

Family Suite: Family/Member Information and Communication

Jeffrey Bachelor
ParishSOFT



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Celebrating 20 Years of Service

Today's Agenda

- Key data to keep current
 - Family
 - Member
- Communication options
 - In software
 - Other

Key Data to Track

- Family Group
- Contact Information
- Birth Dates
- Career Type

Family Group



- How “registered” are they really?
- All staff knows each status
 - List on the “cheat sheet”

Contact Information

- Phone number
- Email(s)
- Emergency
- Salutations

Last Name:*	Dorian
First Name(s):*	John and Elliott
Formal Mailing Name:	Mr. John Dorian and Elliott Ree
Informal Name:	JD Dorian and Elliott Reed
Formal Salutation:	Mr. Dorian and Reed
Informal Salutation:	JD and Elliott
Email Address:	JDmcsqueeze@gmail.com
Primary Phone:	8102271919
Emergency Phone:	8102272020
Emer. Ph. Desc.:	Elliott

} Auto Fill

Happy Birthday!


- Who SHOULD be in RE?
- Ministry opportunities
- Who should be solicited for pledges?
- Small group invitations

Career Type

Dave Ackeret-Jose

Family Details | Member Details (3) | Christ the Redeemer

Pearl | Carl | David | Add | Import

 Gender: Male | Title: Mr. | Status: | Birth Date: | Birth Place: | Age: | Date of Death: | Religion: | Language: | Ethnicity: | Marital Status: | Envelope #:

First Name: David | Nick Name: Dave | Middle Name: Octavio | Last Name: Ackeret-Jose | Suffix: | Maiden Name: | Role: Adult

MemberDUID 627707 | Special Needs: Too much cuteness

General | Contact | Sacraments | Religious Ed. | Misc.

General | Education & Career | Add | Us | Sc | Ve

Father Name: Carl Ackeret | Career Type: Physician | Details: | School: | Education: | Grad Year: 1995

Mother Name: Pearl Ackeret | Mother Maiden Name: Jose | Sacrament Remarks: Created through new member creation process

Save | Save & Close | Cancel | Close

- Anything ever broke at your parish?
- Got extra money?
- Win-win situation

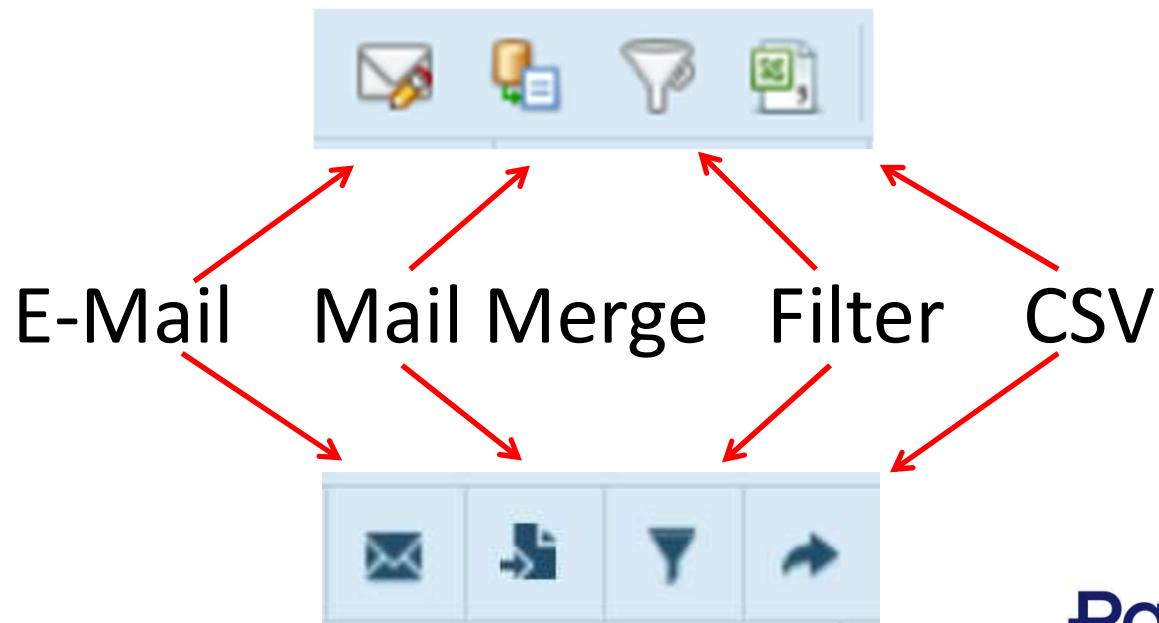
The Power of Workgroups:

- Communicating with the Right People
- Quick and Easy Access to Groups
- Keep Track of Census Update Returns
- Track Contributions for Certain Groups
- Capital Campaigns
- Save Time



Exporting Data from ParishSOFT

- All modules have icons for easy exporting.



Exporting Data from ParishSOFT

Home | **Family Directory** | Religious Education

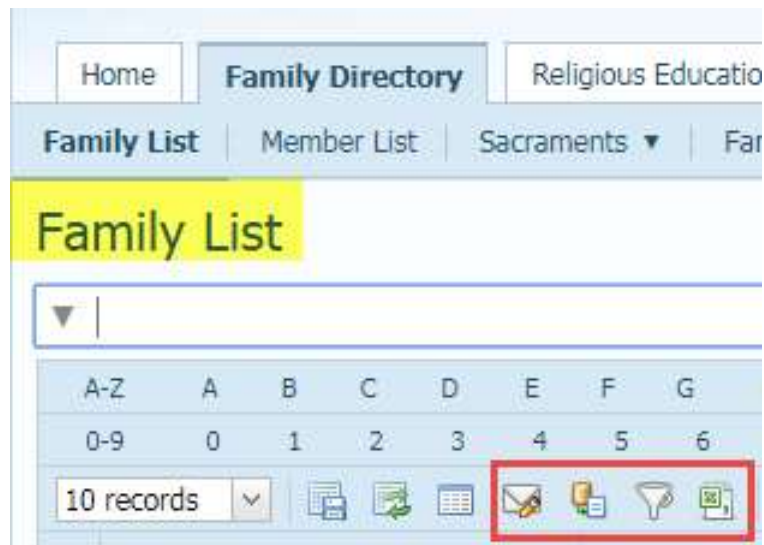
Family List | Member List | Sacraments | Far

Family List

▼ |

A-Z A B C D E F G
0-9 0 1 2 3 4 5 6

10 records ▼ [Print] [Export] [Filter] [Refresh] [Add] [Export]



Members in Workgroup: Parish Council

A-Z A B C D E F G H I J K L M N O P Q R
0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: Filter Col

10 records ▼ [Print] [Export] [Filter] [Refresh] [Add] [Export]

	Last Name	First Name	E-Mail
<input type="checkbox"/>	Abler	Jason	abler@demoemailaddress.com



Home | Family Directory | Religious Education | Offering | **Ministry Scheduler**

Configuration | **Minister Directory** | Teams | Preferences | Scheduling Options | Sched

Minister Directory

+ Add New Minister + Batch-Add New Ministers [Batch-Edit Ministers] [Bulk Change End Date]

A-Z A B C D E F G H I J K L M N O
0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: Non

10 records ▼ [Print] [Refresh] [Filter] [Export] [View Incomplete Minister Records] [Quick Rep]



Exporting Data: Filtering for Export

Filter

1 Membership: Registered

2 Family Group: Active

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 #:

3 Registration Date: From: 1/1/2017 To: 12/31/2017

E-Mail Address:

E-Mail: (Any)

Postal Code:

City:

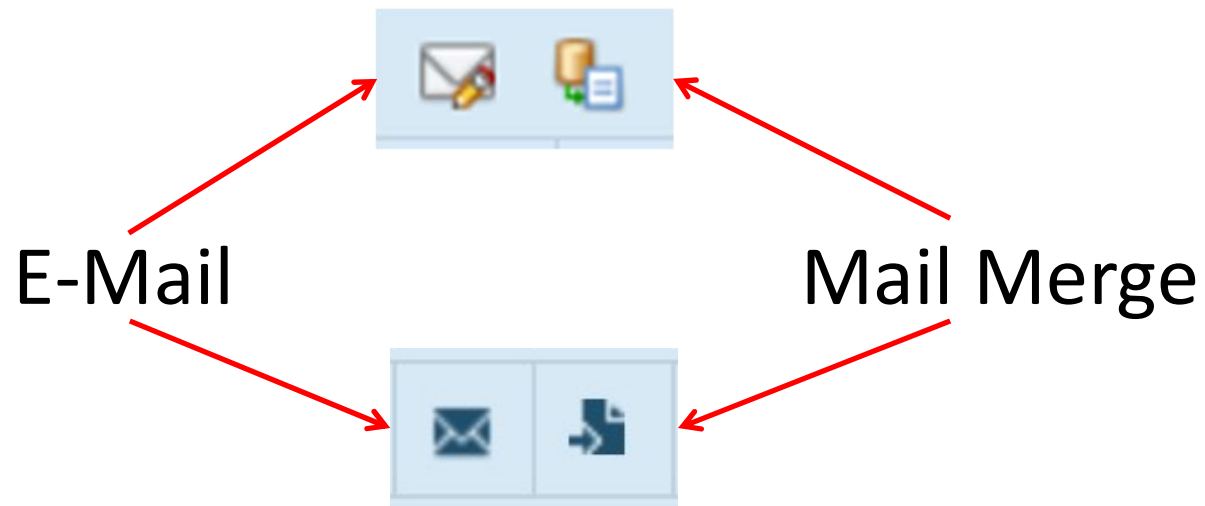
State\Region:

Show 'Send No Mail' Families: (Any)

Show 'Do Not Publish' Families: (Any)

4

Create Mail Merge



Exporting Data: For Emailing

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

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

Family List Sample Parish, Ann Arbor

▼ [Clear Search Results](#)

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

50 records

<input checked="" type="checkbox"/>	Family	Registered	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input checked="" type="checkbox"/>	Abler, Jason and Tracey	Yes	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input checked="" type="checkbox"/>	Adams, Todd and Jane	Yes	Active	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input checked="" type="checkbox"/>	Albert, Mike and Stacey	Yes	Active	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input checked="" type="checkbox"/>	Alberts and Fernandez, Sal and Allison	Yes	Active	alberts@demoemailaddress.com		234 19th Ave	Ann Arbor
<input checked="" type="checkbox"/>	Albrecht, Jennifer	Yes	Active	j.albrecht@church.com	313-694-4642	3810 Syracuse St	Dearborn
<input checked="" type="checkbox"/>	Allen, Marion	Yes	Active	mallen@demoemailaddress.com	555-666-8888	42 Vine Ave	Belleville
<input checked="" type="checkbox"/>	Allen, Paul and Andrea	Yes	Active	allen@demoemailaddress.com	545-2323	3 Jackson Blvd	Ann Arbor
<input checked="" type="checkbox"/>	Anderson, Sarah	Yes	Active	anderson@demoemailaddress.com	555-888-9999	24 Gold Pl #45	Ann Arbor

Exporting Data: For Emailing

The screenshot shows a window titled "New Recipients" with a close button in the top right corner. A red circle with the number "1" is next to the title bar. Below the title bar, the text "Unique Email Count: 68" is displayed and enclosed in a red rectangular box. To the right of this text are three links: "Clear Unchecked", "Clear All", and "Load from Grid". Below these links is a list of 12 email addresses, each with a checked checkbox and a name in parentheses. A red circle with the number "2" is positioned above the "Send Web Based Email" dropdown menu, and a red circle with the number "3" is positioned above the "Send Outlook Email" dropdown menu. Both dropdown menus are also enclosed in red rectangular boxes. The list of recipients is as follows:

- abler@demoemailaddress.com - (Abler, Jason and Tracey)
- adamsfamily@demochurch.com - (Adams, Todd and Jane)
- salbert@demoemailaddress.com - (Albert, Mike and Stacey)
- alberts@demoemailaddress.com - (Alberts and Fernandez, Sal and Allison)
- j.albrecht@church.com - (Albrecht, Jennifer)
- mallen@demoemailaddress.com - (Allen, Marion)
- allen@demoemailaddress.com - (Allen, Paul and Andrea)
- anderson@demoemailaddress.com - (Anderson, Sarah)
- balk@demoemailaddress.com - (Balk, Michael and Sharon)
- bergfamily@demo.com - (Berg, Henry and Barbara)
- bloom@demoemailaddress.com - (Bloom, Alan and Kathy)
- braun@demoemailaddress.com - (Braun, Steven and Julie)

ParishCast

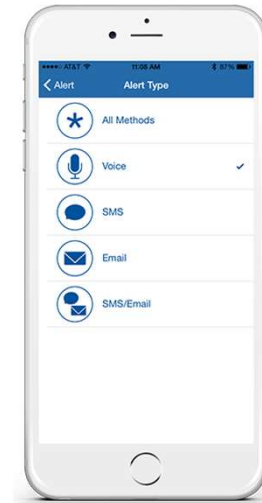
- Rapid notification system
- Cost-effective communication tool
- Reach people across generational/cultural barriers
- Don't confine your ministry to...
 - Building
 - Timeframe
 - Device



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What can it do for my parish?

- Connect with church members and visitors
- Reach out to ministry partners
- Send messages on various platforms
 - Voice calls
 - SMS text messages
 - Emails
- Integrate with social media accounts
- Schedule messages ahead of time



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What can it do for my parish?

- Innovative texting
 - Send messages complete with attachments
- Email with analytics
 - Basic reports and email tracking
- Recipient language preferences
 - Communicate in a preferred language
- Emergency Quick Launch
 - Weather, crisis or emergency

QUESTIONS?

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Thank you!

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