Family Suite Tips & Tricks

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ParishSOFT
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?
Searching vs. Filtering

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

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

### Batch Information

<table>
<thead>
<tr>
<th>Total</th>
<th>Balance</th>
<th>Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>$760.00</td>
<td>$760.00</td>
<td>0 transactions - 0 valid - 0 invalid - 0 family - 0 member</td>
</tr>
</tbody>
</table>

### Default Posting Data

<table>
<thead>
<tr>
<th>Fund</th>
<th>Date</th>
<th>Type</th>
<th>Check</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retired Religious</td>
<td>2/26/2018</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Posting

<table>
<thead>
<tr>
<th>Env #</th>
<th>Last Name</th>
<th>Amount</th>
<th>Check</th>
<th>Memo</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

ParishSOFT®
Celebrating 20 Years of Service
Moving Members Into a New Family

• Importing a spouse into the family
Moving Members Into a New Family

• Extracting a grown child into its own family
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

[Image of ParishSOFT interface showing the Organization Directory]

[Open ParishSOFT website](https://www.parishsoft.com)
Adding a New Celebrant
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

- Reports/labels/mail merge
Emailing Multiple People
QUESTIONS?
Thank you!

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