ParishSOFT Family Directory Hands-on Training

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Today's Agenda

- Going through the process of adding a family

- Filtering and sorting family and member lists

- Reporting features in the modules

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Let's start at the very beginning ...

- Need information to be there first
  - Add New
  - Import
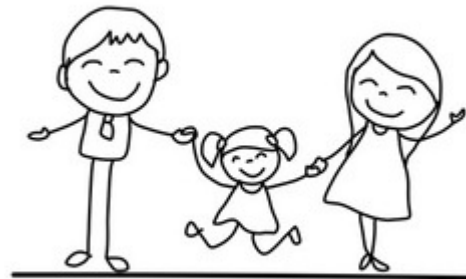   - Registered/Unregistered

Adding New vs. Importing

Add New

- Search
  - **Prevent duplicates**
  - First name/city refine results
- No results
- Add new

Import

- Search
- Find results
- Select family
- Move Selected Family
  - Registered: family is owned by your parish
  - Unregistered: you get a photocopy

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New Family

Find Family

Selected Organization: Regina Caeli H.S. , Ann Arbor

Filter by Organization: | All |

Last Name:* DiGiovanni

First Name:

City:

[Search] **Refine search using name & city**

City:

[Cancel]

Family Name	Registered Organization	Family DUID	Dioce

New [Add New Family] [Move Selected Family ▼] **Import**

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Family Members

- Must have at least 1

- Required fields in red

- **Type is very important**
    - **Head, Husband, Wife** required to add family
    - relationship to head of household

- "Add Another" to add other members

Family Members

- View/Delete shows other members added
  - Shows Name & Type
- Can enter non-required fields if desired
- Starred fields must have information when saving record

Family Member (one or more required)

Prefix:*	Mrs.
First Name:*	Rosina
Nick Name:	
Last Name:*	DiGiovanni
Suffix:	
Type:*	Wife
Gender:	Female
Birth date:	
E-Mail Address:	

Add Another   View / Delete (1)

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Family Information

- **Family Group**
  - Defaults to "active"

- **Registration Status**
  - Defaults to "registered"

- **Registration Date**
  - Defaults to today

Family Information

Family Group: Active

Send Magazine: ☐

Registration Status: ☑

Registration Date: 7/27/2015

Diocesan ID:

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Family Information

Auto Fill Family Names

Last Name:*
First Name(s):*
Formal Mailing Name:
Informal Name:
Formal Salutation:
Informal Salutation:
E-Mail Address:

- Pulls first/last name of Head, Husband, Wife
- Can have different last names

Auto Fill Family Names

Last Name:*	DiGiovanni
First Name(s):*	Leonardo and Rosina
Formal Mailing Name:	Mr. and Mrs. Leonardo DiGiov
Informal Name:	Leonardo and Rosina DiGiova
Formal Salutation:	Mr. and Mrs. DiGiovanni
Informal Salutation:	Leonardo and Rosina
E-Mail Address:	

- Salutations/greetings for labels, letters, etc
- Auto fill short cut

Save Options

Cancel • Cancels the information

Save & New • Saves the family and allows you to add another new family

Save & Edit • Saves current family and opens details to continue editing

Save & Finish • Best option; finalizes record and returns to Family List

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Exercise #1 Add your family

Additional Family Details

1. Family email address

2. Best way to reach family

3. Emergency contact & description (who you're calling)

Additional Family Details

1. Physical address – where they live

2. Where mail should be sent (not house)

3. Seasonal address (ex: snowbirds)

   • Primary address automatically updated if date range entered

Primary Address: Home Address

Home   Mailing   Other

1   **2**   **3**

Country: United States

Postal Code: 49068

Address Line 1: 17781 G Drive North

Address Line 2:

City: Marshall

State/Region: Michigan

Phone Number:

Additional Family Details

Envelope #:	0	*Next*	Send Mail: ☑	Publish Address: ☑
Diocesan ID:			Send Contrib. Env.:	Publish Photo: ☑
Annual Gift $:	0	Giving History	Publish Phone: ☑	Send Magazine: ☐
Map Code:			Publish Email: ☑	

- Next – assign lowest unassigned envelope #
- Can type in envelope #
- "Send Contrib. Env." – must be checked if sending list to envelope vendor
- Publish checkboxes – family preferences

Member Details
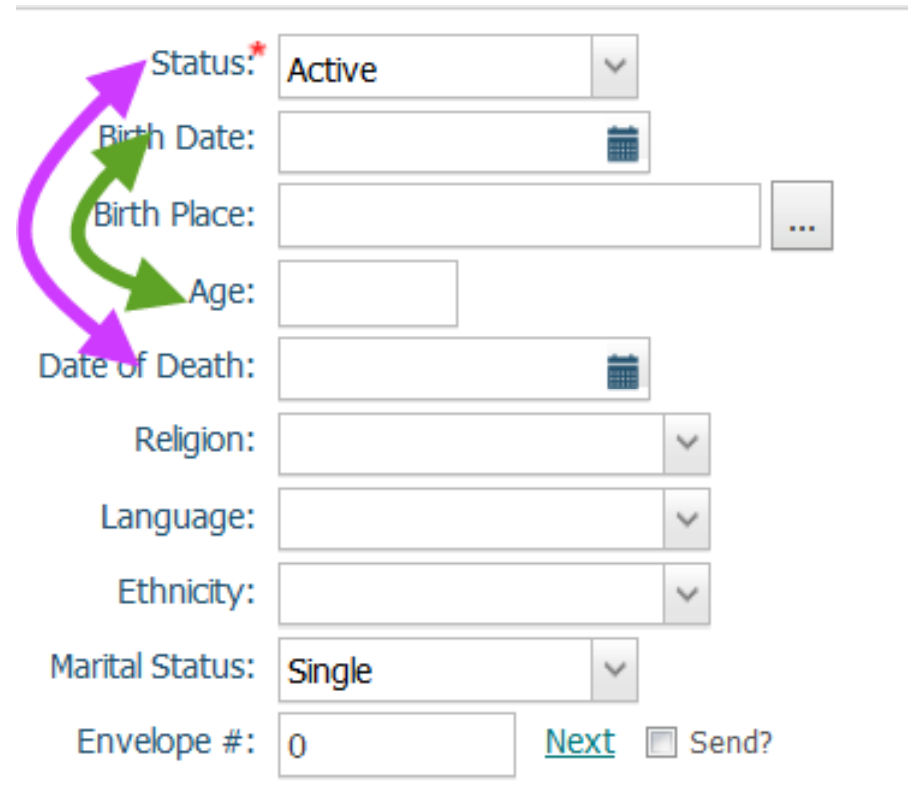
- Lots of information for members!
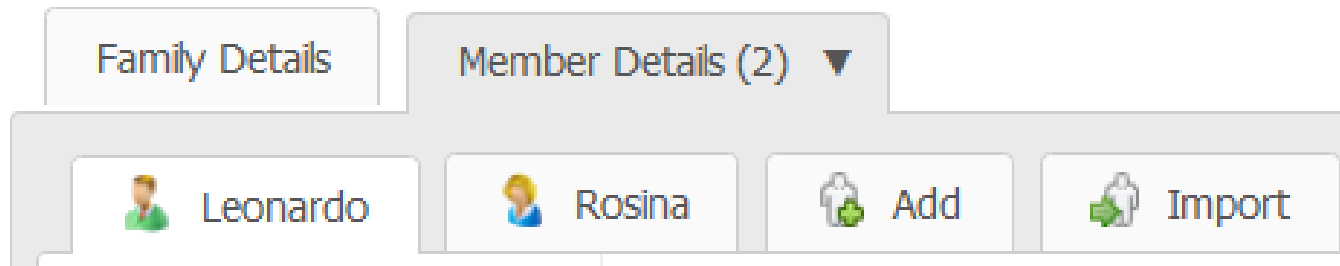
- Tab for each member to view member information
- Add = add a new member to the family
- Import = bring in a member from another family
  - Ex: Marriage

Member Details

- Status must be "deceased" to enter date of death
- Birth date calculates age
- Marital status updates if marriage record entered
- Envelope # - same process as the family record

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Member Details

1. Track contact information for specific members
2. View Only – see basic sacramental information
3. See class/attendance data if using Religious Education module
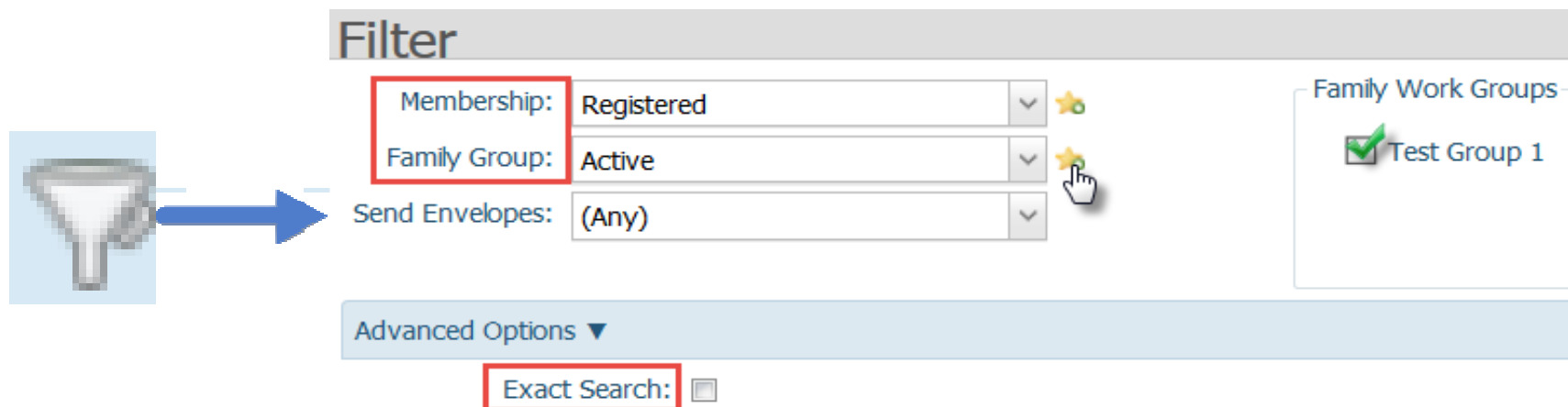4. Member strengths & workgroups

Exercise #2
Add member to Existing Family

Filtering

- Quick Reports
- Gather information to publish in bulletin
    - Ex: birthdays, anniversaries, etc
- Send communications
    - Email, mail merge
- Requests for information on behalf of members

Advanced Filter – Family List

- Filter is comprehensive – results must meet all selected criteria
  - Same process for Family & Member List
- Save Membership/Family Group
- Can do exact search

Advanced Filter – Family List

- Advanced options have other filters
- Check Registration Date checkbox to see From and To fields
- Click Apply to see results and generate reports, send communication, etc.

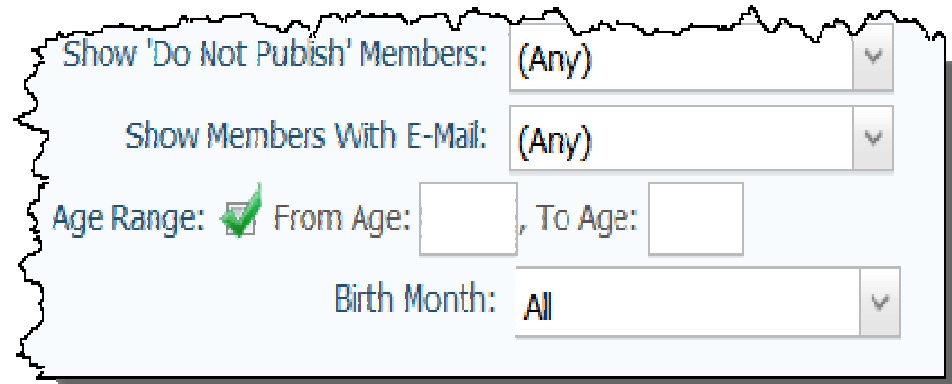# Advanced Filter – Member List

- Same process as Family List
- Many more fields available
  - More to filter for individuals than groups
- Save Membership, Family Group, and Member Status

Quick Reports for Families & Members

- Full Envelope – All families/members w/envelope #. *Must have "Send Contrib" box checked*

- Filtered Envelope – families/members w/envelope # who meet the filter criteria. *Also must have "Send Contrib" box checked*

- Family/Member List – families/members who meet the filter criteria with basic contact details

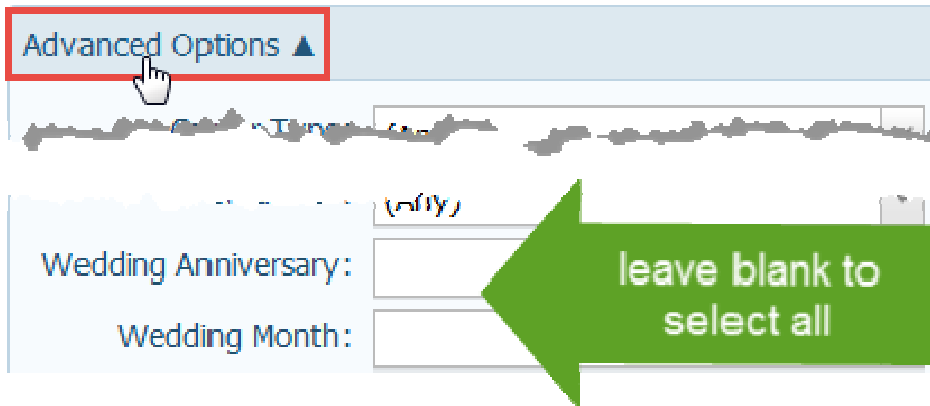- Family/Member Mailing Labels – mailing labels for families/members who meet the filter criteria

Quick Reports for Members

- Anniversary Report – report of member wedding anniversaries
- Can select specific anniversary and months

- Birthday Report – report of member birthdays
- Can filter by age range and month

Show 'Do Not Pubish' Members: (Any)

Show Members With E-Mail: (Any)

Age Range: ✔ From Age: _____ , To Age: _____

Birth Month: All

Advanced Options ▲

Wedding Anniversary: _____

Wedding Month: _____

leave blank to select all

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Exercise #3
Generate report of envelope numbers for Registered & Active Families

Report Results
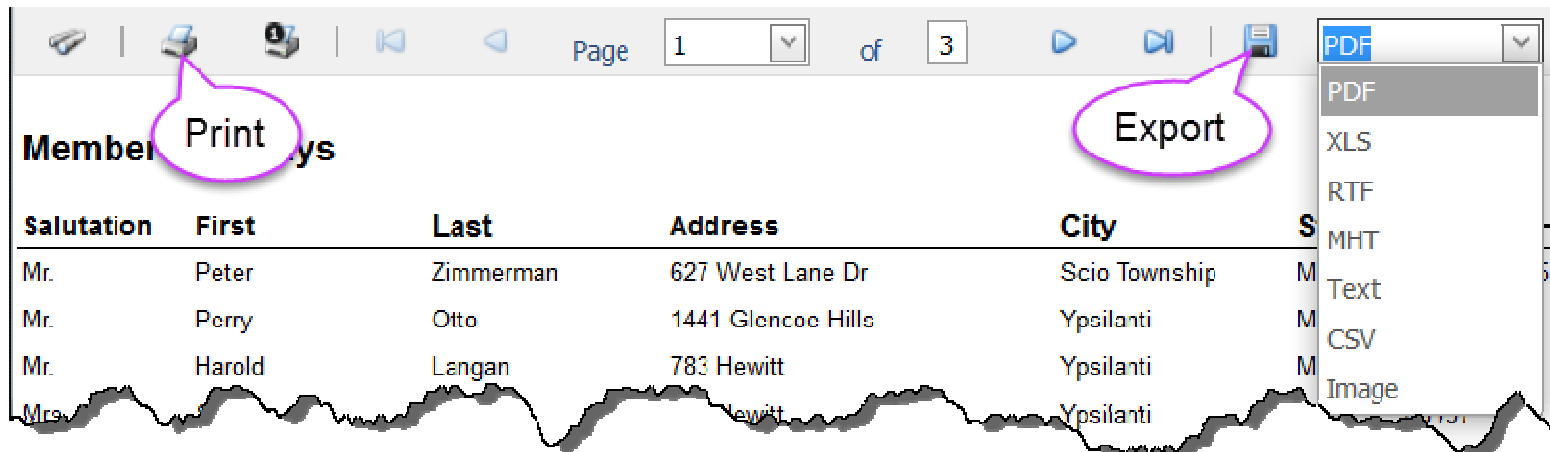
- Export – use drop-down menu to select file type
  - XLS = export to Excel w/formatting of report
  - CSV = export to Excel as basic spreadsheet
  - RTF = export to Word

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Exercise #4
Generate Member List Report

Family Directory Reports

- Sacraments completed at your church
- Select sacrament and enter date range
  – Uncheck start/end dates to get all
- "Click here to view report" opens in new window

Family Directory Reports

Select Report - Baptism

Report Type	Report
Sacrament	Baptism
Statistics	Confirmation
Census	Funeral

Select Filtering Options

Select Date Range

☑ Start Date: 7/31/2015

☑ End Date: 10/31/2015

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Sacramental Registry

Record	Name		Baptism		Confirmation	
Volume:	Name:	Martha Jamison	Date:	09/04/1982	Date:	
Page Num:	Baptismal Name:	Martha Anne Jamison	Location:	Regina Caeli H.S. -- Ann Arbor, MI 48108	Location:	
Registry Num:	POB:					
	DOB:	08/31/1982	Celebrant:	Buckmaster, Bruce	Confirmation Name:	
	Parents:		Sponsors:			
		Barbara Allen				

- Displays in order of date completed
- Blanks on report indicate missing information from sacramental **or** member record

Family Directory Reports

- Shows statistics for your church
- Can change the date range for Kenedy Statistics
  - Defaults to showing the last year
  - Uncheck start/end dates to include all
- No date range for Parish Statistics

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Kenedy Statistics

- Click blue circle arrow to refresh data if date range is modified
  - Census Summary only shows current information in database and doesn't update
- Can click numbers to see list of members/families

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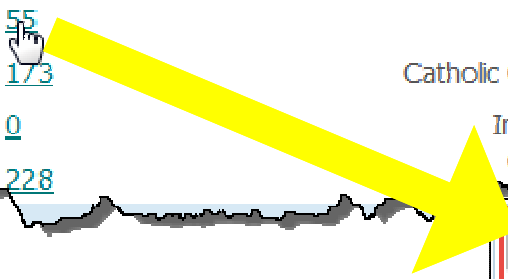
Parish Statistics

- Current snapshot of information in your database right now
  - Doesn't hold on to historical data
- Numbers are hyperlinks. Can click to see who fits that demographic

Parish Directory

- Does **not** consider registration status
- Can choose specific Family Groups to include
- Can include members
  - List members and member type/role

Registration Forms

1. Choose registration status

2. Auto fill with information from database, or print blank forms

3. Print in English, Spanish, or both

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Exercise #5
Generate Parish Directory

QUESTIONS?

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Thank you!

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