

# Key Insights for Pastors from Your Family Suite Database

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ParishSOFT



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Celebrating 20 Years of Service



# Today's Agenda

Key Data

Reports

Registration

Sacramental

Contribution

Administration

## Key Data to Track

- Family Group
- Contact Information
- Birth Dates
- Career Type



## Family Group

- How “registered” are they really?
- All staff knows each status
  - List on the “cheat sheet”


# Happy Birthday!

- Who SHOULD be in RE?
- Ministry opportunities
- Who should be solicited for pledges?
- Small group invitations

Dave Ackeret-Jose

Family Details | **Member Details (3)** | Christ the Redeemer

Pearl | Carl | **David** | Add | Import



Change Delete  
MemberDUID 627707  
Special Needs   
Too much cuteness

Gender: Male | Title: Mr. | Status: \*  
 First Name: David | Birth Date: \*  
 Nick Name: Dave | Birth Place: \*  
 Middle Name: Octavio | Age: \*  
 Last Name: Ackeret-Jose | Date of Death: \*  
 Suffix: | Religion: \*  
 Maiden Name: | Language: \*  
 Role: Adult | Ethnicity: \*  
 Marital Status: \*  
 Envelope #: \*

**General** | Contact | Sacraments | Religious Ed. | Misc.

General | Education & Career | Add

Father Name: Carl Ackeret | Career Type: **Physician** | U:  
 Mother Name: Pearl Ackeret | Details: | Sc  
 Mother Maiden Name: Jose | School: | Ve  
 Sacrament Remarks: Created through new member creation process | Education: |  
 Grad Year: 1995

Save | Save & Close | **Cancel** | Close

## Career Type

- Anything ever broke at your parish?
- Got extra money?
- Win-win situation



# Kenedy Statistics

Home | **Family Directory** | Religious Ed. | Offering | Ministry Scheduler | Tuition | Diocesan Development | IQ | Administration

Family List | Member List | Sacraments ▾ | Family Workgroups | Member Workgroups | **Reports**

## Family Directory Reports

Christ the Redeemer, Ann Arbor

### Select Report - Kenedy Statistics

Report Type	Report
Sacrament	<b>Kenedy Statistics</b>
<b>Statistics</b>	Parish Statistics
Census	

### Select Filtering Options

Select Date Range

**Start Date:** 1/1/2000

**End Date:** 12/31/2017

### Kenedy Statistics

Receptions Into The Church

- Infant Baptisms [116](#)
- Minor Baptisms [5](#)
- Adult Baptisms [11](#)
- Not Specified Baptisms [1](#)
- Received Into Full Communion [0](#)
- First Communions [0](#)
- Confirmations [127](#)

Marriages

- Catholic [0](#)
- Interfaith [0](#)
- Total [0](#)
- Not Specified Marriages [0](#)

### Census Summary

- Registered Parishioner Households [879](#)
- Individual Catholics [95](#)
- Total Deaths [88](#)

Number of Full Time Ministers

- Brothers
- Sisters
- Lay Ministers

Religious Educations

- Elementary Students [21](#)
- High School Students [5](#)
- Total K-12 [26](#)



# Contribution Summary Report

- Total number of donors
- Total number of contributions
- Total donations
- Average amount

# Contribution Trend Graphs

Home | Family Directory | Religious Ed. | **Offering** | Ministry Scheduler | Tuition | Diocesan Development | IQ | Administration






Funds | Batches | Pledges | Posting ▾ | **Contribution List** | Giving History | Import | Reports

## Contribution List

Christ the Redeemer, Ann Arbor ▾

Contribution List Filters

**Start Date** 01/01/2017 **End Date** 04/25/2018 [View Contributions](#)

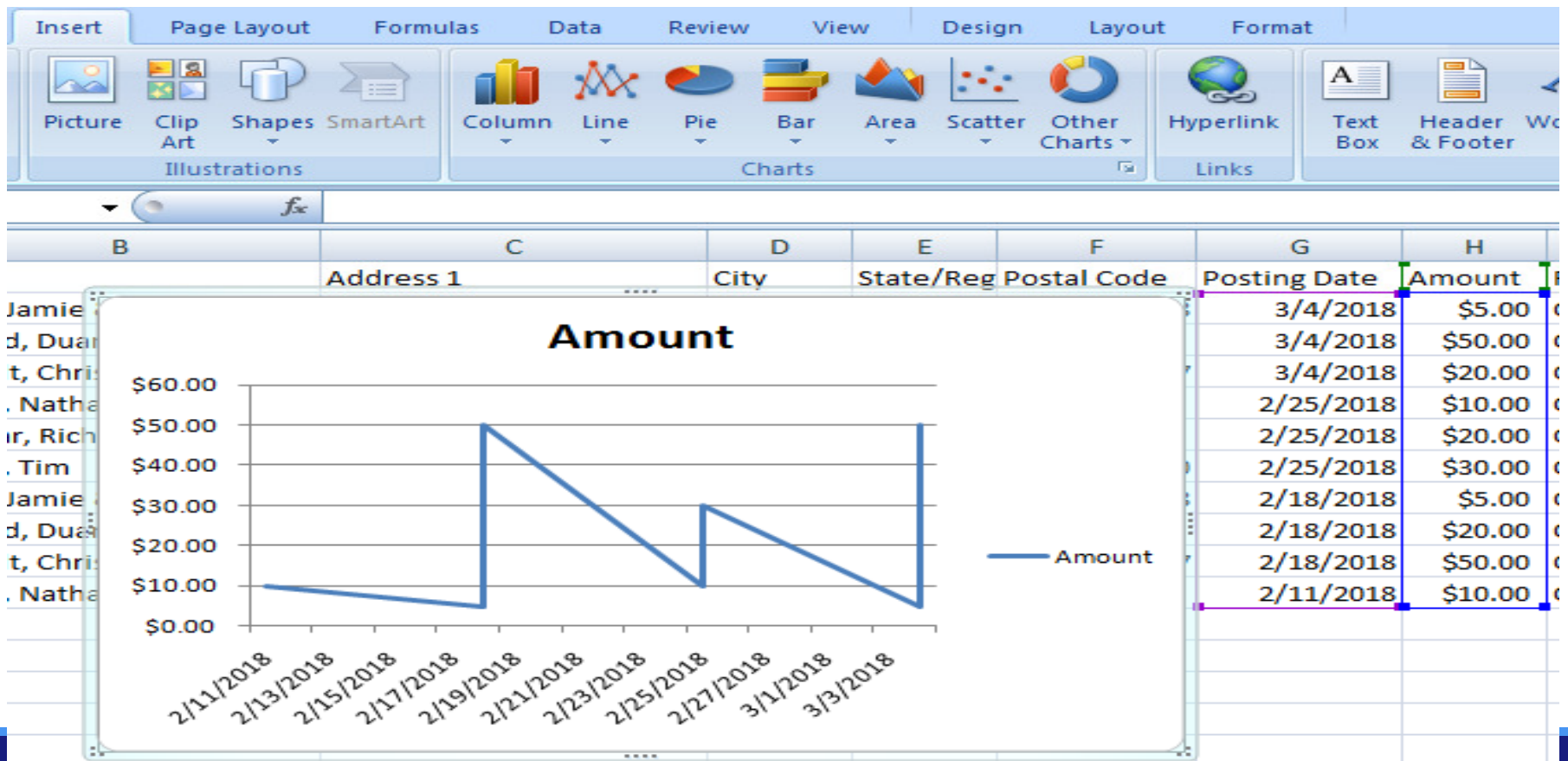
10 records ▾      [Quick Reports ▾](#)

<input type="checkbox"/>	Posting Date ▾	Env #	Name	Amount	Fund	Batch
<input type="checkbox"/>						
<input type="checkbox"/>	02/25/2018	6	Abel, Jamie & Tressa	\$5.00	Offering	2017-12-31 Sunday C
<input type="checkbox"/>	02/25/2018	5	Sebold, Duane and Carol	\$20.00	Offering	2017-12-31 Sunday C
<input type="checkbox"/>	02/25/2018	4	Arendt, Christopher and Diane	\$20.00	Offering	2017-12-31 Sunday C
<input type="checkbox"/>	02/25/2018	3	Denis, Nathan	\$10.00	Offering	2017-12-31 Sunday C
<input type="checkbox"/>	02/25/2018	2	Vognar, Richard and Julie	\$20.00	Offering	2017-12-31 Sunday C
<input type="checkbox"/>	02/25/2018	1	Baker, Tim	\$20.00	Offering	2017-12-31 Sunday C

## Contribution Trend Graphs

- Move Date Posted column next to Amount
- Highlight Date Posted and Amount columns
- Go to Insert tab
  - Select a Chart type
- Copy & paste the graph into reports

# Contribution Trend Graphs



## Staff Permissions

- Unlimited Users (NO SHARING LOGINS!!)
- Per-module access
- Multiple organizations
- Manage login/password

# Bey, Allen (54304)

Assignments

Positions

Access Rights

Notes

Christ the Redeemer, Ann Arbor: Youth Minister

Start Date: 5/1/2008



End Date:



Assignment Deleted

Primary Assignment

Show in Kenedy Dir.

Grant Login Privileges

Edit/View Pastoral Notes

## ParishSOFT Modules

Organization Admin

### Family Directory

View

- Add/Edit
- Delete
- Print
- Import

### Offering

View

- Add/Edit
- Close Batch
- Delete
- Giving History
- Import
- Print

### Ministry Scheduler

View

- Add/Edit
- Delete
- Print

### Religious Education

View

- Add/Edit
- Delete
- Print
- Tuition

[Select All](#) - [Clear All](#)

### Tuition

View

- Add/Edit
- Delete
- Print
- Import

### IQ

View

- Add/Edit
- Delete
- Import/Export

### ParishSOFT

- ParishSOFT Access
- Suspense Reviewer

Edit Details

Close

# Bachelor, Jeffrey (627723)

Assignments

Positions

Access Rights

Notes

## Additional Information

Username\*: jbachelor

SS Num:

Email Address\*: jbachelor@parishsoft.co

Email Username:

Email Password:

Outgoing Mail Server:

Reset Password

## Add Assignment

Add Additional Assignment

## Assignments Details

Pri.	Assignment	Organization			
<input checked="" type="checkbox"/>	Christ the Redeemer	Ann Arbor	Youth Minister	9/16/2013	
<input type="checkbox"/>	Diocese of Demo	Ann Arbor	System Admin	11/23/2015	
<input type="checkbox"/>	Holy Trinity	Grosse Pointe	Coach	4/24/2015	

1 of 1 (3 Assignments) < 1 >

Christ the Redeemer, Ann Arbor: Youth Minister

Christ the Redeemer, Ann Arbor: Youth Minister

Diocese of Demo, Ann Arbor: System Admin

Holy Trinity, Grosse Pointe: Coach

Edit Details

Close

# Manage login/password

Bey, Allen (54304)

Assignments | Positions | Access Rights | Notes | Christ t

**Additional Information**

Username\*: bey\_allen

SS Num:

Email Address\*: fwhiting@parishsoft.com

Email Username:

Email Password:

Outgoing Mail Server:

**Reset Password**

Add Assignment

Add Additional Assignment

**Assignments Details**

Pri. Assignment	Organization	C
<input checked="" type="checkbox"/>	Christ the Redeemer	A

1 of 1 (1 Assignments) < 1 >

Christ the Redeemer, Ann Arbor: Youth Minister

Assignment Deleted  Primary Assignment  Show in Kene

Grant Login Privileges  Edit/View Pas

**stry Scheduler**

View

- Add/Edit
- Delete
- Print

**Religious Education**

View

- Add/Edit
- Delete
- Print

Tuition

[Select...](#)

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**Edit Details** Close



# QUESTIONS?

QUESTIONS?

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# Thank you!

Jeffrey Bachelor  
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