Key Insights for Pastors from Your Family Suite Database

Jeffrey Bachelor
ParishSOFT
Today’s Agenda

Key Data
Registration
Contribution
Reports
Sacramental
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
Career Type

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

Family List

Filter

- Membership: Both
- Family Group: All Groups
- Send Envelopes: (Any)

Advanced Options

Filter By ID: Diocesan ID
Contribution Summary Report

• Total number of donors
• Total number of contributions
• Total donations
• Average amount
## Contribution Trend Graphs

### Contribution List

<table>
<thead>
<tr>
<th>Posting Date</th>
<th>Env #</th>
<th>Name</th>
<th>Amount</th>
<th>Fund</th>
<th>Batch</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/25/2018</td>
<td>6</td>
<td>Abel, Jamie &amp; Tressa</td>
<td>$5.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
<tr>
<td>02/25/2018</td>
<td>5</td>
<td>Sebold, Duane and Carol</td>
<td>$20.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
<tr>
<td>02/25/2018</td>
<td>4</td>
<td>Arendt, Christopher and Diane</td>
<td>$20.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
<tr>
<td>02/25/2018</td>
<td>3</td>
<td>Denis, Nathan</td>
<td>$10.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
<tr>
<td>02/25/2018</td>
<td>2</td>
<td>Vognar, Richard and Julie</td>
<td>$20.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
<tr>
<td>02/25/2018</td>
<td>1</td>
<td>Baker, Tim</td>
<td>$20.00</td>
<td>Offering</td>
<td>2017-12-31 Sunday Church</td>
</tr>
</tbody>
</table>
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
Staff Permissions

- Unlimited Users (NO SHARING LOGINS!!)
- Per-module access
- Multiple organizations
- Manage login/password
## Bachelor, Jeffrey (627723)

### Additional Information
- **Username:** jbachelor
- **Email Address:** jbachelor@parishsoft.co

### Assignments Details

<table>
<thead>
<tr>
<th>Pri. Assignment</th>
<th>Organization</th>
<th>Location</th>
<th>Role</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>✓</td>
<td>Christ the Redeemer</td>
<td>Ann Arbor</td>
<td>Youth Minister</td>
<td>9/16/2013</td>
</tr>
<tr>
<td>☐</td>
<td>Diocese of Demo</td>
<td>Ann Arbor</td>
<td>System Admin</td>
<td>11/23/2015</td>
</tr>
<tr>
<td>☐</td>
<td>Holy Trinity</td>
<td>Grosse Pointe</td>
<td>Coach</td>
<td>4/24/2015</td>
</tr>
</tbody>
</table>

1 of 1 (3 Assignments)
Manage login/password
QUESTIONS?
Thank you!

Jeffrey Bachelor
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