Church Data Spreadsheet Directions

The goal of this spreadsheet and directions is to help Churches be more effective in their efforts, making the most of their time and resources. May God bless your endeavors!

Ryan Austie Founder, Matched by Mission

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The above image is a screen shot of the 'Practice Sheet' worksheet in the MS Excel file. I've included normal looking (but fake) data to aid in this guide. You are encouraged to click around and explore. Once you're ready to record information for your Church, click on the 'Our Data' worksheet. If you're not overly familiar with MS Excel, we suggest keeping the 'Practice Sheet' available so you can experiment without worrying about overwriting your search information.

Let's go through each column:

A. A numbered column

i. I do this on most spreadsheets so that if ever I need to return to the original layout it's as simple as sorting the column (I'll explain how to do that in a bit).

B. Individual ID

i. Assigning ID numbers to congregants, as cold and impersonal as it may seem, is a very effective way of keeping track of them on a spreadsheet. Some Churches use the Finance tracking number for consistency. Regardless, just be sure that no two people or families end up with the same number. I've included a formula that will highlight duplicate numbers. This number should never change.

C. Family ID

i. A secondary ID number is recommended, as it's a quick way to keep grouped information together in a format like this. That said, if an individual has no family members, then they should not need a Family ID number. Again, be sure to avoid having a number shared by more than one family. To guard against that, I suggest having a 5-6 digit number for individuals, and a 3-4 digit number for families. Outside of a change in marital status, this number should never change.

D. Title

i. This is the known title of the individual you will be in contact with.

E. First

i. This is the first name of the individual.

F. Last

i. This is the last name of the individual.

G. Notes

i. This is for anything significant that isn't covered elsewhere on the spreadsheet - especially useful for recording information that a visitor might need to know (recent trauma, etc.).

H. Birthdate

i. The date of birth for the individual. Once you click on a cell and enter the birthdate, the Age in the next column will be calculated (default with no date is 119). Note that this field requires a date - so if the date is not known, please leave the field as it is.

I. Age

i. Their current age. I configured a formula to update this automatically. 119 is the default - this will update automatically when you enter a birthdate.

J. Marital Status

i. Their current marital status.

K. Anniversary

The anniversary of their marriage. Once you click on a cell and enter the birthdate, the Years Married in the next column will be calculated (default with no date is 119). Note that this field requires a date - so if the date is not known, please leave the field as it is.

L. Years Married

i. The length of their marriage. I configured a formula to update this automatically. 119 is the default - this will update automatically when you enter anAnniversary.

M. Source

i. How they first came to the Church. Word of mouth, advertisement (specify which), random visit, etc.

N. Professing Believer

i. Do they self-identify as a Christian?

O. Email

i. This is the email address of the individual.

P. Primary Phone

i. Their preferred number.

Q. Secondary Phone

i. An alternate number, if they have one.

R. Best Times to Call

i. It can be frustrating (and a time suck) to need to make a dozen calls, only to leave a dozen messages. Keeping track of the best times helps to prioritize your calls. Keep this field up to date.

S. Primary Street

i. Current address.

T. Primary City

- i. Current address.
- **U. Primary State**

i. Current address.

V. Primary Zip

i. Current address.

W. Secondary Street

i. Alternate address.

X. Secondary City

i. Alternate address.

Y. Secondary State

i. Alternate address.

Z. Secondary Zip

i. Alternate address.

Part 2: Modifying the Spreadsheet

Adding Information

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1 - To get to the 'Our Data' sheet provided, click on the 'Our Data' worksheet tab at the bottom of the screen.

2 - A 'cell' is where any column and row intersect (e.g. R13).

3 - When adding information to a cell, simply click on that cell with your cursor and begin typing. You will see the data you enter appear both in the cell as well as the 'Formula Bar' above.

4 - To reverse your several most recent actions, in order, click on the 'Undo Typing' arrow at the top of the screen. If you go back too far, you can re-do your most recent reversed action by clicking on the 'Redo Typing' button at the top of the screen - this will bring back the information you removed.

If you're adding the same data to a number of cells, then a shortcut is to enter that data into one cell, then copy and paste it to other cells.

- Enter the data into one cell, then click out of that cell.
 - Click back on that cell.
 - Simultaneously press 'Ctrl' and 'C' this copies the information in the cell.
 - Click on a different cell, and then simultaneously press 'Ctrl' and 'V' this pastes the data. You can paste multiple times.
 - If you want the same data in a long range of cells, then following the steps in 'Sorting Information,' step 6, (renumbering a column) will allow you to do that. Bear in mind that the system should recognize the 'pattern' in that case as unchanging data.

Updating Information

At times you will need to update the information held in a cell - the Notes column is the most frequently updated. If you click on a cell that already contains information and begin typing, then what you type will overwrite (delete and replace) the contents of that cell. The way to update a cell without overwriting the contents is to click on the cell and then click on the Formula Bar data. Your cursor will appear there, and you can edit freely.

Sorting Information



It will be helpful to sort the information in your spreadsheet, in particular when you want to group people by Family Id, age, town, etc. or even when you want to quickly find blank cells.

1 - To sort a column of information, begin by clicking on the header of that column. Using column 'C' as an example, move your cursor to hover over the letter 'C' at the column header. You'll notice that the cursor

turns into a downward-pointing arrow. Click once. The column should now be tinted.

2 - Now, click on 'Sort & Filter' in the upper right-hand corner of the screen. A small menu will drop down.

3 - Click on 'Sort A to Z.' A window will open, and give you two options: 'Expand the selection,' or 'Continue with the current selection.'

4 - Make sure 'Expand the selection' is selected.

5 - Click on 'Sort.' Column 'C' is now in alphabetical order, and all of the other data has shifted so that each row contains the correct information for each candidate.

• Note that if we had selected 'Continue with the current selection,' then only the one column would have been reordered. This would jumble the records and leave us with inaccurate information.

6 - To restore the information, sort column 'A.'

• I've found that due to the amount of data that the spreadsheet will see, it may be useful to renumber column 'A' once you complete the needed sorting.

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Renumbering a column is a straightforward process.

1 - Click on the A1 cell, and overwrite the data with the number '1.' Move to cell A2 and overwrite it with '2.' Overwrite cell A3 with '3.' This is now enough information for the program to recognize the simple pattern (each successive row in column 'A' increases in value by 1).

2 - Now, click and hold on cell A1 (the beginning of the pattern), and drag the cursor down to cell A3 (the end of the pattern). Those three cells should be tinted, with a bold outline. In the bottom right hand corner of that outline you should see a small dark square. Hover your cursor over that square - your cursor should turn into a small dark cross.

3 - Click and hold. Now drag the cursor downward so that the outline extends as far as you desire. Once you've reached your goal cell, release the button. That entire section should now be renumbered.

Adding, Removing, and Reordering Columns

Depending on your needs, you may find it best to customize the layout on the spreadsheet.

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Adding or removing a column

1 - To add a column, click on the letter heading that column. This will tint the column.

2 - Now, right-click anywhere on the highlighted section. This will open a menu.

- To insert a new column, select 'Insert.' This will add a blank column and shift everything to the right of that point one column over. Be sure to add a column header (title) right away, as sorting with data not connected across columns will result in only a portion being sorted.
- To delete the column, select 'Delete.' This will remove the column and shift everything to the right of that point one column to the left. If you want to simply delete a columns content without removing the column, then follow step 1 here, and then click the 'Delete' button on your keyboard.

Reordering a column

• To reorder, follow step 1.

- Hover your cursor over the left or right edge of the highlighted column. Click and then drag the column to its new location.
- Release the button, and the column will stay in place.