ParishSOFT Family Directory
Hands-on Training

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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: 

Refine search using name & city

Family Name | Registered Organization | Family DUID | Diocese

New | Add New Family | Move Selected Family

ParishSOFT
Celebrating 20 Years of Service
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 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 Information

- Family Group
  - Defaults to “active”

- Registration Status
  - Defaults to “registered”

- Registration Date
  - Defaults to today

![Family Information Form](image-url)
Family Information

- Pulls first/last name of Head, Husband, Wife
- Can have different last names

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

• Cancels the information
• Saves the family and allows you to add another new family
• Saves current family and opens details to continue editing
• 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)
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
Additional Family Details

- 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
Member Details

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

### General
- Father Name:
- Mother Name:
- Mother Maiden Name:
- Sacrament Remarks: Created through new member creation process

### Contact

### Sacraments
- Career Type:
- Details:
- School:
- Education:
- Grad Year:

### Religious Ed.

### Misc.
- Username:
- Soc Sec #:
- Aux ID:
- Vendor ID:
- Member Notes:

- Ties to birth date
- Displays last 4
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 is comprehensive – results must meet all selected criteria
  - Same process for Family & Member List
- Save Membership/Family Group
- Can do exact search
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
- Birthday Report – report of member birthdays
- Can filter by age range and month
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
Sacramental Registry

- 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
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 Directory

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

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?
Thank you!

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