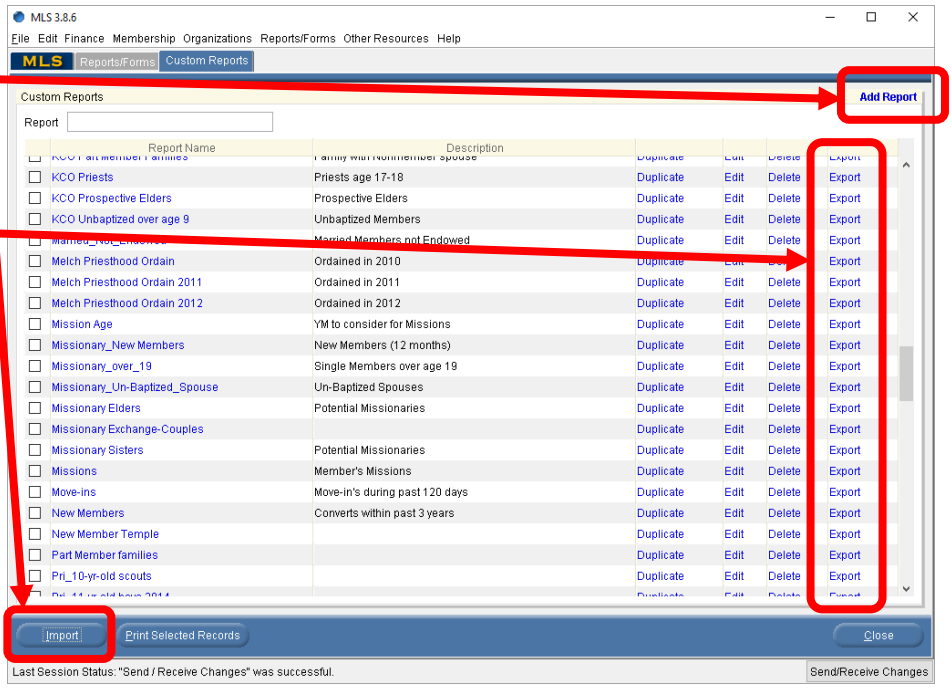
Setting up an MLS Custom report to show phone #s and email addresses of adults

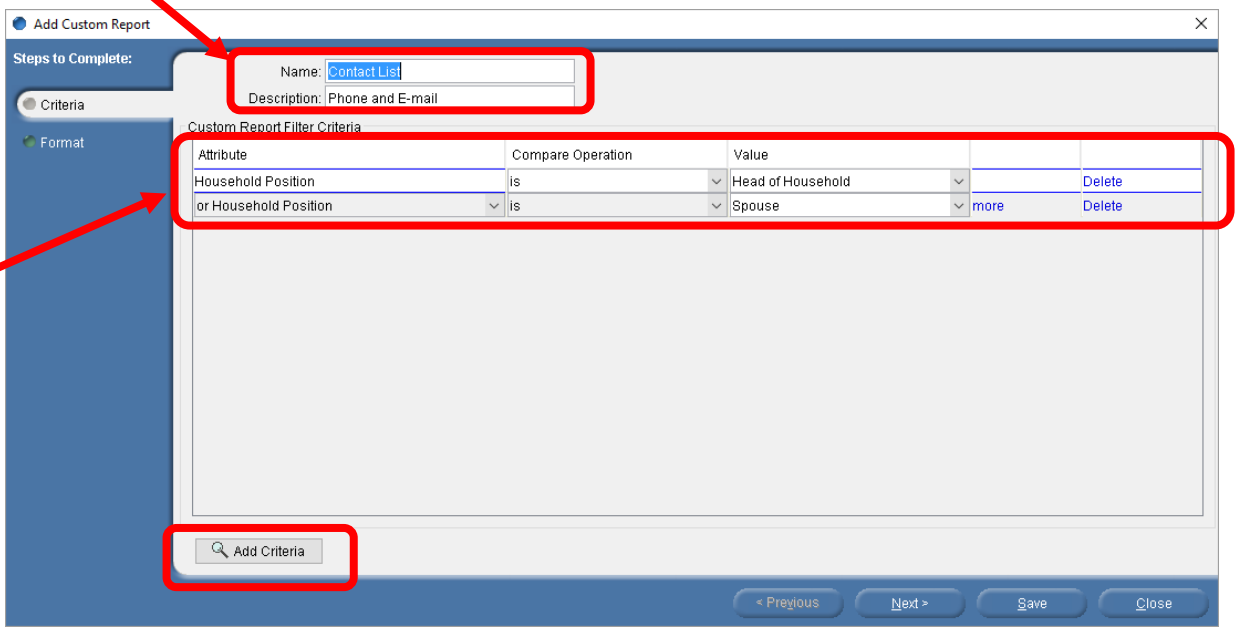
In the Custom Reports screen, click “Add Report”

(Note, to import or export custom report structures, see these options and see the description at the end of this instruction)



Give the report a name

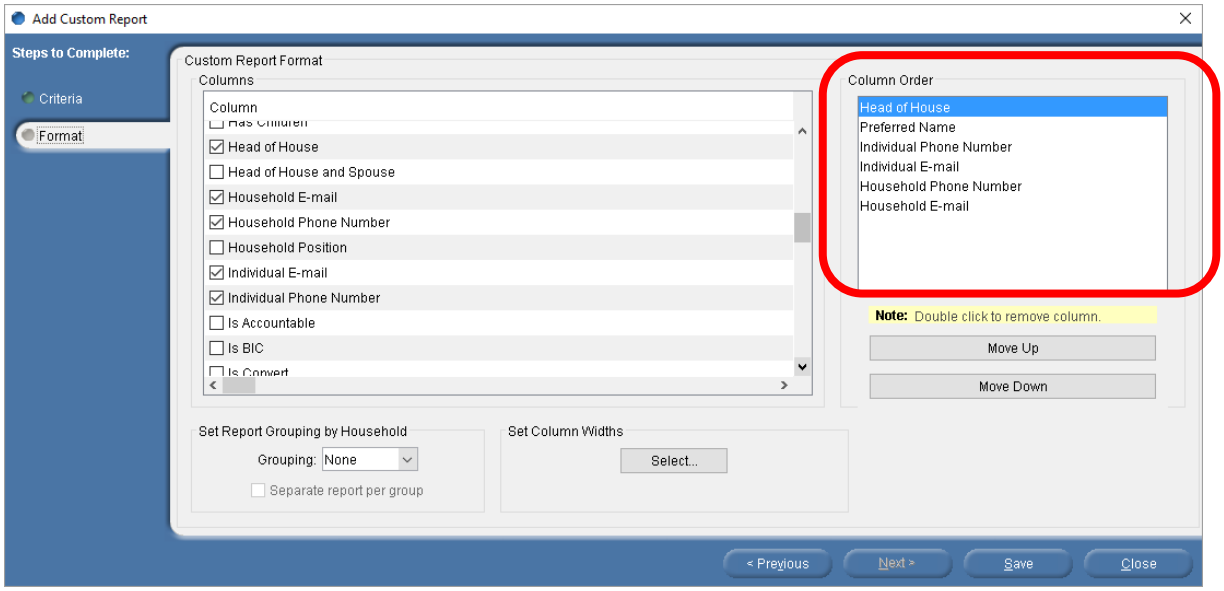
Add your desired criteria – in this example we want all the parents - head of house and their spouse (if they have one)



Setting up an MLS Custom report to show phone #s and email addresses of adults

Establish the information you want to show on the report. By listing the head of house and preferred name, the report automatically groups spouses together when you have multiple families with the same last name in your unit.

For this report, we want the name, individual phone and individual email, household phone and household email.



The resulting report will list everyone who is a head of house or a spouse and their contact information. You can click on any report column header to sort the data. You can export the report as a .csv file for further manipulation in a spreadsheet application.

To share custom report "structures" (the MLS instruction set to build the report without any actual membership data), click on the "export" link to the right of the report in the report list (see the first screenshot) and save it to a convenient location. You can e-mail that file or distribute on a thumb drive.

Another MLS user can import that report into their MLS so they won't have to build the report from scratch. That person should have the *.mls file on the MLS computer or a thumb drive connected to the MLS computer. Then they would click the "Import" button (see the first screenshot) and navigate to the *.mls file. Once they import that into their MLS, they will have an exact copy of the custom report, but it will use data from their MLS database.

