# ParishSOFT | Family Directory

Home screen





### Family List

Part of the Family Directory where you can view, communicate with, and manage a list of families

- Sorting: Rolodex A-Z, 0-9, 10 100 Records
- Columns: Ascending/Descending,
- Filtering: Basic and funnel icon
- · Reorder: Remove items from Grid, add items to Grid, save or reset Grid

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Revised 5/17/2023

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A	-Z A	в	С	D E	F	G	н	1	J K	L	М	Ν	0	Ρ	Q	R	S	т	U	v	w	x	Y	z
0-	<b>∂</b> 0 1	2	3	4 5	6	78	9	Filte	er Crite	ria: Nor	ne Fil	ter Colu	imn: Fa	mily A	scendi	ng						Clear	Filter	
1	) records 🗸		191		5- T	a,	Add	New F	amily		Delete	Selecte	d Fami	lies	Fo	orget S	electe	d Farr	nily			)uick R	eport	s 🗸
	Family				Env	elope #	E-Ma	ail Ado	ress		Pi	rimary	Phone	Prim	ary Ac	Idres	5		С	ity			S	tat€

## Icon

S Email 🔁	Mail Merge 🔄	Advanced Filter	
Export to Excel	Add New Family	Add New Family	Delete Selected Families
Forget Selected Families	Forget Selected Family	Delete Selected Families	(

# Search Exercise

- **1.** Type **Smith** into the search bar and hit the **Enter** key.
- 2. Note: family search of "Smith" includes Goldsmith and Klingensmith
- 3. Click Clear Search Results
- **4.** Expand the list to 50 records.
- 5. Click on the *drop-down arrow* in the search bar to choose the criteria to search by
- 6. Select the box next to Address in addition to Family Name and then click Close
- 7. Type Hill
  - Hill will be visible in the last name field.
  - Look at Gostkowski and scroll to the right to see "Hill" in the address.
- 8. Click Clear Search Results

# **Filters Exercise**

- 1. Type **Smith** into the search bar and hit the **Enter** key
- 2. Click on the Rolodex letter 'S'
- 3. See how the family's last names all begin with the letter S
- 4. Select the *drop-down arrow* in the search bar to choose the criteria to search by **Envelope**.
- 5. Type "101"
- 6. Note, no results. Why? Select Clear filter. Click OK. The family with envelope #101 appears.
- 7. Clear Search Results

# **Advanced Filters Exercise**

Allows filtering on other family criteria such as workgroups, email addresses, and registration date

- 1. Open the advanced filter.
- 2. Click Advanced Options.
- 3. Type John in the first name field
- **4.** Select Apply note the results.
- 5. Select the filter icon again.
- 6. Click the checkbox next to Exact Search.
- 7. Click **Apply**. Note the results and that another filter icon has appeared (to clear filters). Only families that start with John are displayed.
- 8. Clear the filter.

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# **Check Box Exercise**

Allows you to select multiple families to email, mail merge, and run reports

- 1. Select 4 families from the family list by marking the checkboxes
- 2. Click Quick Reports
- 3. Select Family Mailing Labels



Quick Reports Menu

### **Adding Family Exercise**

- 1. Click the Add New Family button.
- 2. Type in Smith.
- 3. Locate the Smith family that you would add.
- 4. Select the Radio button to the left. Note Add new family is removed, and you can now Add Selected Family as registered or unregistered.
- 5. Remove Smith and type your last name in the Last Name field and Search
- 6. Click on Add New Family
- 7. Family Member Column
  - a) Update the **Prefix**
  - b) Type your First Name
  - c) Select Type: Husband or Wife
  - d) Select Gender
- 8. Click Add Another Member
- 9. Repeat Steps #7 & 8 and add the Last Name of the spouse.
- **10.** Repeat Step #7 for your child. *NOTE*: **DON'T** CLICK on Add another Member, or you must add one more member.
- 11. Family Information
  - a) Family Group: Active
  - b) Auto Fill Family Names
- 12. Family Address
  - a) Address Line 1 3767 Ranchero (do not add Rd., St., Lane, Blvd., etc. This will allow the system to find the US Post Office verified address information)
  - b) Postal Code 48108
- 13. Save Options
  - a) Save & New (Saves and allows you to add the next family)
  - b) **Save & Edit** (Saves and takes you to the family where you can add or change information.)
  - c) Save & Finish (Saves and allows takes you back to the main tabs)
  - d) Cancel (removes everything you filled in)

# **Family Details**

Mr. and Ms J	ason Abler (103925) Env#: 6491	St William Parish, Ann Arbor 🗸 🗸
Family Details	Member Details (5) 🔻	
Family Informa	tion Notes	<u>.</u>
-	Church of Registration St William Parish, Ann Arbor Registration Date 3/29/2017	Modified On: Tuesday, October 31, 2017 4:21 PM Family Group Active
Last Name * Abler First Name(s) * Jason and Tra	Registration Status 🗹 Unregistered Date: acey	Primary Address Home Address Home Mailing Other
Formal Mailing Nam Mr. and Ms Ja	ason Abler	Country United States
Informal Name Jason and Tra	acey Abler	Postal Code plus 4 48197 4855 Auto Fill
Mr. and Ms A	Abler	Address Line 1 2351 Ellsworth Rd
Informal Salutation Jason and Tra	acey	Address Line 2
Email Address abler@demo	emailaddress.com	<sub>City</sub> Ypsilanti
Primary Phone 555-2222		State/Region: Michigan Phone Number
Emergency Phone 555-3333		
Emer. Ph. Desc.		Send Contrib. Env. V Publish Address V Publish Address V Publish Photo for Pictorial Directory Publish Photo for Pictorial Directory
		Edit Details Close

# **Member Details**

Jason Abler		St Wi	lliam Parish, Ann Arbor	~
Family Details Member Detai	ls (5) 🔻			
<b>i Jason i T</b> racey <b>&amp;</b> Griffin	<b>≜</b> Parker <b>≜</b> Spencer <b>≗</b> ∙ Ad	d 💀 Import		^
	Gender * Male	<sub>Status</sub> * Active		
	Title Mr.	Birth Date 3/16/1981	Birth Place	I
MemberDUID: 1010951	First Name * Jason	Age 41	Date of Death	
Special Needs Special Needs Details	Nick Name	<sup>Marital Status</sup> Married	<sub>Religion</sub> Roman Catholic	I
	Middle Name	<sub>Language</sub> English	Ethnicity	I
Life Events	Abler	Envelope # O	Next Send?	
Ì	Maiden Name			
	<sub>Role</sub> * Husband			I
General <b>Contact</b> Sacrame	nts Religious Education Minist	ries Misc.		l
Contact Information Home Phone 555-2222	<sup>Email Address</sup> jason.abler@dem	oemailaddress.com		

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## **Update Member Record**

- **1.** Select the Child's record.
- 2. Select Edit Details
- 3. Type in the Age note, you are unable to.
- 4. Type in the **Birthdate** or use the calendar option to select the date. Notice the age populates.
- 5. If you receive a pop-up window, select OK.
- 6. Click Save
- 7. Select the husband's record.
- 8. Select Edit Details.
- 9. Update Marital Status to Married
- **10.** Click **Save** and repeat for the wife's record.

# Life Events

This feature gives parishes the ability to track key life events, important milestones, and achievements in the lives of their clergy and members.

# Exercise

- **1.** Select a member.
- 2. Clicked on Life Events
- 3. Select Community Service Category
- 4. Select Adopt a Park Event
- 5. Click Save
- 6. Click Close

Note • will allow you to add another event or delete the current event. You must have the corresponding permission in your staff record. The parish admin can add Categories and Events.

# Member List

### Search Exercise

- 1. Click Member List
- 2. Select the Advance Filter
- 3. Gender: Male
- 4. Click Advanced Options
- 5. Marital Status: Single
- 6. Click Checkbox next to Age: Type in 65
- 7. Click Apply



# **Family Directory Reports**

William Parish, Ann Ar	bor	~		
Report Type Sacrament Statistics Census GDPR Audit Contact Info	rish Directory Report Parish Directory Registration Forms Life Events	Family Options     Choose one or multiple family groups to display on the report     Family group(s)     No Family Group     Organization/Business     No Surviving Members     Visitor     Active     (blank)	Registration Status Registered Families Non-Registered Families	Member Option
		Staff		

#### **Statistics category**

These are reports to calculate and track parish/sacramental statistics

- Kenedy Statistics
- Parish Statistics

#### Census category

These reports pertain to your current or potential registering parishioners

- Parish Directory
- Registration Forms
  - English
  - Spanish
  - Both English and Spanish
- Life Events

**GDRP** – Per GDPR legislation, individuals have the right to request to be "forgotten," which means having their personal data removed upon request. See your diocesan contact if you have individuals who have a European address in your database and ask to be removed.

#### Additional Exercises

Move a member into their only family record. This may be due to age or marital change.

- **1.** Find a family with children.
- 2. Select a child's record.
- 3. Select Edit Details
- 4. Select Export to New Family.
- 5. Choose Yes or No to pop up.
- 6. Ensure the information is populated correctly, if not, make updates.
- 7. Select Save & Finish.
- **8.** Review the original family record. Note: the child is no longer there.

Note: For a divorce, you must open the member tab that you didn't move and update additional information, including title, marital status, and role. On the family tab for the original family, update the Last Name, if needed, First Names, and then select AutoFill.

# **QUESTIONS FROM CLASS**

- 1. Why don't I input Ave, Rd, or St for the address entry?
- 2. I can only use the AutoFill button once...True or False?
- 3. What do I do if a report does not generate?
- What might be wrong if I'm not getting the search results I know should be?
- 5. What can't parishioners do in My Own Church?
- 6. I can print Registration Forms in English and?

# **TIPS & TRICKS**

- One person in every family must be set as either Head, Husband, or Wife
- Remember to click the Edit Details button to
- Remember to adjust auto-fill family names after
- Reports can be downloaded in multiple
- Don't forget to save your work as you go!

# **ANSWER KEY**

Turn off any pop-up blocker for the Family Suite website 4. Clear all searches/filters/advanced filters.
Parishioners can't see any staff menus and can only submit changes/information to be reviewed 6. Spanish

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