

ParishSOFT Family Directory Hands-on Training

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ParishSOFT®
Celebrating 20 Years of Service

Today's Agenda

- Going through the process of adding a family
- Filtering and sorting family and member lists
- Reporting features in the modules



Let's start at the very beginning ...

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



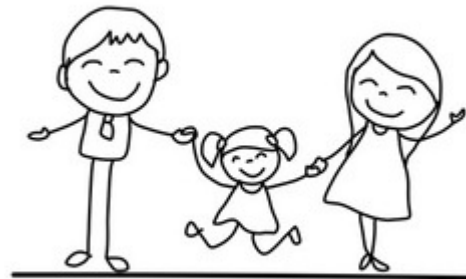
Adding New vs. Importing

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



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

Cancel

Family Name

Registered Organization

Family DUID

Dioc

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 Member *(one or more required)*

Prefix:* Mr. ▾

First Name:* Leonardo

Nick Name:

Last Name:* DiGiovanni

Suffix: ▾

Type:* Head ▾

Gender: Head

Birth date: Husband

E-Mail Address:

[Add Another](#)

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 \(1\)](#)

Family Information


- Family Group
 - Defaults to “active”
- Registration Status
 - Defaults to “registered”
- Registration Date
 - Defaults to today

Family Information


Family Group* 

Send Magazine:

Registration Status:

Registration Date: 

Diocesan ID:



Family Information

[Auto Fill Family Names](#)

Last Name:*

First Name(s):*

Formal Mailing Name:

Informal Name:

Formal Salutation:

Informal Salutation:

E-Mail Address:

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

- 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:

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

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)

Last Name:*	DiGiovanni
First Name(s):*	Leonardo and Rosina
Formal Mailing Name:	Mr. and Mrs. Leonardo DiGiovanni
Informal Name:	Leonardo and Rosina DiGiovanni
Formal Salutation:	Mr. and Mrs. DiGiovanni
Informal Salutation:	Leonardo and Rosina
Email Address:	1
Primary Phone:	2
Emergency Phone:	3
Emer. Ph. Desc.:	

Auto Fill

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

The screenshot shows a web form for family details. At the top, there is a dropdown menu for 'Primary Address' with 'Home Address' selected. Below this are three tabs: 'Home', 'Mailing', and 'Other'. Three yellow callout bubbles with numbers 1, 2, and 3 are positioned over the 'Home', 'Mailing', and 'Other' tabs respectively. The form fields include: 'Country: United States', 'Postal Code: 49068', 'Address Line 1: 17781 G Drive North', 'Address Line 2:', 'City: Marshall', 'State/Region: Michigan', and 'Phone Number:'.

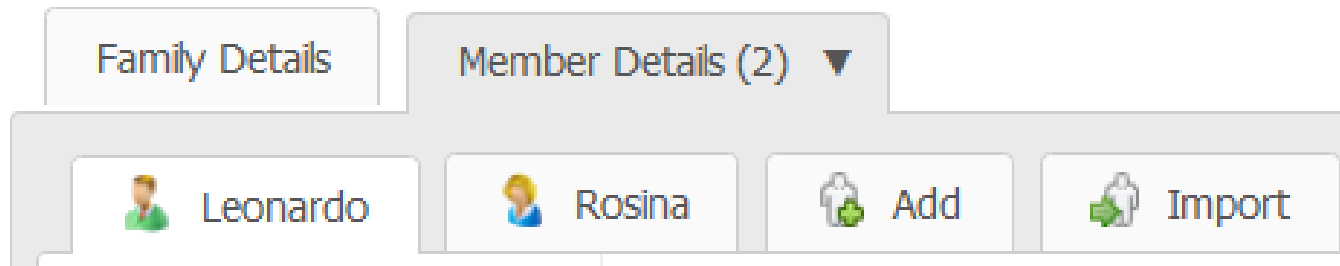
Additional Family Details

Envelope #:	<input type="text" value="0"/>	Next	Send Mail: <input checked="" type="checkbox"/>	Publish Address: <input checked="" type="checkbox"/>
Diocesan ID:	<input type="text"/>		Send Contrib. Env.: <input checked="" type="checkbox"/>	Publish Photo: <input checked="" type="checkbox"/>
Annual Gift \$:	<input type="text" value="0"/>	Giving History	Publish Phone: <input checked="" type="checkbox"/>	Send Magazine: <input type="checkbox"/>
Map Code:	<input type="text"/>		Publish Fmail: <input checked="" type="checkbox"/>	

- 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

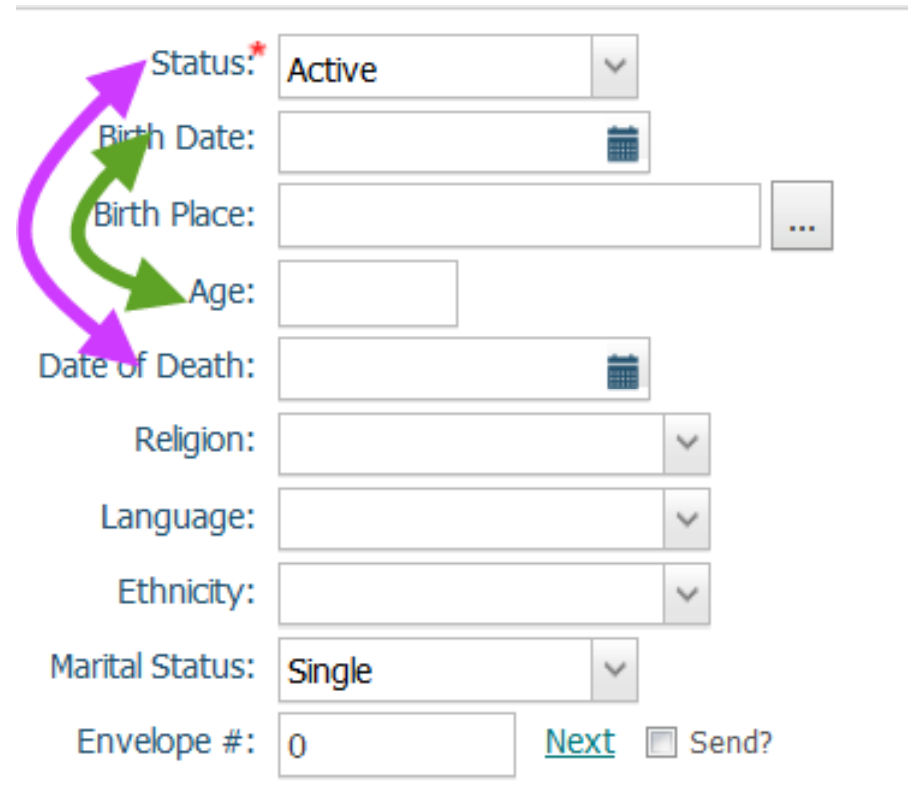
- Lots of information for members!



- 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



A screenshot of a web form for entering member details. The form includes the following fields: Status (dropdown menu, currently set to 'Active'), Birth Date (calendar icon), Birth Place (text input with a search icon), Age (text input), Date of Death (calendar icon), Religion (dropdown menu), Language (dropdown menu), Ethnicity (dropdown menu), Marital Status (dropdown menu, currently set to 'Single'), and Envelope # (text input, currently set to '0'). There are also 'Next' and 'Send?' buttons. Annotations include a purple arrow pointing from 'Status' to 'Date of Death', a green arrow pointing from 'Birth Date' to 'Age', and a green arrow pointing from 'Birth Date' to 'Date of Death'.

Status:	Active
Birth Date:	<input type="text"/>
Birth Place:	<input type="text"/>
Age:	<input type="text"/>
Date of Death:	<input type="text"/>
Religion:	<input type="text"/>
Language:	<input type="text"/>
Ethnicity:	<input type="text"/>
Marital Status:	Single
Envelope #:	0

[Next](#) Send?

Member Details

General Contact Sacraments Religious Ed. Misc.

1 2 3 4

General Education & Career Additional Information

Father Name:

Mother Name:

Mother Maiden Name:

Sacrament Remarks: Created through new member creation process

Career Type:

Details:

School:

Education:

Grad Year:

Username:

Soc Sec #: ← displays last 4

Aux ID:

Vendor ID:

Member Notes:

← Ties to birth date

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

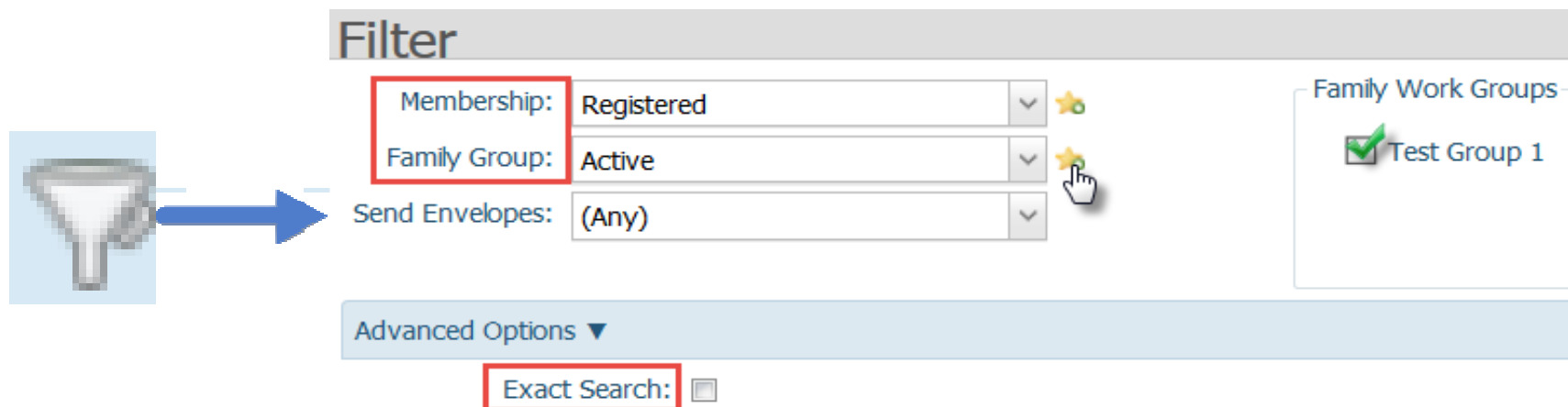
Add member to Existing Family

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

Membership: Registered

Family Group: Active

Send Envelopes: (Any)

Family Work Groups

Test Group 1

Advanced Options ▾

Exact Search:

- 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 ▲

Filter By ID: Diocesan ID

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date: From: To:

E-Mail Address:

E-Mail: (Any)

Postal Code:

City:

- 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

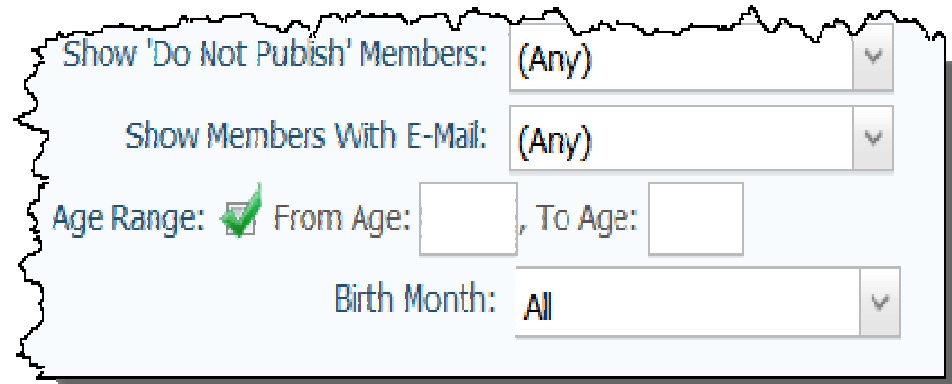
- Same process as Family List
- Many more fields available
 - More to filter for individuals than groups
- Save Membership, Family Group, and Member Status

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

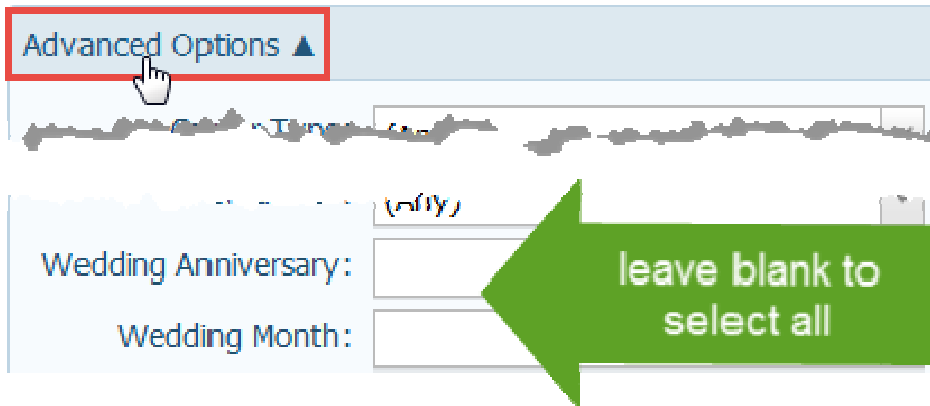
Quick Reports for Members

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



A screenshot of a software interface showing filter options for a report. The filters are: 'Show 'Do Not Publish' Members:' with a dropdown menu set to '(Any)'; 'Show Members With E-Mail:' with a dropdown menu set to '(Any)'; 'Age Range:' with a checked checkbox, 'From Age:' and 'To Age:' input fields; and 'Birth Month:' with a dropdown menu set to 'All'.

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

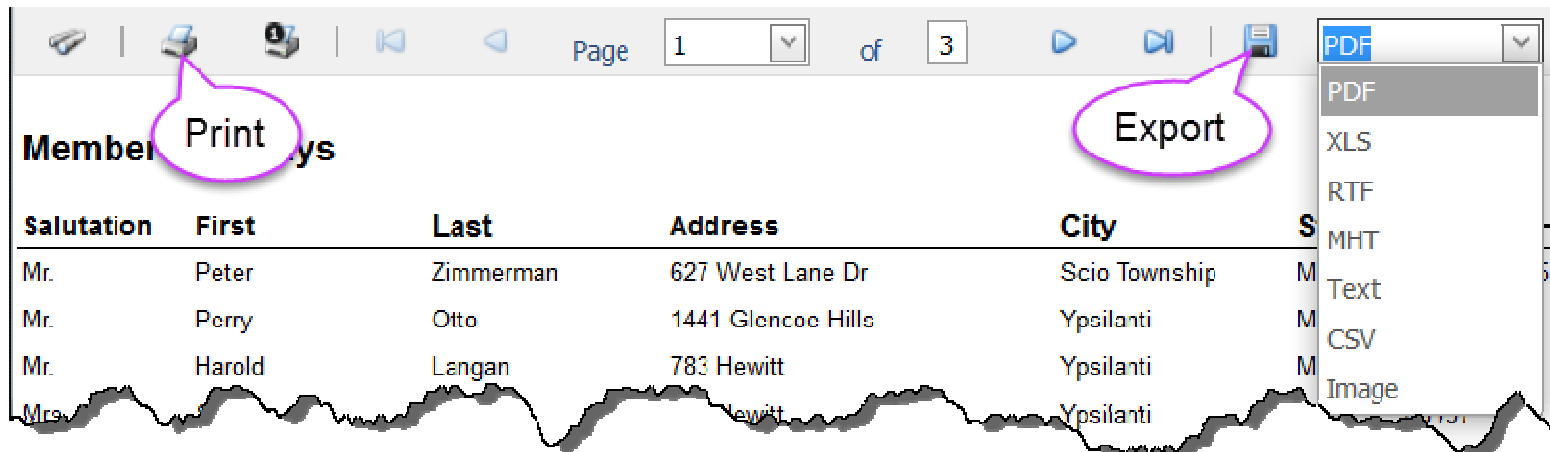


A screenshot of a software interface showing filter options for a report. The 'Advanced Options' section is highlighted with a red box and a mouse cursor. Below it, the 'Wedding Anniversary:' and 'Wedding Month:' input fields are shown. A green arrow points to these fields with the text 'leave blank to select all'.

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

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 

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: <input type="text"/>	Celebrant: Buckmaster, Bruce	Confirmation Name:
	DOB: 08/31/1982		
	Parents: <input type="text"/> Barbara Allen	Sponsors: <input type="text"/>	

- 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


Family Directory Reports


Select Report - Kenedy Statistics

Report Type	Report
Sacrament	Kenedy Statistics
Statistics	Parish Statistics
Census	

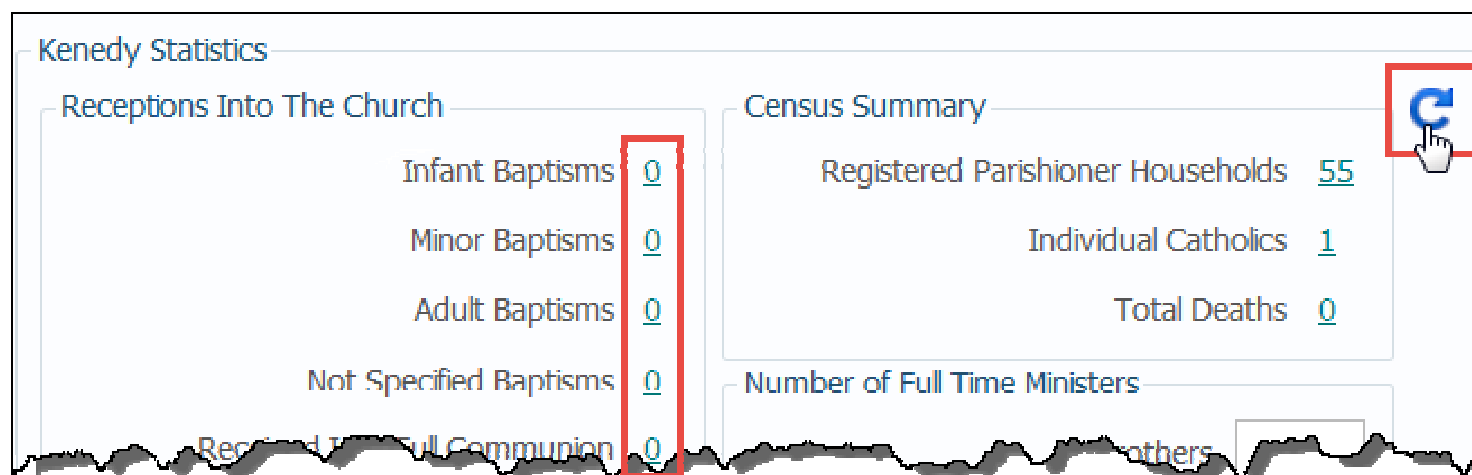
Select Filtering Options

Select Date Range

Start Date: 7/31/2014 

End Date: 7/31/2015 

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

Parish Statistics

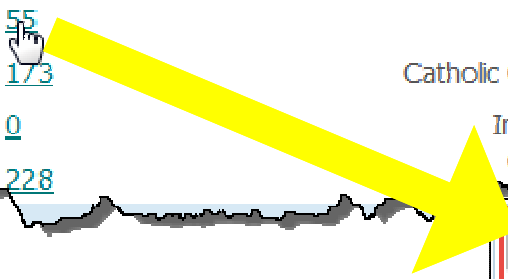
- Current snapshot of information in your database right now
 - Doesn't hold on to historical data
- Numbers are hyperlinks. Can click to see who fits that demographic

Parish Statistics

Households		Households without children	
Registered	55	Single	25
Un Registered	173	Catholic Couples	0
Not Specified	0	Interfaith Couples	9
Total	228		

Registered Households

Last Name	First Name(s)	Mailing Name
Abbott	Pat	Mr. Pat Abbott
Abney	Alexandra	Ms. Alexandra Abney
Allen	Leslie	Ms. Leslie Allen



Parish Directory

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

Family Options

Choose one or multiple family groups to display on the report

<input type="checkbox"/>	Family group(s)
<input checked="" type="checkbox"/>	Active
<input type="checkbox"/>	Contributor Only
<input type="checkbox"/>	Deceased
<input type="checkbox"/>	To

Member Options

Include Members

Registration Forms

The screenshot shows a software interface for generating registration forms. At the top, there is a header bar with a green checkmark icon, the name "Miss Barbara Allen", the address "111 S State", and the number "20". Below this is a pagination bar showing "Page 1 of 24 (233 Records)" and a series of page numbers from 1 to 24, with ellipses between 7 and 22. Below the pagination bar are three panels, each with a red circle containing a number:

- 1** Registration Status: Contains two checkboxes, "Registered Families" (checked) and "Non-Registered Families" (unchecked).
- 2** Report Options: Contains two radio buttons, "Auto Fill" (selected) and "Blank Form" (unselected).
- 3** Language Options: Contains three radio buttons, "English" (selected), "Español" (unselected), and "English & Español" (unselected).

1. Choose registration status
2. Auto fill with information from database, or print blank forms
3. Print in English, Spanish, or both

Exercise #5

Generate Parish Directory

QUESTIONS?

QUESTIONS?

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Thank you!

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