

Quality Data That Works for You!

Jeff Bachelor and Troy Hayes

ParishSOFT



ParishSOFT®
Celebrating 20 Years of Service



Today's Agenda

Good Data

Workgroups

Exporting Data

Why Use
Reports?

Ready-to-use
Reports

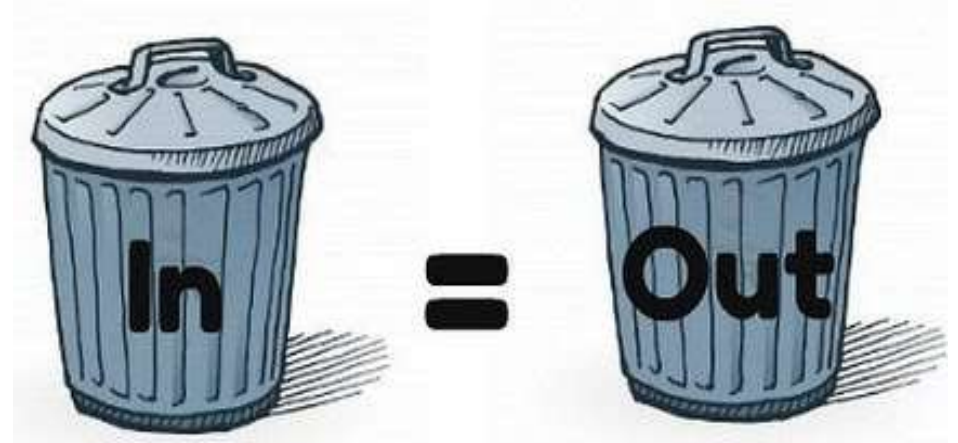
Questions?



Good Data

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



Some Important “Details” to Track

- Registration Status and Family Group
- Emails
- Mailing Names & Salutations
- Address Quality
- Member Status
- Role
- Birthdates

Important Details to Track: Registration Status & Family Group

Church of Registration: All Saints Parish, Ann Arbor

Details Modified On: Tuesday, October 31, 2017 4:21 PM

Family Group: Active

Registration Status:

Registration Date: 3/29/2017

Unregistered Date:

Active

No Family Group

Organization/Business

No Surviving Members

Visitor

Active

(blank)

Inactive

Staff

School Only

Religious Ed Only

Moved

Contributor Only

Sacrament Only

Alumni

Unknown

Ministry Only

- How “registered” are they really?
- Does staff understand each status?
 - Create a “cheat sheet”

Important Details to Track: Emails

Member Email Addresses

General	Contact	Sacraments
Contact Information		
Email Address:	Davidson@parishsoft.com	
Home Phone:	734-655-3333	
Cell Phone:	555-9090	
Work Phone:	555-5678	
Pager:		
Fax:		

Important Details to Track: Emails

Family Email Addresses

Last Name:*	Aabala
First Name(s):*	David and Jen
Formal Mailing Name:	Mr. and Mrs. David Aabala
Informal Name:	Dave and Jenny Aabala
Formal Salutation:	Mr. and Mrs. Aabala
Informal Salutation:	Dave and Jenny
Email Address:	Davidson@parishsoft.com
Primary Phone:	734-655-3333
Emergency Phone:	734-655-3333
Emer. Ph. Desc.:	

Auto Fill

Important Details to Track: Mail Names & Salutations

Last Name:*	Aabala
First Name(s):*	David and Jen
Formal Mailing Name:	Mr. & Mrs. David Aabala
Informal Name:	Dave and Jenny Aabala
Formal Salutation:	Mr. and Mrs. Aabala
Informal Salutation:	Dave and Jenny
Email Address:	Davidson@parishsoft.com
Primary Phone:	734-655-3333
Emergency Phone:	734-655-3333
Emer. Ph. Desc.:	

Auto Fill

- Reports
- Mailings

Mr. & Mrs. David Aabala
1910 Chalice Way
Ann Arbor, MI 48108

Important Details to Track: Addresses

Primary Address:

1 Home **2** Mailing **3** Other

Country:

Postal Code:

Address Line 1:

Address Line 2:

City:

State/Region: Michigan

Phone Number:

Important Details to Track: Addresses

Primary Address:

Other Address

Home

Mailing

Other

Valid From: 12-11 to 03-30 (mm-dd)

Country: United States

Postal Code: 33647

Address Line 1: 1234 Main Street.

Address Line 2:

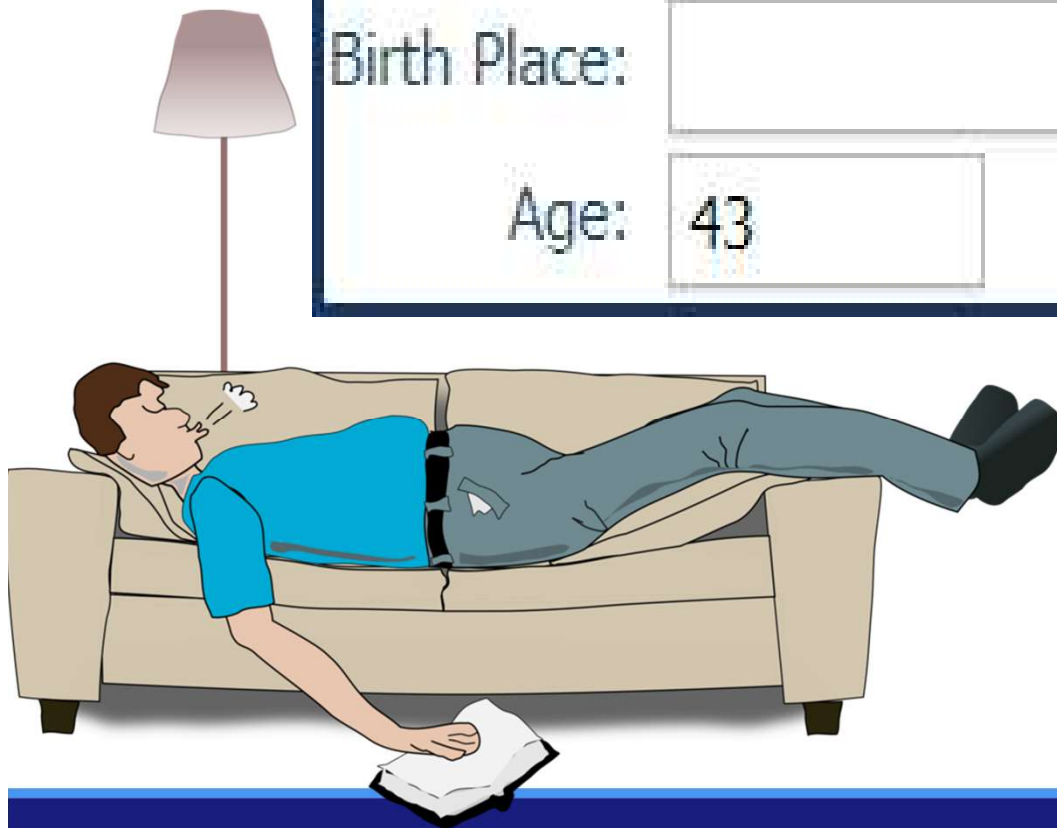
City: Tampa

State/Region: Florida

Phone Number:

Important Details to Track: Member Status

Status:	Active
Birth Date:	4/1/1975
Birth Place:	
Age:	43



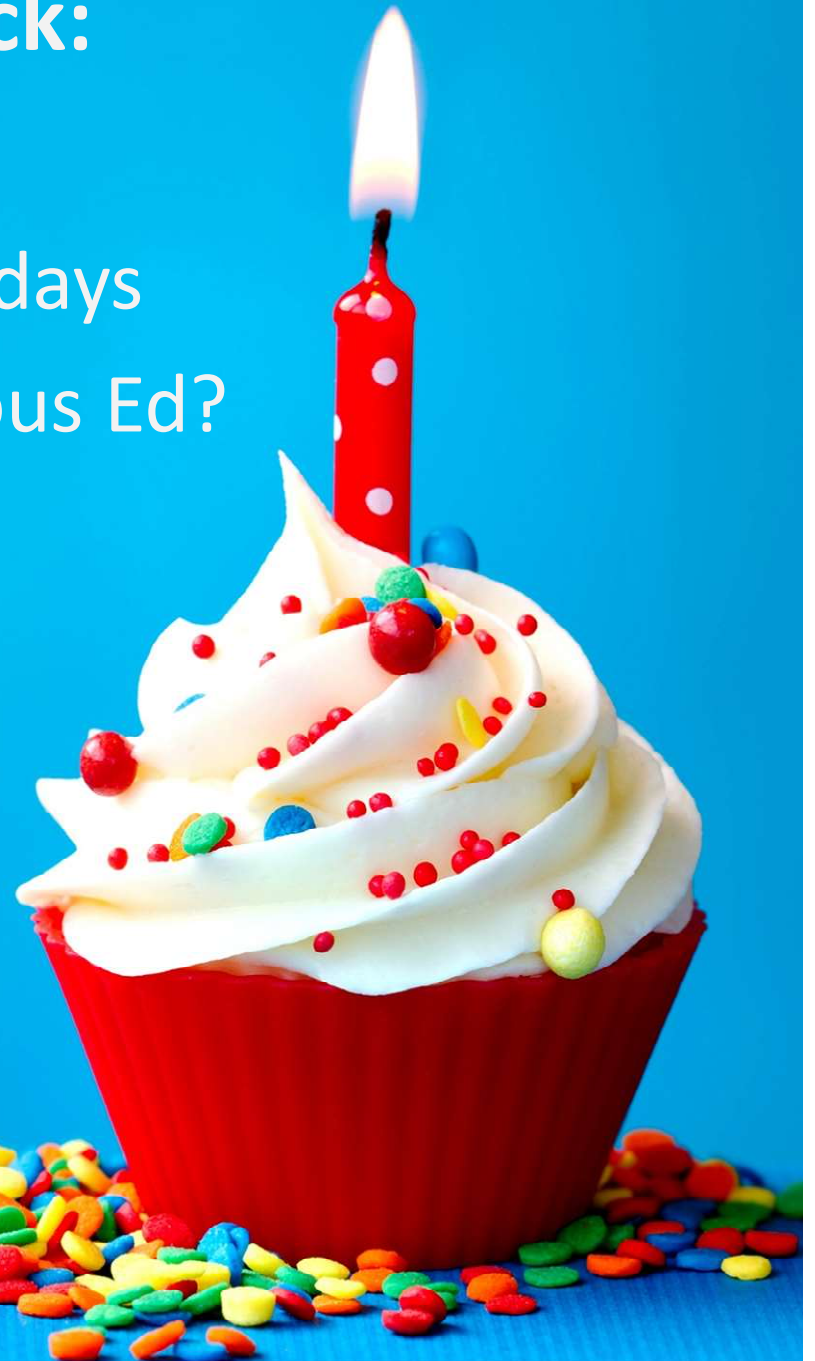
Important Details to Track: Role



First Name:*	<input type="text" value="David"/>
Nick Name:	<input type="text" value="Dave"/>
Middle Name:	<input type="text" value="Elvis"/>
Last Name:*	<input type="text" value="Aabala"/>
Suffix:	<input type="text"/> <input type="button" value="v"/>
Maiden Name:	<input type="text"/>
Role:*	<input type="text" value="Husband"/> <input type="button" value="v"/>

Important Details to Track: Birthdates

- Recognize Milestone Birthdays
- Who SHOULD be in Religious Ed?
- Ministry opportunities
- Who should be solicited for pledges?
- Small group invitations





The Power of Workgroups

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 **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

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



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

<input type="checkbox"/>		Finance Council
<input type="checkbox"/>		Parish Council

Members in Workgroup: **Parish Council**

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	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

0 1 2 3 4 5 6 7 8 9 Filter Criteria: Filter Column: Clear Filter

10 records ▼ [Print] [Export] [Add] [Remove] **Add Members** Manage Selected Members Quick Reports ▼

<input type="checkbox"/>	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

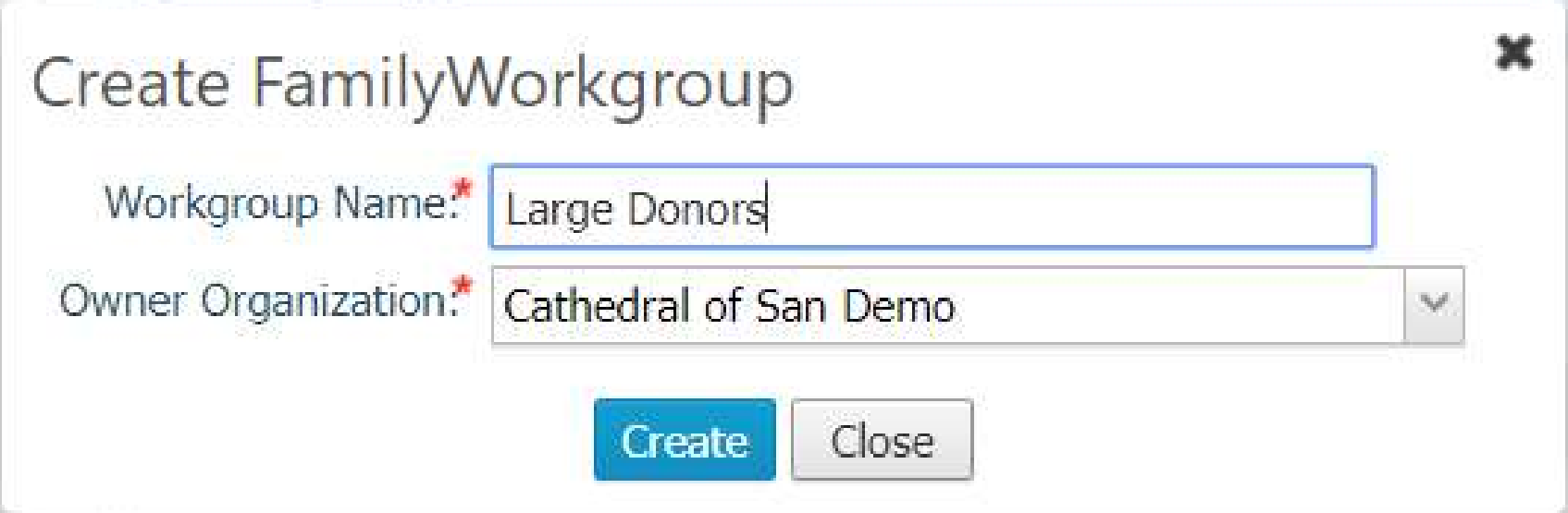
The Power of Workgroups: Creating Workgroups Through IQ

The screenshot displays the IQ software interface. At the top, there is a toolbar with options: '+ New Query', 'Save Query', 'Save Query As', 'My Queries', 'Recent Queries', 'Query Tags', 'View SQL', and 'Model Properties'. Below the toolbar, the interface is divided into several sections:

- Column Picker:** A list of data sources including Batches, Contributions, Families, Funds, Fund - Organization Summary, Members, Ministry Scheduler, Organization, Pledges, Religious Education, Sacraments, SEP, and StatusAnimarum.
- Result Columns:** A table with two columns: 'Expression' and 'Title'. It lists columns like 'Families Family DUID', 'Families First Names', 'Families Last Name', 'Families Family Group Name', and 'Sum of Contributions Payment Amount'.
- Query Conditions:** A section for defining filters, such as 'Families is Registered is equal to Yes' and 'Contributions Payment Amount is greater than or equal to 5000'.
- Query Results - 24:** A table showing the results of the query. A red arrow points to a context menu that appears over the table, with the option 'Create Family Workgroup' highlighted.

Families Family DUID	Families First Names	Families Last Name	Families Family Group Name	Contributions P
759	Eugene and Violet	Bucheger	Active	
1023	Bernard and Barbara	Campbell	Active	
2019	Odilia	Sweeney	Active	
12051	Rose	Meyer	Active	
39121	Nick and Iris	Rotering	Active	
60013	Richard and Betty	Ahles	Active	50,000.00

The Power of Workgroups: Creating Workgroups Through IQ



Create FamilyWorkgroup

Workgroup Name:* Large Donors

Owner Organization:* Cathedral of San Demo

Create Close

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**

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 **2** **3** Add Members Manage Selected Members Quick Reports ▼

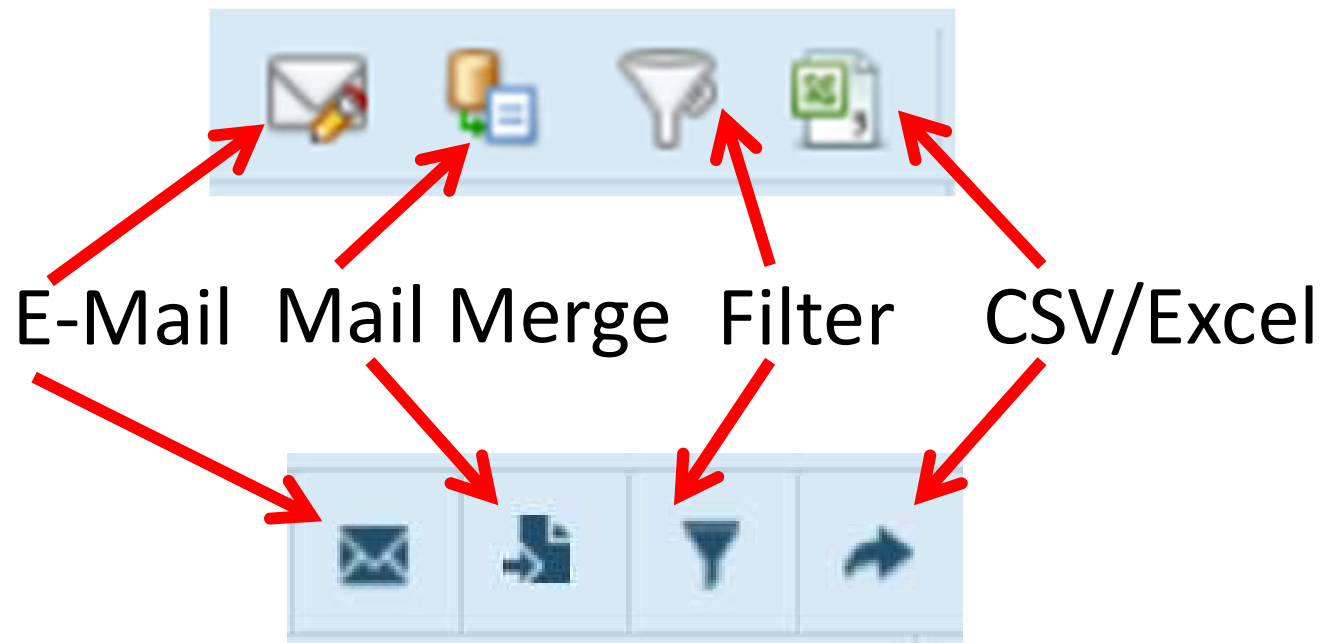
<input type="checkbox"/>	Last Name	First Name	E-Mail	Phone	A
<input type="checkbox"/>	Abler	Jason	abler@demoemailaddress.com		2: ^
<input type="checkbox"/>	Adams	Benjamin	benji@parishdemo.com	734-621-1212	3:
<input type="checkbox"/>	Adams	Maria	madams@parishdemo.com	734-621-1212	3:



Exporting Data From ParishSOFT

Exporting Data from ParishSOFT

- All modules have icons for easy exporting.



Exporting Data from ParishSOFT

Home | **Family Directory** | Religious Education

Family List | Member List | Sacraments | Far

Family List

▼ |

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

10 records ▼ [Print] [Export] [Filter] [Export CSV]

Members in Workgroup: Parish Council

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

10 records ▼ [Print] [Export] [Filter] [Export CSV] [Add Members] [Manage Se

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

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

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

Minister Directory

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

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

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

Exporting Data: Filtering for Export

Filter

1 Membership: Registered

2 Family Group: Active

Send Envelopes: (Any)

Family Work Groups

- Church Cleanup
- School Families
- School Families 2015-2016

Advanced Options

Filter By ID: Diocesan ID

Enter ID:

First Name:

Last Name:

Address:

Phone #:

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

E-Mail Address:

E-Mail: (Any)

Postal Code:

City:

State\Region:

Show 'Send No Mail' Families: (Any)

Show 'Do Not Publish' Families: (Any)

4 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.com	555-888-9999	24 Gold Pl #45	Ann Arbor
<input type="checkbox"/>	Anderson, Thomas and Andrea	Yes	Active	anderson@demoemailaddress.com	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 positioned over 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 over the "Send Web Based Email" button at the bottom left, and a red circle with the number "3" is positioned over the "Send Outlook Email" button at the bottom right. Both buttons are enclosed in red rectangular boxes.

1 New Recipients

Unique Email Count: 68

[Clear Unchecked](#) [Clear All](#) [Load from Grid](#)

- 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)

2 Send Web Based Email ▼

3 Send Outlook Email ▼

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 Family column header and the first row.
2: Red circle around the 'Export' icon (floppy disk with arrow).
3: Red circle around the 'Merge Selected Records (50)' option in the dropdown menu.
4: Red circle around the 'Merge All Records' option in the dropdown menu.

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

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
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<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



**Ready to Use
Reports**

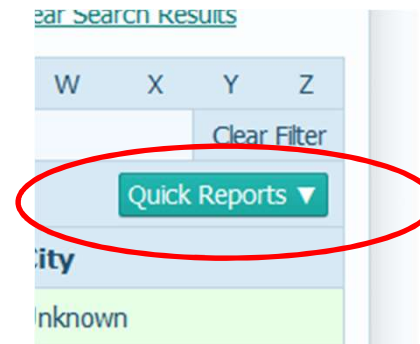
Why Use Reports?

- 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

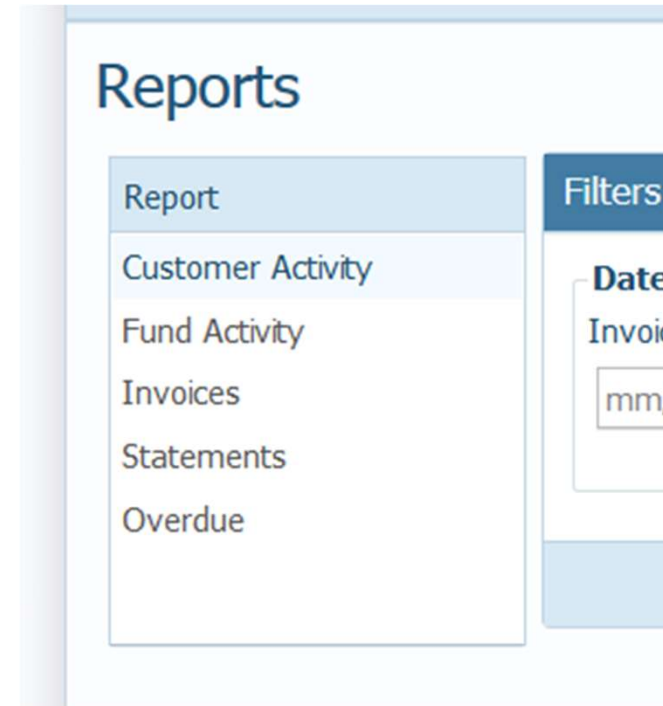
Ready-to-Use Reports: Religious Education

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



Ready-to-Use Reports: Tuition

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



QUESTIONS?

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Additional Resources

- Knowledge Base:
<https://support.parishsoft.com/hc/en-us>
- ParishSOFT Family Suite Training Videos:
<https://www.parishsoft.com/training/ps-family-suite/training-videos/>

Thank you!

Jeff Bachelor and Troy Hayes
ParishSOFT



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