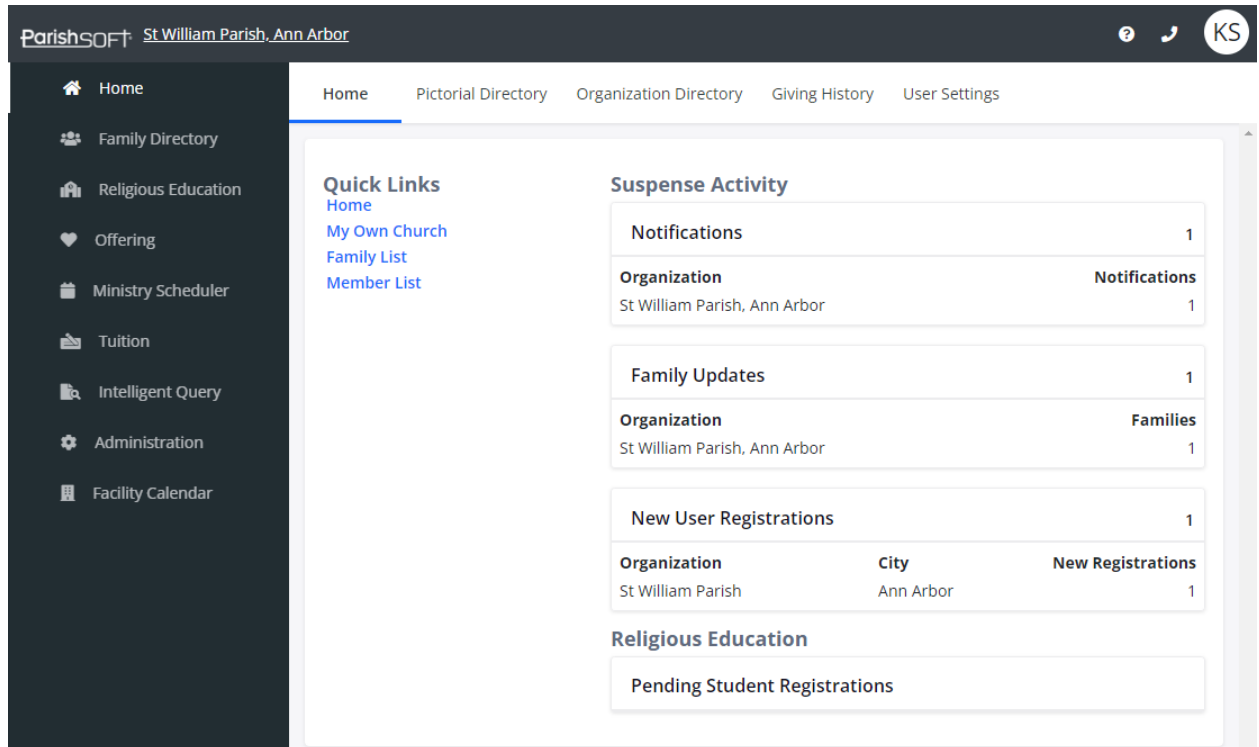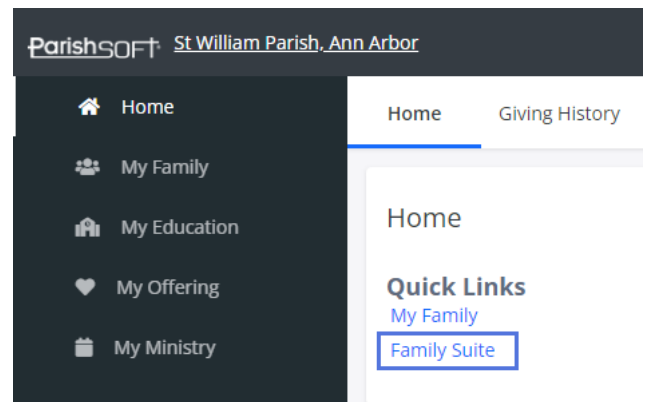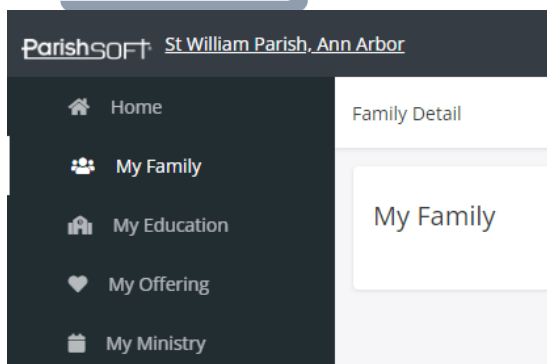# ParishSOFT® | Family Directory
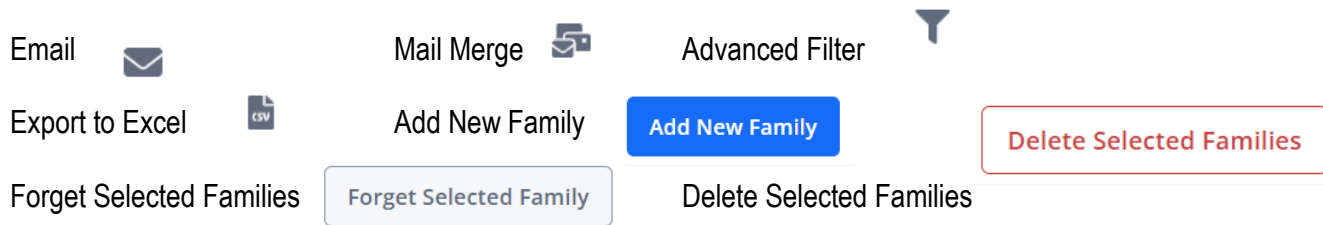
My Own Church

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

Icons

Email ✉	Mail Merge	Advanced Filter ▼
Export to Excel (csv)	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.

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

Quick Reports ˅

Family Mailing Labels

Family List

Filtered Envelope Numbers

Full Envelope Numbers

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 <u>your last name</u> 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 Jason Abler (103925) Env#: 6491   St William Parish, Ann Arbor   ⌄

Family Details   Member Details (5) ▼

Family Information   Notes

Church of Registration
St William Parish, Ann Arbor   Modified On: Tuesday, October 31, 2017 4:21 PM

Registration Date   Family Group
3/29/2017   Active

Registration Status ☑
Unregistered Date:

Last Name *   Primary Address
Abler   Home Address

First Name(s) *
Jason and Tracey   **Home**   Mailing   Other

Formal Mailing Name   Country
Mr. and Ms Jason Abler   United States

Informal Name   Postal Code   plus 4
Jason and Tracey Abler   48197   4855

Formal Salutation   Auto Fill   Address Line 1
Mr. and Ms Abler   2351 Ellsworth Rd

Informal Salutation   Address Line 2
Jason and Tracey

Email Address   City
abler@demoemailaddress.com   Ypsilanti

Primary Phone   State/Region: Michigan
555-2222   Phone Number

Emergency Phone
555-3333

Emer. Ph. Desc.   Send Mail ☑   Publish Address ☑
                                                             Send Contrib. Env. ☑   Publish Photo for Pictorial Directory
                                                             Publish Phone ☑   ☑

                              Edit Details   Close

Member Details

Jason Abler   St William Parish, Ann Arbor   ⌄

Family Details   **Member Details (5) ▼**

👤 Jason   👤 Tracey   👤 Griffin   👤 Parker   👤 Spencer   👤 Add   👥 Import

                    Gender *   Status *
                    Male   Active

                    Title   Birth Date   Birth Place
                    Mr.   3/16/1981

MemberDUID: 1010951 First Name *   Age   Date of Death
Special Needs ☐   Jason   41

Special Needs Details Nick Name   Marital Status   Religion
                                                Married   Roman Catholic

                    Middle Name   Language   Ethnicity
                                                English

                    Last Name *   Envelope #
Life Events   Abler   0   Next   Send? ☐

                    Suffix

                    Maiden Name

                    Role *
                    Husband

General   **Contact**   Sacraments   Religious Education   Ministries   Misc.

Contact Information
Home Phone   Email Address
555-2222   jason.abler@demoemailaddress.com

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**

Member Quick Reports

Quick Reports ⌄

Birthday Report

Filtered Envelope Numbers

Full Envelope Numbers

Member List

Member Mailing Labels

Wedding Anniversaries

Family Directory Reports

Family List   Member List   Sacraments ▾   Family Workgroups   Member Workgroups   Group Events Entry   **Reports**   Import ▾

St William Parish, Ann Arbor ⌄

Select Report - Parish Directory

Report Type
Sacrament
Statistics
Census
GDPR
Audit Contact Info

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)
  ☐ Inactive
  ☐ Staff

Registration Status
☐ Registered Families
☐ Non-Registered Families

Member Options
☐ Include Members

View Report

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?
4. 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 adjust any Family/Member data.
- Remember to adjust auto-fill family names after changing a family member to deceased.
- Reports can be downloaded in multiple formats.
- Don't forget to save your work as you go!

ANSWER KEY
1. *Leave the street suffix out to allow the address certification to fill it in upon saving.*   2. *False*
3. *Turn off any pop-up blocker for the Family Suite website*   4. *Clear all searches/filters/advanced filters.*
5. *Parishioners can't see any staff menus and can only submit changes/information to be reviewed*   6. *Spanish*