

ParishSOFT Family Suite

Frequently Asked Questions



Finance Office / Parish Support

Updated July 29, 2020

ParishSOFT Family Suite FAQs

Table of Contents

- Family Directory:..... 4
 - 1. Our database is now browser-based, what is the URL?..... 4
 - 2. When I select a report, nothing happens, why? 4
 - 3. When searching for a particular family, one that I know is in our database, I get no results, why? 6
 - 4. How do I run an envelope number report for my envelope company?..... 6
 - 5. When I log in to my database, I don't see a tab for Religious Education or Ministry Scheduler, etc., why? 6
 - 6. I've gotten an "Ooops" error or frequent "time Out" errors and it keeps happening; what can I do?.. 6
 - 7. We have duplicate records for some families in our database, how do we merge these? 7
 - 8. I know I can change the layout of the columns in my Family List or Member List, can I save these settings?..... 8
 - 9. We have lots of old family records, with no recent contribution or sacrament history. Can we delete these old records? 8
 - 10. Is there an easy way to find a list of newly registered families at our parish? 8
 - 11. What should we do to prevent deceased members from showing up on our mailing lists or reports?9
 - 12. Who should I contact if I can't remember my password and need to have it reset? 10
 - 13. We have a new staff member (or volunteer), how do I request their user credentials?..... 10
 - 14. We frequently need to remove a family member from the household – adults after divorce or grown children. Should we just delete the member? 11
- Religious Education and Sacraments..... 13
 - 1. Is there a way to add a nearby parish to our list of "favorites"? 13
 - 2. I need to assign a presider to a sacrament, but he is not available on the drop-down list – how do I do that?..... 14
 - 3. We are having trouble entering a marriage record because the system shows a preexisting marriage. 14
 - 4. How can I create a new mail merge template with landscape orientation? 14
 - 5. We have an incorrect or duplicate marriage record that we cannot seem to remove – how do we go about this?..... 15
- Offering..... 15
 - 1. We need to set up a new fund for contributions. How do we do that? 15

ParishSOFT Family Suite FAQs

2. We have SO many Fund names that it gets confusing, and takes up time to scroll through all the options. Can we delete some of the old Funds?	16
3. My job duties involve posting contributions in ParishSOFT Family Suite and I have permissions in the Offering Module, but I can't find the Fund that I need to post the contributions to – how do I fix that?.....	18
4. What are the steps I can take to prepare for printing year-end tax statements?.....	18
5. When we create our regular offertory batches, is there anything we need to remember?.....	20
6. Is there a naming convention that is recommended for the offertory batches?	22
7. What steps do I need to take to import online giving?	22
Administration Functions	24
8. I don't set up new users very often – what are the steps I need to follow?	24
9. How to I add or edit information in the lookup tables?	25
NOTES:	27

ParishSOFT Family Suite FAQs

Family Directory:

1. Our database is now browser-based, what is the URL?

<https://atlantaaim.parishsoftfamilysuite.com>.

This URL is accessible from all browsers and devices – smartphones, tablets, PCs, Macs. There is not an app for the data, simply a responsive web address.

2. When I select a report, nothing happens, why?

To view your selected report, you not have pop-up windows blocked in your internet browser settings. Please check your browser options/content settings and make sure that pop-up windows are allowed.

Here is how you can select this option in your Internet Browser:

Enabling Pop-Up Windows for Internet Explorer

By default, Internet Explorer blocks pop-up windows. To allow pop-up windows to display on the ParishSOFT website:

1. From the Internet Explorer Tools menu, select Pop-up Blocker > Pop-up Blocker Settings.
2. Type the URL of the ParishSOFT website in the Address of website to allow box. For example: <https://atlantaaim/parishsoftfamilysuite.com>

3. Click .

The address of the website is added to the Allowed sites list. This is a list of sites for which you want to allow pop-up windows to display.

4. Click .

The address of the ParishSOFT website you entered now allows pop-up windows.

Enabling Pop-Up Windows for Mozilla Firefox

By default, Firefox blocks pop-up windows. To allow pop-up windows to display on the ParishSOFT website:

1. At the top right corner of the Mozilla Firefox Start page, find the three horizontal bars, click click .to choose Options (usually indicated by a gear icon), then select Privacy & Security and scroll down to find the Block Pop-up windows options.
2. The Block pop-up windows option is checked by default.

3. To the right of the Block pop-up windows option, click .

The Allowed Sites - Pop-ups window is displayed. This window lists the list of sites allowed to display pop-up windows.

4. Type the URL of the ParishSOFT website in the Address of website box. For example:

<https://atlantaaim/parishsoftfamilysuite.com>.

5. Click .

The address of the website is added to the list at the bottom of the window. This is a list of sites allowed to display pop-up windows.



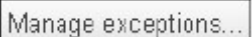
6. Click .

The address of the ParishSOFT website you entered now allows pop-up windows.

ParishSOFT Family Suite FAQs

Enabling Pop-Up Windows for Google Chrome

By default, Google Chrome blocks pop-up windows. To allow pop-up windows to display on the ParishSOFT website:

1. In the upper-right corner of the browser window, click  (Settings icon). Then, select the Settings option to display the Settings page.
2. In the Privacy section, click . The Content settings window is displayed.
3. Scroll down to the Pop-ups section and do the following:
 - Leave the Do not allow any site to show pop-ups checked.
 - Click .

The Pop-up exceptions window is displayed. This window contains a list of sites that are allowed to display pop-up windows.

4. Click inside an empty Hostname pattern field and type the URL of the ParishSOFT website. For example:

<https://atlantaaim/parishsoftfamilysuite.com>.


5. To the right of the URL you typed, select Allow from the dropdown list.

6. Click .

The address of the ParishSOFT website you entered now allows pop-up windows.

Enabling Pop-Ups for Safari


Safari does not have a feature that enables you to allow or block pop-up windows on a site-by-site basis. You can either allow them to appear or block them for all websites. **To allow pop-up windows:**

1. In the upper-right corner, click  (Settings).
2. By default, the Block Pop-Up Windows setting is checked. (This means that Safari blocks pop-up windows for all websites.)
3. Select Block Pop-Up Windows to remove the check mark.

Pop windows are now enabled for the ParishSOFT website and all other websites.

To disable pop-up windows:

After you conclude your work on the ParishSOFT website, you may want to reset Safari to block pop-up windows for all websites. To do this:

1. Before exiting the browser, click  (Settings) again.
2. Select Block Pop-Up Windows to check the setting.

Pop-up windows are now blocked for all websites. The check mark appears the next time you open Safari.

ParishSOFT Family Suite FAQs

3. When searching for a particular family, one that I know is in our database, I get no results, why?

It is likely that you have some saved search criteria or filters that are preventing your results from returning as you expect. There are three potential areas to clear your search and filter criteria, as highlighted in yellow, below:

The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation tabs: Home, Family Directory (selected), Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below these are sub-tabs: Family List (selected), Member List, Sacraments, Family Workgroups, Member Workgroups, and Reports. The main area is titled 'Family List' and shows a search bar with a dropdown menu set to 'St. Patrick Parish, Norcross'. To the right of the search bar is a yellow button labeled 'Clear Search Results'. Below the search bar is a grid of filters for letters A-Z and numbers 0-9. The letter 'G' is highlighted in yellow. Below the grid, there are buttons for 'Add New Family' and 'Delete Selected Families'. To the right is a 'Quick Reports' dropdown menu. Below these are buttons for '50 records', 'Print', 'Export', 'Import', and 'Refresh'. At the bottom, there is a table with columns: Family DUID, Family, Primary Address, City, State, Postal Code, Plus 4, Regis, and Family Group. The first row shows a family with DUID 2553838, name Gaba, Adakou, address 1755 Rogers Ave SW, city Atlanta, state GA, postal code 30310, plus 4 2309, and family group Contributor.

4. How do I run an envelope number report for my envelope company?

From Family Directory/Family List, choose quick reports (blue tab on the right) and Full Envelope Numbers.

5. When I log in to my database, I don't see a tab for Religious Education or Ministry Scheduler, etc., why?

If you do not see something that you expect to see or need to have access to, it is likely due to the permissions set on your user credentials. Your Business Manager can adjust your permissions to meet the needs of your job.

6. I've gotten an "Ooops" error or frequent "time Out" errors and it keeps happening; what can I do?

Once you get an "oops" error, it is likely that you will get another immediately following. You may choose one of two options: a) clear the cache memory in your internet browser (generally under Advanced Options) and then close the browser window and open a new window to begin again; or, b) choose a different browser.

If the "Ooops" or "Time Out" errors persist, you may need to take further steps:

1) Reset your Browser Cache.

In order to reset your browser cache, please follow the steps at the linked page below.

<http://www.refreshyourcache.com/en/home/> 2)

Clear your DNS Cache.

In order to reset your DNS Cache, please follow the steps at the linked page below according to your Operating System version:

<https://www.whatsmydns.net/flush-dns.html>

3.) Run a Speed Test.

*Change Server to: LANSING, MI

<http://beta.speedtest.net/>

*Run test 3 times and write down the results.

ParishSOFT Family Suite FAQs

Ping:

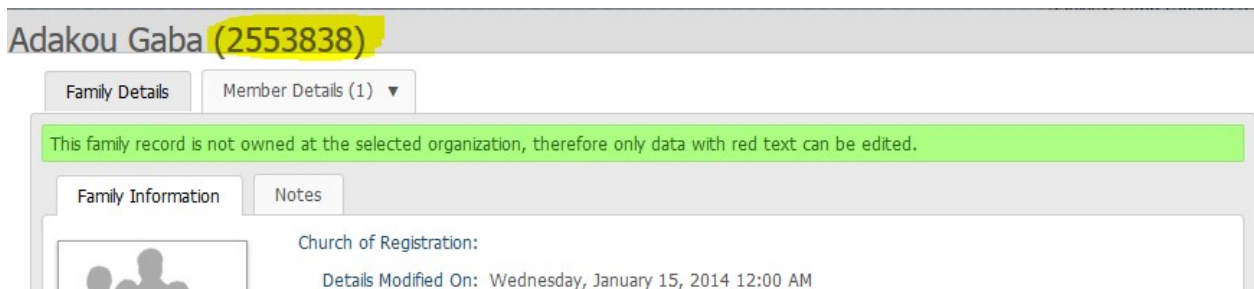
Upload:

Download:

Your upload speed should be at least 1 MBPS. If it's not, then your internet service is not fast enough to handle the heavier functionality in ParishSOFT.

7. We have duplicate records for some families in our database, how do we merge these?

At this time, duplicate families can only be merged at the Diocesan level. Once you have identified family records that need to be merged, simply send the Family DUID of the Master Family and the Family DUID of the Duplicate Family to Susan Shirley sshirley@archatl.com or Carolina Figueroa cfigueroa@archatl.com and the records will be merged overnight. If you duplicate families have the same Family DUID, you will need to contact ParishSOFT for resolution – support@parishsoft.com. The Family DUID is a column heading in the Family List or you can locate the Family DUID at the top of the Family Details screen, shown below.



If you wish to review your Family List and search for potential duplicates, it is easy to export a csv file from your Family List. This spreadsheet can then be sorted and filtered based on Family Status, Last Name, etc. to find any potential duplicates. Each family record must be reviewed to make certain that we do not revert to a previous family situation. For instance, you might have family that shows a married couple and then a family with only one adult at the same address. If this was a divorce situation, where one spouse left the family, a merge of these two family records could possibly return the spouse to the single member household! A frequent cause of duplicates are contributor families that eventually became registered families. Maintaining two separate records causes confusion when posting and the potential for duplicate year-end contribution statements.

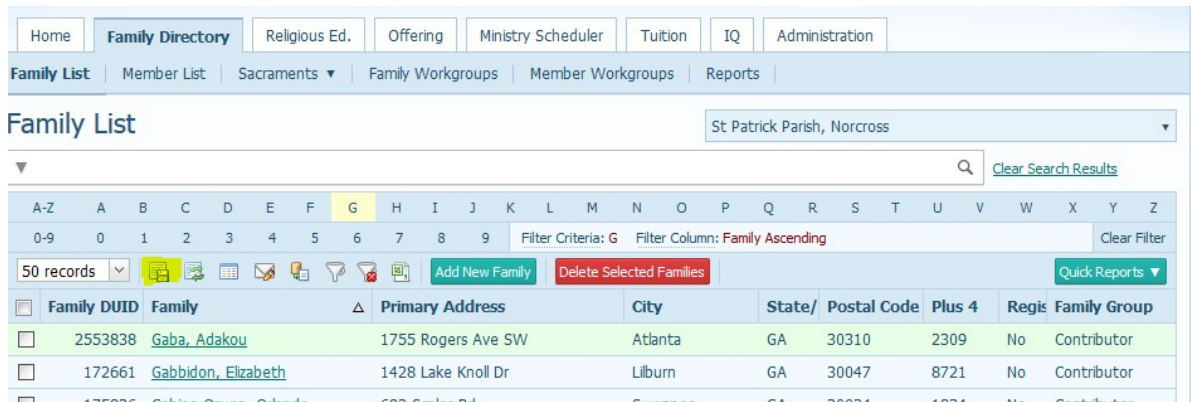
Note: if you find duplicate family records with the same Family DUID for both families, that merge will need to be reported to ParishSOFT support for merging. The same is true if a household has duplicate family members – this too needs to be reported to ParishSOFT support for proper merging.

To help identify any duplicated Family DUIDs you can simply export your family list to Excel and let the system do the “finding” work for you. In an Excel spreadsheet, select your data range (it should be one column with the Family DUID). On the home tab, in the Styles group, click Conditional Formatting, Click Highlight Cells Rules, Duplicate Values. Select a formatting style and click OK. I usually use Format cells that contain: Duplicate values with Light Red Fill with Dark Red Text. Then click OK and Excel will do all the work. The highlighted cells are your work list to send to ParishSOFT.

ParishSOFT Family Suite FAQs

8. I know I can change the layout of the columns in my Family List or Member List, can I save these settings?

Yes, we recommend that you choose which columns you need to view and arrange them in the order you wish. Choose the save icon to retain these settings with your personal credentials.



The screenshot shows the ParishSOFT Family List interface. At the top, there are navigation tabs: Home, Family Directory (selected), Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. Below these are sub-tabs: Family List (selected), Member List, Sacraments, Family Workgroups, Member Workgroups, and Reports. The main heading is "Family List" with a dropdown menu set to "St Patrick Parish, Norcross". A search bar contains "G" and a "Clear Search Results" link. Below the search bar is a grid of letters A-Z and numbers 0-9. Filter criteria are shown as "Filter Criteria: G" and "Filter Column: Family Ascending". A "Clear Filter" button is present. The record count is "50 records". There are buttons for "Add New Family" and "Delete Selected Families". A "Quick Reports" dropdown is also visible. The table below has the following columns: Family DUID, Family, Primary Address, City, State/Postal Code, Plus 4, Regis, and Family Group. The first two rows are highlighted in green:

Family DUID	Family	Primary Address	City	State/Postal Code	Plus 4	Regis	Family Group
2553838	Gaba, Adakou	1755 Rogers Ave SW	Atlanta	GA 30310	2309	No	Contributor
172661	Gabbidon, Elizabeth	1428 Lake Knoll Dr	Lilburn	GA 30047	8721	No	Contributor

The icon to the right of the highlighted “save” icon, will reset the columns to the default settings as designated by ParishSOFT.

9. We have lots of old family records, with no recent contribution or sacrament history. Can we delete these old records?

The proper choice for this situation is to mark the family inactive or moved and unregistered. Any history is then retained with the record but will not populate any of your active lists or reports. The “Delete Selected Family” button should only be used if a Family was created or imported in error. The same is true for Member records.

10. Is there an easy way to find a list of newly registered families at our parish?

The easiest way to display newly registered families from the Family List is to use the Funnel/Filter and choose Advanced Options/Registration Date. Once you place a check in the Registration Date box, the date range windows will open up and you may set a date range for your newly registered families. Once the date range is entered, click Apply and only those families whose registration date meets your preset criteria will be displayed. You can then use the Mail Merge options to communicate with this group of Families.

ParishSOFT Family Suite FAQs

Filter

Membership:

Family Group:

Send Envelopes:

Family Work Groups

- Dynamic Workflow Groups
- Electronic Giving
- English

▼ **Advanced Options**

Filter By ID:

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date: From: To:

E-Mail Address:

E-Mail:

Postal Code:

City:

State\Region:

Show 'Send No Mail' Families:

Show 'Do Not Publish' Families:

Show Families With E-Mail:

Exact Search:

11. What should we do to prevent deceased members from showing up on our mailing lists or reports?

It is best to apply the “sacrament” of Funeral to the individual member who has died, filling in as much information as is known, even an approximate date of death is okay. Remember to adjust the Family information, especially the First Names, Mailing Names and Salutations, if the member was married and his/her spouse is still active at your parish. You should also remove all contact info from deceased member record to prevent populating this data when running custom IQ queries.

ParishSOFT Family Suite FAQs

12. Who should I contact if I can't remember my password and need to have it reset?

ParishSOFT Family Suite is built to allow each user to request their own password reset when they login. Just click on the “Lost password?” link below your user name, as shown below, and a new password will be sent to the email address on file for your user id.

ParishSOFT Connecting People and the Church

Welcome - Log In Below

Your browser session expired.

Username:*

Password:*

[Log In](#)

[New User?](#) [Lost password?](#)

For security purposes - we only support the following browsers
IE 9.0+, Edge, Chrome, Firefox and Safari.
If you do not have any of these installed on your system you must install or upgrade to one of them before you can login.

Use of this software, website, and services is subject to the [Terms of Use](#)

13. We have a new staff member (or volunteer), how do I request their user credentials?

Your Parish Administrator has the authorization to set up new users. To do so, they will navigate to the Administration tab, select Manage staff, then choose the “plus sign” icon in the blue bar to add the new staff member. Please remember to follow the same user name sequence First initial, Last Name and Parish POL #. The critical choices on the Access Rights tab of the user screen are “Grant Login Privileges” and “ParishSOFT Access”.

Home Family Directory Religious Ed. Offering Ministry Scheduler Tuition IQ Administration

Suspense Lookups System Setup Organizations Manage Staff Module Settings Utilities Notifications

Staff List Archdiocese of Atlanta, Atlanta

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: Name Ascending Clear Filter

25 records

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiza
Admin, Diocesan				Unknown	01/01/1900	Archdiocese of Atlanta	2104
Admin, Exclusive				Unknown	01/01/1900	Archdiocese of Atlanta	2104
Dahlheim, Sherri	Mrs.		Sherri	Admin - Arch Support	12/04/1973	Archdiocese of Atlanta	2133
Duran, Anna	Mrs.			Admin - Admin & Gen	01/01/1900	Archdiocese of Atlanta	2104
Gomez, Rosa	Ms.		Rosa	Vol-child & vuln indiv	03/01/1964	Archdiocese of Atlanta	2104

ParishSOFT Family Suite FAQs

Shirley, Susan123 (3580446)

Assignments | Positions | Access Rights | Notes | Archdiocese of Atlanta, Smyrna: Admin - Technology

Start Date: 6/15/2015 | End Date: | Assignment Deleted Primary Assignment Show in Kenedy Dir.
 Grant Login Privileges Edit/View Pastoral Notes

Diocese Directory & Web Solutions | ParishSOFT Modules

Organization Admin

Family Directory: View, Add/Edit, Delete, Print, Import

Offering: View, Add/Edit, Close Batch, Delete, Giving History, Import, Print

Ministry Scheduler: View, Add/Edit, Delete, Print

Religious Education: View, Add/Edit, Delete, Print, Tuition

Tuition: View, Add/Edit, Delete, Print, Import

IQ: View, Add/Edit, Delete, Import/Export

ParishSOFT: ParishSOFT Access, Suspense Reviewer

[Select All](#) - [Clear All](#)

Assignments | Positions | Access Rights | Notes | Archdiocese of Atlanta, Parish Acct Mgr

Additional Information: Username: PWarner21066, SS Num: , Email Address: pwarner@archatl.com, Email Username: , Email Password: *****

Outgoing Mail Server:

Reset Password

Assignments Details

Pri. Assignment	Organization	City	Primary Position	Hire Date	Release
<input checked="" type="checkbox"/>	Archdiocese of Atlanta	Atlanta	Parish Acct Mgr	7/1/1991	
<input type="checkbox"/>	Purification Mission (Sharon)	Washington	Accountant	10/5/2011	

1 of 1 (2 Assignments) < 1 >

14. We frequently need to remove a family member from the household – adults after divorce or grown children. Should we just delete the member?

Please refrain from deleting any members. All inactive members or those who have moved away should be marked as unregistered/inactive. The proper procedure is to move the member into their own household. We follow this standard even if the removed member is non-Catholic and is moving away from the Atlanta area. Retaining the information, even if the member is now unregistered and inactive, allows the parent/child connection to be retained for sacramental details. The new procedure (as of July 2019) to remove a member from the household and import them into their own household is as follows:

ParishSOFT Family Suite FAQs

- Open the Family record (from Family Directory/Family List) of the family containing the member that needs to be removed. From the Member Details, select the member to be removed, choose Edit Details on this member's record. Then choose Export to New Family (see below). Follow the options on the subsequent screens to complete the export.

The screenshot shows the 'Member Details' form for Christina Shirley in the ParishSOFT Family Suite. The form is titled 'Christina Shirley' and is for 'St Thomas Aquinas Parish, Alpharetta'. It includes a navigation bar with 'Family Details' and 'Member Details (3)' tabs, and a list of family members: Ricky, Susan, and Christina. The main form area contains personal information fields: Gender (Female), Title (Miss), First Name (Christina), Nick Name (Christina), Middle Name (Marie), Last Name (Shirley), Suffix, Maiden Name, Role (Daughter), Status (Active), Birth Date (12/30/1998), Birth Place (Atlanta, GA), Age (20), Date of Death, Religion (Catholic), Language (English), Ethnicity (Caucasian), Marital Status (Single), and Envelope # (0). Below this is a 'Contact Information' section with fields for Email Address, Home Phone (678-895-7577), Cell Phone, Work Phone, Pager, and Fax. At the bottom, there is a toolbar with buttons: 'Export to New Family' (highlighted in yellow), 'Save', 'Save & Close', 'Cancel', 'Close', and 'Delete'.

ParishSOFT Family Suite FAQs

Religious Education and Sacraments

1. Is there a way to add a nearby parish to our list of “favorites”?

We have many children who were baptized at another parish located in close proximity to our parish. It would be nice to pick the parish from a list.

Yes, from the Home tab, select Organization Directory and search for the parish you need by entering the city and state of the parish.

ParishSOFT Family Suite St. Clare Catholic Church, Acworth
CFIGueroa21066 (Carolina123 Figueroa)

Home Family Directory Religious Ed. Offering Ministry Scheduler Tuition IQ Administration

Home Pictorial Directory **Organization Directory** Giving History User Settings

Organization Group: All
Organization ID:
Organization Name:
City: Atlanta
State/Province: GA
Postal Code:
Search Clear

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	Count																					
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Atlanta University Center - Lyke House	809 Beckwith Street SW	Atlanta	GA	30314	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bethel United Methodist Church	1215 New Hope Rd SW	Atlanta	GA	30331	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cathedral of Christ the King	2699 Peachtree Rd NE	Atlanta	GA	30305	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cathedral of Christ the King School	46 Peachtree Way NE	Atlanta	GA	30305	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Catholic Social Services	680 West Peachtree Street, NW	Atlanta	GA	30308	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Centro Catolico del Espiritu Santo Mission	120 Northwood Drive NE Suite B5-8	Atlanta	GA	30342	USA															
<input type="radio"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Emory University Catholic Center	1753 North Decatur Road, NE	Atlanta	GA	30307	USA															

Once you have found the one you need, you may add it as a favorite by selecting the “star” to the left of the organization name. If the parish you need does not show on the list, you may add it by selecting the green plus sign icon on the blue bar. Once added, you can then use the star to make it a favorite.

ParishSOFT Family Suite FAQs

2. I need to assign a presider to a sacrament, but he is not available on the drop-down list – how do I do that?

As of June 2019, our celebrant list is only open to additions and/or modifications by Diocesan staff. We have standardized the list of priests to help utilize the certificate printing options in ParishSOFT Family Suite. We previously had many duplicate names and misspellings (or incorrect/incomplete) titles for our presiders. All current, and many former Priests, Bishops and Deacons are currently loaded into the system. Their names are displayed with the title format and spelling used by the Office of Priest Personnel and the Office of Permanent Diaconate. To search for your presider you must enter their title first – options include The Reverend First Name Last Name (priests), Rev. Mr. First Name Last Name (Permanent Deacons), The Most Reverend First Name Last Name (bishops), The Very Reverend and The Reverend Monsignor. For a complete listing of active presiders, please visit the Archdiocesan website at www.archatl.com/offices and select either Priest Personnel or Permanent Diaconate. Should you wish to have a visiting presider (with faculties) added to the mast presider list, please contact Susan Shirley – sshirley@archatl.com.

3. We are having trouble entering a marriage record because the system shows a preexisting marriage.

When duplicate marriage records exist for a member, sometimes you cannot edit the member record. You will get an error message saying that the sacrament cannot be updated because the member belongs to an existing marriage record.

This happens because the member record always displays the sacrament record created last, which has a higher Sacrament DUID. If there is a duplicate record that was created earlier, with a lower Sacrament DUID, this record is causing the error message.

To fix this issue:

- Look up both marriage records and find the one with the lower DUID.
- Uncheck the "Completed" box on this record.
- Now clear out any fields you can. Some cannot be cleared.
- Give the record an end date. It doesn't matter what date you choose.

Now you should be able to edit the member record without an error message.

4. How can I create a new mail merge template with landscape orientation?

You can produce a mail merge template in landscape orientation if you create it in Microsoft Word and then import it into ParishSOFT from the mail merge page.

- Open Microsoft Word, and create a document in landscape orientation. It doesn't have to have any text in it. Save it as a **.doc** file, and give it a name you will recognize when you browse for it later.
- Begin a mail merge in ParishSOFT.
- When the Silverlight window opens, click on "Open Local Template".
- Browse to find the file you created, select it and click "Open".

ParishSOFT Family Suite FAQs

- You should now have a landscape-oriented screen to work from as you create your mail merge template.

5. We have an incorrect or duplicate marriage record that we cannot seem to remove – how do we go about this?

First you should uncheck "completed" on the extra or incorrect record; and then add a "date ended" -- an arbitrary date. Then the record will still appear, but it has a gray circle in the list and won't show up on any queries or reports. If you have an incorrect spouse listed, you can perform the steps above and then hit the red X next to the incorrect spouse name. That will remove this incorrect record.

Offering

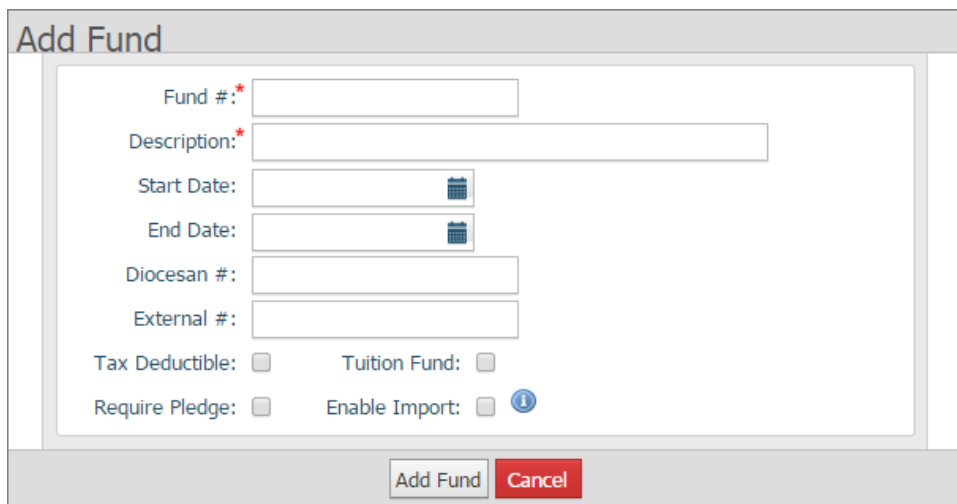
1. We need to set up a new fund for contributions. How do we do that?

Your Parish Administrator, or other designated manager can set up new funds.




Click  to display the **Fund Management** page.

Click .

The Add Fund window is displayed:

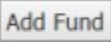


The screenshot shows the 'Add Fund' window with the following fields and options:

- Fund #:
- Description:
- Start Date: 
- End Date: 
- Diocesan #:
- External #:
- Tax Deductible:
- Tuition Fund:
- Require Pledge:
- Enable Import: 

At the bottom of the window are two buttons: 'Add Fund' and 'Cancel'.

Complete the details for the new fund.

Click . A confirmation window is displayed to let you confirm the details of the newly created fund:

ParishSOFT Family Suite FAQs

Festival (15279)
Fund has successfully been created.

Fund #: 10-20-2013
Description: Festival
Start Date: Tue May 07 2013
End Date: Mon Oct 21 2013
Diocesan #:
External #:
Tax Deductible: No
Require Pledge: No
Tuition Fund: No

Edit Close

2. We have SO many Fund names that it gets confusing, and takes up time to scroll through all the options. Can we delete some of the old Funds?

Funds cannot be deleted but they can be managed so they do not get in the way of current work. Any old, no longer used Funds may be end-dated. To do so, go to Offering/Funds and find the fund you wish to edit, then choose the edit Fund icon on the left (pencil) and enter an end-date in the pop-up box, as shown below.

Funds | Batches | Pledges | Posting | Contribution List | Giving History | Import | Reports

Fund Management St Ann Parish, Marietta

10 records | Add Fund | Fund Permissions

Fund #	Description	Fund ID	Tax Deductible	Tuition Fund	Require Pledge	Diocesan
97	Altar Flowers	10768	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
34	Annua					
8	Arch S					
141	Archd					
145	Arkan					
99	Ascen					
101	Ash W					
98	Assur					
157	Black					
140	Black					

Page 2 of 17 (161 Records)

Arkansas Mission Trip - 2015

Fund #: 145 Fund ID: 2064603
Description: Arkansas Mission Trip - 2015
Start Date:
End Date:
Diocesan #:
External #: 145
Tax Deductible: No Tuition Fund: No
Require Pledge: No Enable Import: No

Edit Close

You may also change the fund name for all funds to keep them out of the normal alphabetical list of funds. In the case shown above, Arkansas Mission Trip – 2015 would become zzzArkansas Mission Trip – 2015, thus putting it at the bottom of any alphabetical listing.

A global IQ query is available to help you identify your funds by name and Fund DUID and will show other pertinent details. See below:

ParishSOFT Family Suite FAQs

My Queries

	Query Name	Query Tags	Date Created	Date Modified	Owner	Global
Edit Delete	Families without Members by parish - SRS		3/21/2017	3/21/2017	Shirley, Susan123	<input type="checkbox"/>
Edit Delete	Family Email Search	QueriesForReview	3/26/2014	12/11/2014	Shirley, Susan123	<input checked="" type="checkbox"/>
Edit Delete	Family Email Search-SRS		1/29/2016	1/29/2016	Shirley, Susan123	<input checked="" type="checkbox"/>
Edit Delete	Family Email Search-SRS		10/6/2017	10/6/2017	Bulger, Patricia	<input checked="" type="checkbox"/>
Edit Delete	Family/Parish/Contact		12/19/2017	12/19/2017	Shirley, Susan123	<input checked="" type="checkbox"/>
Edit Delete	FC prep 2017		1/25/2018	1/25/2018	Meehan, Mary	<input checked="" type="checkbox"/>
Edit Delete	FC prep 2017	MLM	1/25/2018	2/9/2018	Meehan, Mary	<input checked="" type="checkbox"/>
Edit Delete	First Communion 5-8 year olds		8/3/2017	8/3/2017	Van Velsor, Judith	<input checked="" type="checkbox"/>
Edit Delete	Fund Description and Fund DUID	SRS	10/27/2017	10/27/2017	Shirley, Susan123	<input checked="" type="checkbox"/>
Edit Delete	Fund Description/#/DUID		11/15/2017	11/15/2017	Fox, Jessica	<input checked="" type="checkbox"/>

Page 12 of 44 (435 items) [<](#) [1](#) [2](#) [3](#) ... [11](#) [12](#) [13](#) [14](#) ... [42](#) [43](#) [44](#) [>](#)

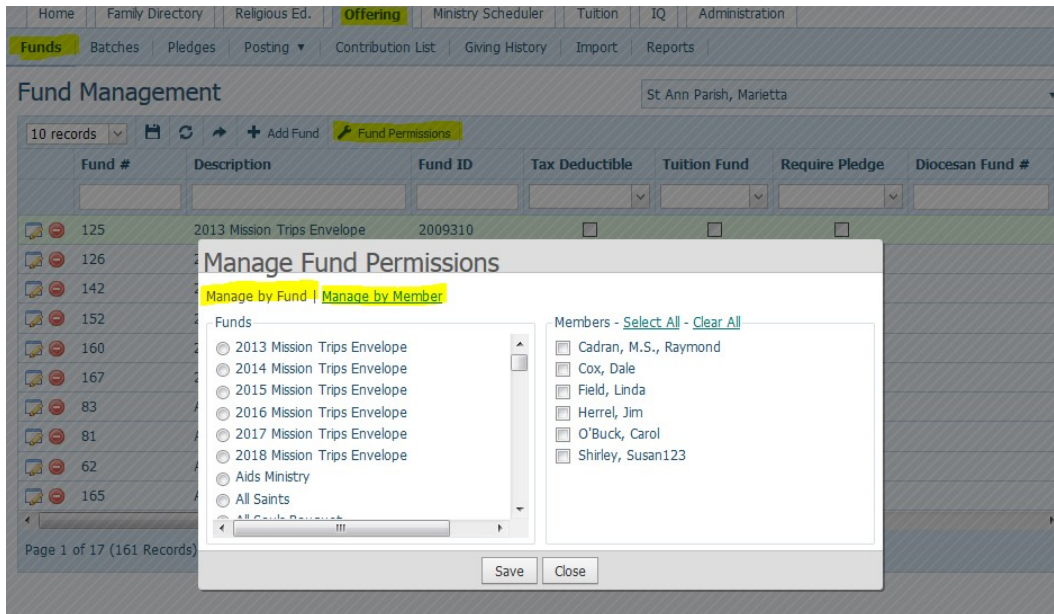
[Open](#) [Close](#)

You may run this query on your database and export the results to an Excel spreadsheet as a good reference and to use when managing online giving.

ParishSOFT Family Suite FAQs

3. My job duties involve posting contributions in ParishSOFT Family Suite and I have permissions in the Offering Module, but I can't find the Fund that I need to post the contributions to – how do I fix that?

Fund permissions and Offering permissions are managed in two separate areas of the system. Your Parish Administrator can grant you the necessary permissions to the fund you need by selecting the Offering tab, then Funds, then Fund Permissions and choosing either Manage by Fund or Manage by User as shown below.



4. What are the steps I can take to prepare for printing year-end tax statements?

These quick and simple steps help ensure that your statements are accurate and that they are delivered to the correct place the first time, saving you time and money.

Overview of Steps:

1. Audit Family names and addresses.
2. Audit Fund names and settings.
3. Post all tax-deductible contributions with the previous year's posting dates.
4. Print populated registration forms for member audit purposes
5. Print Family and Member Statements.

Detailed Steps:

1. Audit Family names and addresses.
 - Find and fix any blank names or address fields in your family data—before you mail any statements. When you use the tools listed below, this audit is quick and easy.
 - From any ParishSOFT module open Reports
 - ParishSOFT Reports
 - Click Census Menu ▪ Family Filtering and Sorting.
 - Set Filters to:
 - Registered? = Both
 - Envelopes? = Both
 - Click the Show Results button to view the query results screen.

ParishSOFT Family Suite FAQs

- To find blank Mailing Names
 - Right click the Mailing Name column header
 - Click the Sort Ascending A–Z menu option
 - Fix any blank Mailing Names in your Family Directory module.
 - Follow the same procedure for:
 - Addresses using the Address1 column header.
 - Zip codes using the Zip column header.
 - Audit Fund names and settings.
 - Click your Add/Edit/Delete Funds button in your Offering Module.
 - Are fund names clear and accurate?
 - Are tax deductible and nondeductible funds marked appropriately?
2. Post all tax-deductible contributions with the previous year's posting dates
All contributions received before December 31, must be posted with a that year's posting date.
 3. Print populated registration forms for member audit.
 - Send populated registration forms along with your Contribution Statements. Ask your families to review their information and communicate any changes to the parish office (or update themselves in ParishSOFT My Own Church, if your parish is currently using this program.)
 - From ParishSOFT Family Directory module click Reports
 - From Report Type, select Census
 - Next select Registration Forms
 - Choose the appropriate Family Group and select the "include members" check box
 - Next, Choose the "Click Her to View Report" button
 4. Print your Statements for Families or Members.
 - From ParishSOFT Offering Module:
 - From the horizontal menu bar select Reports – Contributions Reports/ Statements
 - The setup for the Contribution Statements report is displayed. See example, below.
 - Select all tax deductible Funds by choosing the topmost check box in the Fund window, and selecting all Funds.
 - Select **Summary Report Format**, Sort order, Date Filter (01/01/20XX - 12/31/20XX), Membership - Both, Contribution Source - Family and make sure to check "List Contribution of \$250 or more"
 - Select Everyone for the first time you run the statements (can choose a specific family for reprints or if only printing for those that requested statements). By default the program selects all Tax-deductible funds so there is no need to click any additional funds.

ParishSOFT Family Suite FAQs

Description	Fund #
<input type="checkbox"/> 428 Fund for Testing	428
<input type="checkbox"/> 432 Fund For Testing	43200
<input type="checkbox"/> A-General Offertory	625625
<input type="checkbox"/> ADA Donations	444100
<input type="checkbox"/> ADA Rebate	444000
<input type="checkbox"/> April Showers	4889
<input type="checkbox"/> Ascension	413500
<input type="checkbox"/> Assumption of Mary	413400
<input type="checkbox"/> Baptismal Offering	421100
<input type="checkbox"/> Bequests and Legacy	445000

- Select your Body of Statement (the letter that will appear in the statements) and save your selected message.
- Determine whether you will include a printed name or digital signature.
- Click Print Statements.
- Select All Givers and then View Statements.
- Once statements are displayed in the pop-up window, you should save the file before attempting to print the statements.
- Each December & January, our office will send out more detailed instructions for this year-end task.

5. When we create our regular offertory batches, is there anything we need to remember?

- All regular offertory batches will post more quickly and easily using Quick Entry posting. You will determine the type of posting when you create a new batch. Detailed posting should only be used for correction batches with negative batch \$\$ totals. For all other batches use Quick Entry Posting.
- To begin your batch choose Offering/Batches and use the + sign to add a new batch. In the Create new batch window, you will select the batch name/description (please see suggested naming convention, below), cash total, default fund and date opened (today's date – not the posting date as that will be set later) and batch type – Detailed (for negative batch totals) or Quick Entry (for all regular batches).

ParishSOFT Family Suite FAQs

Create new batch

Batch Description:	Fund: 2017 Offertory	Status: Open
Cash Total: \$0.00	Date Opened: 8/9/2017	Date Closed:
Cash Balance: \$0.00	Pledge Total: \$0.00	Transaction Count: 0
Batch Type:	Pledge Balance: \$0.00	Batch Owner: Shirley, Susan123
Comment:		

- Once the batch is created, select Posting – either Detailed or Quick Entry. Choosing Detailed Posting will launch the Detailed Posting Screen (similar to ParishSOFT Desktop). Choosing Quick Entry Posting will display a list of the available Quick Entry Batches for you to select the one you wish to begin posting. The next option is Launch Quick Entry Posting, see below:

Quick Entry Posting

Quick Entry Batch Details

<input type="button" value="Clear Batch"/>	<input type="button" value="Launch Quick Entry Contribution Posting Page"/>		
Batch	Total Entered	Balance	Cou
<input type="radio"/> 2017 0709 Miscellaneous Admin Deposit	\$2,946.70	\$0.00	8

- When you launch the Quick Entry posting, remember to select Options and Filters, on the right side of the screen, see below, and choose lookup by “Both” (this means envelope number and/or Family name) and include the Additional Fields of “Check Number” and “Memo”. You must choose this each time you begin posting to a new Quick Entry batch.

Batch Information

Total	Balance	Tr
\$64713.80	\$0.00	96

Default Posting Data

Fund: Offertory 2017

Posting

Env #	Amount	Memo
1 2340	500	O/L - 5-1
2 3224	300	O/L - 5-1
3	50	O/L - 5-1

5-31-17-On-line contributions (2961529)

Options and Filters

Family / Member Lookup

Select which lookup fields will be visible on each line item

Lookup By: Both

Additional Fields

Removing additional fields that have data entered does not remove the field from the posting page. The field is only removed from the tabbing sequence.

Check Number

Memo

Posting Filters

Family Reg. Status: Both

Family Group: All Groups

ParishSOFT Family Suite FAQs

- You must also adjust the Default Posting Data to showing the correct posting date. Remember that we use the date the money was received (generally Sunday) as the posting date. See below:

Default Posting Data Options and Filters

Fund: Offeratory 2017 Date: 8/9/2017 Type: Check

Posting

Env #	Amount	Check #	Memo	Status
-------	--------	---------	------	--------

6. Is there a naming convention that is recommended for the offertory batches?

Yes, for ease in finding and sorting your batches, it is recommended that you name the batches first with the date in the following format **2018-03-04 900 am**. You may not use any special characters including the colon symbol in the Mass time, only alphanumeric characters, spaces and dashes are allowed.

7. What steps do I need to take to import online giving?

Before importing online contributions into your database for the first time you must contact your online giving company for assistance. These companies are very familiar with the requirements of the new system and will be happy to guide you through the setup process. Of special importance is the need to update the Fund numbering in your online giving portal (now the Fund DUID is required, and must be updated) and verify the contributor numbers (generally envelope numbers). A new file format will be required to import your giving details into ParishSOFT Family Suite. All ParishSOFT funds that you wish to receive donations from online giving must be marked to "Enable Import". To do this, choose Offering/Funds/ and select the fund or funds that represent the online fund options you have selected for your donor families. You may edit their properties using the tablet & pencil icon shown to the left of the fund name.

Home Family Directory Religious Ed. **Offering** Ministry

Funds Batches Pledges Posting Contribution List Gi

Fund Management

10 records + Add Fund ✎ Fund Permissions

Fund #	Description	Fund ID
	offertory	
12018	Offertory 2018	206605
1 Pre 1997	Offertory Pre 1997	12126

Page 3 of 3 (22 Records) < 1 2 3 >

ParishSOFT Family Suite FAQs

Offertory 2018

Fund #: 12018 Fund ID: 2066057

Description: Offertory 2018

Start Date:

End Date:

Diocesan #: 12018

External #: -NEW-

Tax Deductible: Yes Tuition Fund: No

Require Pledge: No Enable Import: No

Edit Close

A list of our online giving companies and their contact information is included here for your convenience.

Vanco

Richard A. Bauer e-Giving

Ambassador Direct: 952-352-8135

Cell – 612-759-3904

Richard.Bauer@vancopayments.com <http://vancopayments.com/solutions/online-giving/>

ParishSOFT

Jennifer Buckley

ParishSOFT Giving Specialist

tf: 866.930.4774 x1932 | jbuckley@parishsoft.com | www.parishsoft.com/online-giving/

OSV

Courtney Sewell

Online Giving Representative Office:

(800) 348-2886, opt 1, x2357

csewell@osv.com

The export and import process consists of five main steps. Follow the steps in the order given:

1. Link and enable funds for export.
2. Assign and verify envelope numbers for all givers.
3. Create an export file for your Online Giving contribution and pledge records.
4. (optional) Generate a report on data in the export file.

ParishSOFT Family Suite FAQs

5. Import contribution and pledge records into ParishSOFT Offering by locating the import file on your computer – see below.

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

Funds | Batches | Pledges | Posting ▼ | Contribution List | Giving History | **Import** | Reports

Import

St Clare Catholic Church, Acworth

The import feature lets you import a file containing your organization's contributions into ParishSOFT Offering and Pledges. The file you are importing must be in .csv (comma separated value) format. After the import process completes, the system updates you on the status of the import.

Upload Contributions and Pledges File

Upload your .CSV import file.

Browse... Maximum file size limit: 2MB

The last import occurred on 08/29/2018

Download the import report: [CSV](#) | [PDF](#)

[View more import history](#)

Administration Functions

8. I don't set up new users very often – what are the steps I need to follow?

- Open Family Directory. **Make sure** the person for whom you are creating the staff record has a member record in Family Directory.
- Go to the Administration tab. Click on Manage Staff.
- Check the Staff List to make sure this person doesn't already have a staff record.
- Click on the plus sign button that says *Add New Staff* when you mouse over it.
- You'll be taken to a new screen. A small screen will be in the foreground. It should say **Find Member**. Here, type in last name of the person to find their member record. Click Search.
- Now you'll be in another screen, the **Member Search** screen. Look in the list of possible matches for the member record of your person. You can put in their first name in the First Name field and click Search again to make the list smaller. *If there are multiple people* that have the same first and last name as your person, look at the other details on the page for possible matches. For instance, look for the correct address, email address, and organization (meaning your church's name).
- Once you've found the correct member record, select it by clicking in the circle to its left. **Then click the Accept button. Do not click Add New Staff, as this will create a brand new member record.**
- You'll get a popup message that reads, "**Staff has been added successfully**".
- Now you're looking at the new staff record you've just created. There are four tabs across the top. Make sure you're in the Assignments tab.
- **Assignments:** Click Edit Details. Choose a username for your staff person. **The user names for the Atlanta Archdiocese are setup as the users first initial followed by last name and POL of your parish (the 5 digit code associated with your location) (e.g., SShirley21066).** Type in their email address in the email address field. You can fill out the other fields, but you don't need to. Save your changes.
- Now select Edit Details and click the Reset Password button. This will send the user an email with a temporary password. They will then login with that password and be prompted to

ParishSOFT Family Suite FAQs

change their password to a new one of their choosing. The new password must be at least 6 characters in length and contain at least 2 numbers. Click Save.

- **Positions:** Click on the Positions tab. Click Edit details. In the column on the right hand side, scroll through until you find the name of their staff position. For instance, you could choose DRE, Pastor, or Administrator, to name a few. That position box will go to the top of the screen, directly underneath the Unknown box. Then, drag and drop the position box you just selected so that it is directly on top of the Unknown box. That puts it in the Primary Position. Once the proper position is at the top of the list, deselect the "unknown" position box. Click Save.
- **Access Rights:** Click on the Access Rights tab. Click Edit Details. Input the Start Date and the End Date if you desire.
- **Check the box that says Primary Assignment.**
- If you want him or her to be able to log in, also check the boxes for **Grant Login Privileges** and **ParishSOFT Access**.
- Grant access, viewing, and editing privileges to the various Modules such as Offering and IQ as you see fit.
- If this person is an **Organization Administrator** who should have privileges to do everything, check the box next to Organization Admin. Click Save.
- **Notes:** Click on the Notes tab. Input any notes about the staff record that you desire.
- The last step is to **enable Fund Permissions**. Go to the Offering tab. Go to Funds. Click on the Fund Permissions button, the one with a wrench icon on it.
- Once in the Manage Fund Permissions screen, click Manage by Member. Select the staff person you just created. On the right side, select all of the funds that you want him or her to have permission to view and edit.
- *Please note: Staff members must have fund permissions for a fund in order to view the contributions that are posted to that fund. If a staff member generates contributions statements, he or she will NOT see contributions for funds he doesn't have permissions to view, and those contributions will NOT print out in the statements.*

9. How to I add or edit information in the lookup tables?

To add an item to a lookup table or sort the table, go through the following steps:

- 1) Go to Administration module. This module is only visible to staff members with "Parish Administrator" rights. If you can't see the tab, you should talk to another staff person with administrative rights.
- 2) Select the Lookups tab.
- 3) Choose the table you want to edit. In this example, we've clicked on **School**.
- 4) Click on the + to add an entry.
- 5) Enter the text you would like to appear in the entry.

ParishSOFT Family Suite FAQs

Home | Family Directory | Faith Formation | Offering | Ministry Scheduler | Tuition | IQ | **Administration**

Suspense | **Lookups** | System Setup | Organizations | Manage Staff | Module Settings | Utilities | Notifications

Lookup Management

St Mary Parish, Rome

Tables

- Family Directory
 - Career Types
 - Celebrants
 - Member Education Level
 - Ethnic Background
 - Faith of Baptism
 - Family Group
 - Solicitation Group
 - Language
 - Suffix
 - Title
 - Religion
 - School**
 - Member Strengths
- Faith Formation
 - Buildings
 - Rooms
 - Departments
 - Grades
 - Leader Roles
 - School Type

School

School: Names of schools members attend or graduate from. Assigned in Member Details. Examples: Cardinal Stritch, University of Michigan, Hiawatha.

Merge Lookup Values

Permanent Lookup ID Duplicate Lookup ID

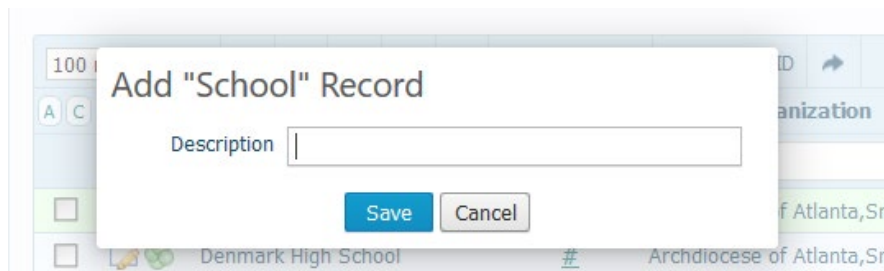
Configuration

[Bulk Manage Lookup Permissions](#)

Allow all Parishes to Add, Edit, or Merge School.

100 records | Sort A to Z | Sort by ID

	Description	# in Use	Creator Organization	Organization ID	Lookup ID
<input type="checkbox"/>	DeSana Middle School	#	Archdiocese of Atlanta, Smyr	21066	38855
<input type="checkbox"/>	Denmark High School	#	Archdiocese of Atlanta, Smyr	21066	38854
<input type="checkbox"/>	Riverwatch Middle School	#	Archdiocese of Atlanta, Smyr	21066	38853
<input type="checkbox"/>	Abbotts Hill Element	#	Archdiocese of Atlanta, Smyr	21066	38637
<input type="checkbox"/>	Alan C. Pope HS	#	Archdiocese of Atlanta, Smyr	21066	730
<input type="checkbox"/>	Alcova Elementary	#	Archdiocese of Atlanta, Smyr	21066	38547
<input type="checkbox"/>	Allatoona Elementary	#	Archdiocese of Atlanta, Smyr	21066	38549
<input type="checkbox"/>	Alpharetta ES	#	Archdiocese of Atlanta, Smyr	21066	38000
<input type="checkbox"/>	Alpharetta High School	#	Archdiocese of Atlanta, Smyr	21066	995
<input type="checkbox"/>	Amana Academy	#	Archdiocese of Atlanta, Smyr	21066	37948
<input type="checkbox"/>	Annistown Elementary	#	Archdiocese of Atlanta, Smyr	21066	38575
<input type="checkbox"/>	Apalachee High Schoo	#	Archdiocese of Atlanta, Smyr	21066	38647
<input type="checkbox"/>	Arbor Montessori	#	Archdiocese of Atlanta, Smyr	21066	38217
<input type="checkbox"/>	Archer High School	#	Archdiocese of Atlanta, Smyr	21066	38539
<input type="checkbox"/>	Argyle Elementary	#	Archdiocese of Atlanta, Smyr	21066	38544
<input type="checkbox"/>	Arnall MS	#	Archdiocese of Atlanta, Smyr	21066	35588



6) Click **Save**.

To edit an entry, click on the pencil and paper icon to the left of the name.

To remove an entry, click on the icon of the four green spheres. Select another entry to merge with. The original entry will be removed from the list. Any examples of the first entry in the database will be replaced with the second. If an entry was entered by mistake and never used, this will be equivalent to deleting it.

