the family screen, click on Reports.

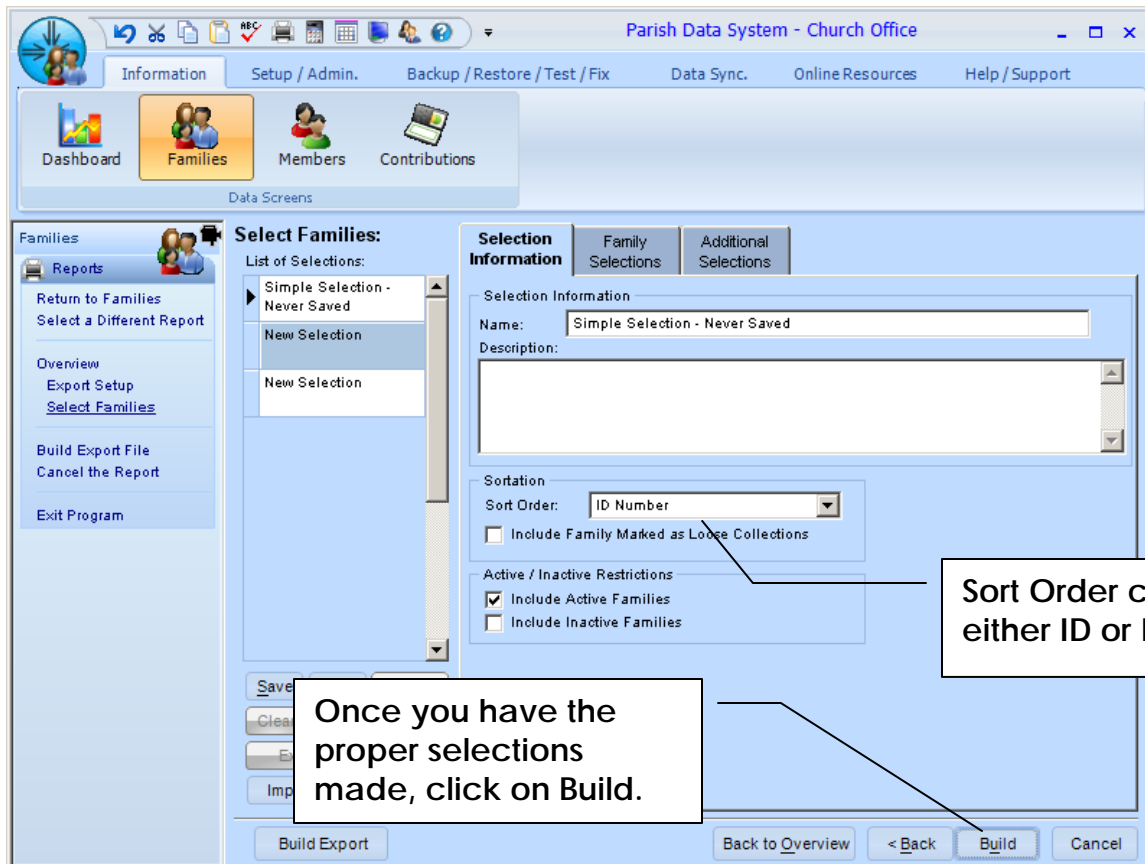




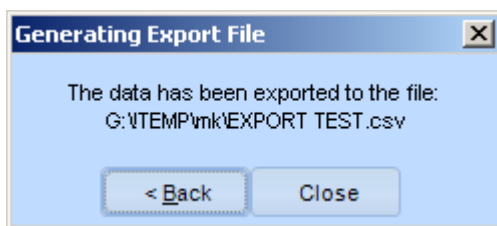
Make sure that this information is still correct

Click Next.





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