How to manage and create Field Sets

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A Field Sets allows you to create a CSV export with specific fields of your choice. Generating the export can be done from a Listing, like the Member Listing. You can create Field Sets to include the data that is most relevant to your needs. Follow the steps below to learn how to manage and create Field Sets:

1. Click **Settings** or the **Gear icon** on the left menu.
2. On the **Membership & Data** tab, under the **Import & Export** section, click the **Field Sets** link.
3. You can now see all of the Field Sets on the account. There are several actions you can take:
    - **Create Field Set button** - Allows you to create a new Field Set.
    - **Plus Icon (+)** - Expands the row to see what Permissions (Roles) it has and what fields are included in it.
    - **Down Arrow**
        - **Edit** - Edit the Field Set.
        - **Copy** - Copies the Field Set.
        - **Usage** - See where the Field Set is used.
        - **Delete** - Deletes the Field Set (this cannot be undone).

Creating a Field Set

1. When creating a Field Set, it asks you for the following values:
    - **Record Type** - The type of record that will be exported.
    - **Name** - The name of the Field Set.
    - **Description** - The description of the Field Set.
    - **Permissions** - What roles can use the Field Set.
2. After you enter the values in the fields, click **Continue**.
3. Next, you select what fields you want to export. You are able to move the field up and down using the 6 dots on the left if needed.

4. Once done, click the **Save** button to create the Field Set. To use the Field Set, go to the Listing of the Record Type you select.