

Family Suite Tips & Tricks

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ParishSOFT®
Celebrating 20 Years of Service

Today's Agenda

- Searching vs. Filtering
- Grid Layout Adjustments
- Batch Management Filtering
- Quick Entry Posting
- Moving Members Into a New Family
- Adding a New Church or Celebrant
- Multiple sessions/tabs
- Home/Mailing other
- Emailing multiple family members at once



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

▼

A-Z 0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Ascending

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

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Show 'Do Not Publish' Families: (Any)

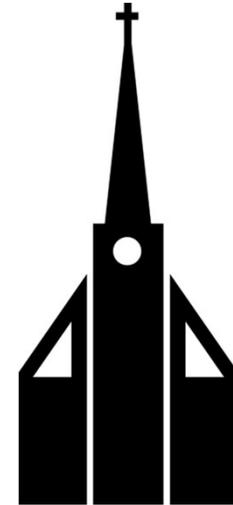
Show Families With E-Mail: (Any)

Exact Search:

Apply Clear Cancel

Grid Layout Adjustments

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



Family List

Sample Parish, Ann Arbor

▼ [Clear Search Results](#)

A-Z 0-9 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
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Batch Filters

- Open is default, which means **Detailed**
- Pull down to reveal alternatives
- Choose All until you're comfortable with options
- Name batches by date with year first to keep in order

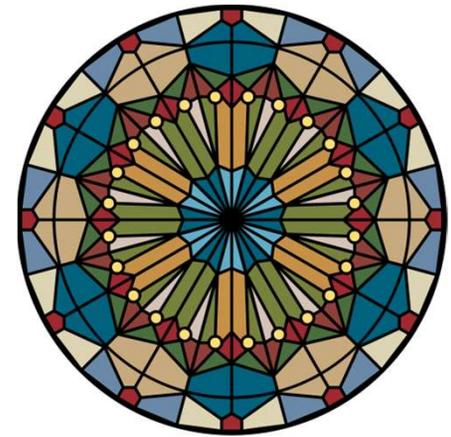
The screenshot shows the 'Batch Management' interface in ParishSOFT. At the top, there are navigation tabs: Home, Family Directory, Religious Education, **Offering**, and Ministry Scheduler. Below these are sub-tabs: Funds, **Batches**, Pledges, Posting, Contribution List, Giving History, and Impo. The main title is 'Batch Management'. Below the title, there are controls: '100 records' (dropdown), a refresh icon, '+ Add Batch', 'Delete Batch(s)', 'Close Batch(s)', and 'Quick Reports' (dropdown). The table has columns: Status, Batch, Cash, and Pledges. A dropdown menu is open over the 'Status' column, showing options: All (selected), Open, Closed, Quick Entry, Committed, and All. The table contains 12 records. The first record is highlighted in green.

Status	Batch	Cash	Pledges
All			
Open	2016-1-10	\$1,000.35	
Closed	2016-1-3	\$890.00	
Quick Entry	2016-12-25 Offering	\$827.32	
Committed	2016-3-27 Offering	\$770.00	
All	2017-05-28 Offertory	\$500.00	
Quick Entry	2017-15-8 Pledge	\$500.00	
Closed	Building Campaign	\$0.00	
Open	Contribution Import 110617_1550	\$38,720.00	
Closed	Second Collection from Last Weekend	\$760.00	
Quick Entry	Spindler Batch	\$500.00	
Closed	test batch 11-22-17	\$550.00	
Closed	TEST2	\$0.00	

Page 1 of 1 (12 Records) < 1 >

Quick Entry Posting

- Quicker and easier than Detailed
- Saves contributions in real time
- Can track check numbers
- Color-coded for ease of use
- Mix and match funds in one batch
- Can enter contributions by envelope or name
- **NOTE:** Can NOT enter negative numbers



Quick Entry Posting

Options and Filters

Quick Entry Contribution Posting ✖

Batch Information Second Collection from Last Weekend (3005) ▼

Total	Balance	Transactions
\$760.00	\$760.00	0 transaction(s) - ✓ 0 valid - ✗ 0 invalid - 👤 0 family - 👤 0 member

Default Posting Data ⚙️ Options and Filters

Fund Retired Religious ▼ Date 2/26/2018 📅 Type Check ▼

Posting

Env #	Last Name	Amount	Check #	Memo	Status
1	<input type="text" value="🔍"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Lookup a family/member and enter amount ⚙️ 🗑️
2	<input type="text" value="🔍"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Lookup a family/member and enter amount ⚙️ 🗑️

Moving Members Into a New Family

- 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 “placeholder” family for extraction



Moving Members Into a New Family

- Importing a spouse into the family

Mike Cooper

Family Details Member Details (1) Sample Parish, Ann Arbor

Michael Add Import

Gender: Male Status: Active
Title: Mr. Birth Date: 12/22/1972
First Name: Michael Birth Place:
Nick Name: Mike Age: 45
Middle Name: Date of Death:
Last Name: Cooper Religion:
Suffix: Language:
Maiden Name: Ethnicity:
Role: Head Marital Status: Single
Envelope #: 0 Next Send?

MemberDUID 1000114
Special Needs

Moving Members Into a New Family

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

Save & New Save & Edit Save & Finish Cancel

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
- New organizations can be more than churches



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: All 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 Clear Filter

10 records

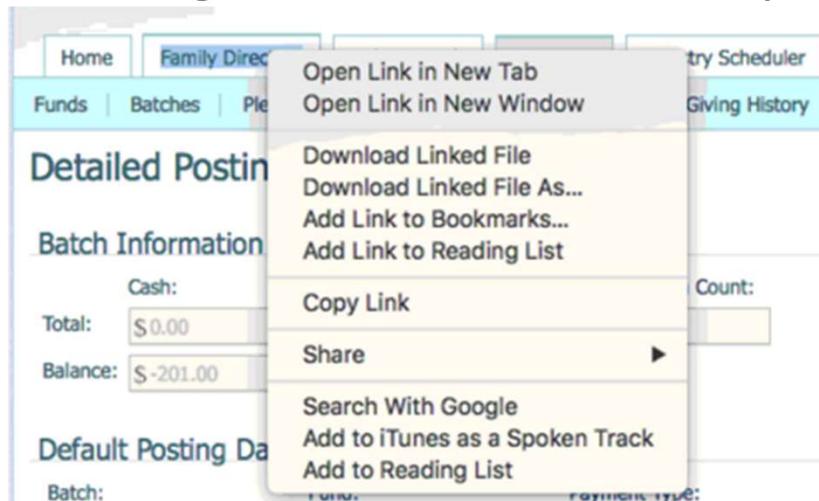
	Parish Name	Address	City	State/Region	Postal Code	Country
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	598 Needmore Lane, N.E.	Floyd	VA	24091	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	435 4th St NE	Minneapolis	MN	55413	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints	19795 Holyoke Ave	Lakeville	MN	55044	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints - St. Aidan Parish	PO Box 185	New Richland	MN	56072	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2233 Diamond Avenue	Grand Rapids	MI	49505	USA
<input type="radio"/> <input type="button" value="Info"/> <input type="button" value="Minus"/> <input type="button" value="Star"/>	All Saints Academy	2855 E. Livingston Ave.	Columbus	OH	43209	USA

Adding a New Celebrant

The screenshot displays the ParishSOFT software interface. At the top, a navigation bar includes tabs for Home, Family Directory, Religious Education, Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below this is a secondary menu with options like Suspense, Lookups (highlighted with a red box), System Setup, Organizations, Manage Staff, Module Settings, Utilities, and Notifications. The main content area is titled 'Lookup Management' and shows a dropdown menu for 'Sample Parish, Ann Arbor'. On the left, a 'Tables' sidebar lists various categories, with 'Family Directory' expanded to show 'Celebrants'. The main table, titled 'Celebrants', shows a list of records with columns for checkboxes, icons, and 'Description'. A red box highlights the table's toolbar, which includes a '100 records' dropdown, navigation arrows, a plus sign, and sorting options. An 'Add "Celebrant" Record' dialog box is open in the foreground, featuring a 'Description' input field and 'Save' and 'Cancel' buttons. The table lists the following records: Reverend Carl Judge, Reverend Wes Bozzetto, Cardinal John Fleischer, Bishop Dan France, Bishop Dan Burton, and Bishop Drew Seuss.

Easy way to correct a mistake

- You can have multiple sessions open at a time.
 - PC browsers
 - Right click on tab and Duplicate tab
 - Mac/Safari
 - Right click on tab and Open Link in New Tab



Address Home/Mailing/Other...

- Family Tab

Mr. and Mrs. Todd Adams (100332) Env#: 1129

Family Details Member Details (4) All Saints Parish, Ann Arbor

Family Information Notes

Church of Registration: All Saints Parish, Ann Arbor

Details Modified On: Thursday, April 19, 2018 10:35 AM

Family Group: Active

Registration Status:

Registration Date: 9/15/2017

Unregistered Date:

 Add Delete

Last Name*: Adams

First Name(s)*: Todd and Jane

Formal Mailing Name: Mr. and Mrs. Todd Adams

Informal Name: Todd and Jane Adams } Auto Fill

Formal Salutation: Mr. and Mrs. Adams

Informal Salutation: Todd and Jane

Email Address: adamsfamily@demochurch.com;cdargis@y

Primary Phone: 734-621-1212

Emergency Phone: 734-658-3252

Emer. Ph. Desc.: Aunt Betty

Primary Address: Mailing Address

Home Mailing Other

Country: United States

Postal Code: 48106 1245 ... ✖

Address Line 1: PO Box 1245

Address Line 2:

City: Ann Arbor

State/Region: Michigan

Phone Number:

- Reports/labels/mail merge

Emailing Multiple People



QUESTIONS?

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Thank you!

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