

# Ask the Expert

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ParishSOFT



**ParishSOFT®**  
Celebrating 20 Years of Service

# Today's Agenda

Searching/Filtering  
The Family List

Changing the  
Religious Ed Grid

Development  
Requests

Custom Reporting

Reducing Picture  
Size

Questions



# Searching and Filtering the Family List

# Searching vs. Filtering

- Family/Member List
  - Searching is broad while filtering is specific
  - How can filters affect your search?
  - What if a family does not appear in my results?

Family List Sample Parish, Ann Arbor

Search:  Clear Search Results

A-Z 0-9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records Add New Family Delete Selected Families Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> <a href="#">Abler, Jason and Tracey</a>	6491	<a href="mailto:abler@demoemailaddress.com">abler@demoemailaddress.com</a>	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> <a href="#">Adams, Todd and Jane</a>	1129	<a href="mailto:adamsfamily@demochurch.com">adamsfamily@demochurch.com</a>	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> <a href="#">Admin, Dio</a>		<a href="mailto:training@parishsoft.com">training@parishsoft.com</a>		23 Parishsoft Way	Belleville
<input type="checkbox"/> <a href="#">Albert, Mike and Stacey</a>	1201	<a href="mailto:salbert@demoemailaddress.com">salbert@demoemailaddress.com</a>	555-888-7777	53 Truman Dr	Ann Arbor

# Searching vs. Filtering

- Advanced Filters allow you to be more specific with names, membership, addresses, etc.

Filter

Membership: Both

Family Group: All Groups

Send Envelopes: (Any)

Family Work Groups

- Church Cleanup
- School Families
- School Families 2015-2016

Advanced Options

Filter By ID: Diocesan ID

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date:

E-Mail Address:

E-Mail: (Any)

Postal Code:

City:

State\Region:

Show 'Send No Mail' Families: (Any)

Show 'Do Not Publish' Families: (Any)

Show Families With E-Mail: (Any)

Exact Search:

Apply Clear Cancel

# Customization: Family List Grid Adjustments

- Columns can be removed
- Column width can be adjusted
- Columns can be reordered

Family List Sample Parish, Ann Arbor

▼  [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 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records

<input type="checkbox"/>	Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/>	<a href="#">Abler, Jason and Tracey</a>	6491	<a href="mailto:abler@demoemailaddress.com">abler@demoemailaddress.com</a>	555-2222	2351 Ellsworth Rd	Ypsilanti
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<input type="checkbox"/>	<a href="#">Admin, Dio</a>		<a href="mailto:training@parishsoft.com">training@parishsoft.com</a>		23 Parishsoft Way	Belleville
<input type="checkbox"/>	<a href="#">Albert, Mike and Stacey</a>	1201	<a href="mailto:salbert@demoemailaddress.com">salbert@demoemailaddress.com</a>	555-888-7777	53 Truman Dr	Ann Arbor



# Custom Reports Through Intelligent Query (IQ)

# Custom Reports Through IQ

Viewing Query **Age/Gender Query** Query Properties

**Column Picker**

- Batches
- Contributions
- Families
- Funds
- Fund - Organization Summary
- Members
- Ministry Scheduler
- Organization
- Pledges
- Religious Education
- Sacraments
- SEP
- StatusAnimarum

**Result Columns**

Expression	Title
<a href="#">Families Family DUID</a>	<a href="#">Family DUID</a>
<a href="#">Members First Name (Formal)</a>	<a href="#">Members First Name</a>
<a href="#">Members Last Name</a>	<a href="#">Last Name</a>
↓ <a href="#">Members Age</a>	<a href="#">Age</a>
Members.Contact Info Email Address	Contact Info Email Address

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

**Query Conditions**

Select records where **all** of the following apply + {+}

- [Members Gender](#) starts with [m](#)
- and [Members Gender](#) starts with [f](#)
- and [Members Age](#) is between [18](#) and [35](#)
- and [Members Age](#) is less than [18](#)
- and [Members Age](#) is greater than [35](#)

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

Query Results - 0 Return All results  Unique Records Only Execute Query Query Results

# Custom Reports Through IQ

Viewing Query **All Male 18-35** 🔍 Query Properties

### Column Picker

- Batches
- Contributions
- Families
- Funds
- Fund - Organization Summary
- Members
- Ministry Scheduler
- Organization
- Pledges
- Religious Education
- Sacraments
- SEP
- StatusAnimarum

### Result Columns

Expression	Title
<a href="#">Members Member DUID</a>	<a href="#">Members Member DUID</a>
<a href="#">Members First Name (Formal)</a>	<a href="#">Members First Name</a>
<a href="#">Members Last Name</a>	<a href="#">Members Last Name</a>
<a href="#">Members Age</a>	<a href="#">Members Age</a>

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

### Query Conditions

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

[Members Age](#) is between [18](#) and [35](#)  
and [Members Gender](#) starts with [m](#)

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

# Custom Reports Through IQ

Viewing Query **Baptized But Not Confirmed: Ages 6-8** Query Properties

### Column Picker

- Batches
- Contributions
- Families
- Funds
- Fund - Organization Summary
- Members
- Ministry Scheduler
- Organization
- Pledges
- Religious Education
- Sacraments
- SEP
- StatusAnimarum

### Result Columns

Expression	Title
<a href="#">Members First Name (Informal/Nickname)</a>	<a href="#">Members First Name (Informal/Nickname)</a>
↓ <a href="#">Members Last Name</a>	<a href="#">Members Last Name</a>
<a href="#">Members Birthdate</a>	<a href="#">Members Birthdate</a>
<a href="#">Members Age</a>	<a href="#">Members Age</a>
Sacraments.Baptism is Baptized	Sacraments.Baptism is Baptized

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

### Query Conditions

Select records where **all** of the following apply + {+}

- [Members Age](#) is between 6 and 8
- and [Sacraments.Baptism is Baptized](#) is equal to 1
- and [Sacraments Confirmation is Confirmed](#) is null

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

Query Results - 0 Return All results Unique Records Only Execute Query Query Results



# Changing the Religious Education Grid

# Changing Grid in Religious Ed

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

Dashboard | Student Directory | **Classes** | Leaders | Calendars | Reports | Tools | Configuration | Pending Registrations **2**

## Classes

Cathedral of San Demo, Ann Arbor

Class List | Calendar

Term: 2017-2018  
View By: Session

+ Add Class | Edit | Remove | View

Class	Students
Sunday	
<input type="checkbox"/> 10th Grade	49
<input type="checkbox"/> 11th Grade	3
<input type="checkbox"/> Confirmation	0
<input type="checkbox"/> First Communion	0
<input type="checkbox"/> K-5	0

### 2017-2018 > Sunday > 10th Grade

Class Name	Grade	Students	Department	Leaders
10th Grade	10	<b>49 of 30</b>	Student Education	

Term: 2017-2018 | Dates: 09/10/2017 - 05/20/2018 | Session: Sunday

+ Add Students | + Add Leaders | + Add Group Sacraments | List of Quick Reports

Students | Leaders | Attendance | Schedule | Notes | Sacraments

Edit Grade | Remove | Transfer | Email | Mail Merge | Promote | csv | Grid:   

Select Grid Columns

<input checked="" type="checkbox"/> Student Name	<input checked="" type="checkbox"/> Grade	<input checked="" type="checkbox"/> Birth Date	<input checked="" type="checkbox"/> Age
<input checked="" type="checkbox"/> M/F	<input checked="" type="checkbox"/> Family Last	<input checked="" type="checkbox"/> Family Phone	<input type="checkbox"/> Phone
<input type="checkbox"/> EMail Address	<input type="checkbox"/> Emergency Contact	<input type="checkbox"/> Family	<input type="checkbox"/> Address
<input type="checkbox"/> City	<input type="checkbox"/> State	<input type="checkbox"/> Zip Code	<input type="checkbox"/> Student ID
<input type="checkbox"/> Envelope #	<input type="checkbox"/> Family E-Mail	<input type="checkbox"/> Plus 4	<input type="checkbox"/> Registered
<input type="checkbox"/> Family Group	<input type="checkbox"/> Map Code	<input type="checkbox"/> Registered Org ID	<input type="checkbox"/> Organization Of Registration
<input type="checkbox"/> Family ID	<input type="checkbox"/> Family DUID	<input type="checkbox"/> Family Group ID	

Select All | Clear All | Save & Close | Cancel





# Reducing Picture Sizes

# Reducing Picture Size

- Uploading Pictures requires them to be smaller than .5 MB

Upload Family Photo

The photo should not be bigger than half (0.5) megabyte (MB) and will be displayed at 130x110 pixels on the screen.

**Current Image**      **New Image**

      

Supported formats are **jpg, gif, png** and **bmp**

# Free Online Tools

- <http://www.simpleimageresizer.com/>
- <http://resizeimage.net/>



# Development Requests

# 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/>

# Thank you!

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