

# Ask the Expert

Troy Hayes  
ParishSOFT



**ParishSOFT®**  
Celebrating 20 Years of Service

# Today's Agenda

Families With Two  
Last Names

Managing  
Duplicates

Printing Invoices

Creating and Using  
Workgroups

Adult Children

Unregistered but  
Contributing Families

Adding New Church  
or Celebrant

Questions

# Q: How to Enter Families With Two Last Names?

James Garcia		Sandra Sanchez	
Family Details	Member Details (2) ▾	Family Details	Member Details (2) ▾
James	Sandra	Add	Import
	Gender: <input type="text" value="Male"/>		Gender: <input type="text" value="Female"/>
	Title: <input type="text" value="Mr."/>		Title: <input type="text" value="Ms."/>
	First Name: <input type="text" value="James"/>		First Name: <input type="text" value="Sandra"/>
	Nick Name: <input type="text" value="James"/>		Nick Name: <input type="text" value="Sandra"/>
	Middle Name: <input type="text" value="W"/>		Middle Name: <input type="text" value="K"/>
MemberDUID 398373	Last Name: <input type="text" value="Garcia"/>	MemberDUID 398375	Last Name: <input type="text" value="Sanchez"/>
Special Needs <input type="checkbox"/>	Suffix: <input type="text"/>	Special Needs <input type="checkbox"/>	Suffix: <input type="text"/>
<input type="text"/>	Maiden Name: <input type="text"/>	<input type="text"/>	Maiden Name: <input type="text"/>
	Role: <input type="text" value="Husband"/>		Role: <input type="text" value="Wife"/>

# Q: How to Enter Families With Two Last Names?

Mr. James Garcia and Ms Sandra Sanchez (153883)

Family Details Member Details (2) Cathedral of San Demo, Ann Arbor

Family Information Notes

Church of Registration: Cathedral of San Demo, Ann Arbor  
Details Modified On: Monday, October 29, 2018 5:03 PM  
Family Group: Active  
Registration Status:   
Registration Date: 1/4/1998  
Unregistered Date:

Last Name: Garcia  
First Name(s): James and Sandra  
Formal Mailing Name: Mr. James Garcia and Ms Sandi  
Informal Name: James Garcia and Sandra Sancl } Auto Fill  
Formal Salutation: Mr. Garcia and Ms Sanchez  
Informal Salutation: James and Sandra

Primary Address: Home Address  
Home Mailing Other  
Country: United States  
Postal Code: 49855  
Address Line 1: 1207 Nve Rd

# Q: How to Enter Families With Two Last Names?

**James Garcia-Sanchez**

Family Details Member Details (2) Ca

James Sandra Add Import

MemberDUID 398373

Special Needs

Gender:

Title:

First Name:

Nick Name:

Middle Name:

Last Name:

Suffix:

Maiden Name:

Role:

**Sandra Garcia-Sanchez**

Family Details Member Details (2) (

James Sandra Add Import

MemberDUID 398375

Special Needs

Gender:

Title:

First Name:

Nick Name:

Middle Name:

Last Name:

Suffix:

Maiden Name:

Role:

# Q: How to Enter Families With Two Last Names?

Mr. and Ms James Garcia-Sanchez (153883)

Family Details | Member Details (2) | Cathedral of San Demo, Ann Arbor

Family Information | Notes

 Church of Registration: Cathedral of San Demo, Ann Arbor  
Details Modified On: Monday, October 29, 2018 5:41 PM  
Family Group: Active  
Registration Status:   
Registration Date: 1/4/1998  
Unregistered Date:

Last Name\*: Garcia-Sanchez  
First Name(s)\*: James and Sandra  
Formal Mailing Name: Mr. and Ms James Garcia-Sancl  
Informal Name: James and Sandra Garcia-Sanc } Auto Fill  
Formal Salutation: Mr. and Ms Garcia-Sanchez  
Informal Salutation: James and Sandra  
Email Address:  
Primary Phone: 555-2222  
Emergency Phone: 555-3333  
Emer. Ph. Desc.:

Primary Address: Home Address

Home | Mailing | Other

Country: United States  
Postal Code: 49855  
Address Line 1: 1207 Nye Rd  
Address Line 2:  
City: Marquette  
State/Region: Michigan  
Phone Number: 555-2222



# **Moving Adult Children to Their Own Family**

# Q: When and How to Move Adult Children Into Their Own Families?

- **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 “fake” family for extraction

# Q: When and How to Move Adult Children Into Their Own Families?

- Importing a spouse into the family

Mike Cooper

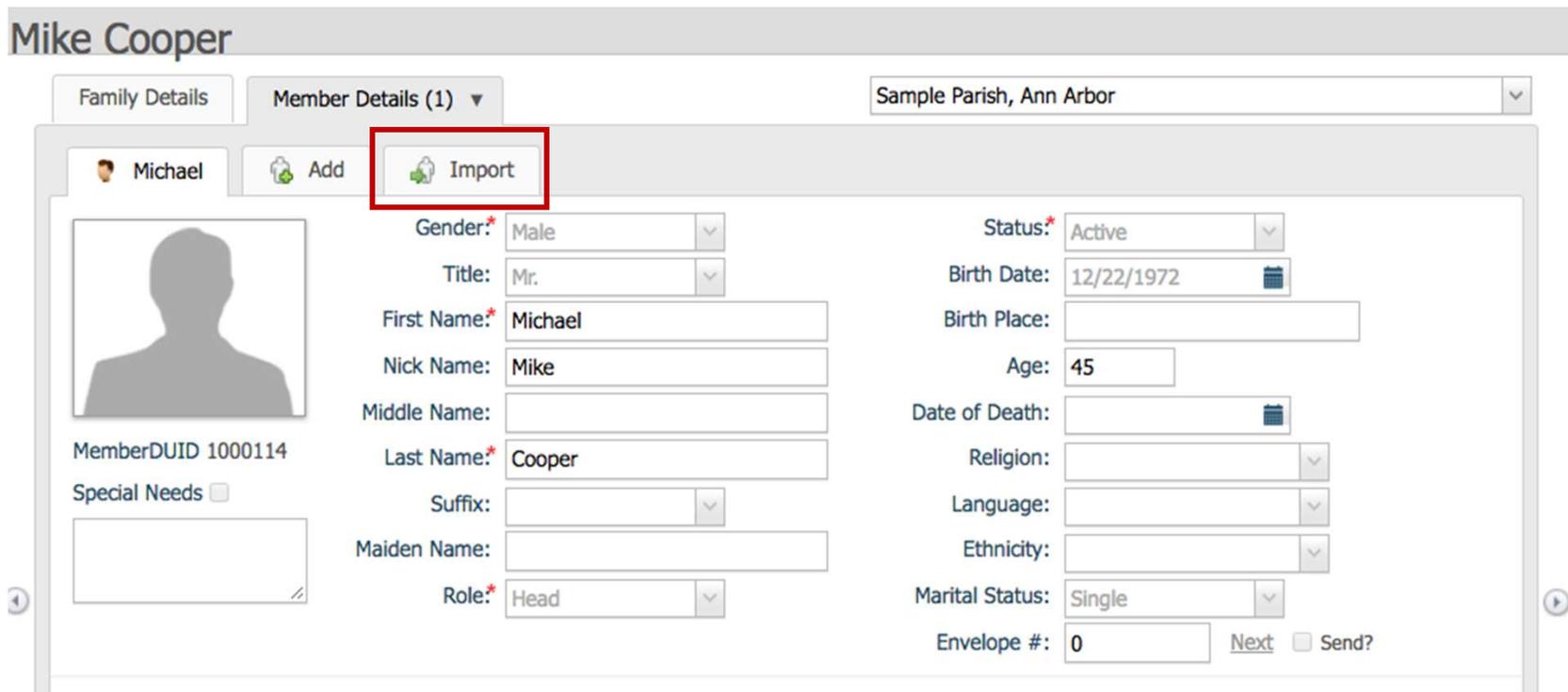
Family Details Member Details (1) Sample Parish, Ann Arbor

Michael Add Import

MemberDUID 1000114 Special Needs

Gender: Male Title: Mr. First Name: Michael Nick Name: Mike Middle Name: Last Name: Cooper Suffix: Maiden Name: Role: Head

Status: Active Birth Date: 12/22/1972 Birth Place: Age: 45 Date of Death: Religion: Language: Ethnicity: Marital Status: Single Envelope #: 0 Next Send?



# Q: When and How to Move Adult Children Into Their Own Families?

- Extracting a grown child into its own family

Home **Family Directory** Religious Education Offering Ministry Scheduler Tuition IQ Administration

Family List Member List Sacraments Family Workgroups Member Workgroups Reports

### Add New Family to Sample Parish, Ann Arbor

Family Member <i>(one or more required)</i>	Family Information	Family Address
Prefix:* Mr. <input type="text"/>	Family Group:* Active <input type="text"/>	Address Type: Home <input type="text"/>
→ First Name:* Fake <input type="text"/>	Send Magazine: <input type="checkbox"/>	Address Line 1:* 123 Main St <input type="text"/>
Nick Name: <input type="text"/>	Registration Status: <input checked="" type="checkbox"/>	Address Line 2: <input type="text"/>
→ Last Name:* Placeholder <input type="text"/>	Registration Date: 2/26/2018 <input type="text"/>	Postal Code:* 48108 <input type="text"/>
Suffix: <input type="text"/>	<a href="#">Auto Fill Family Names</a>	City: Ann Arbor <input type="text"/>
→ Type:* Husband <input type="text"/>	Last Name:* Placeholder <input type="text"/>	State/Region: Michigan <input type="text"/>
Gender: Male <input type="text"/>	First Name(s)*: Fake <input type="text"/>	Country: United States <input type="text"/>
Birth date: <input type="text"/>	Formal Mailing Name: Mr. Fake Placeholder <input type="text"/>	
E-Mail Address: <input type="text"/>	Informal Name: Fake Placeholder <input type="text"/>	
<a href="#">Add Another Member</a>	Formal Salutation: Mr. Placeholder <input type="text"/>	
	Informal Salutation: Fake <input type="text"/>	
	E-Mail Address: <input type="text"/>	

Save & New Save & Edit Save & Finish Cancel



# How To Handle Duplicate Families

# Q: How To Handle Duplicate Families?

- Contact Susan Shirley at the Archdiocese
  - [sshirley@archatl.com](mailto:sshirley@archatl.com)
- Be Sure to Get Family DUID's for the Master Family and the Duplicate Family

# Q: How To Handle Duplicate Families?

Home | **Census** | Ministry Scheduler | Diocesan Development | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

## Family List

Cathedral of San Demo, Ann Arbor

▼ hayes  [Clear Search Results](#)

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Descending Clear Filter

25 records         [Add New Family](#) [Delete Selected Families](#) [Quick Reports](#)

<input type="checkbox"/> Family	▼ Family DUID	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> <a href="#">Hayes, Troy</a>	250489		<a href="mailto:troydhayes2@gmail.com">troydhayes2@gmail.com</a>		207 Miller Avenue	Ann Arbor
<input type="checkbox"/> <a href="#">Hayes, Troy</a>	250587				213 Miller Avenue	Ann Arbor

Page 1 of 1 (2 Records) < 1 >

# Q: How To Handle Duplicate Families?

Mr. Troy Hayes (250489) 

Family Details Member Details (1) Cathedral of San Demo, Ann Arbor

Family Information Notes



Church of Registration: Cathedral of San Demo, Ann Arbor  
Details Modified On: Monday, October 29, 2018 4:04 PM  
Family Group: Contributor Only  
Registration Status:   
Registration Date: 2/28/2017  
Unregistered Date:

Last Name: Hayes  
First Name(s): Troy  
Formal Mailing Name: Mr. Troy Hayes

Primary Address: Home Address  
Home Mailing Other



# Tracking Unregistered Families

# Q: How to Track Unregistered But Contributing Families?

Mr. Troy Hayes (250489)

Family Details | Member Details (1) | Cathedral of San Demo, Ann Arbor

Changes made to data in fields with red text only apply to Cathedral of San Demo

Family Information | Notes

Church of Registration: Christ the Redeemer, Pontiac  
Details Modified On: Monday, October 29, 2018 4:15 PM

Family Group: Contributor

Registration Status:

Registration Date: 2/28/2017

Unregistered Date: Not Available

Last Name: Hayes  
First Name(s): Troy  
Formal Mailing Name: Mr. Troy Hayes

Primary Address: Home Address

Home | Mailing | Other



# **Printing Partial Invoices With All Payments Listed**

# Q: How to Print Partial Invoices or Statements with Charges and Credits?

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

**Invoices** Invoice Items Customers Templates Funds Reports Settings

Invoices Cathedral of San Demo, Ann Arbor

10 records

Description	Invoice #	Date	Status	Total	Balance
<input type="checkbox"/> <a href="#">Allen, Isabel - 1 Student</a>	1	3/8/2017	Ready	\$55.00	\$55.00
<input type="checkbox"/> <a href="#">Achterberg, Dean and Marci - New Invoice</a>	2	3/8/2017	Ready	\$55.00	\$55.00
<input type="checkbox"/> <a href="#">Abel, Daniel - 2016/2017 School Year</a>	3	9/1/2016	Ready	\$105.00	\$105.00
<input type="checkbox"/> <a href="#">Anderson, Brad and Deirdra - 2016/2017 School Year</a>	4	9/1/2016	Paid	\$105.00	\$0.00
<input type="checkbox"/> <a href="#">Anderson, David and Carolyn - 2016/2017 School Year</a>	5	9/1/2016	Partial	\$105.00	\$30.00
<input type="checkbox"/> <a href="#">Anderson, Dennis and Susan - 2016/2017 School Year</a>	6	9/1/2016	Partial	\$105.00	\$40.00

# Q: How to Print Partial Invoices or Statements with Charges and Credits?

The screenshot shows the ParishSOFT Reports interface. At the top, there is a navigation bar with buttons for Home, Family Directory, Religious Ed., Offering, Ministry Scheduler, Tuition (marked with a red circle 1), Diocesan Development, IQ, and Administration. Below this is a secondary navigation bar with buttons for Invoices, Invoice Items, Customers, Templates, Funds, Reports (marked with a red circle 2), and Settings. The main content area is titled 'Reports' and includes a dropdown menu for 'Cathedral of San Demo, Ann Arbor'. On the left, there is a 'Report' sidebar with options: Customer Activity, Fund Activity, Invoices, Statements (marked with a red circle 3), and Overdue. The main area has tabs for 'Filters' (selected), 'Date', and 'Customers' (marked with a red circle 4). Under the 'Filters' tab, there are two sections: 'Balance Filters' with checkboxes for 'Outstanding' and 'Zero' (both checked), and 'Report Options' with a checkbox for 'Include a remittance slip' (unchecked). A 'Next' button is located at the bottom right of the main area.

# Q: How to Print Partial Invoices or Statements with Charges and Credits?

**Cathedral of San Demo**  
 123 Main St.  
 Ann Arbor, MI 48108

Invoice Print Date : 10/29/2018 02:50 PM

Mr. David Anderson  
 5205 Rambo Ln  
 Ann Arbor , MI 48108

**Bill To** Mr. David Anderson  
 555-2222 (primary)

**Current Payment Due: \$30.00**

**Invoice Detail**

**Invoice Description** 2016/2017 School Year  
**Invoice Due Date** 10/21/2016  
**Invoice Number** 5  
**Invoice Total** \$105.00  
**Discount** \$0.00  
**Balance** \$30.00

**Payment Plan**

**First Payment Date** 09/16/2016:  
**Installment Amount** \$52.50  
 Monthly

**Payment History**

Date	Amount	Item	Date	Amount	Item
07/17/2017	20.00	Registration Fee	07/17/2017	5.00	Book Fee
07/17/2017	50.00	1 Student Tuition			

Student	Term	Session	Grade	Class
---------	------	---------	-------	-------



# **Adding a New Church or Celebrant**

# 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

# Adding a Custom Organization

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Home | Pictorial Directory | **Organization Directory** | Giving History | Start Page Settings

Organization Group: All | City:

Organization ID:  | State/Province:

Organization Name:  | Postal Code:

A-Z | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

0-9 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Filter Criteria: None | Filter Column: Parish Name | [Clear Filter](#)

10 records |

	Parish Name	Address	City	State/Region	Postal Code	Country
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	598 Needmore Lane, N.E.	Floyd	VA	24091	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	435 4th St NE	Minneapolis	MN	55413	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	19795 Holyoke Ave	Lakeville	MN	55044	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints - St. Aidan Parish	PO Box 185	New Richland	MN	56072	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2233 Diamond Avenue	Grand Rapids	MI	49505	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2855 E. Livingston Ave.	Columbus	OH	43209	USA

# Adding a New Celebrant

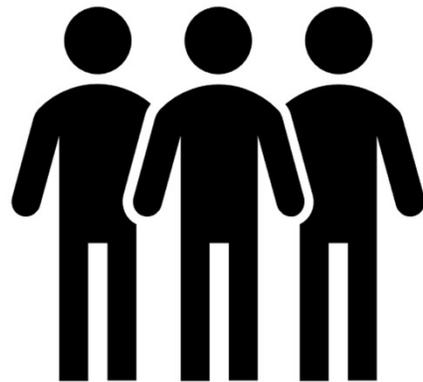
The screenshot displays the ParishSOFT administration interface. At the top, a navigation bar includes tabs for Home, Family Directory, Religious Education, Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below this, a secondary menu shows options like Suspense, Lookups (highlighted with a red box), System Setup, Organizations, Manage Staff, Module Settings, Utilities, and Notifications. The main content area is titled 'Lookup Management' and includes a dropdown menu for 'Sample Parish, Ann Arbor'. On the left, a 'Tables' sidebar lists various lookup categories, with 'Celebrants' under the 'Family Directory' section highlighted. The main table, titled 'Celebrants', shows a list of records with columns for checkboxes, icons, and 'Description'. A red box highlights the table's toolbar, which contains a '100 records' dropdown, navigation arrows, a plus sign, and sorting options. An 'Add "Celebrant" Record' dialog box is open in the foreground, featuring a 'Description' input field and 'Save' and 'Cancel' buttons. The table lists the following records: Reverend Carl Judge, Reverend Wes Bozzetto, Cardinal John Fleischer, Bishop Dan France, Bishop Dan Burton, and Bishop Drew Seuss.



# Tracking and Importing Families Into Workgroups

# Q: Tracking Groups and Importing into Workgroups

- Tracking Postings to a Group of People
- Creating Workgroups Through IQ



# Creating Workgroups in IQ

- Enter “Parameters” in **I**ntelligent **Q**uery  
Must include **MemberDUID** or **FamilyDUID** in order to create workgroup from results.
- Execute Query
- Create Family or Member Workgroup

# Creating Workgroups in IQ

### Column Picker

- Entity Type ID
- Ethnic ID
- Ethnicity
- Family DUID
- Father DUID
- Father First Name
- Father Last Name
- Father Name Text
- First Name (Formal)
- First Name (Informal/Nickname)
- Full Name
- Gender
- Graduation Year
- Home Organization ID

### Result Columns

Expression	Title
<u>Members Member DUID</u>	<u>Member DUID</u>
<u>Members Last Name</u>	<u>Last Name</u>
<u>Members First Name (Formal)</u>	<u>First Name (Formal)</u>
<u>Families.Contact Info Primary Address 1</u>	<u>Address 1</u>
<u>Families.Contact Info Primary Address 2</u>	<u>Address 2</u>

[\[Add new column\]](#)

### Query Conditions

Select records where **all** of the following apply + (+)

- Members Member Status **starts with** Active
- and Members Age **is between** 19 and 29
- and Members Gender **starts with** M

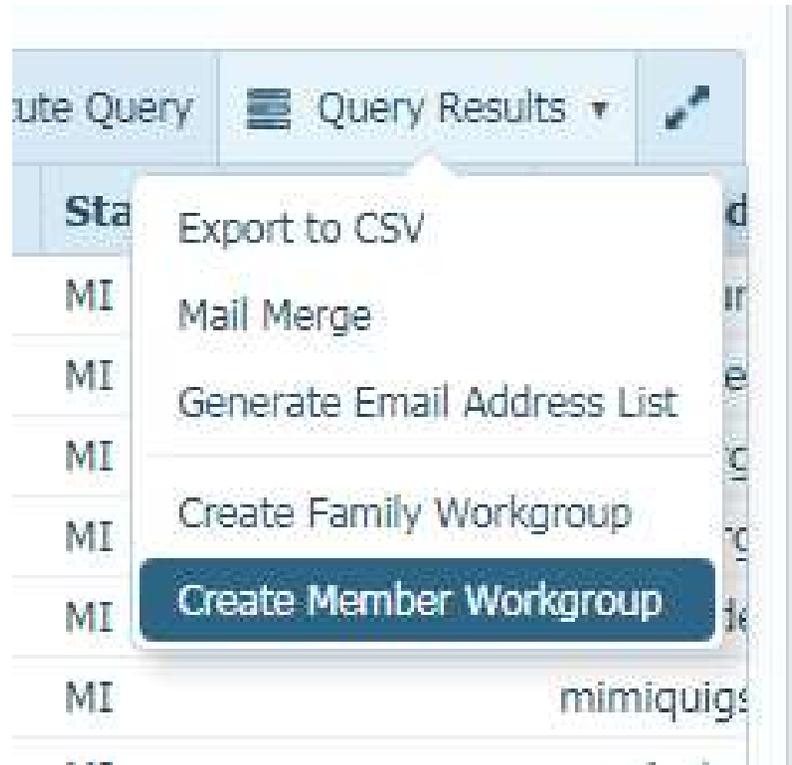
[\[Add new condition\]](#)



Query Results - 7 Return All results ▾  Unique Records Only  Execute Query

Member DUID	Last Name	First Name (Formal)	Address 1	Address 2	City	Postal Code (incl_ +4)	State	Cell Phone	Email Ad
1000719	Robinson	Glen	333 E Stadium Blvd		Ann Arbor	48109-2007	MI		gr3@churc
1000891	Davidson	Dale	8087 Sundon Dr		Ann Arbor	48108	MI		davis@den
1000933	Berg	Kevin	3811 Carpenter Rd		Ypsilanti	48197-9606	MI		Kevinbergt
1000936	Berg	Byran	3811 Carpenter Rd		Ypsilanti	48197-9606	MI	734-584-8694	byranbergt
1001012	Posey	Madison	48 Ballpark St		Brighton	48116	MI		posey@de
1001016	Quigley	Tyler	12545 Lighthouse Ct		Plymouth	48170-3029	MI		mimiquigs
1001043	Stauskas	Reggie	852 Stonegate Rd		Ann Arbor	48103-1545	MI		reggiestau

# Creating Workgroups in IQ



# Creating Workgroups in IQ

## Create MemberWorkgroup ✕

Workgroup Name:

Owner Organization:

# Creating Workgroups in IQ

## Create MemberWorkgroup ✕

Member Workgroup **Men's Retreat 2018** was created successfully.

**Group DUID** 33

**Members In Request** 7

**Members Added to Group** 7

Close

# Creating Workgroups in IQ

## Members in Workgroup: **Men's Retreat 2018**

A-Z						0-9						Filter Criteria:	Filter Column:	Clear Filter
10 records												Add Members	Manage Selected Members	Quick Reports ▼
<input type="checkbox"/>	Last Name	First Name	E-Mail	Phone	Ac									
<input type="checkbox"/>	Berg	Byran	byranberg@demoschurch.com	734-514-2484	38									
<input type="checkbox"/>	Berg	Kevin	Kevinberg@demoparish.com	734-514-2484	38									
<input type="checkbox"/>	Davidson	Dale	davis@demoemailaddress.com		80									
<input type="checkbox"/>	Posey	Madison	posey@demoemailaddress.com		48									
<input type="checkbox"/>	Quigley	Tyler	mimiquigs@church.com		12									
<input type="checkbox"/>	Robinson	Glen	gr3@church.com		33									
<input type="checkbox"/>	Stauskas	Reggie	reggiestauskas@church.com		85									

# QUESTIONS?

**ParishSOFT®**  
Celebrating 20 Years of Service



# Additional Resources

- Knowledge Base:  
<https://support.parishsoft.com/hc/en-us>
- ParishSOFT Family Suite Training Videos:  
<https://www.parishsoft.com/training/ps-family-suite/training-videos/>

# Thank you!

Troy Hayes  
ParishSOFT



**ParishSOFT®**  
Celebrating 20 Years of Service