

**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 a white background and black border points to the 'Reports' link in the 'Listing Screen' section of the sidebar. The callout text reads: 'From the family screen, click on Reports.'

**Family Information:**  
 ID/Envelope: 1 Avail? 2nd ID: 84828-21 Avail?  
 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 Map  
 Addr Line 2:  
 City/State: Phoenix, AZ Zip/Postal: 85023-6707  
 E-Mail: jjvanloon@PDSDemo.com  
 Send No Mail Geog. Area: 21-33  
 Send E-Mail Instead of Mail when Possible

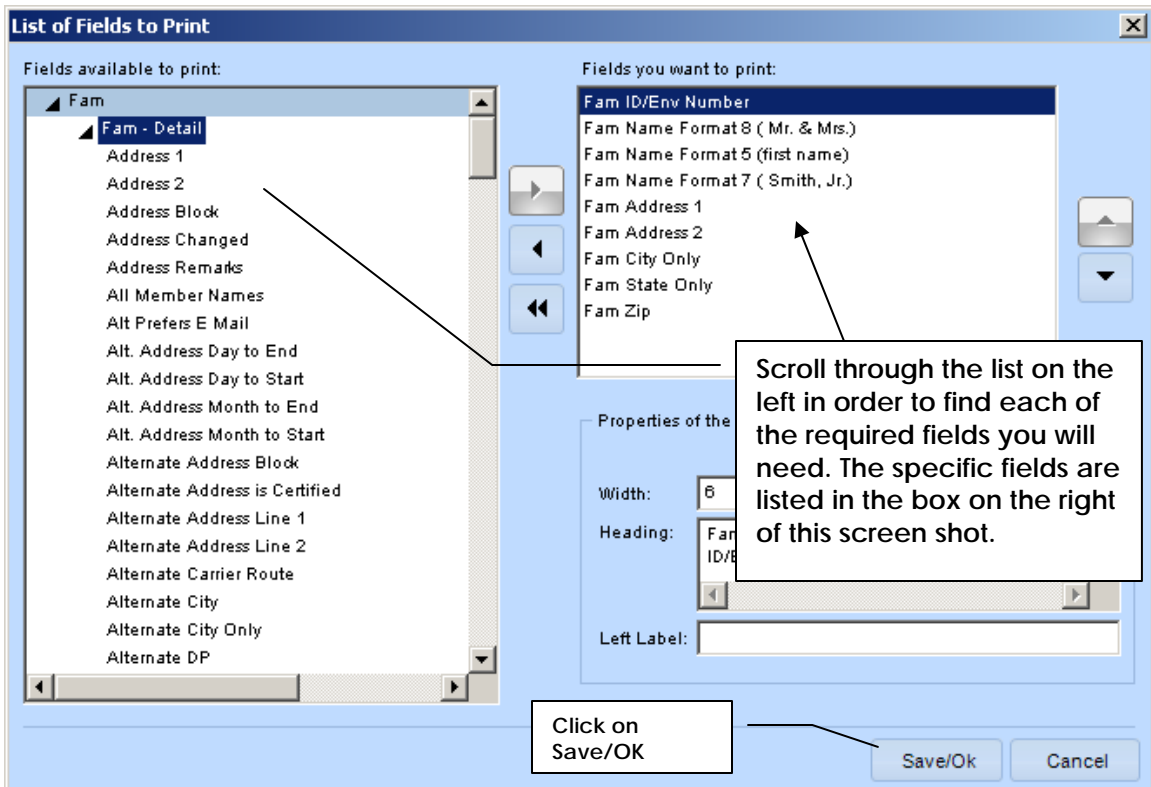
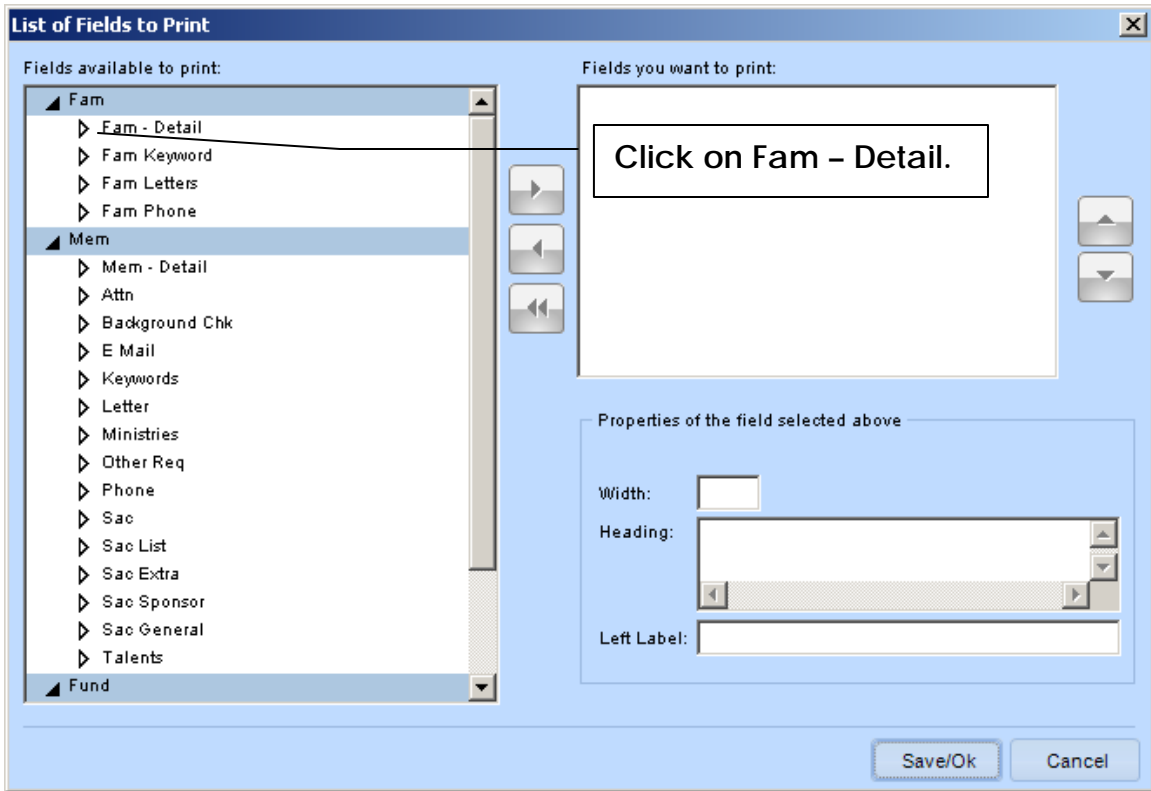
Phone Number	Description	Unl.	Insert	Delete	Reorder
(602) 278-9932	Home	<input type="checkbox"/>			
(602) 344-2334	Cellular	<input type="checkbox"/>			
(602) 398-4324	Alternate Address	<input checked="" type="checkbox"/>			

**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.  
 General \* Confidential \*

**Family Keywords:**  
 Founding Family  
 Gone In Summer  
 Census Card Returned  
 Active In Block Watch

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:

Description:

Export:

Filename: G:\TEMP\mkEXPORT TEST.csv

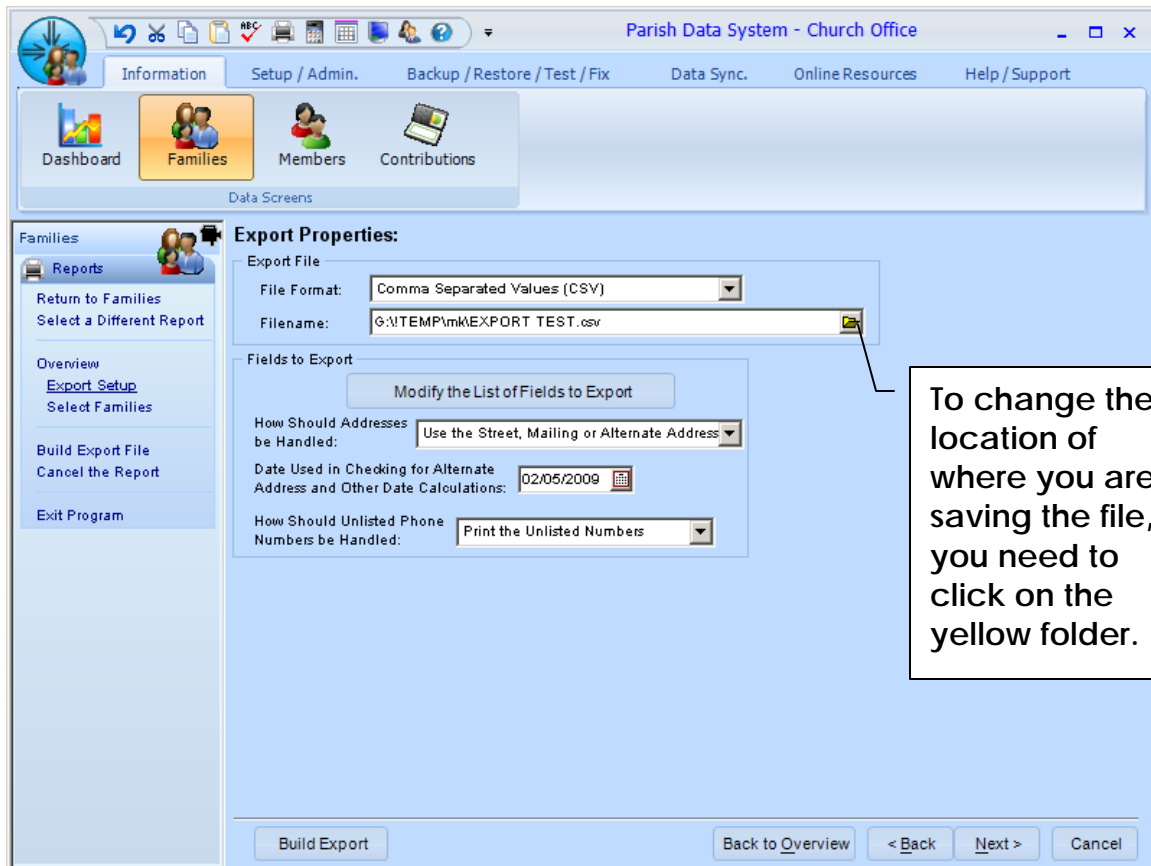
File format: Comma Separated Values (CSV)

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.

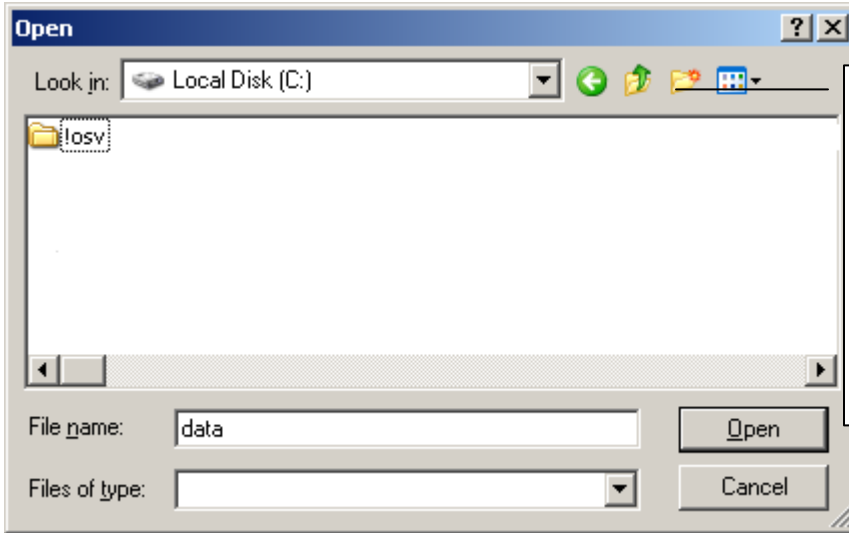
Click Next.



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)

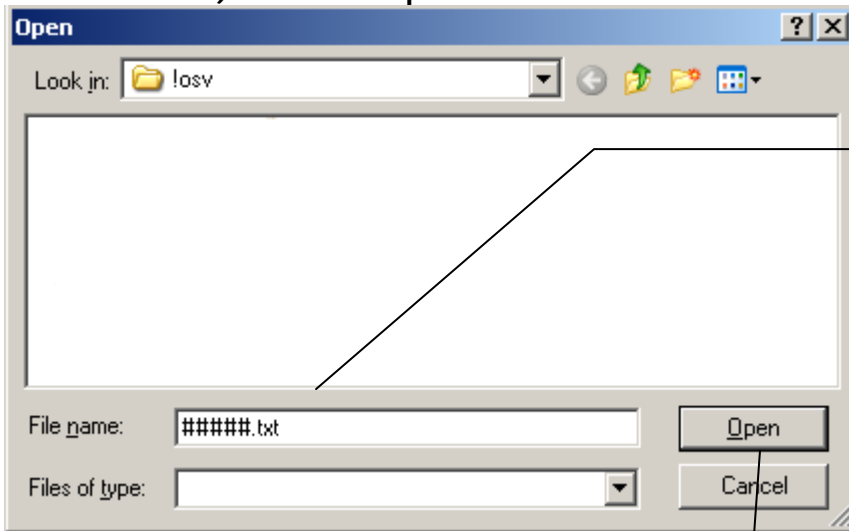
View the next step to see how to set up saving your parishioner list.

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.

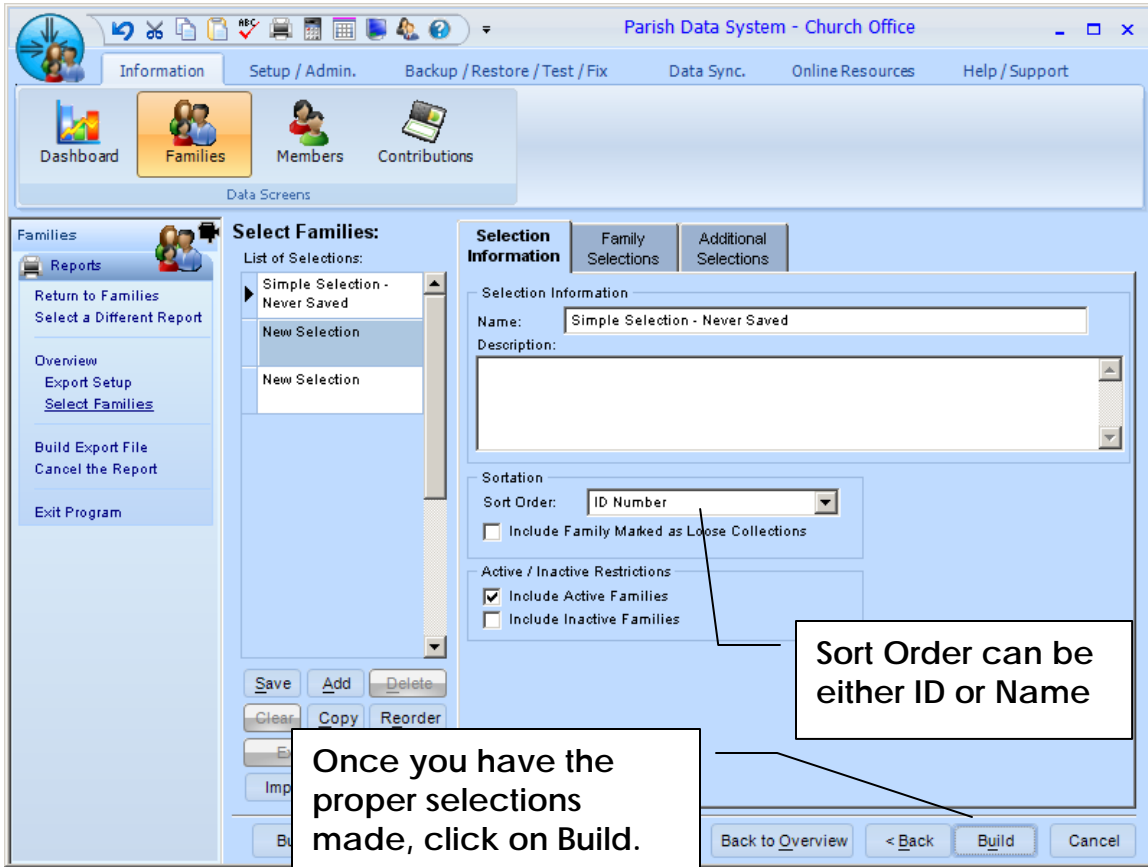
When naming your parishioner list, please reference your 6 digit account number\_your 5 digit list number. (List number currently represents your order number) See example below.



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.

Parish Data System - Church Office

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

Dashboard Families Members Contributions

Data Screens Navigation Tasks

Text for Family Name Search...  
Order by: ID/Env Num  
Members

Save Add Family  
Cancel Delete Family

Families

Data Entry

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

Other Tasks

Individual Letter, Label

Listing Screen  
Reports  
Quick Posting  
Processes  
Exit Program

ID/Envelope: 1 Avail? 2nd ID: 84828-21 Avail?

Family Name: Van Loon, Jeff(Jeane), M/M Show Name Formats

Registered: 10/05/1995 Envelope User Synchronize with Diocese

Status: Married Left Parish:

Street Addr: 14430 N 19th Ave Apt 30 Map

Addr Line 2:

City/State: Phoenix, AZ Zip/Postal: 85023-6707

Send No Mail Geog. Area: 21-33

E-Mail: jjvanloon@PDSDemo.com

Send E-Mail Instead of Mail when Possible

Picture File Name: Photo97.jpg

Family Keywords

Description
▶ Founding Family
▶ Gone In Summer
▶ Census Card Returned
▶ Active In Block Watch

Insert Line Delete Reorder

Phones

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

Insert Delete Reorder

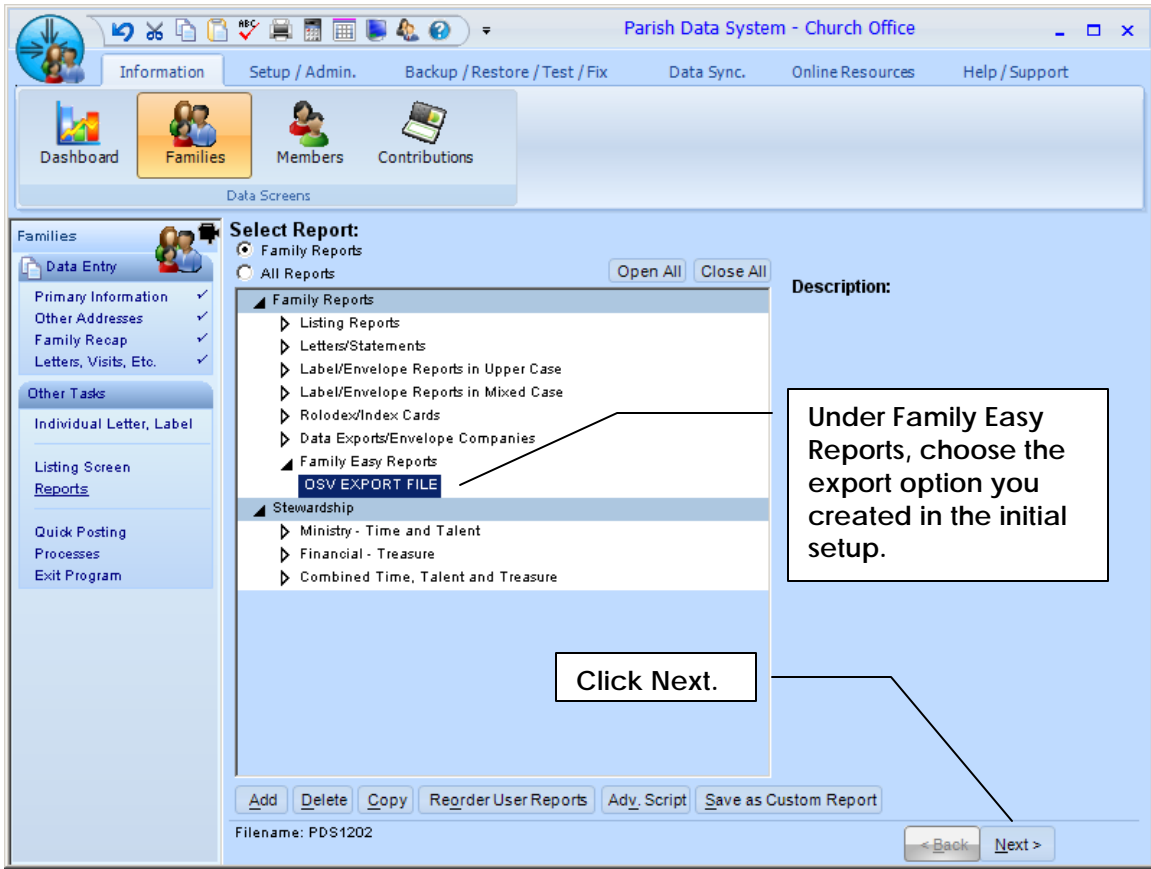
Remarks

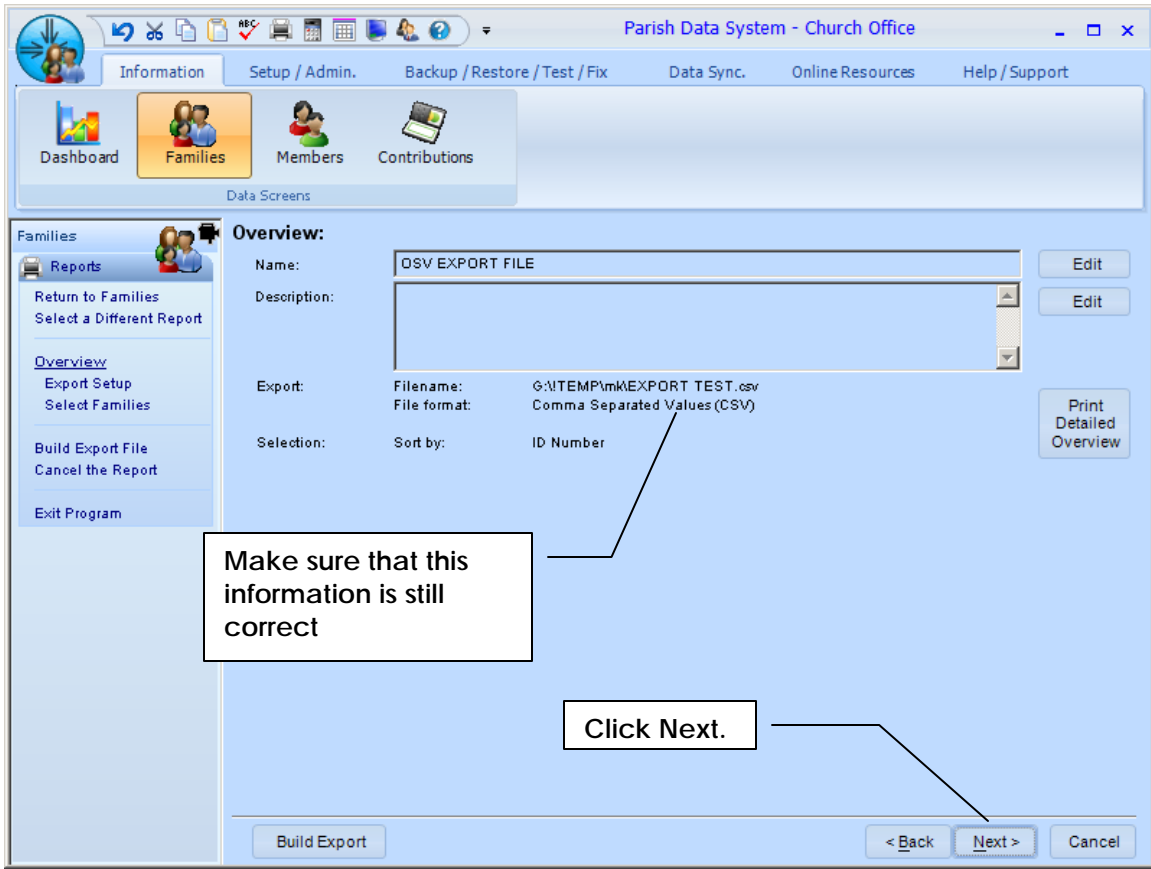
Originally from From Akron, OH. Jeane's parents were founding members of the parish. They are always willing to assist with fund raisers and volunteering their time whenever possible.

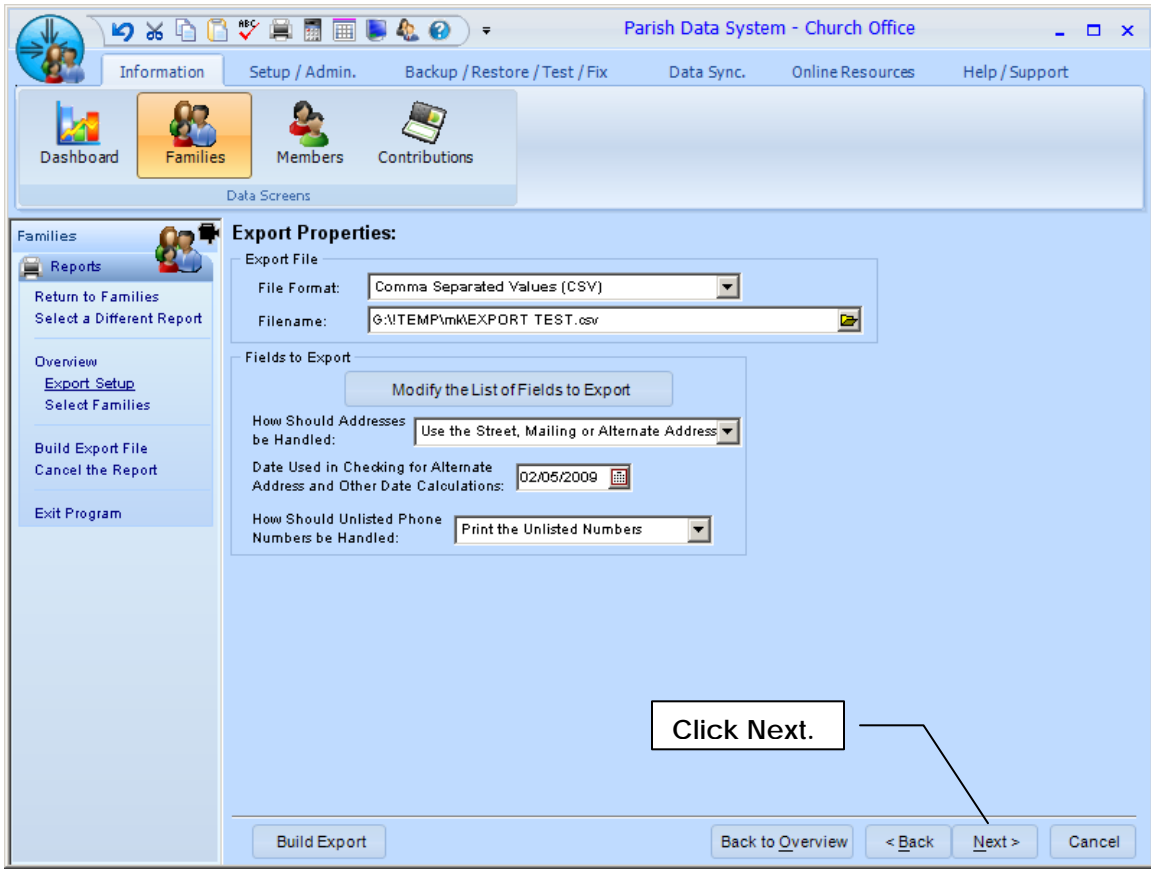
General \* Confidential \*

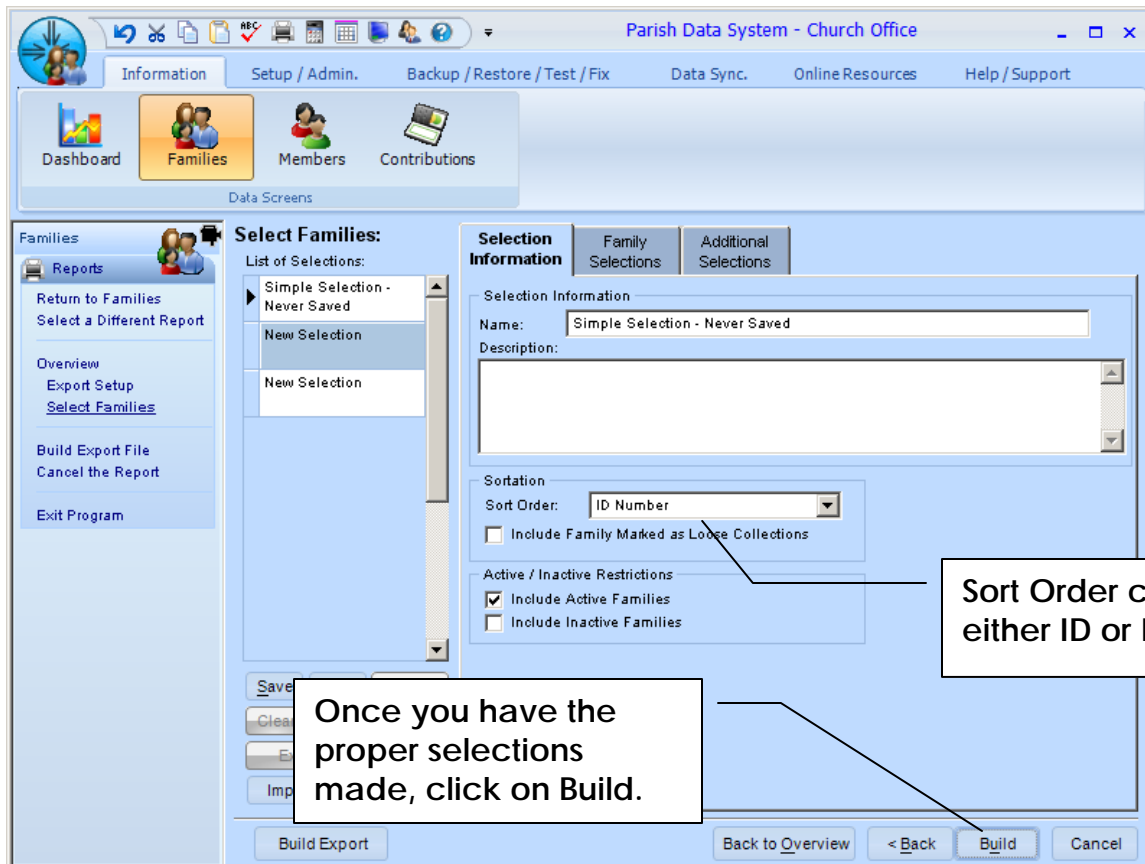
Funds Used by this Family: 1, 2, 3, 4, 6, 9 Number of Members: 7 Screen Changed: 02/03/2009

From the family screen, click on Reports.

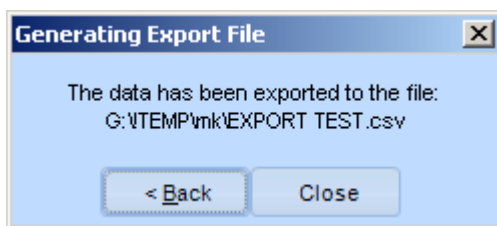








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