

Family Suite Tips & Tricks

Cole Janisch, Cristina Dargis, Elaine Tank

ParishSOFT



ParishSOFT®
Celebrating 20 Years of Service

Today's Agenda

- Searching vs. Filtering
- Grid Layout Adjustments
- Batch Management Filtering
- Quick Entry Posting
- Moving Members Into a New Family
- Adding a New Church or Celebrant
- Multiple sessions/tabs
- Home/Mailing other
- Emailing multiple family members at once



Searching vs. Filtering

- Family/Member List
 - Searching is broad while filtering is specific
 - How can filters affect your search?
 - What if a family does not appear in my results?

Family List Sample Parish, Ann Arbor

Search: Clear Search Results

A-Z 0-9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records Add New Family Delete Selected Families Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey	6491	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	1129	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> Admin, Dio		training@parishsoft.com		23 Parishsoft Way	Belleville
<input type="checkbox"/> Albert, Mike and Stacey	1201	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor

Searching vs. Filtering

- Advanced Filters allow you to be more specific with names, membership, addresses, etc.

Filter

Membership: Both

Family Group: All Groups

Send Envelopes: (Any)

Family Work Groups

Church Cleanup

School Families

School Families 2015-2016

Group Size

Advanced Options

Filter By ID: Diocesan ID

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date:

E-Mail Address:

E-Mail: (Any)

Postal Code:

City:

State\Region:

Show 'Send No Mail' Families: (Any)

Show 'Do Not Publish' Families: (Any)

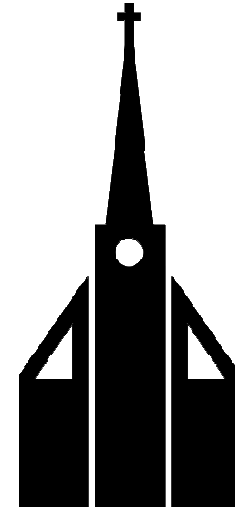
Show Families With E-Mail: (Any)

Exact Search:

Apply Clear Cancel

Grid Layout Adjustments

- Columns can be removed
- Columns can be reordered
- Column width can be adjusted



Family List

Sample Parish, Ann Arbor

▼ [Clear Search Results](#)

A-Z 0-9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey	6491	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	1129	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> Admin, Dio		training@parishsoft.com		23 Parishsoft Way	Belleville
<input type="checkbox"/> Albert, Mike and Stacey	1201	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor

Batch Filters

- Open is default, which means **Detailed**
- Pull down to reveal alternatives
- Choose All until you're comfortable with options
- Name batches by date with year first to keep in order

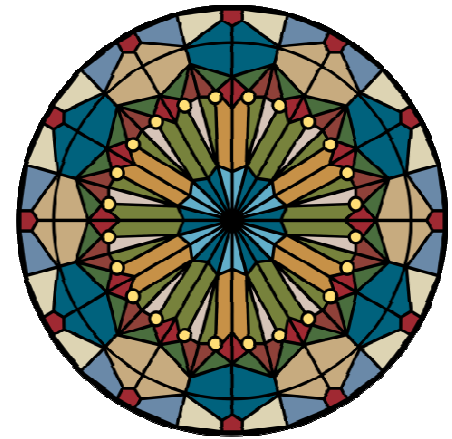
The screenshot shows the 'Batch Management' interface in ParishSOFT. The top navigation bar includes 'Home', 'Family Directory', 'Religious Education', 'Offering' (selected), and 'Ministry Scheduler'. Below this is a secondary navigation bar with 'Funds', 'Batches' (selected), 'Pledges', 'Posting', 'Contribution List', 'Giving History', and 'Imp'. The main content area is titled 'Batch Management' and features a toolbar with '100 records', '+ Add Batch', 'Delete Batch(s)', 'Close Batch(s)', and 'Quick Reports'. A table with columns 'Status', 'Batch', 'Cash', and 'Pled' is displayed. A dropdown menu is open over the 'Status' column, showing options: 'All', 'Open', 'Closed', 'Quick Entry', 'Committed', and 'All'. The table contains 12 records, with the first record highlighted in green.

Status	Batch	Cash	Pled
All			
Open	2016-1-10	\$1,000.35	
Closed	2016-1-3	\$890.00	
Quick Entry	2016-12-25 Offering	\$827.32	
Committed	2016-3-27 Offering	\$770.00	
All	2017-05-28 Offertory	\$500.00	
Quick Entry	2017-15-8 Pledge	\$500.00	
Closed	Building Campaign	\$0.00	
Open	Contribution Import 110617_1550	\$38,720.00	
Closed	Second Collection from Last Weekend	\$760.00	
Quick Entry	Spindler Batch	\$500.00	
Closed	test batch 11-22-17	\$550.00	
Closed	TEST2	\$0.00	

Page 1 of 1 (12 Records) < 1 >

Quick Entry Posting

- Quicker and easier than Detailed
- Saves contributions in real time
- Can track check numbers
- Color-coded for ease of use
- Mix and match funds in one batch
- Can enter contributions by envelope or name
- **NOTE:** Can NOT enter negative numbers



Quick Entry Posting

Options and Filters

Quick Entry Contribution Posting ✖

Batch Information Second Collection from Last Weekend (3005) ▼

Total	Balance	Transactions
\$760.00	\$760.00	0 transaction(s) - ✓ 0 valid - ✗ 0 invalid - 👤 0 family - 👤 0 member

Default Posting Data ⚙ Options and Filters

Fund Retired Religious ▼ Date 2/26/2018 📅 Type Check ▼

Posting

Env #	Last Name	Amount	Check #	Memo	Status
1	<input type="text" value="🔍"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Lookup a family/member and enter amount ⚙ 🗑
2	<input type="text" value="🔍"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Lookup a family/member and enter amount ⚙ 🗑

Moving Members Into a New Family

- Two common occurrences
 - Combining existing members who are marrying
 - Extracting a grown adult into their own family
- Steps are very specific to accomplish goal
 - Import tab for existing family
 - Create “placeholder” family for extraction



Moving Members Into a New Family

- Importing a spouse into the family

Mike Cooper

Family Details Member Details (1) Sample Parish, Ann Arbor

Michael Add **Import**

MemberDUID 1000114 Special Needs

Gender: Male Title: Mr. First Name: Michael Nick Name: Mike Middle Name: Last Name: Cooper Suffix: Maiden Name: Role: Head

Status: Active Birth Date: 12/22/1972 Birth Place: Age: 45 Date of Death: Religion: Language: Ethnicity: Marital Status: Single Envelope #: 0 Next Send?

Moving Members Into a New Family

- Extracting a grown child into its own family

Home **Family Directory** Religious Education Offering Ministry Scheduler Tuition IQ Administration

Family List Member List Sacraments Family Workgroups Member Workgroups Reports

Add New Family to Sample Parish, Ann Arbor

Family Member <small>(one or more required)</small>	Family Information	Family Address
Prefix:* Mr. <input type="text"/>	Family Group:* Active <input type="text"/>	Address Type: Home <input type="text"/>
→ First Name:* Fake <input type="text"/>	Send Magazine: <input type="checkbox"/>	Address Line 1:* 123 Main St <input type="text"/>
Nick Name: <input type="text"/>	Registration Status: <input checked="" type="checkbox"/>	Address Line 2: <input type="text"/>
→ Last Name:* Placeholder <input type="text"/>	Registration Date: 2/26/2018 <input type="text"/>	Postal Code:* 48108 <input type="text"/>
Suffix: <input type="text"/>	Auto Fill Family Names	City: Ann Arbor <input type="text"/>
→ Type:* Husband <input type="text"/>	Last Name:* Placeholder <input type="text"/>	State/Region: Michigan <input type="text"/>
Gender: Male <input type="text"/>	First Name(s)*: Fake <input type="text"/>	Country: United States <input type="text"/>
Birth date: <input type="text"/>	Formal Mailing Name: Mr. Fake Placeholder <input type="text"/>	
E-Mail Address: <input type="text"/>	Informal Name: Fake Placeholder <input type="text"/>	
Add Another Member	Formal Salutation: Mr. Placeholder <input type="text"/>	
	Informal Salutation: Fake <input type="text"/>	
	E-Mail Address: <input type="text"/>	

Save & New Save & Edit Save & Finish Cancel

Adding a New Church or Celebrant

- It's easy and YOU can do it!
- Churches added from Home screen
- Celebrants added from Administration
- You can custom-order celebrant list
- New organizations can be more than churches



Adding a Custom Organization

Home | Family Directory | **Organization Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Home | Pictorial Directory | **Organization Directory** | Giving History | Start Page Settings

Organization Group: All City:
Organization ID: State/Province:
Organization Name: Postal Code:

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Parish Name [Clear Filter](#)

10 records

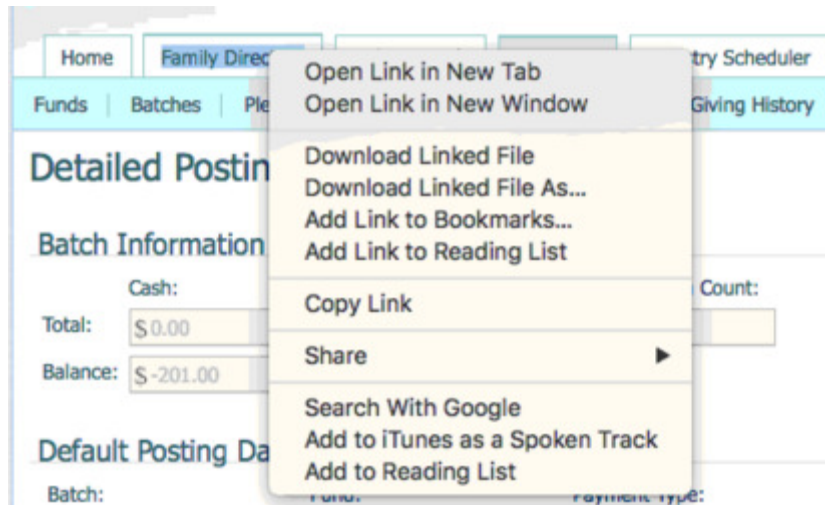
	Parish Name	Address	City	State/Region	Postal Code	Country
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	598 Needmore Lane, N.E.	Floyd	VA	24091	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	435 4th St NE	Minneapolis	MN	55413	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	19795 Holyoke Ave	Lakeville	MN	55044	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints - St. Aidan Parish	PO Box 185	New Richland	MN	56072	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2233 Diamond Avenue	Grand Rapids	MI	49505	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2855 E. Livingston Ave.	Columbus	OH	43209	USA

Adding a New Celebrant

The screenshot displays the ParishSOFT administration interface. At the top, a navigation bar includes tabs for Home, Family Directory, Religious Education, Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below this, a secondary menu shows options like Suspense, Lookups (highlighted with a red box), System Setup, Organizations, Manage Staff, Module Settings, Utilities, and Notifications. The main content area is titled 'Lookup Management' and includes a dropdown menu for 'Sample Parish, Ann Arbor'. On the left, a 'Tables' sidebar lists various lookup categories, with 'Celebrants' under the 'Family Directory' section. The main table, titled 'Celebrants', shows a list of records with columns for 'Description' and checkboxes. A red box highlights the table's toolbar, which contains a '100 records' dropdown, navigation arrows, a plus sign, and sorting options 'Sort A to Z' and 'Sort by #'. An 'Add "Celebrant" Record' dialog box is open in the foreground, featuring a 'Description' input field and 'Save' and 'Cancel' buttons. The table lists the following celebrants: Reverend Carl Judge, Reverend Wes Bozzetto, Cardinal John Fleischer, Bishop Dan France, Bishop Dan Burton, and Bishop Drew Seuss.

Easy way to correct a mistake

- You can have multiple sessions open at a time.
 - PC browsers
 - Right click on tab and Duplicate tab
 - Mac/Safari
 - Right click on tab and Open Link in New Tab



Address Home/Mailing/Other...


- Family Tab

Mr. and Mrs. Todd Adams (100332) Env#: 1129

Family Details Member Details (4) All Saints Parish, Ann Arbor

Family Information Notes

Church of Registration: All Saints Parish, Ann Arbor
Details Modified On: Thursday, April 19, 2018 10:35 AM
Family Group: Active
Registration Status:
Registration Date: 9/15/2017
Unregistered Date:


[Add](#) [Delete](#)

Last Name*: Adams
First Name(s)*: Todd and Jane
Formal Mailing Name: Mr. and Mrs. Todd Adams
Informal Name: Todd and Jane Adams } [Auto Fill](#)
Formal Salutation: Mr. and Mrs. Adams
Informal Salutation: Todd and Jane
Email Address: adamsfamily@demochurch.com;cdargis@y
Primary Phone: 734-621-1212
Emergency Phone: 734-658-3252
Emer. Ph. Desc.: Aunt Betty

Primary Address: Mailing Address

Home Mailing Other

Country: United States
Postal Code: 48106 1245 ... ✖
Address Line 1: PO Box 1245
Address Line 2:
City: Ann Arbor
State/Region: Michigan
Phone Number:

- Reports/labels/mail merge

Emailing Multiple People



QUESTIONS?

QUESTIONS?

ParishSOFT®
Celebrating 20 Years of Service



Thank you!

Cole Janisch, Cristina Dargis, Elaine Tank
ParishSOFT



ParishSOFT®
Celebrating 20 Years of Service