

Donor Management



EXPORTING HOUSEHOLDS

When exporting contacts, you can choose to export all selected individual contacts or you can opt to export them by household. This may come in handy if you are sending out a mailer.

TO EXPORT HOUSEHOLDS ONLY:

1. Go to **Contacts > All Contacts**
2. Select/create a filter
3. Click **Select All** or select individual contacts by checking the box in the upper left corner of their record
4. Click **Export**
5. A modal will open displaying the number of contacts in the number of households
6. Click on the toggle next to "Combine contacts into households in export file."
- (Note: households without addresses will not be included in the export as indicated in the modal)*
7. Click **Export**

GLOSSARY OF TERMS IN EXPORT FILE:

1. **Household Greeting** - Intended to be used as the greeting for the household on the letter or mailing label, i.e., The Smith Family, Dr. Tom and Sue Smith (This is also a field in the Household section of the contact profile).
2. **Household Name** - This is the name of the household, which is automatically generated but can be updated in the Household section of the contact profile. This name is displayed on the contact profile page.
3. **Head of Household** - When a Household exists, you have the option of designating a contact within the Household as "Head of Household." This can be set in the Household section of the contact profile.
4. **Other Household Members** - This column includes the names of all other members in the household.

Remember: When the address for multiple contacts is an exact match, Households are automatically created. A user does not have to manually associate contacts with a household.

Questions? We're here to help!

Email us at donormanagement@networkforgood.com

We'll help you get started with groups.