Georgia Bulletin Mailing List Management Procedures – ParishSOFT Family Suite

Beginning in 2017, all parishes and missions in the Archdiocese of Atlanta operating in the ParishSOFT Family Suite will be able to take advantage of the new features of this system to manage their Georgia Bulletin mailing list. The new features will eliminate the monthly administrative tasks at the parish level and take advantage of newer address validation technology to streamline the workflow associated with the Georgia Bulletin mailing list. The details of the new procedure are included in this document. Until your parish has a chance to verify your mailing list, the Georgia Bulletin will continue to use your current list. Tina Levitt is the Georgia Bulletin staff member in charge of the parish mailing lists – you may reach her at <u>tlevitt@archatl.com</u>.

To have your parish families included in the mailing list for the Georgia Bulletin, three items should be selected on their family record.

- 1. Family Group Active
- 2. Registration Status checked/registered
- 3. Send Magazine checked

| | Family Information | Notes | | | |
|---|----------------------|--|-----------|--------------------|--|
| | | Church of Registration: Details Modified On: Family Group: | | 3, 2015 12:00 AM | |
| | Add Delete | Registration Status: Registration Date: Unregistered Date: | 5/25/2017 | iii | |
| | Last Name.* | Arroya | | Primary Address: | Home Address |
| | | | | Home Ma | aling Other |
| • | | | 1 | Country: | Unknown |
| | | Juan and Maria Arroya | Auto Fill | Postal Code: | 00000 🛛 |
| | | Pint and Pins. Pinoya | J | Address Line 1: | 2701 Park DR |
| | Informal Salutation: | Juan and Maria | | Address Line 2: | |
| | Email Address: | | | City: | × |
| | Primary Phone: | | | State/Region: | Unknown |
| | Emergency Phone: | | | Phone Number: | |
| | Emer. Ph. Desc.: | | | | |
| | Envelope #: | 266 <u>Next</u> | | Send Mail | : 🔽 Publish Address: 🕅 |
| | Annual Gift \$: | 0 | | Send Contrib. Env. | Publish Photo for Pictorial Directory: |
| | Map Code: | | | Publish Phone | : 🔽 Send Magazine: 🔽 |
| | | | | Publish Email | : 🔽 |

Note, if any of these three items are <u>not</u> selected, the family will no longer receive the Georgia Bulletin.

The Georgia Bulletin mailing list will be managed by the Georgia Bulletin staff through access to ParishSOFT Family Suite query program. An IQ query will be run to identify all registered, active families with the "send magazine" option selected. This will provide real-time updates and accurate mailing addresses.

Each parish can, and should, periodically review their mailing list by running the same query.

To run the IQ query, log in to ParishSOFT Family Suite (user credentials required) and select the IQ tab, highlighted in yellow, below.

| ConnectNow | Dioces | san Suite | HELP - CONTACT - HOME - SIGN C Archdiocese of Atlanta, Atla |
|--------------------------|-----------------|---|--|
| | Diotoc | | SShirley21066 (Susan123 Shirl |
| Home Census IQ | Administration | | |
| uery Builder | | | |
| ntelligent Query | | | |
| + New Query 🗎 Save Query | 🗎 Save Query As | 🖀 My Queries 🛸 Recent Queries 🛸 Query Tags | |
| olumn Picker | | Result Columns | |
| Batches | <u>^</u> | [Add new column] | |
| Contributions | | | |
| Families | | | |
| E Funds | | | |
| Fund - Organization Summ | nary | | |
| Members . | | | |
| Ministry Scheduler | 8 | a a bi | |
| Contraction Internation | | Query Conditions | + {+} |
| Pledges | | Select records where <u>all</u> of the following apply [Add new condition] | T (T) |
| Religious Education | | [Add new condition] | |
| Sacraments | | | |
| 📰 StatusAnimarum | | | |
| Subscription Manager | - | | |
| * | (ii) (ii) | | |
| Query Results - 0 | | Return All results | Inique Records Only 🛛 Execute Query 🗮 Query Results 🔹 |

To begin, choose "My Queries" and select the "GA Bulletin" query from the list, then open the query.

| | Query Name | Query Tags | Date Created | Date Modified | Owner | Global |
|---------------------------|--|-----------------|--------------|---------------|-------------------|--------------|
| Edit Delete | ages 14 to 17 | SRS | 3/2/2018 | 3/2/2018 | Shirley, Susan123 | ¥ |
| Edit Delete | AOA - GA Bulletin - St Joseph Athens 12642 | SRS | 5/14/2018 | 5/14/2018 | Shirley, Susan123 | \checkmark |
| Edit Delete | Famílies without Members - SRS | SRS | 9/22/2017 | 9/22/2017 | Shirley, Susan123 | |
| Edit Delete | Fund Description and Fund DUID | SRS | 10/27/2017 | 10/27/2017 | Shirley, Susan123 | \checkmark |
| <u>Edit Delete</u> | GA Bulletin - CNFS | SRS | 5/25/2017 | 5/11/2018 | Shirley, Susan123 | \checkmark |
| <u>Edit</u> <u>Delete</u> | GA Bulletin - CNFS - St Anna | SRS | 5/11/2018 | 5/11/2018 | Shirley, Susan123 | \checkmark |
| Edit Delete | GA Bulletin - CNFS - Transfiguration | SRS | 5/11/2018 | 5/11/2018 | Shirley, Susan123 | \checkmark |
| <u>Edit</u> <u>Delete</u> | GA Bulletin - PSFS | SRS GA Bulletin | 11/21/2018 | 11/21/2018 | Shirley, Susan123 | \checkmark |
| Edit Delete | GA Bulletin - PSFS - all in list | SRS | 5/23/2018 | 5/23/2018 | Shirley, Susan123 | \checkmark |
| <u>Edit</u> <u>Delete</u> | GA Bulletin - St Joseph Athens 12642 | SRS | 5/14/2018 | 5/14/2018 | Shirley, Susan123 | \checkmark |
| age 1 of 3 (| 25 items) < 1 2 3 | | | | | |

Next, in the query conditions add your ParishSOFT Site License number POL so that it reads Organization Organization ID is equal to <u>your unique POL</u>. This number shows is generally used as part of your user name when logging in to the system. If you do not know your parish POL, please check with your business manager or administrator. Then, at the bottom of the page, select "Execute Query", as shown below.

| Home Census IO | Administration | | |
|------------------------------|-----------------|--|--|
| Query Builder | | | |
| Intelligent Query | | | |
| | 🗎 Save Query As | 🖀 My Queries 🛸 Recent Queries 🛸 Query Tags | |
| Viewing Query GA Bulletin | | | Q, Query Properties |
| Column Picker | | Result Columns | |
| >>>>>>>>>>>>>>>>>>>>>>>>>>>> | ary E | Expression Parineso.execution Parineso Parineso Parineso.execution Par | Tole Trainers contracts into Printer Fab Prints Families Stand Hagazine Orranization Arganizion Hame Organization Organization ID Φ |
| * | (ii) | [Add new condition] | |
| Query Results - 0 | | Return All results 💌 📄 Unio | que Records Only 🧧 Execute Query 🚆 Query Results 🔻 🖌 |
| | | No Query Results | |

This will load all families from your parish that meet the criteria set by the query.

| Connect | ÓW Dio | ces | san Suite | | | | Archdiocese of Atlanta, Atla SShirley21066 (Susan123 Shir | | | | |
|----------------------|------------------|---|---|-------------------|---------|--|--|-------------|--------------------------|--|--|
| Home Census | IQ Administrat | ion | | | | | | | | | |
| Query Builder | | | | | | | | | | | |
| Intelligent Que | erv | | | | | | | | | | |
| + New Query 🗄 Sav | | ery As | 🖀 My Queries 🛙 | Recent Queries | 📎 Quer | y Tags | | | | | |
| Viewing Query GA B | ulletin | | | | | | | | Q Query Property | | |
| Column Picker | | | Result Columns | | | | | | | | |
| Batches | | Expression Parmes-contact and Primary zip Plus | | | | Title rannes.concacc and Printary 20 Pius | | | | | |
| Contributions | | | Families is Reg | | rius | | | Registered | 1 <u>7 20 Pus</u> | | |
| Families | | | Familes Send | | | | | nd Magazine | | | |
| Funds | | | | | | | | | Name | | |
| Fund - Organizatio | n Summary | | | | | | Organization Organization Name Organization Organization ID | | | | |
| Members | | | | | | | Unganization Unganization to | | | | |
| Ministry Scheduler | | Е | [Add new column] Query Conditions Select records where all of the following apply | | | | | | | | |
| Organization | | | | | | | | | | | |
| Pledges | | | | | | | | + {+} | | | |
| Religious Education | n | | Families is Regatered is equal to Yes and F <u>amilies Send Magazine is equal to Yes</u> | | | | | | | | |
| Sacraments | | | | | | | | | | | |
| StatusAnimarum | | | | | | | | | | | |
| Subscription Mana | ger | + | | | | | | | | | |
| × | ۵ (| D | [Add new condit | ion] | | | | | | | |
| Query Results - 50 | | | | Return 50 results | • | 🕅 Unique Reo | ords Only | Execute Qu | ery 📃 Query Results 🔻 | | |
| Families Family DUID | Families Members | hip D | ate Families Dat | e Last Updated | Familie | s Last Name | Families | First Names | Families Mailing Name | | |
| 6278 | 12/1/1972 | | 9/16/2015 | | Dooley | | Kenneth | 1 | Mr. Kenneth M. Dooley | | |
| 6279 | 6/24/1986 | | 3/5/2015 | | | ier | Marvin and Ann | | Mr. and Mrs. Marvin Drum | | |
| 6282 | 8/15/1956 | | 8/8/2016 | | | Elison | | | Mrs. James B. Ellison | | |
| 6283 | 8/12/1956 | | 5/2/2012 | | Epps | | Leondria | 1 | Ms. Leondria K. Epps | | |
| 6284 | 11/15/1993 | | 1/29/2013 | | Evans | | Leola | | Mrs. Leola Evans | | |
| 6285 | 8/28/1961 | | 1/29/2013 | | Fergus | on | Samuel | and Deborah | Mr. and Mrs. Samuel Ferg | | |

Next, select Query Results, highlighted in yellow, above, and choose "Export to CSV".

This will create a spreadsheet of the mailing list for your families to review and/or save. It is very important that you review the list created by this query to make certain that all families have full mailing name and address info. Any missing information should be corrected in the database before finalizing this list. It is recommended that you also track this list on a monthly and/or quarterly basis and save the results to verify the annual billing from the Georgia Bulletin.

Should you have any questions about your mailing list, please contact Susan Shirley at <u>sshirley@archatl.com</u> or 404-920-7408.