

## CSV Export – now with selection of columns to export

The CSV Export (CSV is short for Comma Separated Value – a common export mode typically used to share data between various software programs in a common format) continues to become more and more versatile and powerful as a means of pulling data from your database for use in lists in Word or Excel, mail merge documents to send personalized mailings, Pivot Tables to analyze data, or as a link to other software.

This is one of the common tools in your ShelbyNext Membership database that appears under the three-dot icon (. . . just like when you use this to end a sentence or list implying there is MORE).

Choose this from the Simple, Advanced, or Query Searches. Choose this when selecting Groups from the list of Groups. Choose this when you want to export the individuals from a giving or attendance report. (Use the ↓ [or download] icon if you want to show the giving or attendance data.)

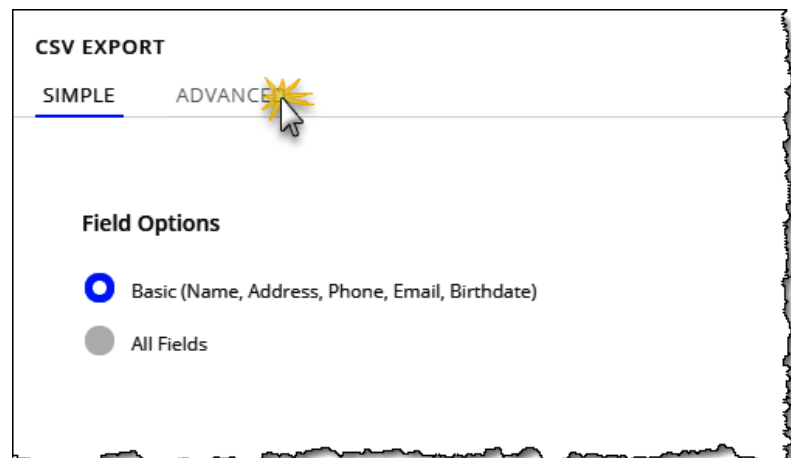
So click the **MORE** (...) icon, then Export Individuals to CSV, to take those selected or rendered names to a CSV Export. Next, you will be presented with choices for how you want the exported data to appear.



The CSV Export is not a new feature, but has been augmented and enhanced several times, but until this update you had the choice of a very few columns (Basic – mostly name and address info) or Full (all of the fields in the export). You can now select exactly which fields to include in or perhaps to omit from the export.

If you just want a simple export and do not want to think about which fields to export or which to omit, then you can stop on the first screen that pops up and just choose either Basic or All Fields as your export choice.

If, however, you want to be more specific in formatting the export, then click the **Advanced** tab and proceed on to much greater controls.



There are five distinct sections of this control that are important to consider and each will influence what is included in the export or how the data is assembled.

1. **Advanced or Simple tab** – Here you choose the level of control desired in forming the export.
2. **Take action on** – Here you choose WHO is included in the Export. Just the individuals in the selection or spouses, children, the whole family, etc... Choosing anything besides **These Individuals** will override the **One Line Per** options.
3. **One Line Per** – Choosing **One Line per Family** or per **Contributor** will combine those records onto a single line either by Family or by those whose Giving in combined.
4. **Basic / All Fields** – You can see the fields checked when you make either selection. Use this to add to a simple selection or remove checkboxes from a full selection.
5. **Field Selections** – now you can see all the fields that are available and choose to either include or omit each.

The screenshot shows a 'CSV EXPORT' dialog box with a close button (X) in the top right corner. It has two tabs: 'SIMPLE' and 'ADVANCED', with 'ADVANCED' selected. Below the tabs is a 'Take action on' dropdown menu currently set to 'These Individuals'. Underneath are three radio button options: 'One Line Per Individual' (selected), 'One Line Per Family', and 'One Line Per Contributor'. Below these is a 'Field Options' section with two radio buttons: 'Basic (Name, Address, Phone, Email, Birthdate)' (selected) and 'All Fields'. The 'Field Options' section is followed by a grid of checkboxes for various fields, organized into columns: 'User ID', 'Family ID', 'First Name', 'Preferred Name', 'Last Name', 'Formal Full Name', 'Group Giving With Family', 'Contact' (with sub-options 'Email', 'Subscribed Status', 'Secondary Email'), 'Env #', 'Campus', 'Created Date', 'Baptism Date', 'Alternate Rfid', 'Check-In Notes', 'Notes', 'Active Groups', and 'Archive Groups'. At the bottom right are 'Cancel' and 'Export' buttons. Five red circles with numbers 1 through 5 are overlaid on the image to highlight specific areas: 1 on the 'ADVANCED' tab, 2 on the 'Take action on' dropdown, 3 on the 'One Line Per Individual' radio button, 4 on the 'All Fields' radio button, and 5 on the 'Email' checkbox in the 'Contact' section.

Once you click to **Export**, the file will ask where you want to save the file, which can typically be opened without issue in **Excel** or used as a mail merge source file with **Word** or **Publisher**. (Of course, a CSV is very portable and could also be opened using Google Docs, or other comparable spreadsheet or document programs.)