

# 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

Family Details Member Details (2) ▾

James Sandra Add Import



MemberDUID 398373

Special Needs ☐

Gender: Male ▾

Title: Mr. ▾

First Name: James

Nick Name: James

Middle Name: W

Last Name: Garcia

Suffix: ▾


Maiden Name:

Role: Husband ▾

## Sandra Sanchez

Family Details Member Details (2) ▾

James Sandra Add Import



MemberDUID 398375

Special Needs ☐

Gender: Female ▾

Title: Ms ▾

First Name: Sandra

Nick Name: Sandra

Middle Name: K

Last Name: Sanchez

Suffix: ▾

Maiden Name:


Role: 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

Formal Salutation: Mr. Garcia and Ms Sanchez

Informal Salutation: James and Sandra

Auto Fill

Primary Address: Home Address

Home Mailing Other

Country: United States

Postal Code: 49855

Address Line 1: 1207 Nye Rd

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

**James Garcia-Sanchez**

Family Details Member Details (2) ▼

James Sandra Add Import



MemberDUID 398373

Special Needs ☐

Gender: Male

Title: Mr.

First Name: James

Nick Name: James

Middle Name: W

Last Name: Garcia-Sanchez

Suffix:


Maiden Name:

Role: Husband

**Sandra Garcia-Sanchez**

Family Details Member Details (2) ▼

James Sandra Add Import



MemberDUID 398375

Special Needs ☐

Gender: Female

Title: Ms

First Name: Sandra

Nick Name: Sandra

Middle Name: K

Last Name: Garcia-Sanchez

Suffix:

Maiden Name:

Role: Wife

# 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-Sanch

Informal Name: James and Sandra Garcia-Sanc

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.:

Auto Fill

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

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?

MemberDUID 1000114 Special Needs

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

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?

1

2

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

| <input type="checkbox"/> | Description   | Invoice # | Date     | Status  | Total    | Balance  |
|--------------------------|---|-----------|----------|---------|----------|----------|
| <input type="checkbox"/> |   |           |          |         |          |          |
| <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  |

3

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

The screenshot shows the ParishSoft web application interface. At the top is a navigation bar with tabs: 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 tabs: 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 set to "Cathedral of San Demo, Ann Arbor". On the left is a "Report" sidebar with options: Customer Activity, Fund Activity, Invoices, **Statements** (marked with a red circle 3), and Overdue. The main area has three tabs: **Filters** (marked with a red circle 4), Date, and Customers. 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 with a right arrow is 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:  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 <input type="button" value="Clear Filter"/> |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| 10 records <input type="button" value="Add"/> <input type="button" value="Refresh"/> <input type="button" value="Print"/> |                          |                          |                          |                               |                         |              |         |       |     |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
|   |                          | Parish Name              | Address                  | City                          | State/Region            | Postal Code  | Country |       |     |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints                    | 598 Needmore Lane, N.E. | Floyd        | VA      | 24091 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints                    | 435 4th St NE           | Minneapolis  | MN      | 55413 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints                    | 19795 Holyoke Ave       | Lakeville    | MN      | 55044 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints - St. Aidan Parish | PO Box 185              | New Richland | MN      | 56072 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints Academy            | 2233 Diamond Avenue     | Grand Rapids | MI      | 49505 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |
| <input type="radio"/>   | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | All Saints Academy            | 2855 E. Livingston Ave. | Columbus     | OH      | 43209 | USA |   |  |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  |

# Adding a New Celebrant

The screenshot displays the ParishSoft Administration interface. The top navigation bar includes tabs for Home, Family Directory, Religious Education, Offering, Ministry Scheduler, Tuition, IQ, and Administration. The 'Lookups' tab is selected and highlighted with a red box. Below the navigation bar, the 'Lookups' section is active, showing a 'Lookup Management' header and a dropdown menu for 'Sample Parish, Ann Arbor'. On the left, a sidebar lists various lookup categories under 'Family Directory' and 'Religious Education'. The main area shows a table of 'Celebrants' with 100 records. The table header includes a 'Description' column. A red box highlights the table's toolbar, which contains icons for adding, deleting, and sorting records. A modal dialog titled 'Add "Celebrant" Record' is open, featuring a 'Description' input field and 'Save' and 'Cancel' buttons. The table lists several celebrants, including Reverend Carl Judge, Reverend Wes Bozzetto, Cardinal John Fleischer, Bishop Dan France, Bishop Dan Burton, and Bishop Drew Seuss.

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

Suspense ▾ | **Lookups** | System Setup ▾ | Organizations | Manage Staff | Module Settings | Utilities ▾ | Notifications

## Lookup Management

Sample Parish, Ann Arbor ▾

### Tables

- Family Directory
  - Career Types
  - Celebrants**
  - Education
  - Ethnic Background
  - Faith
  - Family Group
  - Solicitation Group
  - Language
  - Suffix
  - Title
  - Religion
  - School
  - Member Strengths
- Religious Education
  - Buildings

### Celebrants

100 records ▾ [Icons: Add, Delete, Sort] Sort A to Z Sort by #

|                          | Description             |
|--------------------------|-------------------------|
| <input type="checkbox"/> | Reverend Carl Judge     |
| <input type="checkbox"/> | Reverend Wes Bozzetto   |
| <input type="checkbox"/> | Cardinal John Fleischer |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> |                         |
| <input type="checkbox"/> | Bishop Dan France       |
| <input type="checkbox"/> | Bishop Dan Burton       |
| <input type="checkbox"/> | Bishop Drew Seuss       |

### Add "Celebrant" Record

Description

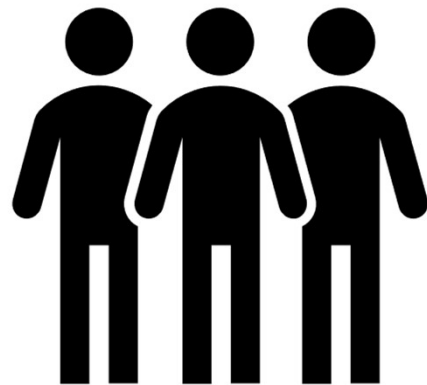
**Save** **Cancel**



# **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 Intelligent Query  
Must include **MemberDUID** or **FamilyDUID** in order to create workgroup from results.
- Execute Query
- Create Family or Member Workgroup

# Creating Workgroups in IQ

Interface for creating and executing queries 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

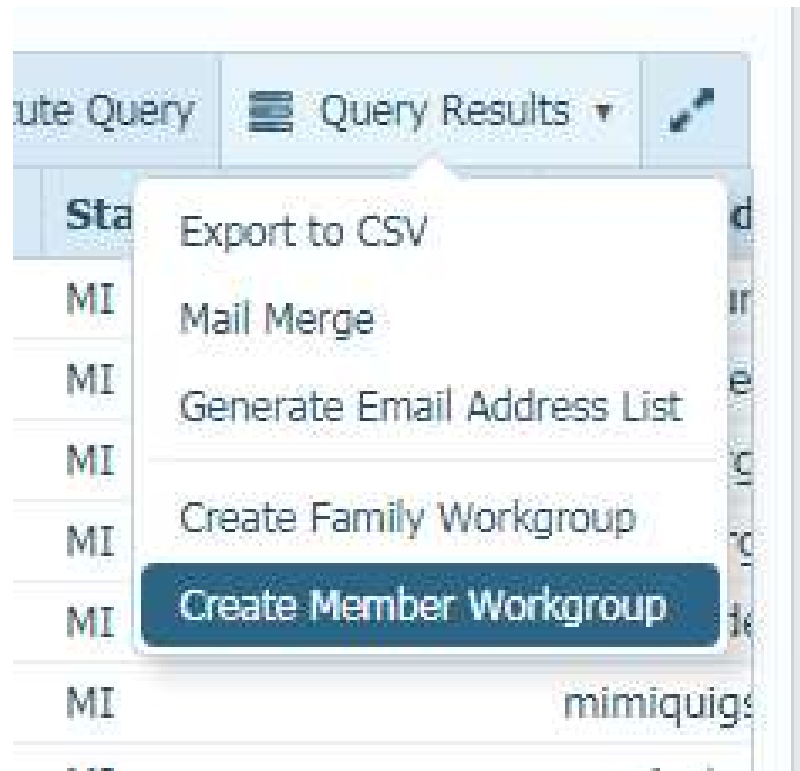
[Add new condition]

**Query Results - 7**

Return All results | Unique Records Only | Execute Query | Query Results

| Member DUID | Last Name | First Name (Formal) | Address 1           | Address 2 | City      | Postal Code (incl_ +4) | State | Cell Phone   | Email Address |
|-------------|-----------|---------------------|---------------------|-----------|-----------|------------------------|-------|--------------|---------------|
| 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    |              | Kevinberg     |
| 1000936     | Berg      | Byran               | 3811 Carpenter Rd   |           | Ypsilanti | 48197-9606             | MI    | 734-584-8694 | byranberg     |
| 1001012     | Posey     | Madison             | 48 Ballpark St      |           | Brighton  | 48116                  | MI    |              | posey@de      |
| 1001016     | Quigley   | Tyler               | 12545 Lighthouse Ct |           | Plymouth  | 48170-3029             | MI    |              | mimiquig      |
| 1001043     | Stauskas  | Reggie              | 852 Stonegate Rd    |           | Ann Arbor | 48103-1545             | MI    |              | reggiesta     |

# Creating Workgroups in IQ





# Creating Workgroups in IQ

Create MemberWorkgroup

Workgroup Name:<sup>\*</sup>

Men's Retreat 2018

Owner Organization:<sup>\*</sup>

All Saints Parish

Create

Close

# 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 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:

Filter Column:

Clear Filter








10 records



Add Members

Manage Selected Members

Quick Reports

|                          |   | Last Name | First Name | E-Mail                     | Phone        | Ac |
|--------------------------|---|-----------|------------|----------------------------|--------------|----|
| <input type="checkbox"/> |    | Berg      | Byran      | byranberg@demochurch.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



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