

Reconcile Web Contact Data and Hard Copy Roster Data

It is important to make sure the website member contact information and the hard copy roster match before printing. Here is how to export the contact information for primary addresses and other addresses.

EXPORT CONTACT INFORMATION FOR HARD COPY ROSTER

Primary Address Export

In August, it is time to make sure the web contact data and hard copy roster data are aligned. Export the following contact data to assist with this process:

- Step 1: Login**
- Step 2: Select CiviCRM**
- Step 3: Select Contacts**
- Step 4: Select Manage Groups**
- Step 5: Select phx_General Member**
- Step 6: Select All Records**
- Step 7: Go to Actions and select Export Contacts**
- Step 8: Select Fields for export**
- Step 9: Use Saved Field Mapping and scroll to Roster – Primary Address Export**
- Step 10: Select Continue**
- Step 11: Select Export**
- Step 12: Select File**
- Step 13: Select Save As and be sure to change File Format from .csv to .xlsx **Change name, if wanted, and SAVE to your Hard Drive****

“Other” Address Export

In August, it is time to make sure the web contact data and roster data are aligned. Several members have second addresses that need to be confirmed annually. Export the following “Other” Address data to assist with this process:

- Step 1: Login**
- Step 2: Select CiviCRM**
- Step 3: Select Contacts**
- Step 4: Select Manage Groups**
- Step 5: Select phx_General Member**
- Step 6: Select All Records**

Step 7: Go to **Actions** and select **Export Contacts**

Step 8: Select **Fields for export**

Step 9: Use **Saved Field Mapping** and scroll to **Roster – “Other Address” Export**

Step 10: Select **Continue**

Step 11: Select **Export**

Step 12: Select **File**

Step 13: Select **Save As** and be sure to change **File Format** from **.csv** to **.xlsx**. **Change name, if wanted, and SAVE to your Hard Drive**