

# Excel Tips and Tricks

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Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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## Utilizing Excel

**CN Family Suite moves from paper processing to electronic processing.**

As migration from Paper processing to Excel processing continues, a few formulas in Excel will enable to build a mailing name for printing of Labels. This example will grab those who have Send Contrib Envelopes checked. This can apply to any csv list in Last Name, Comma, First Names format.

Create mailing name from csv download. Check your filters!

1.

### Filter

Please enter and or select criteria for searching. Only entered and selected criteria will be used in the 'Filter search' box, or change the 'Filter' dropdowns if you do not want the:

Membership: Registered

Family Group: Active

Send Envelopes: Envelopes

1. Filter Icon
2. Members - Registered
3. Family Group - Active
4. Send Envelopes - Envelopes
5. Click Apply

2.

1.

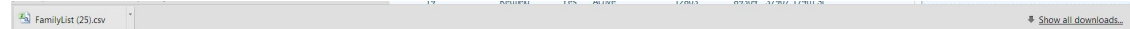
4.

3.

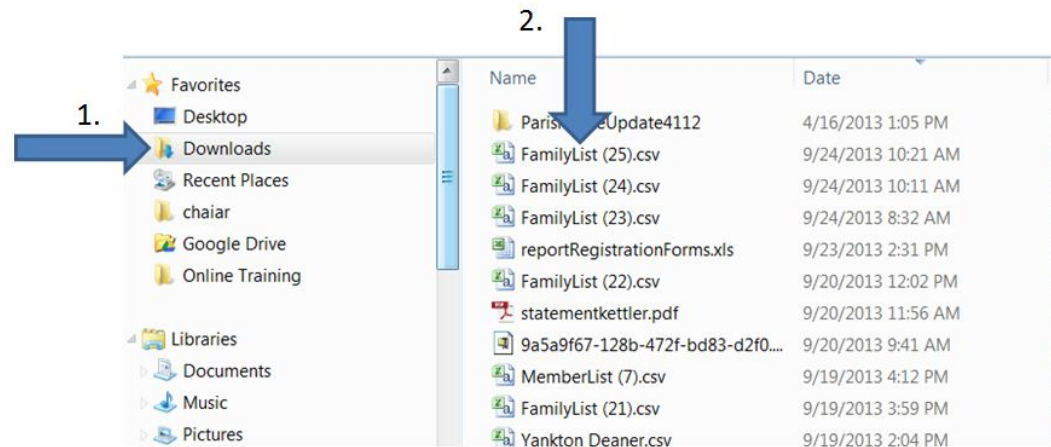
Family	Envelop	E-Mail Addr	City	Regis!	Family C	Registered Org	Family DUID	Primary Address
<input type="checkbox"/> Akn, Dan and Jeanine	1		Ashton	Yes	Active	12803	89193	38781 164th St
<input type="checkbox"/> Akn, Jayme and Amy	2	yukonrpp@	Redfield	Yes	Active	12803	89533	900 E 3rd St
<input type="checkbox"/> Albrecht, Dave and Yvette	3	parkandrec@sd.com	Redfield	Yes	Active	12803	89437	38658 174th St
<input type="checkbox"/> Anderson, Arnold and Ethelmae	4		Redfield	Yes	Active	12803	89488	1226 W 1st St
<input type="checkbox"/> Anderson, Bryon and Kathi	5		Redfield	Yes	Active	12803	89545	822 W 5th St
<input type="checkbox"/> Anderson, Patty	6		Redfield	Yes	Active	12803	89577	1014 E 2nd St

	<input type="checkbox"/>	Anderson, Mary	7	Redfield	Yes	Active	12803	89645	1045 E 3rd St Apt 50
	<input type="checkbox"/>	Anderson, Tynan	8	Redfield	Yes	Active	12803	101754	822 W 5th St.
	<input type="checkbox"/>	Appel, Crystal	9	Redfield	Yes	Active	12803	89194	1225 W 2nd St
	<input type="checkbox"/>	Appel, Dan and Vickie	10	Redfield	Yes	Active	12803	89205	17486 375th Ave
	<input type="checkbox"/>	Appel, David and Mary	11	maryannappe	Redfield	Yes	Active	12803	89216 17263 383rd Ave

1. Click on the Envelope Column (invoke a sort by Envelope Number).
2. Click on 0-9
3. Note the filter and sort.
4. Click Excel icon to download this file to CSV.



Depending on your browser, the file will download and appear in your Downloads folder. Or, if you are using Google Chrome, the file will appear at the bottom of your screen. Double click on the ContributionList.csv file to open in Excel.



1. Click on Folders.
2. You should see a Downloads folder.
3. Double-click on your most recent FamilyList.csv file that was just downloaded to open it in Excel.

Note: You may open the file directly from your browser.

U	V	W	X
FindCOMn	LastName	FirstNames	MailingName
12	Auerbach	Alan and Kathryn	Alan and Kathryn Auerbach

12	Aughenbaugh	Alan and Kathryn	Alan and Kathryn Aughenbaugh
7	Biever	Kathleen	Kathleen Biever
5	Blue	Greg and Diane	Greg and Diane Blue
5	Blue	Jesse and Heather	Jesse and Heather Blue
5	Blue	Marjorie	Marjorie Blue
5	Blue	Robbie and Heidi	Robbie and Heidi Blue
5	Blue	Robert and Sheryl	Robert and Sheryl Blue
5	Blue	Rodney and Patty	Rodney and Patty Blue
10	Bohlander	Karen	Karen Bohlander

1. Scroll to the right of the spreadsheet to Column U.
2. Enter the following column headings:

- U - FindComma
- V - LastName
- W - First Names
- X - MailingName

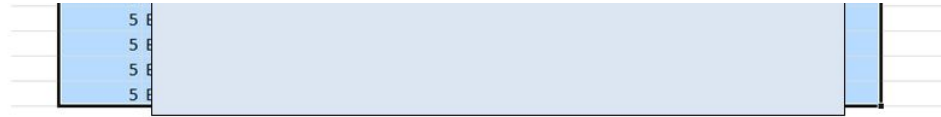
U	
FindComma	LastName
12	Augher
7	Biever

1. Click on U2, Enter =FIND(",", A2)
2. Click on V2, Enter =LEFT(A2, (U2-1))
3. Click on W2, Enter =RIGHT(A2,(LEN(A2)-U2-1))
4. Click on X2, Enter =W2 & " " & V2

2.

1.

	U	V	W	X	Y
	FindComma	LastName	FirstNames	MailingName	
12					
7					
5					
5					



1. Select column and row U2 to X2. Continue to drag and select to the bottom of the excel sheet.
2. Click Fill, Down. This will copy the formula fields from row 2 to each row in the spreadsheet.
3. Save this spreadsheet.

You may now use this spreadsheet as the source for a Word Mail Merge. Envelope numbers are included in this sheet along with a newly formulated Mailing Name.

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