Ask the Expert

Troy Hayes
ParishSOFT

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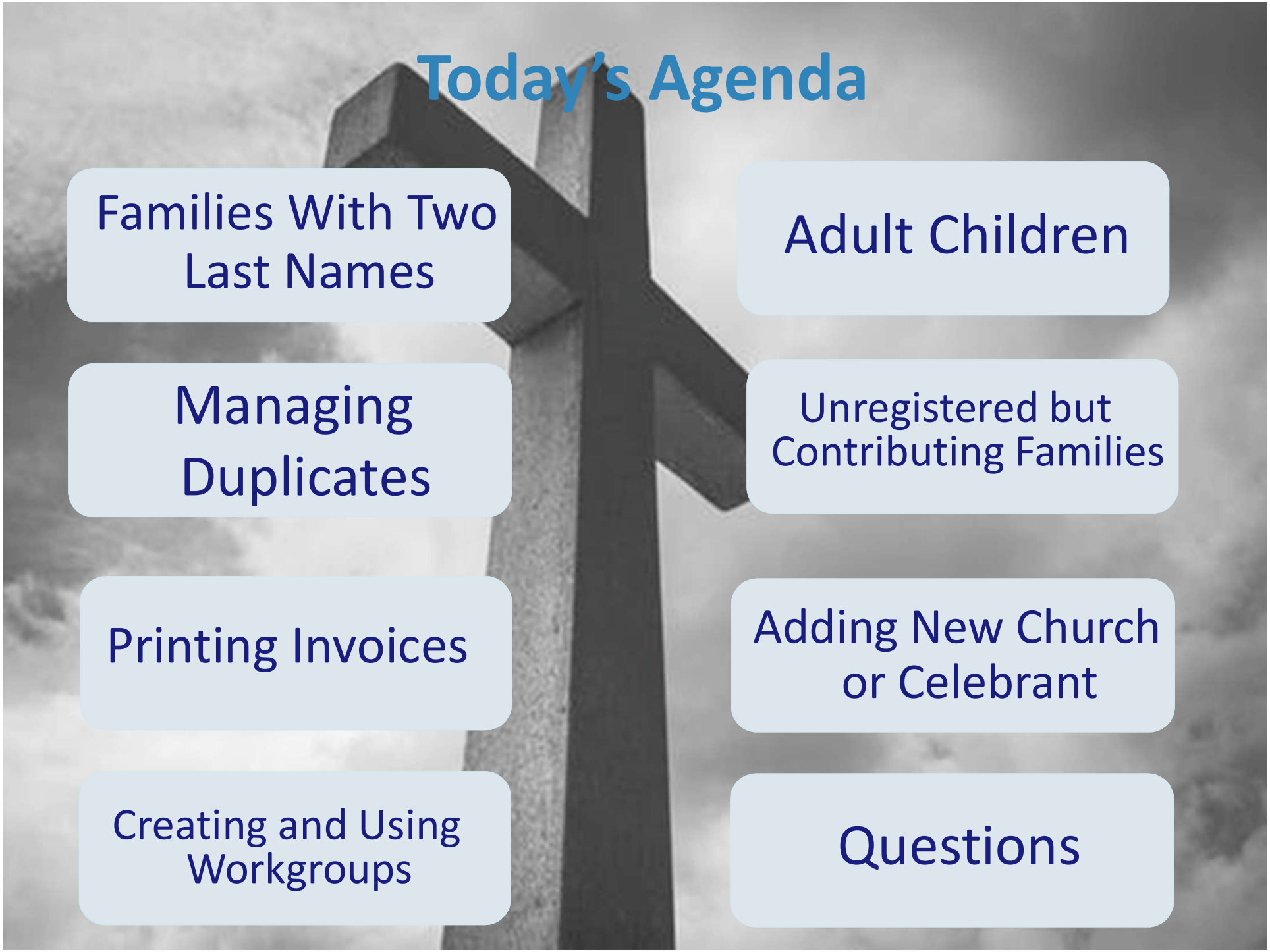
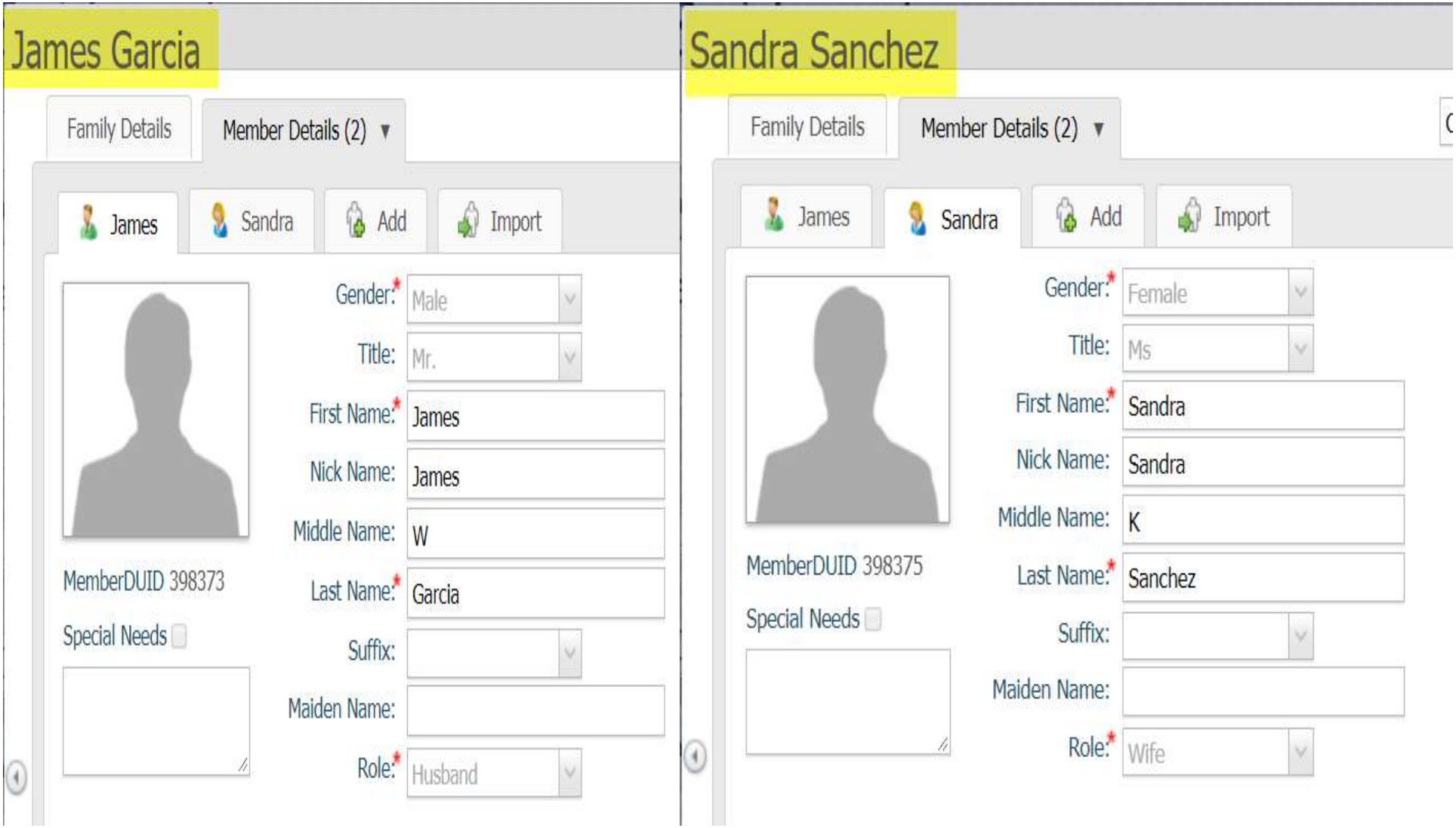

Today's Agenda
Families With Two Last Names
Adult Children
Managing Duplicates
Unregistered but Contributing Families
Printing Invoices
Adding New Church or Celebrant
Creating and Using Workgroups
Questions

Q: How to Enter Families With Two Last Names?



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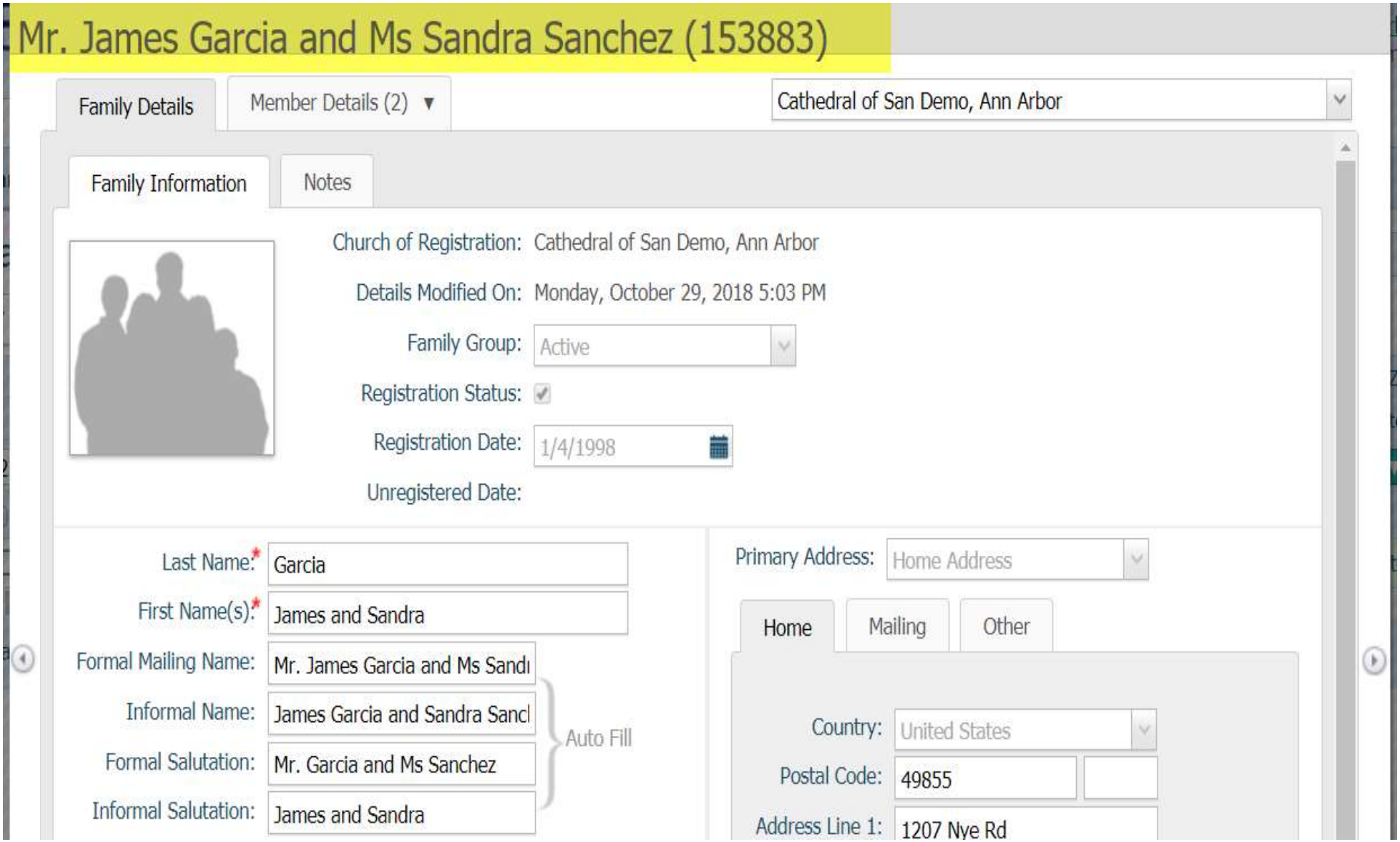

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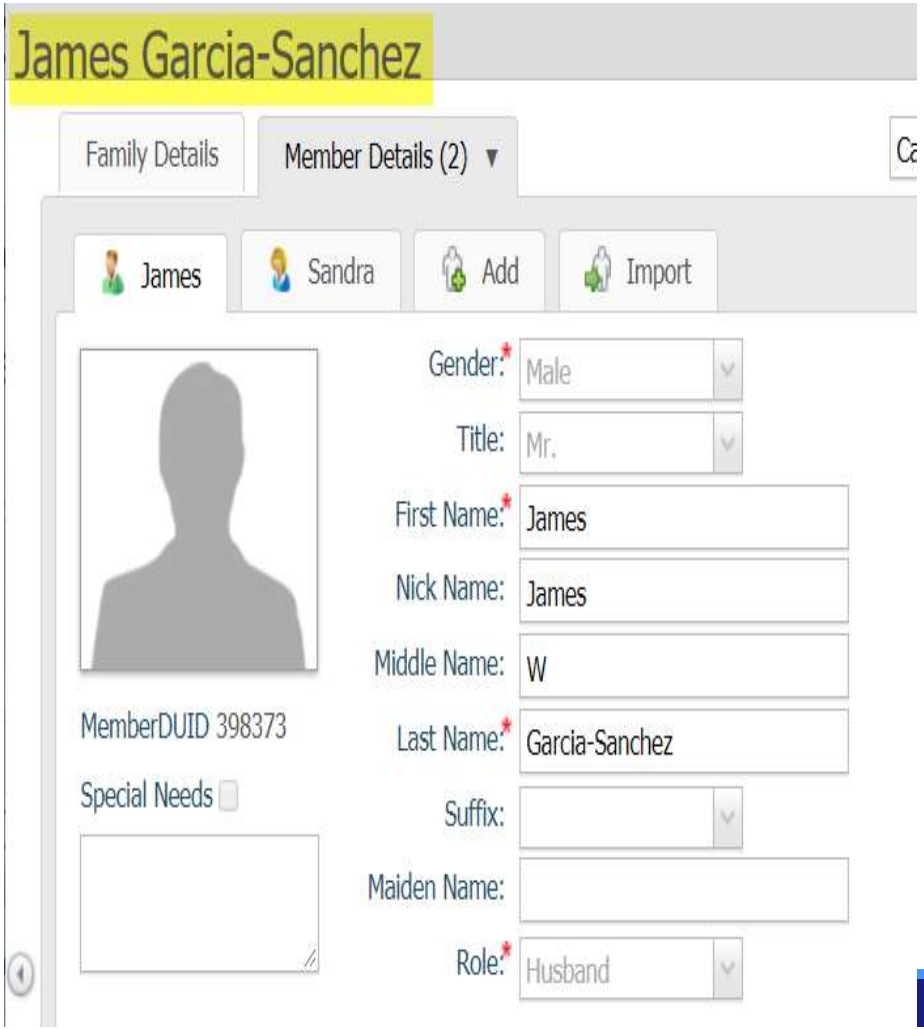

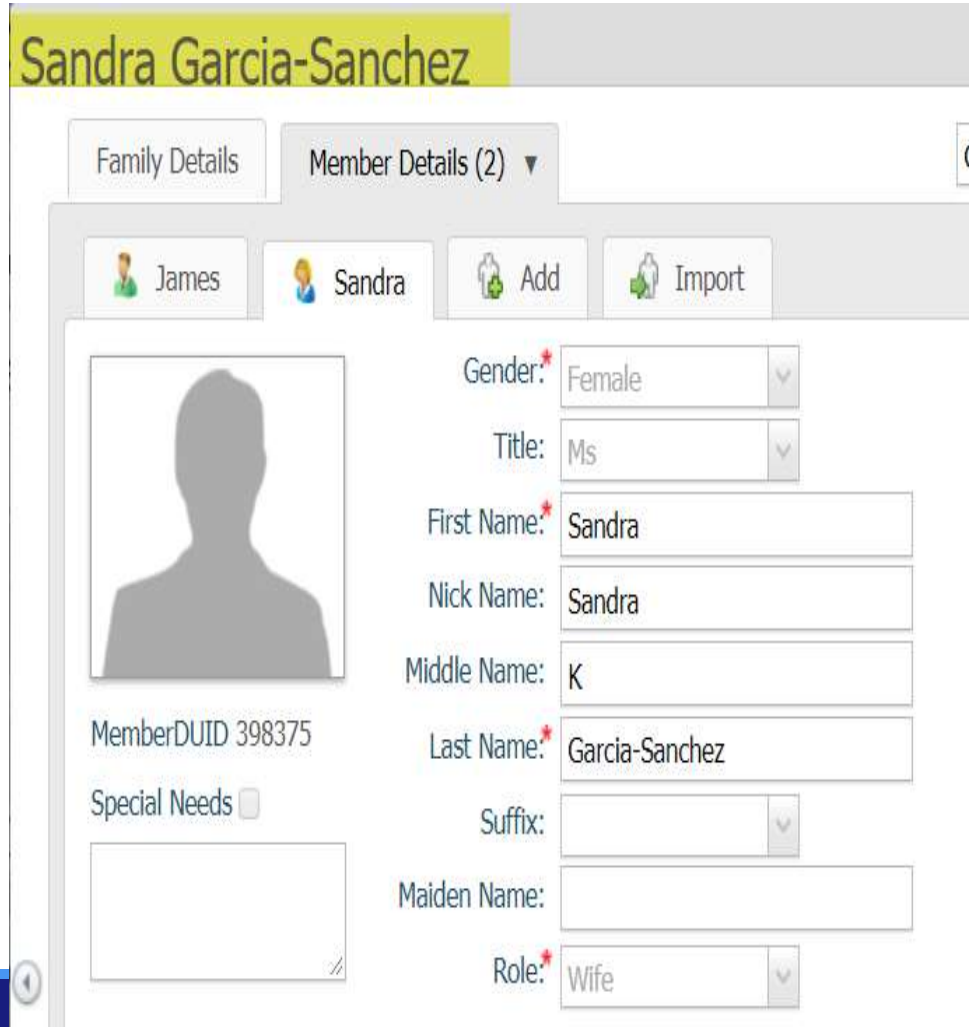

Q: How to Enter Families With Two Last Names?

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

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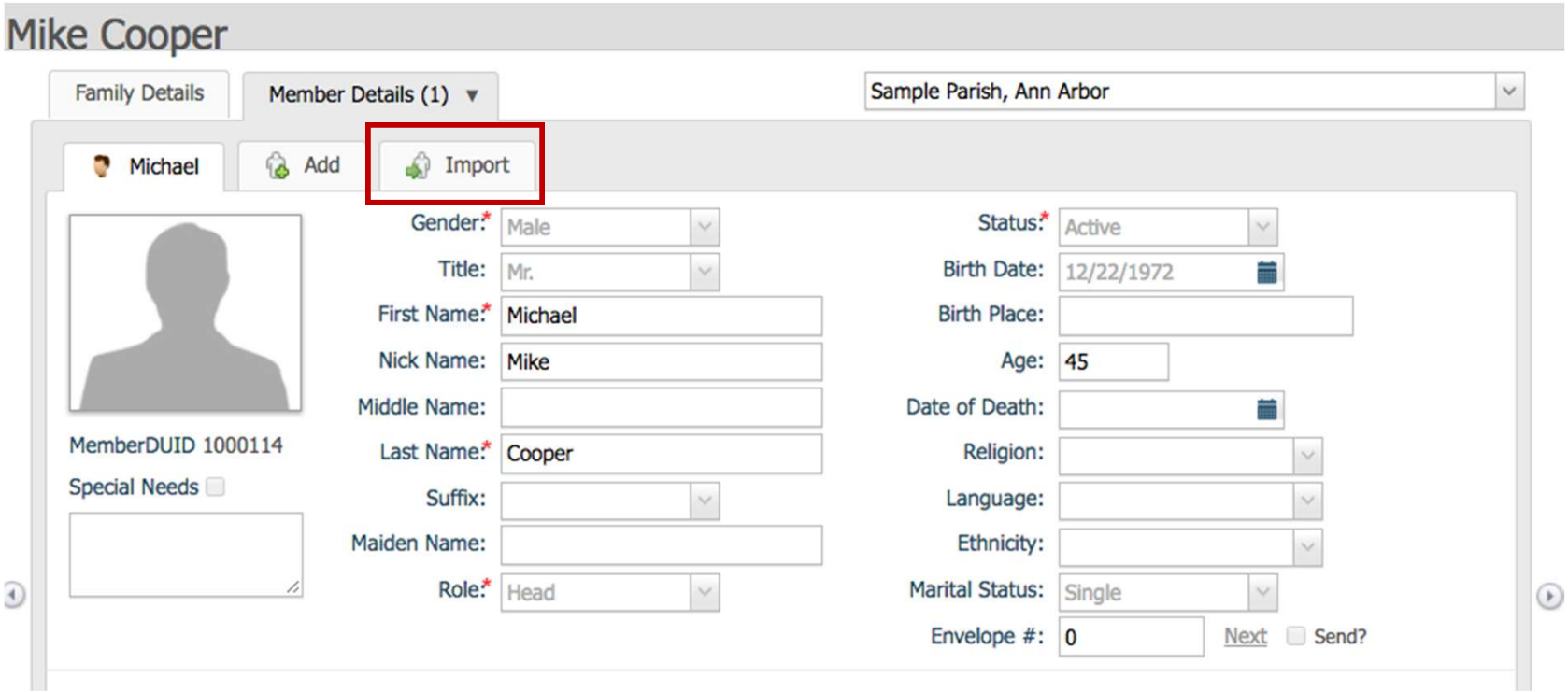
Q: When and How to Move Adult Children Into Their Own Families?

- Importing a spouse into the family



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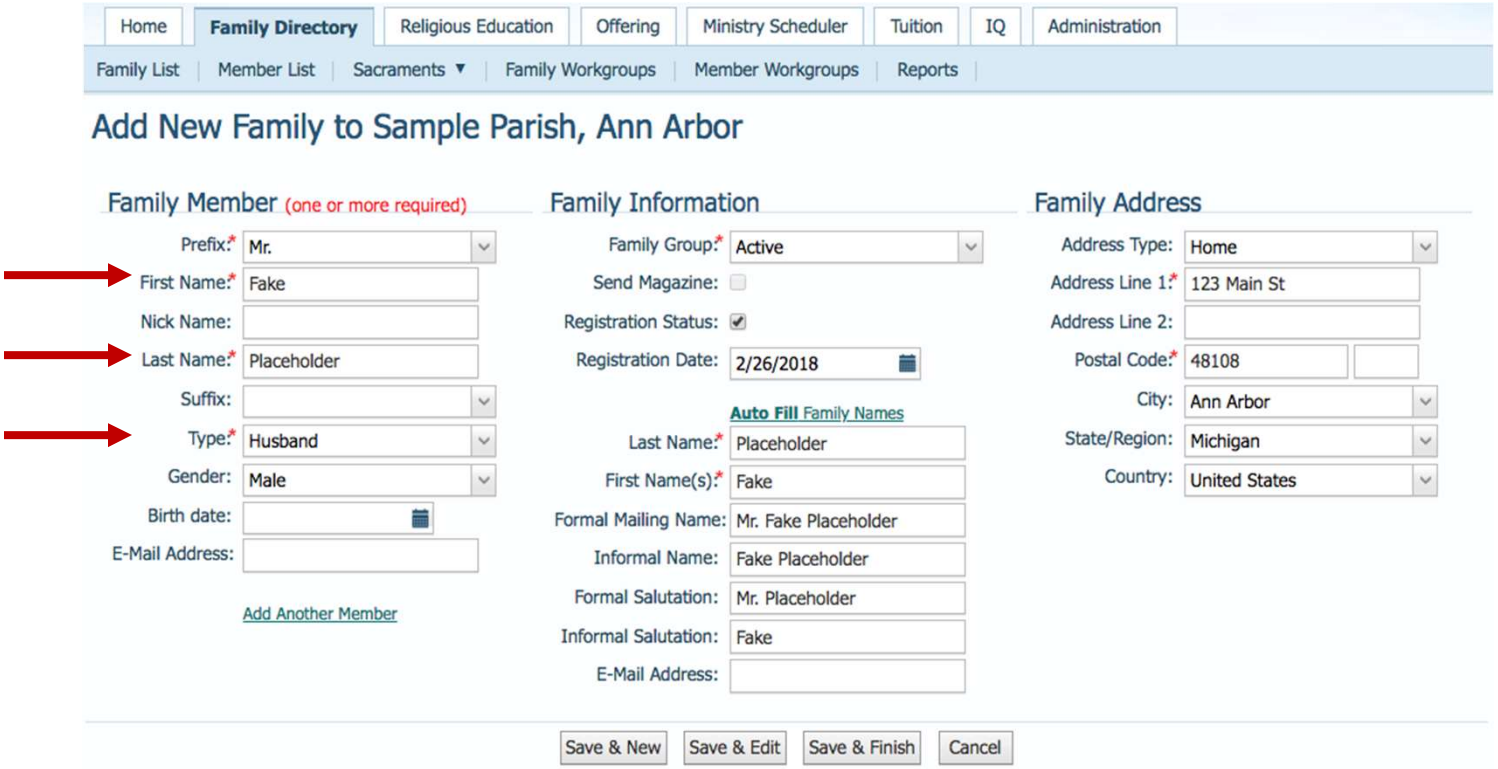
Q: When and How to Move Adult Children Into Their Own Families?

- Extracting a grown child into its own family



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How To Handle Duplicate Families

Q: How To Handle Duplicate Families?

- Contact Susan Shirley at the Archdiocese
  - sshirley@archatl.com

- Be Sure to Get Family DUID's for the Master Family and the Duplicate Family

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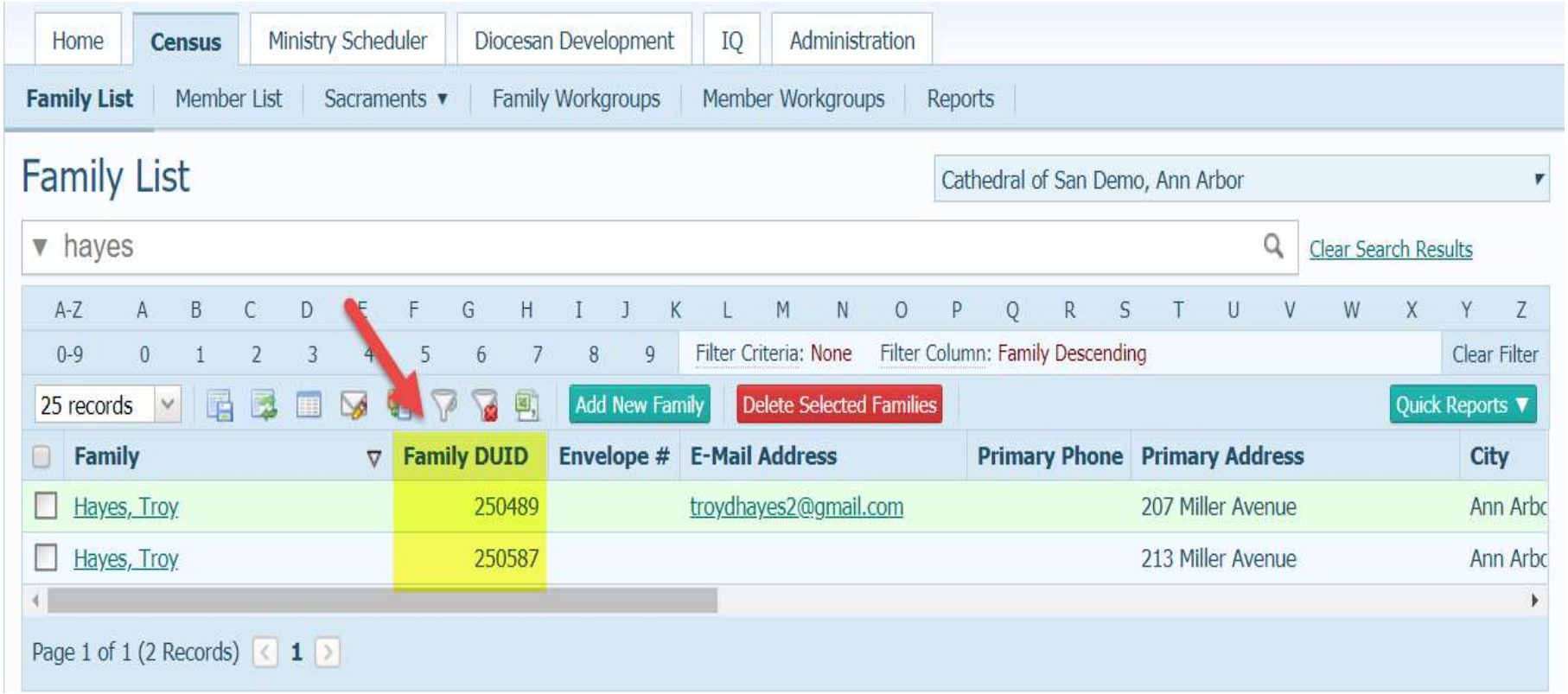
Q: How To Handle Duplicate Families?



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Q: How To Handle Duplicate Families?

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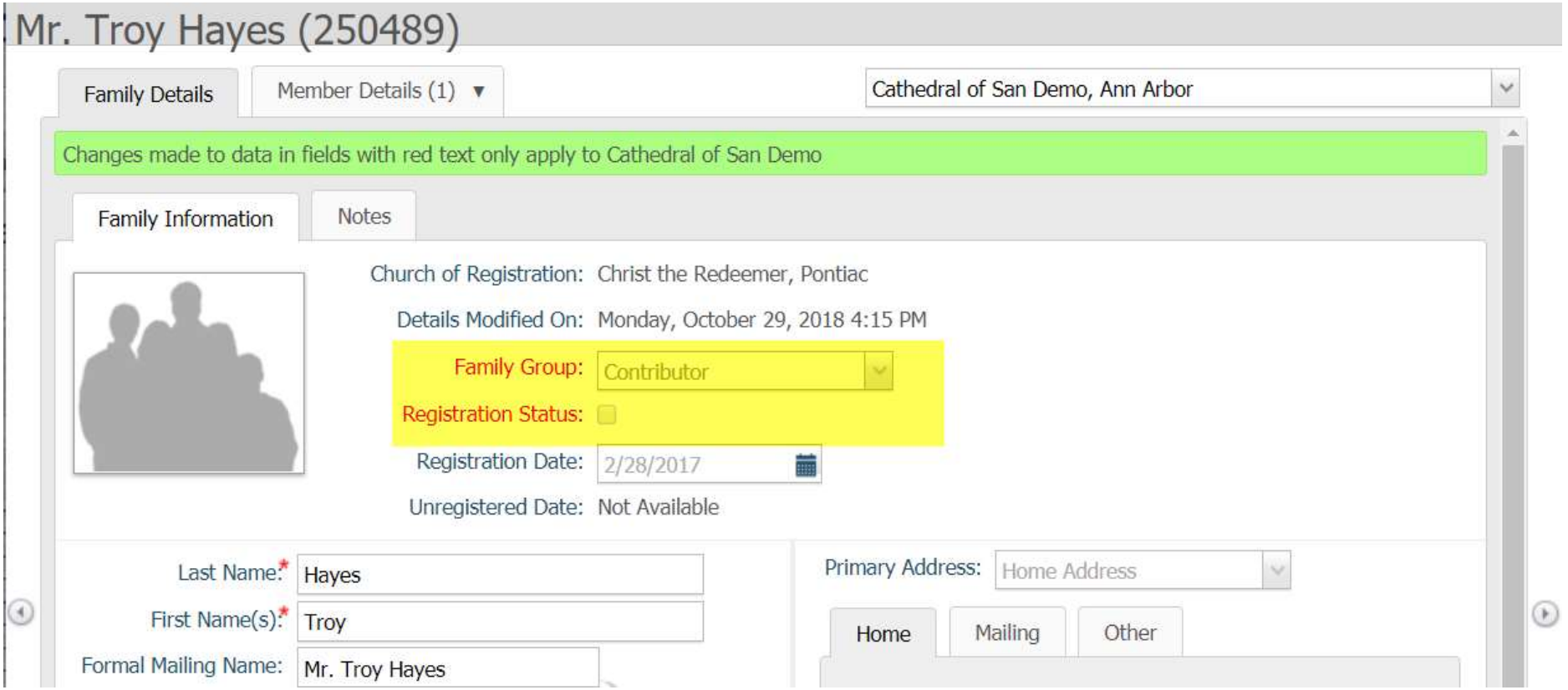
Tracking Unregistered Families

Q: How to Track Unregistered But Contributing Families?



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Printing Partial Invoices With All Payments Listed

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

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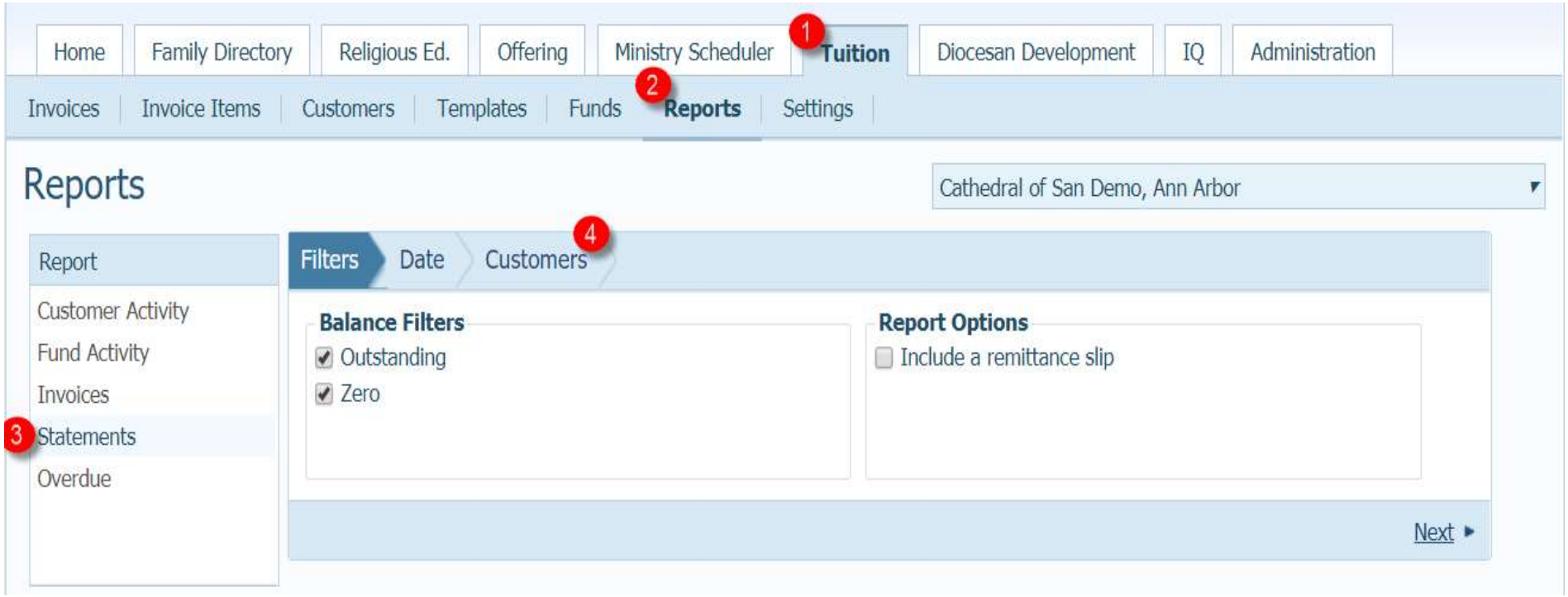

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Q: How to Print Partial Invoices or Statements with Charges and Credits?

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			

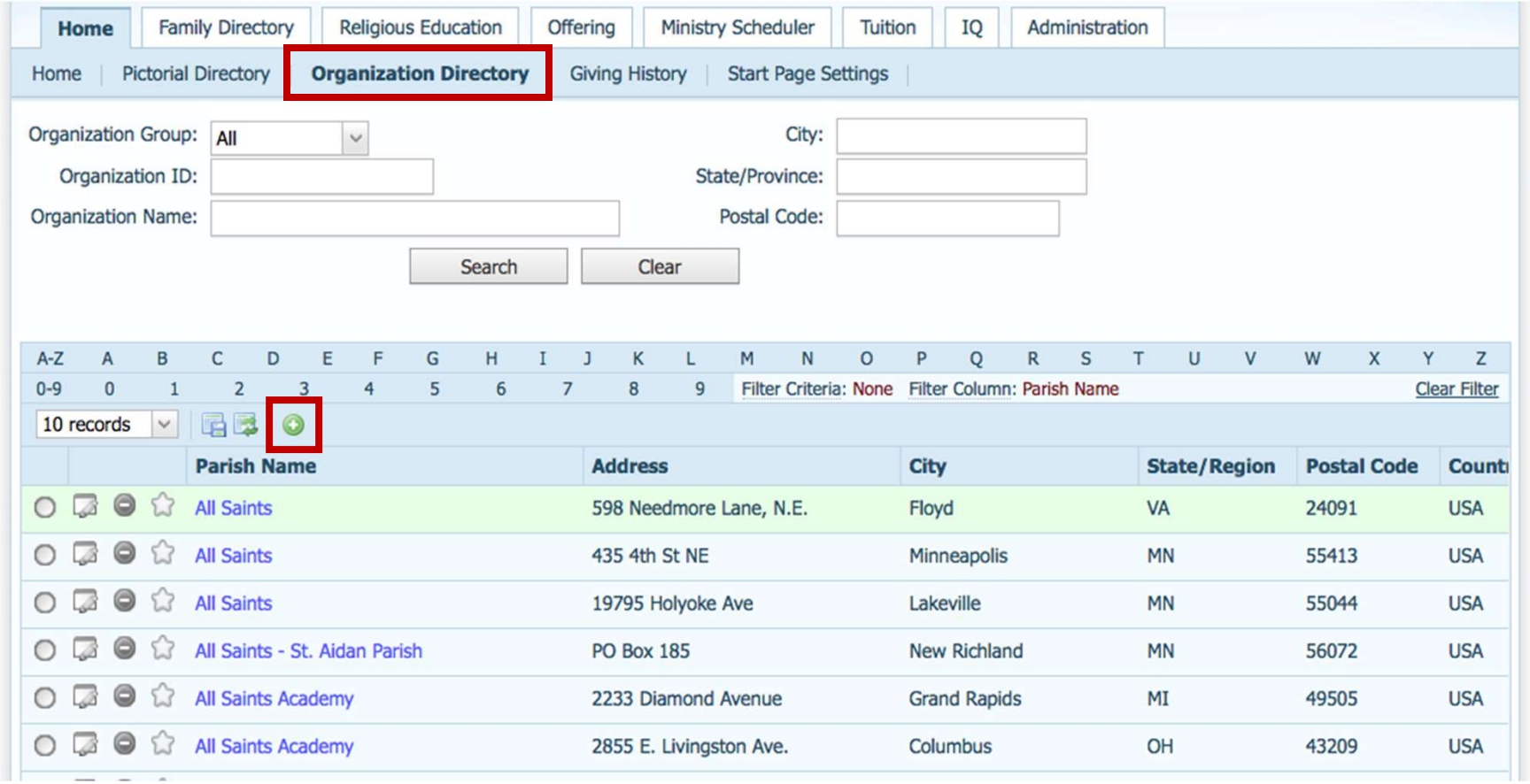
Student	Term	Session	Grade	Class

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



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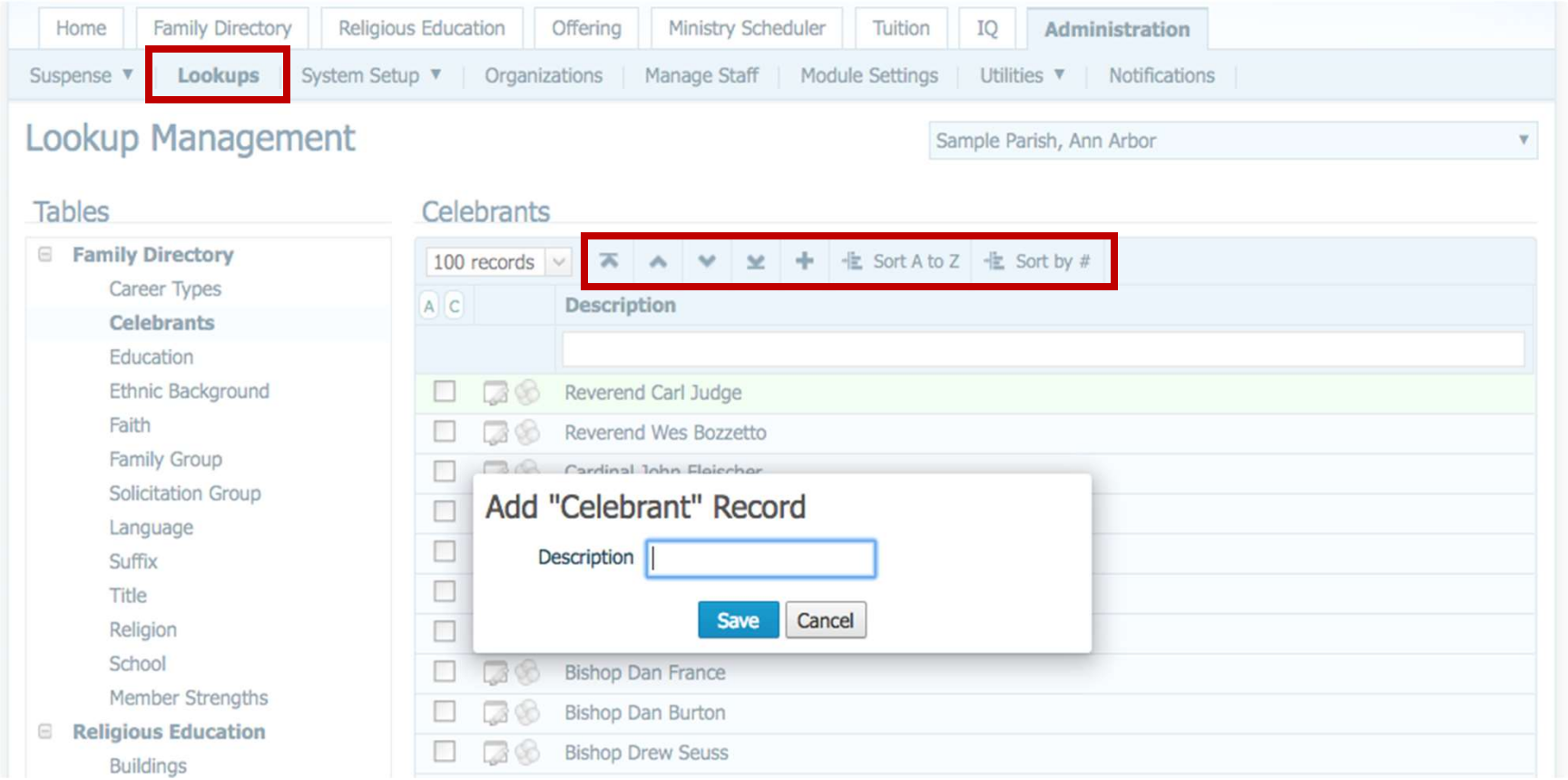
Adding a New Celebrant



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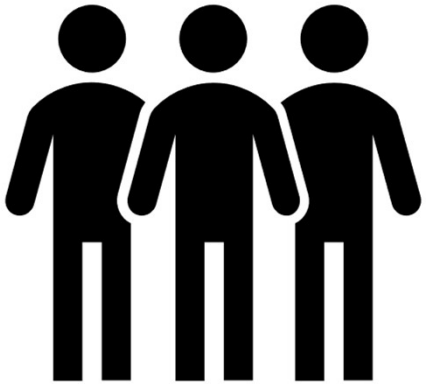
Tracking and Importing Families Into Workgroups

Q: Tracking Groups and Importing into Workgroups

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



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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

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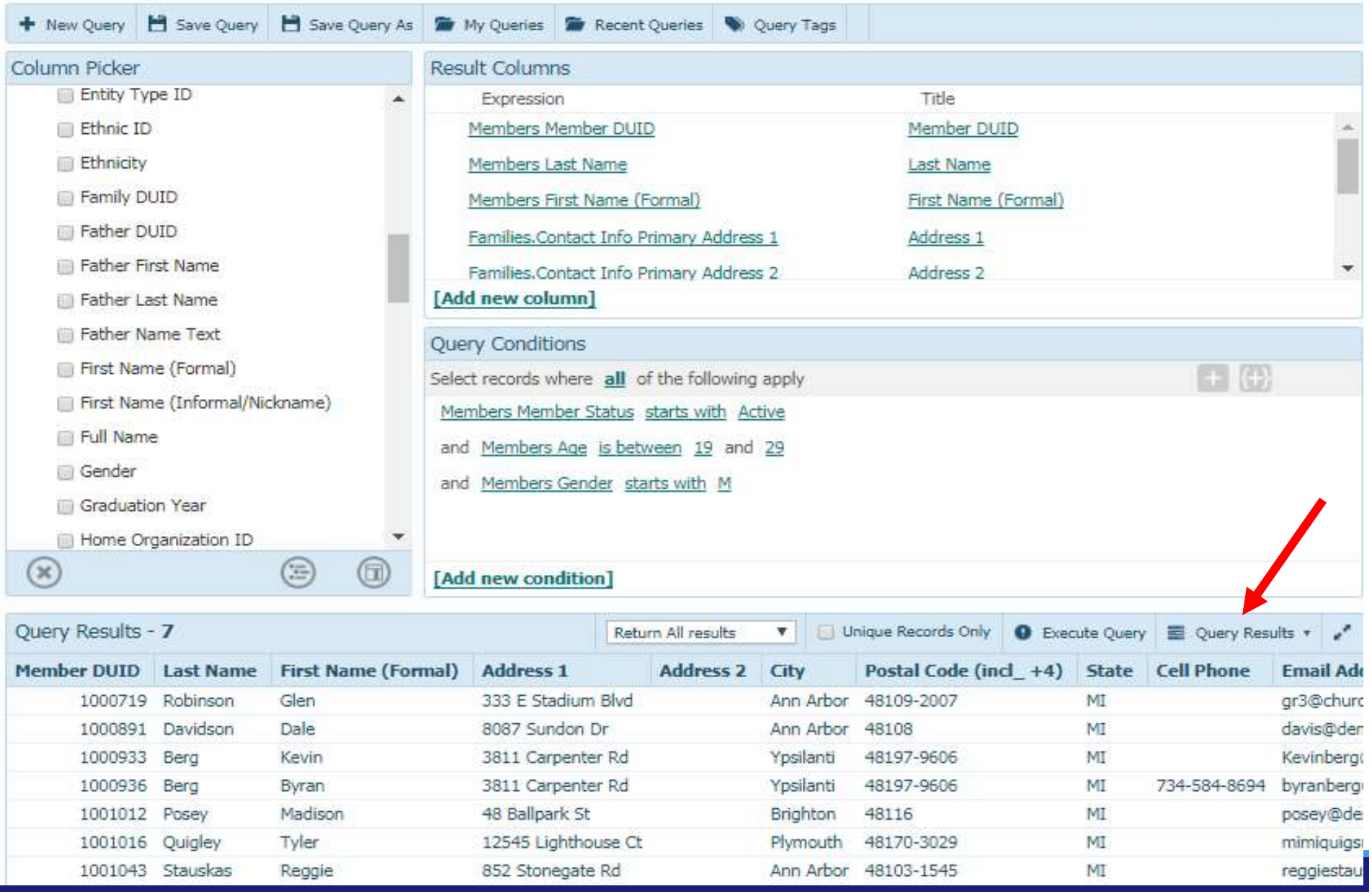
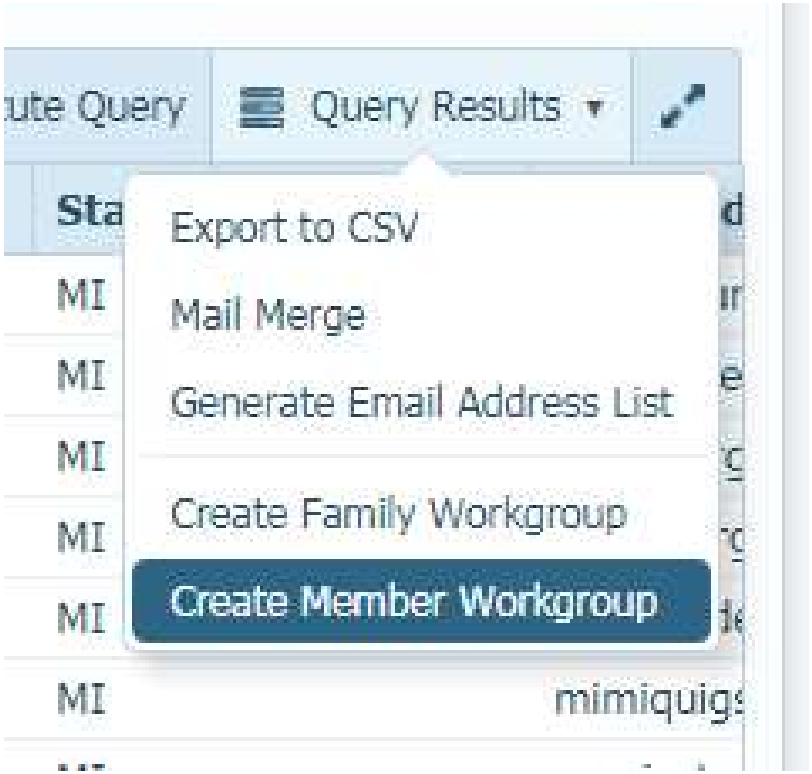
Creating Workgroups in IQ



Creating Workgroups in IQ



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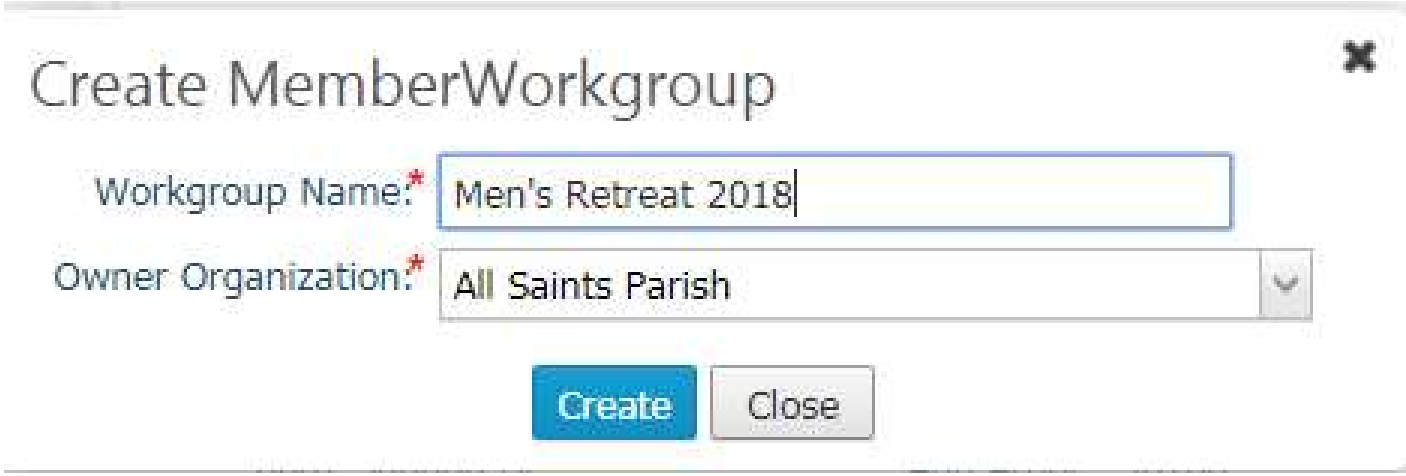
Creating Workgroups in IQ



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Creating Workgroups in IQ

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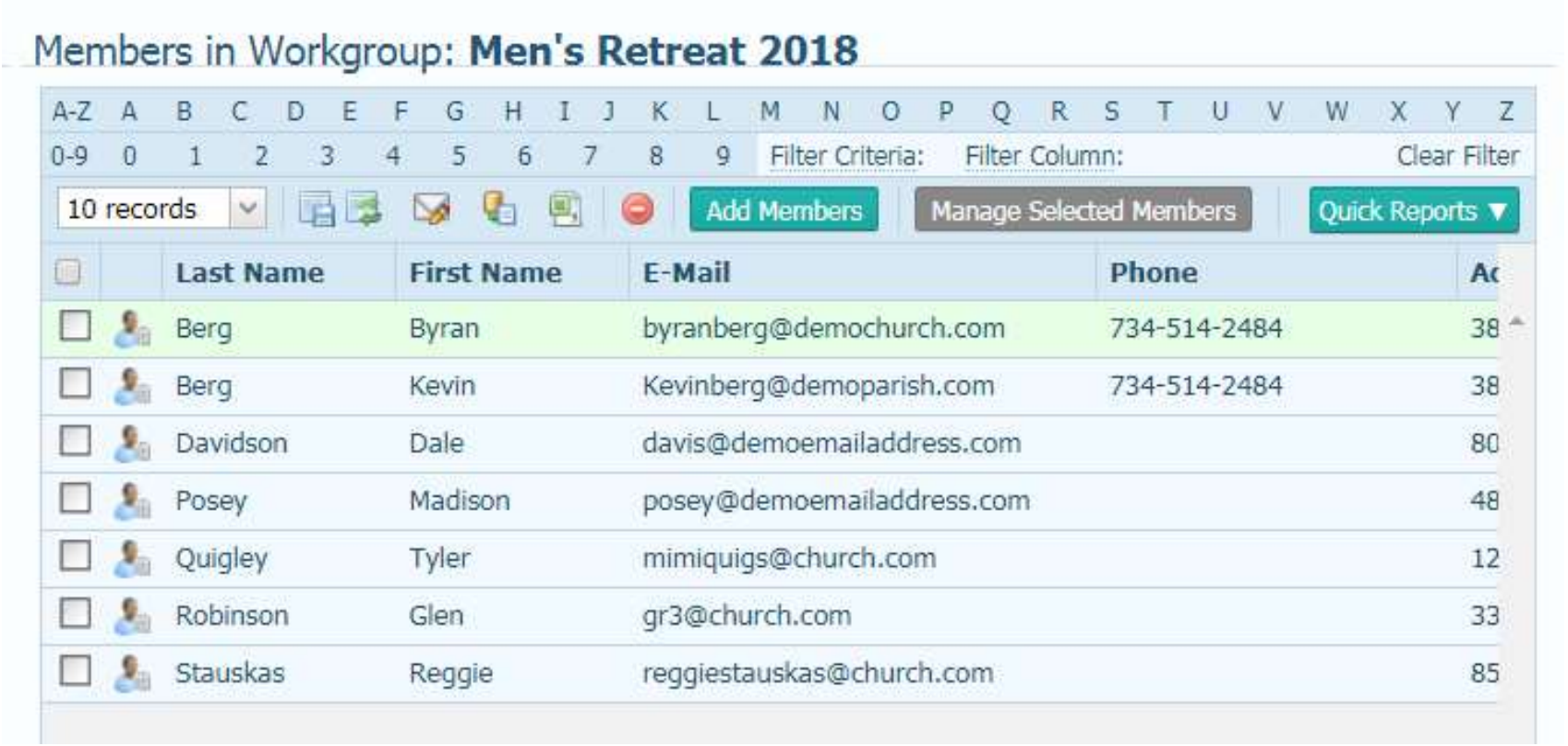

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QUESTIONS?

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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/

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Thank you!

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