

## How to Export Church Community Builder (CCB) Information to a CSV File for importing into Servant Keeper.

1. First create a group that contains everyone you want to export and give it a name (for example "Entire Database"). Click the "Reports" tab
2. Build a Custom Report
3. First Category: Which People
4. Change the "Search On" drop box to "Group"
5. Change the "Choose..." drop box to "Is"
6. Change the "Search On" drop box to the group name you created above
7. Change the "Search On" drop box to "Member" (assuming all people in that group are denoted as group members)
  - a. Other option combinations, such as using "Is any status of" instead of "is" tends to leave out large groups of people.
8. Second Category: Report Columns (NOTE: You can only select 12 columns so you will likely need to create more than one file, see notes below)
9. Pick the following columns you want to export and you need to at least include
  - a. Last Name
  - b. First Name
  - c. Individual ID \*This is critical to allow for loading additional data past the 12 field limit
  - d. Family ID \*This is critical to maintain the householding you have in CCB when importing into Servant Keeper
  - e. Mailing Street
  - f. Mailing City
  - g. Mailing State
  - h. Mailing Zip
  - i. Email
  - j. Home Phone
  - k. Gender
  - l. Family Position
10. Third Category: Refinements Sort First on: Family ID Low to High
  - a. Sort Second on: Last Name A to Z Return All Family Members – Unchecked
  - b. Don't Include Inactive Individuals – Checked
  - c. Don't Include Unlisted Individuals – Unchecked
  - d. Don't Include "Child Protected" Children - Unchecked \*\*If you don't Uncheck this box, you will lose a whole lot of kids from your database

e. Don't Include Deceased Individuals – Checked

f. Give your report a name, and hit "Save and Run Report" and change the output to "CSV"

11. To create additional file(s) to get any columns that you didn't have room for due to the 12 column limit you would follow the same steps except for when selecting the columns you would want to use

a. Last Name

b. First Name

c. Individual ID \*This is critical to allow a direct match with the correct person/individual

For columns 4 through 12 select any additional data such as Membership Type, Mobile Phone, Work Phone, Date of Birth, Anniversary date etc. If you have more fields you need you can create additional files in a similar fashion with Last Name, First Name, and Individual ID plus your additional fields.