

PARISHSOFT NEWSLETTER

Brought to you weekly by the Diocese of Salt Lake City

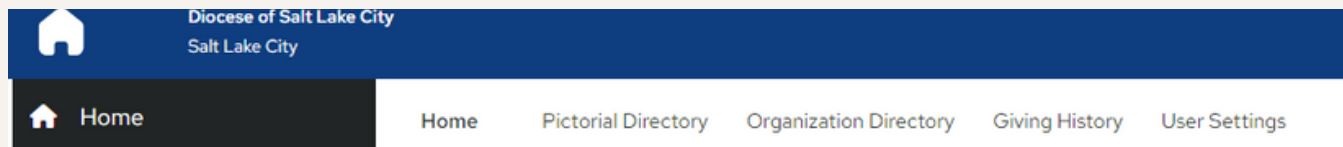
Our Goal is to make ParishSOFT information easily accessible to all Parishes in the Diocese, and guide all with simple tips & tricks when using ParishSOFT 💡

Our Weekly Focus: How to Look up Family & Member Giving History

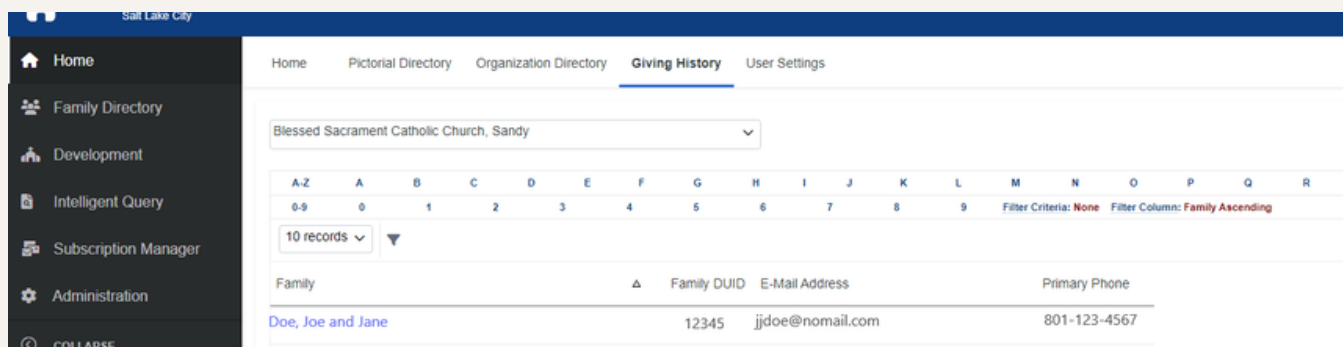
This week we will be looking at how to look at the Giving History and the ways you can look up this information for families and members in your parish.

METHOD 1: HOME SCREEN

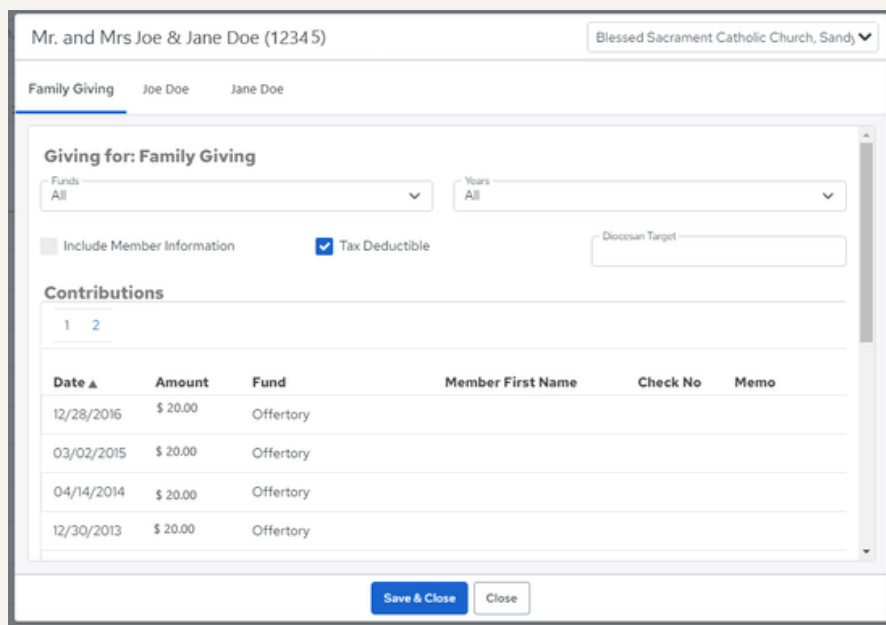
From the Home Screen you can select the tab "Giving History"



This will bring up the 'Family List' Giving History for your Parish:



You can search and select the Family, and it will open the "Family Giving":



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You are able to search the Giving History Funds and for a particular year : *(Please note Funds will differ per family)*

The Giving History will be listed by 'Contributions' and 'Pledges':

Contributions					
Date ▲	Amount	Fund	Member First Name	Check No	Memo
08/08/2020	\$0.00	DDD 2020			
08/08/2020	\$300.00	DDD 2020			
Total Contributions: \$300.00					

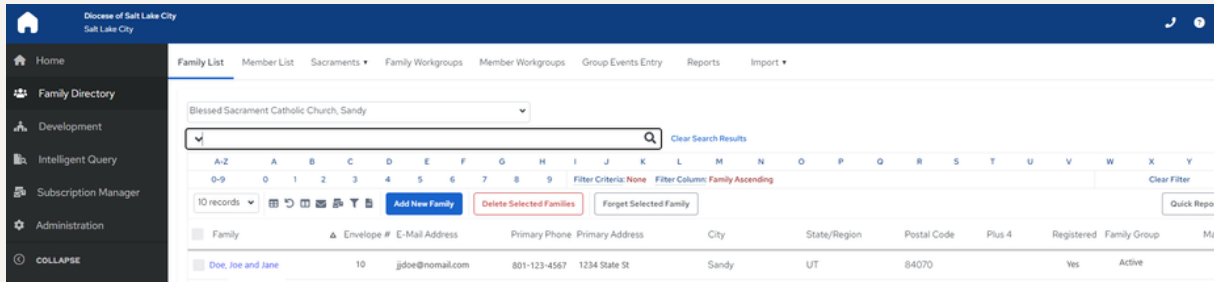
Pledges						
Fund	Pledge Amount	Balance Due	Payments Remaining	First Payment-Date	Pledge Date ▲	Adjust
DDD 2020	\$300.00	\$0.00	0	08/08/2020	08/08/2020	
Total Pledges: \$300.00						

You are able to look at a 'Member' Giving History as well, by selecting on the name of the family member:

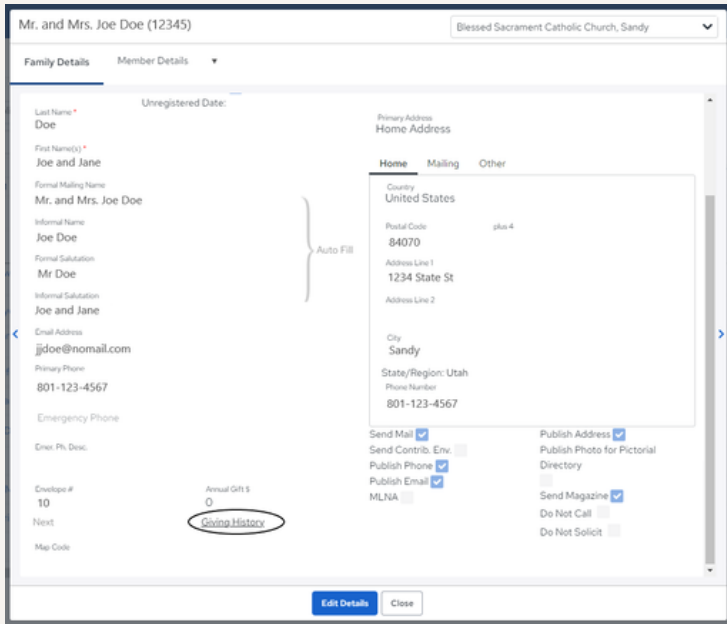
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METHOD 2: FAMILY DIRECTORY

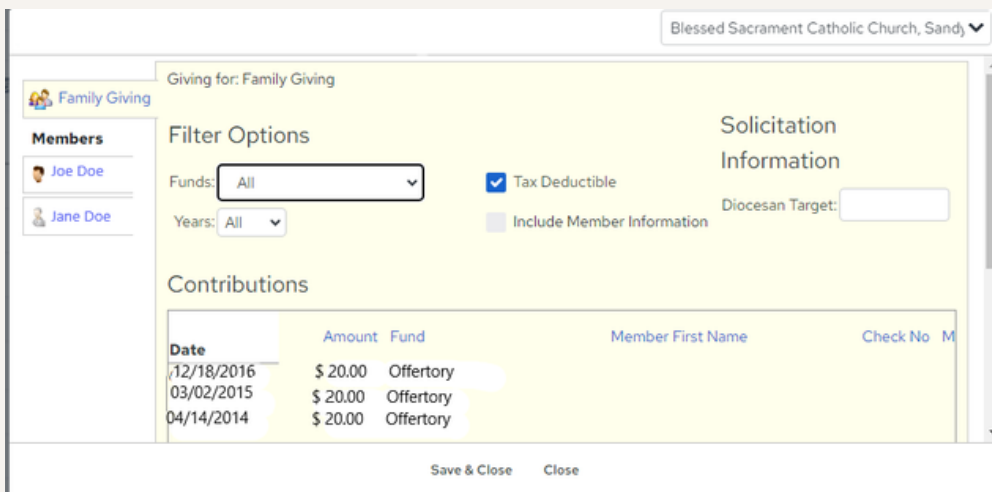
From the Family Directory you can search and select from the 'Family List':



Once you have selected the family, the 'Family Details' will open and at the bottom of the box will be the option "Giving History":



This will open the 'Family Giving' box:



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METHOD 2: FAMILY DIRECTORY

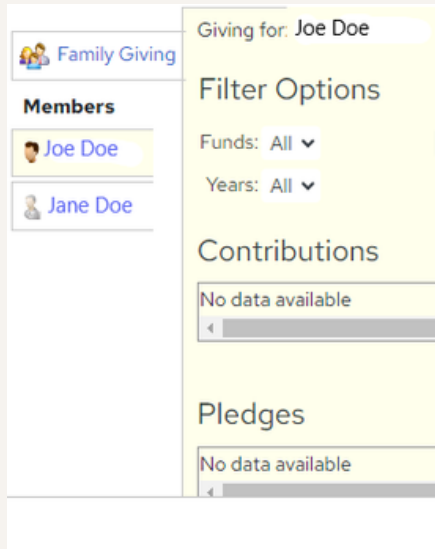
Again you are given the 'Filter Options' so that you can select a fund and a specific year:

Filter Options

Funds: All Tax Deductible

Years: All Include Member Information

PLEASE NOTE! You can only access the Giving History via the 'Family List' tab and **NOT** the 'Member List' tab on the Family Directory page. Member's giving history will reflect in the 'Family Giving" box:



ParishSOFT Latest Update

For more information on training and updates, you can visit the ParishSOFT website via the links provided for their [Success Lab](#) and [Home Support Page](#).

For All ParishSOFT FamilySuite related matters, contact:

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of Salt Lake City