PDS Exporting Instructions Version 9.0

1

File | Information | Personnel | Sacramental Regis

Dashboard | Families | Mem...

Select Families

PARISH DATA SYSTEM™

Church Office

2

Dashboard | Families | Members | Contributions

Primary Information ✓
Other Addresses at alt ✓
Relationships ✓
Family Recap ✓
Letters, Visits, Etc. ✓

Individual Letter, Label
Export Family
Import Family

Listing Screen
Reports

Quick Posting
Processes
Exit Program

ID/Envelope: 1
Family Name: Van Loon,Jeff(Jeane),
Registered: 10/05/2002
Status: Married
Street Addr: 14430 N 19th Ave Apt

Click on Reports

...hoenix, AZ

☐ Send No Mail
☐ All Addresses are U...

➕ ➖ ⬍

Phone Number | Des

3

Parish Data System - Church Office

Information | Personnel | Sacramental Registers | Reports | Processes | Administration

Dashboard | Families | Members | Contributions

Primary Information ✓
Other Addresses at alt ✓
Relationships ✓
Family Recap ✓
Letters, Visits, Etc. ✓

Individual Letter, Label
Export Family
Import Family

Listing Screen
Reports

Quick Posting
Processes
Exit Program

Select Report:
◉ Family Reports
○ All Reports

Under Family Reports

Find | Open All | Close All

⊿ Family Reports
  ▷ Listing Reports
  ▷ Letters/Statements
  ▷ Label/Envelope Reports in Upper Case
  ▷ Label/Envelope Reports in Mixed Case
  ▷ Rolodex/Index Cards
  ⊿ Data Exports/Envelope Companies
    Export to Envelope Companies
    PhoneTree Export - Primary Phone
    PhoneTree Export - All Selected Phones
    FACTS Demographic File Export
    Export for Lifetouch
    Email Export to Constant Contact
    Quick Communication - Send Text/Email
    Build Family Email Address List
    Family Address Export
  • Family Easy Reports
⊿ Stewardship
  ▷ Ministry - Time and Talent
  ▷ Financial - Treasure

Description:
Export family and member information to be sent to an envelope company.

Under Data Exports

Choose Export to Envelope Companies

Add | Delete | Copy | Reorder User Reports

Filename: PDS1061

Click Next

< Back | Next >

4

| Information | Personnel | Sacramental Registers | Reports | Processes | Administration |

Parish Data System - Church Office

Dashboard   Families   Members   Contributions

Overview:

Return to Families
Select a Different Report

Name: Export to Envelope Companies

Description: Export family and member information to be sent to an envelope company.   Edit

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Export: Filename: C:\PDSChurch90CDemo\   Print Detailed Overview
          File format: American Church Envelope Co.

Exit Program

Selection: Sort by: ID Number

Click Next

Build Export   < Back   Next >   Cancel

5

Company: Should be listed as Our Sunday Visitor to pull the correct format.

Envelope Company Information:

Export File:

Company: Our Sunday Visitor

6

Parish Data System - Church Office

File | Information | Personnel | Sacramental Registers | Reports | Processes | Administration

Dashboard | Families | Members | Contributions

Envelope Company Information:
Export File:

Company: Our Sunday Visitor

Filename: C:\PDSChurch90CDemo\data

☑ Include Family Envelopes
☐ Include Member Envelopes

☐ Limit to Those With Envelope User Checkbox Marked
☐ Limit Envelopes by ID
☐ Mailing Name Format
☑ Include Spouse First

Date Used in Alt. Address

Click on the Yellow folder where it says Filename.
Use your drop down box to choose the location you want to store the file.

**We suggest using your Documents or create an "OSV" folder for your Desktop in order to find it easily.

Whatever is going to be easiest for you.

Return to Families
Select a Different Report

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

Build Export | Back to Overview | < Back | Next > | Cancel

7

Open

This is where you will choose your location to save the file to.

Look in: Desktop

Name	Date modified
Pics	6/6/2019 9:49 AM
Trailer	7/
USMT	8/
USMT5	8/
Advantage ADV-PRD	6/

Type the file name (we always suggest using the current month and year) then .csv

File name: 770000XXXXXX July 2019.csv | Open

Files of type: | Cancel

Click Open

3

8

The check boxes below are based on individual Parish use. You will need to choose the options that have been entered into your system. The two main options would be using the Envelope User Checkbox or an Envlope Range.

We have been seeing with the upgrade to version 9 – 'Include member envelopes' is checked and 'include family envelopes' is not (some parish's need to check Family and uncheck Member).

Dashboard Families Members Contributions

Envelope Company Information:

Return to Families
Select a Different Report

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

Export File:

Company: Our Sunday Visitor

Filename: C:\Users\ashideler\Desktop\770000XXXXXX July 2019.csv

☑ Include Family Envelopes

☐ Include Member Envelopes

☐ Limit to Those With Envelope User Checkbox Marked

☐ Limit Envelopes by ID/Env: From Enve

☐ Mailing Name Format ☐ Postal Format

☑ Include Spouse First Name

If you want the Spouse First Names to be included, check the box.

If there was a recent update, you may need to uncheck this box

If you have been choosing "*Envelope User*" within the Family Records please choose "Limit to Those With Envelope User Checkbox Marked" from the above screen.

Families

Option 1

Information ✓
Other Addresses ✓
Family Recap ✓
Letters, Visits, Etc. ✓

Other Tasks

Individual Letter, Label

ID/Envelope: 1 Avail? 2nd ID: 84828-21
Family Name: Van Loon,Jeff(Jeane),M/M
Show
Registered: 10/05/1998 ☑ Envelope User ☐ Synchro
Status: Married Left Parish:
Street Addr: 14430 N 19th Ave Apt 30
Addr Line 2:
City/State: Phoenix, AZ ZIP/Postal:
☐ Send No Mail Geog. Area:

Option 2

Family Envelopes
Member Envelopes
☐ Limit to Those With Envelope User Checkbox Marked
☑ Limit Envelopes by ID/Env: From Envelope: 1 To: 3000

If you are using an envelope range for your contributors please check the box & use this field to enter the information.

9

Parish Data System - Church Office

Information | Personnel | Sacramental Registers | Reports | Processes | Administration

Dashboard | Families | Members | Contributions

Envelope Company Information:
Export File:

Company: Our Sunday Visitor

Filename: C:\Users\ashideler\Desktop\770000XXXXXX July 2019.csv

☑ Include Family Envelopes
☐ Include Member Envelopes

☑ Limit to Those With Envelope User Checkbox Marked
☑ Limit Envelopes by ID/Env: From Envelope: 1   To: 9999
☐ Mailing Name Format   ☐ Postal Format
☐ Include Spouse First Name

Date Used in Alt. Address Calculation: 07/29/2019

Click Next

Return to Families
Select a Different Report

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

Build Export | Back to Overview | < Back | Next > | Cancel

Parish Data System - **Church Office**

File | Information | Personnel | Sacramental Registers | Reports | Processes | Administration

Dashboard | Families | Members | Contributions

Return to Families
Select a Different Report

Overview
Export Setup
Select Families

Build Export File
Cancel the Report

Exit Program

Select Families:

List of Selections: Find

▶ Simple Selection - Never Saved

☐ Show Only My Selections

Save | Add | Delete
Clear | Copy | Reorder
Export Sel. to a File
Import Sel. from a File

Selection Information | Family Selections | Additional Selections

Selection Information:

Name: Simple Selection - Never Saved
Description:

Sortation:
Sort Order: ID Number

☐ Include Family Marked as Loose Collections

Active / Inactive / Send No Mail Restrictions:
☑ Include Active Families
☐ Include Inactive Families
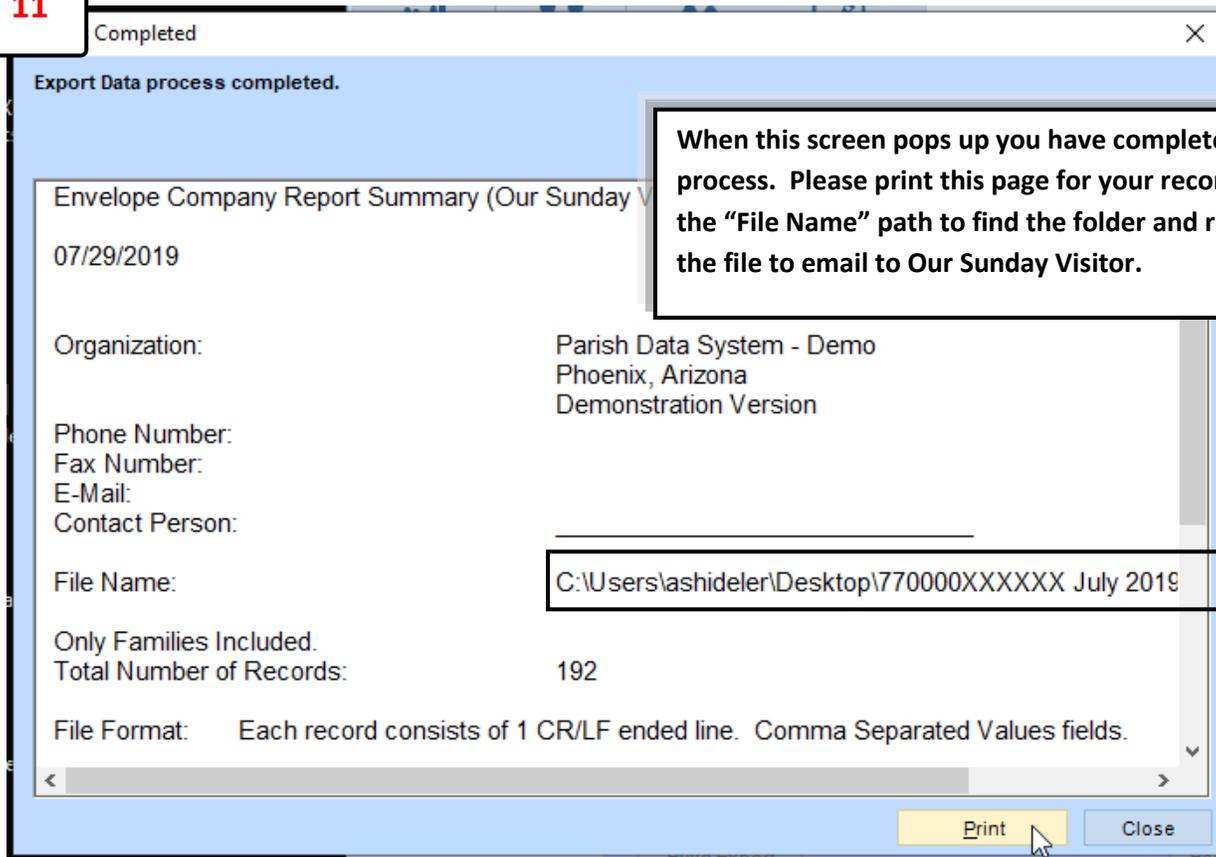☑ Include Families Even If Send No Mail is Marked

Sort by ID number or Name

Choose Active Families

Up to the church of they want this checked or unchecked.

Click Build

Build Export | Back to Overview | < Back | Build | Cancel

11

Completed ✕

Export Data process completed.

Envelope Company Report Summary (Our Sunday V

07/29/2019

Organization: Parish Data System - Demo
                                 Phoenix, Arizona
                                 Demonstration Version

Phone Number:
Fax Number:
E-Mail:
Contact Person: _____

File Name: C:\Users\ashideler\Desktop\770000XXXXXX July 2019

Only Families Included.
Total Number of Records: 192

File Format: Each record consists of 1 CR/LF ended line. Comma Separated Values fields.

Print   Close

> When this screen pops up you have completed your process. Please print this page for your records, use the "File Name" path to find the folder and retrieve the file to email to Our Sunday Visitor.

Create a new message or reply to the email reminder. Send file to envprocessing@osv.com. We would like to request you enter the number of records in your email to indicate how many Parishioners you will be sending envelopes to along with a contact name & phone number so we can contact you if needed.

***Please note that if your file increases or decreases by more than 50 parishioners & you do NOT include the number of records in the body of your email we will need a verbal or email confirmation this is a correct change to your account which can add processing time to your order.