

Family Suite: Reporting

Jeffrey Bachelor
ParishSoft



ParishSOFT[®]
Celebrating 20 Years of Service



Today's Agenda

Good Data

Workgroups

Exporting Data

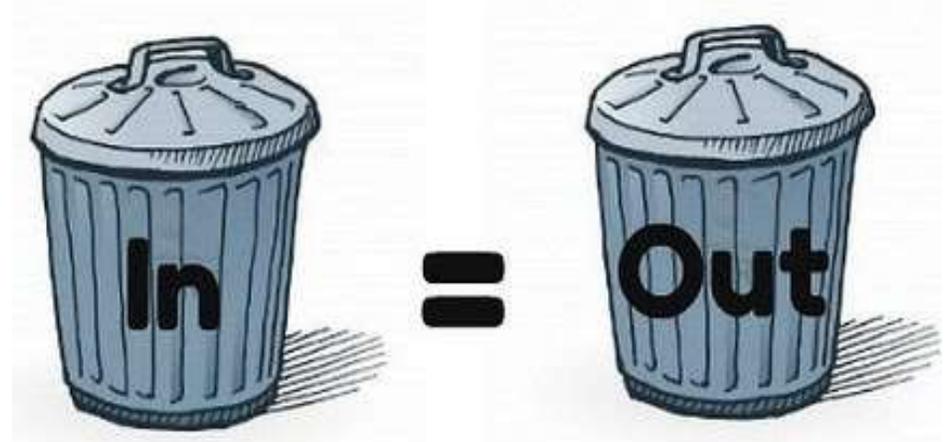
Why Use Reports?

Ready-to-use
Reports

Intelligent Query

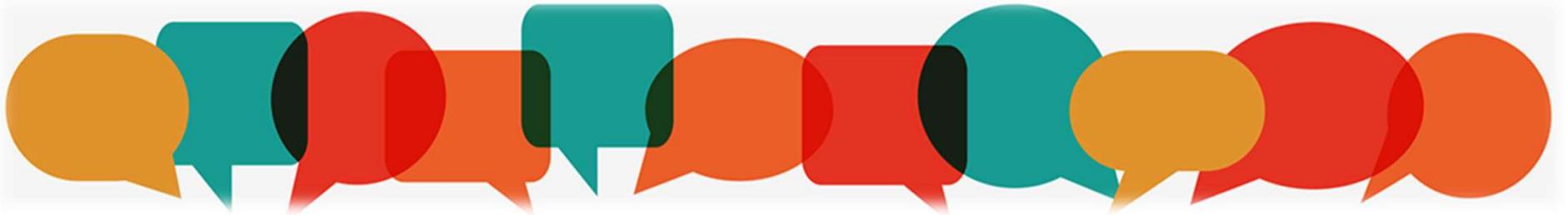
Importance of Good Data

- Garbage In = Garbage Out
- Data Standards
- Creative Ways to Capture Data
- Using Data to Build a Picture
- Targeted Marketing
 - Leveraging your data



The Power of Workgroups

- Family vs. Member Workgroups
- Creating Workgroups
 - Manual vs. Automatic (IQ) Workgroups



The Power of Workgroups: Why Use 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



The Power of Workgroups: Creating Workgroups

ParishSOFT® Family Suite HELP - CONTACT - HOME - SIGN OUT
Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

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 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 Ascending Clear Filter

10 records

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey	6491	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	1129	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> Admin, Dio		training@parishsoft.com		23 Parishsoft Way	Belleville
<input type="checkbox"/> Albert, Mike and Stacey	1201	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input type="checkbox"/> Alberts and Fernandez, Sal and Allison	1203	alberts@demoemailaddress.com		234 19th Ave	
<input type="checkbox"/> Albrecht, Jennifer	2349	j.albrecht@church.com	313-694-4642	3810 Syracuse	

The Power of Workgroups: Creating Workgroups

ParishSOFT[®] Family Suite HELP - CONTACT - HOME - SIGN OUT
Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

Home **1** Family Directory Religious Education Offering Ministry Scheduler Tuition IQ Administration

Family List Member List Sacraments Family Workgroups **2** Member Workgroups Reports

Member Workgroups

Sample Parish, Ann Arbor

Workgroups

3   

 Finance Council

Members in Workgroup: Finance Council

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**

<input type="checkbox"/>	Last Name	First Name	E-Mail	Phone	A
<input type="checkbox"/>	Abler	Jason	abler@demoemailaddress.com		20
<input type="checkbox"/>	Albert	Stacey	salbert@demoemailaddress.com		50
<input type="checkbox"/>	Cooper	Michael	michaelcooper@church.com		10
<input type="checkbox"/>	Crisp	Linda	lindacrisp@church.com		10
<input type="checkbox"/>	Miller	Bill	miller@demoemail.com		70
<input type="checkbox"/>	Pelinka	Jennifer	thepelinkas@church.com		80
<input type="checkbox"/>	Scott	Lisa	scott@demoemailaddress.com		80

The Power of Workgroups: Creating Workgroups

Members in Workgroup: **Finance Council**

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

Add Member Workgroup

1 Name:

2 Description:

3

<input type="checkbox"/>		Chap	Erna	mudchap@church.com
<input type="checkbox"/>		Miller	Bill	miller@demoemail.com
<input type="checkbox"/>		Pelinka	Jennifer	thepelinkas@church.com



The Power of Workgroups: Creating Workgroups

ParishSOFT® Family Suite HELP - CONTACT - HOME - SIGN OUT
Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

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

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

Member Workgroups

Sample Parish, Ann Arbor ▼

Workgroups

- [Finance Council](#)
- [Parish Council](#)

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 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 ▼

<input type="checkbox"/>	Last Name	First Name	E-Mail	Phone	A



The Power of Workgroups: Updating Workgroups

ParishSOFT® Family Suite

HELP - CONTACT - HOME - SIGN OUT

Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

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

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

Member Workgroups

Sample Parish, Ann Arbor

Workgroups

- Finance Council
- Parish Council**

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 S T U V W X Y Z

10 records | Filter Criteria: | Filter Column: | Clear Filter

Add Members | Manage Selected Members | Quick Reports ▼

	Last Name	First Name	E-Mail	Phone	A
--	-----------	------------	--------	-------	---

The Power of Workgroups: Updating Workgroups

Add Members To Workgroup **1** Parish Council

Member Search

2 Member Status: Active

3 Last Name: First Name:

4 Search

Available Member(s)

Please search for members

Cancel

Add Members To Workgroup: Parish Council

Member Search

Member Status:

Last Name:

First Name:

1 Available Member(s)

2 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

3

A-C	Last Name	First Name	E-Mail	Phone	Address
<input type="checkbox"/>	Abler	Griffin			2351 Ellswor
<input checked="" type="checkbox"/>	Abler	Jason	abler@demoemailaddress.com		2351 Ellswor
<input type="checkbox"/>	Abler	Parker			2351 Ellswor
<input type="checkbox"/>	Abler	Spencer			2351 Ellswor
<input type="checkbox"/>	Abler	Tracey	cmann@parishsoft.com		2351 Ellswor
<input checked="" type="checkbox"/>	Adams	Benjamin	benji@parishdemo.com	734-621-1212	373 N Zeeb f
<input type="checkbox"/>	Adams	Jane	janeadams@parishdemo.com	734-621-1212	373 N Zeeb f
<input checked="" type="checkbox"/>	Adams	Maria	madams@parishdemo.com	734-621-1212	373 N Zeeb f

Page 1 of 35 (348 Records) < 1 2 3 4 5 6 7 ... 33 34 35 >

4

The Power of Workgroups: Updating Workgroups

ParishSOFT® Family Suite

HELP - CONTACT - HOME - SIGN OUT

Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

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

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

Member Workgroups

Sample Parish, Ann Arbor

1 Workgroups

- Finance Council
- Parish Council

Members in Workgroup: Parish Council

10 records

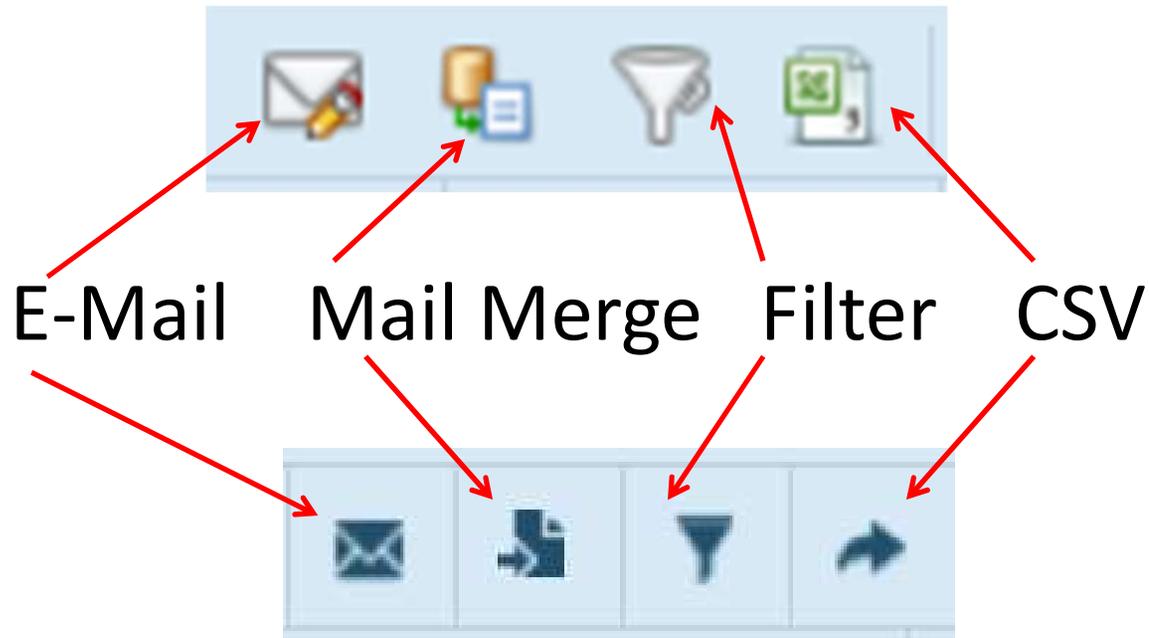
2 3

3 Add Members Manage Selected Members Quick Reports ▼

	Last Name	First Name	E-Mail	Phone	A
<input type="checkbox"/>	Abler	Jason	abler@demoemailaddress.com		2: ^
<input type="checkbox"/>	Adams	Benjamin	benji@parishdemo.com	734-621-1212	3:
<input type="checkbox"/>	Adams	Maria	madams@parishdemo.com	734-621-1212	3:

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

10 records

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

10 records

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

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

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 **Apply** Clear Cancel

[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 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 Ascending Clear Filter

10 records

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

<input type="checkbox"/>	Family	Registered	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/>	Abler, Jason and Tracey	Yes	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/>	Adams, Todd and Jane	Yes	Active	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/>	Albert, Mike and Stacey	Yes	Active	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input type="checkbox"/>	Alberts and Fernandez, Sal and Allison	Yes	Active	alberts@demoemailaddress.com		234 19th Ave	Ann Arbor
<input type="checkbox"/>	Albrecht, Jennifer	Yes	Active	j.albrecht@church.com	313-694-4642	3810 Syracuse St	Dearborn
<input type="checkbox"/>	Allen, Marion	Yes	Active	mallen@demoemailaddress.com	555-666-8888	42 Vine Ave	Belleville
<input type="checkbox"/>	Allen, Paul and Andrea	Yes	Active	allen@demoemailaddress.com	545-2323	3 Jackson Blvd	Ann Arbor
<input type="checkbox"/>	Anderson, Sarah	Yes	Active	anderson@demoemailaddress.c	555-888-9999	24 Gold Pl #45	Ann Arbor
<input type="checkbox"/>	Anderson, Thomas and Andrea	Yes	Active	anderson@demoemailaddress.c	777-4444	8941 River Road	Ann Arbor
<input type="checkbox"/>	Balk, Michael and Sharon	Yes	Active	balk@demoemailaddress.com	444-5555	7999 7th Street	Ann Arbor

Page 1 of 8 (74 Records) < 1 2 3 4 5 6 7 8 >

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 ▼

▼ Q [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 Ascending Clear Filter

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

<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	saibert@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.c	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 (X) 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 ten 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" button, and a red circle with the number "3" is positioned above the "Send Outlook Email" button. Both buttons are 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)

Exporting Data: For Mail Merge

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

50 records

Filter Criteria: None | Filter Column: Family Ascending | Clear Filter

Family	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input checked="" type="checkbox"/> Abler, Jason and Tr...	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input checked="" type="checkbox"/> Adams, Todd and Jane	Active	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input checked="" type="checkbox"/> Albert, Mike and Stacey	Active	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input checked="" type="checkbox"/> Alberts and Fernandez, Sal and Allison	Active	alberts@demoemailaddress.com		234 19th Ave	Ann Arbor
<input checked="" type="checkbox"/> Albrecht, Jennifer	Active	j.albrecht@church.com	313-694-4642	3810 Syracuse St	Dearborn
<input checked="" type="checkbox"/> Allen, Marion	Active	mallen@demoemailaddress.com	555-666-8888	42 Vine Ave	Belleville
<input checked="" type="checkbox"/> Allen, Paul and Andrea	Active	allen@demoemailaddress.com	545-2323	3 Jackson Blvd	Ann Arbor
<input checked="" type="checkbox"/> Anderson, Sarah	Active	anderson@demoemailaddress.c	555-888-9999	24 Gold Pl #45	Ann Arbor
<input checked="" type="checkbox"/> Anderson, Thomas and Andrea	Active	anderson@demoemailaddress.c	777-4444	8941 River Road	Ann Arbor
<input checked="" type="checkbox"/> Balk, Michael and Sharon	Active	balk@demoemailaddress.com	444-5555	7999 7th Street	Ann Arbor

1: Red box around the first column (Family)

2: Red circle around the 'Export' icon (document with arrow)

3: Red circle around the 'Merge Selected Records (50)' option

4: Red circle around the 'Merge All Records' option

Exporting Data: For Mail Merge

My Templates Global Templates ParishSOFT Templates Mail Merge (50 Records)

Select a template below, [create a new one](#) or [open one](#).

	Template Name
	<input type="text"/>
  	10 Envelope
  	Birthday Letter
  	Certificate of Anointing
  	Certificate of Anointing Parish Detail
  	Certificate of Baptism
  	Certificate of Baptism Full
  	Certificate of Baptism Full Parish Detail
  	Certificate of Baptism Parish Detail
  	Certificate of Confirmation
  	Certificate of Confirmation Parish Detail

Exporting Data: To a CSV File

ParishSOFT® Family Suite

HELP - CONTACT - HOME - SIGN OUT

Sample Parish, Ann Arbor
trainer (Kimberly Spindler)

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

50 records

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 Ascending | Clear Filter

1 **2**

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

Family	Registered	Family Group	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Jason and Tracey	Yes	Active	abler@demoemailaddress.com	555-2222	2351 Ellsworth Rd	Ypsilanti
<input type="checkbox"/> Adams, Todd and Jane	Yes	Active	adamsfamily@demochurch.com	734-621-1212	373 N Zeeb Rd	Ann Arbor
<input type="checkbox"/> Albert, Mike and Stacey	Yes	Active	salbert@demoemailaddress.com	555-888-7777	53 Truman Dr	Ann Arbor
<input type="checkbox"/> Alberts and Fernandez, Sal and Allison	Yes	Active	alberts@demoemailaddress.com		234 19th Ave	Ann Arbor
<input type="checkbox"/> Albrecht, Jennifer	Yes	Active	j.albrecht@church.com	313-694-4642	3810 Syracuse St	Dearborn
<input type="checkbox"/> Allen, Marion	Yes	Active	mallen@demoemailaddress.com	555-666-8888	42 Vine Ave	Belleville
<input type="checkbox"/> Allen, Paul and Andrea	Yes	Active	allen@demoemailaddress.com	545-2323	3 Jackson Blvd	Ann Arbor
<input type="checkbox"/> Anderson, Sarah	Yes	Active	anderson@demoemailaddress.c	555-888-9999	24 Gold Pl #45	Ann Arbor
<input type="checkbox"/> Anderson, Thomas and Andrea	Yes	Active	anderson@demoemailaddress.c	777-4444	8941 River Road	Ann Arbor

Exporting Data: To a CSV File

	A	B	C	D
1	Family	Mailing Name	E-Mail Address	Primary Phone
2	Abler, Jason and Tracey	Mr. and Ms Jason Abler	abler@demoemailaddress.com	555-2222
3	Adams, Todd and Jane	Mr. and Mrs. Todd Adams	adamsfamily@demochurch.com	734-621-1212
4	Albert, Mike and Stacey	Mr. and Mrs. Micheal Albert	salbert@demoemailaddress.com	555-888-7777
5	Alberts and Fernandez, Sal and Allison	Mr. Sal Alberts and Mrs. Allison Fernandez	alberts@demoemailaddress.com	
6	Albrecht, Jennifer	Ms Jennifer Albrecht	j.albrecht@church.com	313-694-4642
7	Allen, Marion	Mrs. Marion Allen	mallen@demoemailaddress.com	555-666-8888
8	Allen, Paul and Andrea	Mr. and Mrs. Paul Allen	allen@demoemailaddress.com	545-2323
9	Anderson, Sarah	Ms Sarah Anderson	anderson@demoemailaddress.com	555-888-9999
10	Anderson, Thomas and Andrea	Mr. and Ms Thomas Anderson	anderson@demoemailaddress.com	777-4444
11	Balk, Michael and Sharon	Mr. and Ms Michael Balk	balk@demoemailaddress.com	444-5555
12	Berg, Henry and Barbara	Mr. and Mrs. Henry Berg	bergfamily@demo.com	734-514-2484
13	Bloom, Alan and Kathy	Mr. and Mrs. Alan Bloom	bloom@demoemailaddress.com	777-8888
14	Braun, Steven and Julie	Mr. and Ms Steven Braun	braun@demoemailaddress.com	555-3333
15	Burgundy and Corningstone, Mark and Veronica	Mr. and Mrs. Mark Burgundy	markburgundy@church.com	319-555-3674
16	Cantrell, Hope	Ms Hope Cantrell	hcantrell@demoemailaddress.com	777-777-7777
17	Cash, Loose	Mr. Loose Cash		
18	Christensen, Linda	Ms Linda Christensen	christensen@demoemail.com	734-568-4544
19	Cooper, Michael	Mr. Michael Cooper	mcooper@church.com	213-555-5678
20	Curry, Stephen and Ellen	Mr. and Mrs. Stephen Curry	curry@demoemailaddress.com	333-333-3333

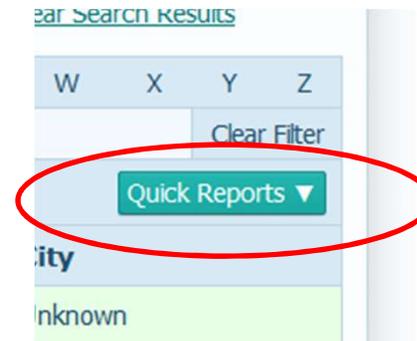
Why Use Reports?

- Easy to Use
- Good Way to Present Your Data



Ready-to-Use Reports

- **Quick Reports** are specific to module.



- All modules have a **Reports** tab with user-definable report selections.



Ready-to-Use Reports: Family Directory

- Sacraments
- Statistics
 - Kenedy Directory
 - Statistics Snapshot
- Census
 - Parish Directory
 - Registration Forms

Family Directory Reports

Select Report - Baptism

Report Type	Report
Sacrament	Baptism
Statistics	Confirmation
Census	Funeral
	First Eucharist
	Marriage

Select Filtering Options

Select Date Range

Start Date: 8/3/2017 

End Date: 11/3/2017 

Ready-to-Use Reports: Offering

- Audit (Type or User)
- Batches (Detail or List)
- Contributions
(Postings, Statements, or Summary)
- Pledges
(Detail, Non-Pledger List, Past Due, Pledger List, or Statements)

Offering Reports

Select Report

Category	Report
Audit	
Batches	
Contributions	
Pledges	

Tip!

Use of batches is a best practice for internal controls.

Ready-to-Use Reports: Ministry Scheduler

- Schedules for Liturgical Ministries
- Individual Minister Schedules
- Minister Lists & Labels
- Schedules by Date
- Other Uses

Ministry Scheduler Reports

Select Report

Ministry Schedule
Individual Minister Schedule
Times Served Count
Minister List
Minister Mailing Label
Unscheduled Ministers
Family Group Mailing Label
Minister Schedule By Date

Ready-to-Use Reports: Religious Education

- Class Rosters & Schedules
- Class Lists
- Mailing Labels
- Sacraments List
- Class Attendance Sheets & Records
- Registration Forms

Religious Ed. Reports

Class Rosters & Schedules

Class Lists

Mailing Labels

Sacraments List

Class Attendance Sheets & Records

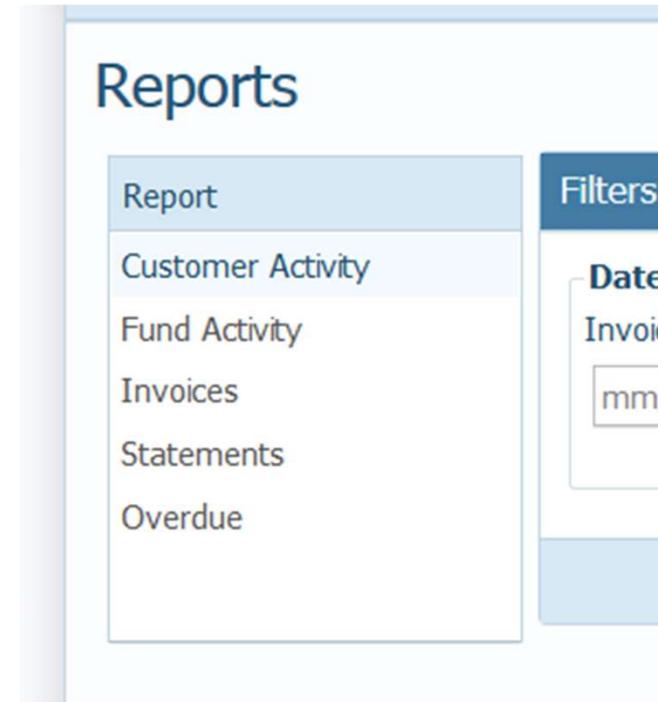
Registration Forms

ParishSOFT®

Celebrating 20 Years of Service

Ready-to-Use Reports: Tuition

- Invoices
- Customer Activity
- Fund Activity
- Invoices
- Statements
- Overdue



Ready-to-Use Reports: Diocesan Development Reports

- Parish Reports from Diocesan Appeals
(Permission must be assigned by Diocese.)
- Listing of Donors & Amounts per Campaign

Parish Reports

Select a Fund

Annual Catholic Appeal 2017

Select a Report

Parish Master Report

Group Sorting
No group sorting available for this report.

Detail Sorting
No detail sorting available for this report.

Intelligent Query (IQ)

- Create Custom Queries
- Select Data Desired in Columns
- Add Query Conditions to Narrow Search



*Cast a wide net initially.
Then narrow search one condition
at a time. Execute query after
adding each condition.*



Intelligent Query

[+ New Query](#)
[Save Query](#)
[Save Query As](#)
[My Queries](#)
[Recent Queries](#)
[Query Tags](#)

Column Picker

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

Result Columns

Expression	Title
Members Last Name	Last Name
Members First Name (Formal)	Name (Formal)
Families.Contact Info Primary Address 1	Address 1
Families.Contact Info Primary Address 2	Address 2
Families.Contact Info Primary City	City

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

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 Query Results ▼

Last Name	Name (Formal)	Address 1	Address 2	City	Phone	Postal Code (incl_ +4)	State	Cell Phone	Email Address
Berg	Byran	3811 Carpenter Rd		Ypsilanti	734-514-2484	48197-9606	MI	734-584-8694	byranberg@democ
Berg	Kevin	3811 Carpenter Rd		Ypsilanti	734-514-2484	48197-9606	MI		Kevinberg@demop
Davidson	Dale	8087 Sundon Dr		Ann Arbor	734-561-7845	48108	MI		davis@demoemail

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

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
Members Member DUID	Member DUID
Members Last Name	Last Name
Members First Name (Formal)	First Name (Formal)
Families.Contact Info Primary Address 1	Address 1
Families.Contact Info Primary Address 2	Address 2

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

Query Conditions

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

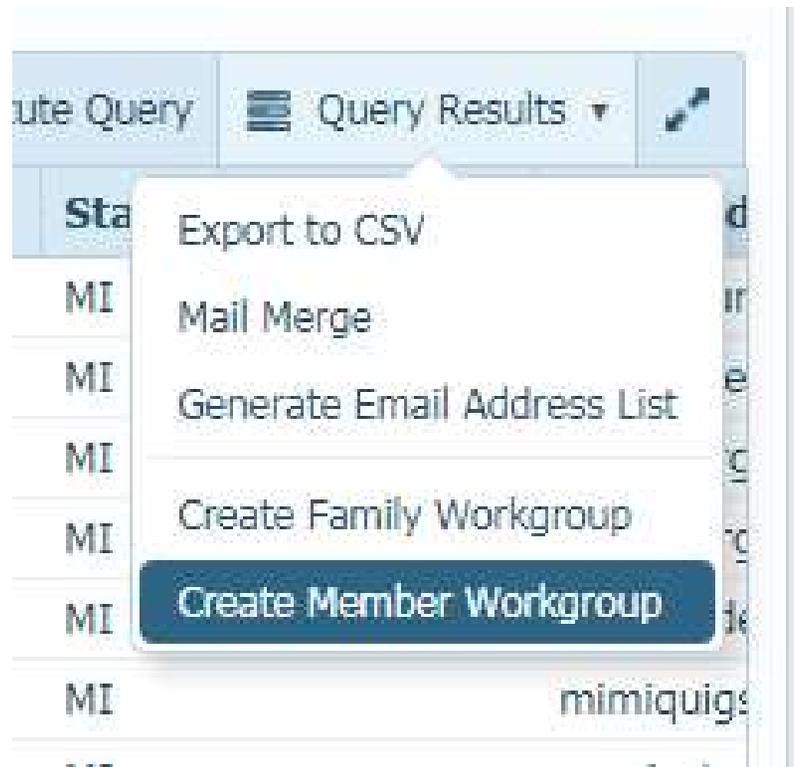
- [Members Member Status](#) **starts with** [Active](#)
- and [Members Age](#) **is between** [19](#) and [29](#)
- and [Members Gender](#) **starts with** [M](#)

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

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 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@der
1000933	Berg	Kevin	3811 Carpenter Rd		Ypsilanti	48197-9606	MI		Kevinbergi
1000936	Berg	Byran	3811 Carpenter Rd		Ypsilanti	48197-9606	MI	734-584-8694	byranbergi
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@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?

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Thank you!

Jeffrey Bachelor
ParishSoft



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