

# FamilySuite User Guide For Parish Bookkeepers

Parishes can increase offertory income by using FamilySuite data to analyze:

- Who/how many are the parish's biggest donors?
- How many parishioners give above or below the average contribution?
- Which parishioners have made no contributions? Why not?
- What variations in specific parishioner giving explains the overall change in offertory income?

Parish and School Financial Operations February 2020

This recorded training session provides the foundation for Connect Now IQ.

ParishSOFT® | Family Suite

INTELLIGENT QUERY

BASICS – PSIQ 10

The screenshot displays the 'Intelligent Query' interface. On the left, a 'Column Picker' lists various fields under the 'Contributions' category, with 'Payment Amount' selected. The main area shows a query result table with columns for 'Funds Fund DUID' and 'Contributions Payment Amount Sum'. Below the table, a 'Family Summary Report' is visible for 'Holy Trinity' at '123 Main St.', covering the period '01/01/2012 - 12/31/2017'. The report includes details like 'All Families', 'Total Given Range : \$0.01 - (no max)', and 'All Groups'. A table at the bottom lists individual families with columns for 'Env #', 'Name(s)', 'Address', 'Home Phone', and 'Total'. A dropdown menu is open, showing options like PDF, XLS, RTF, MHT, Text, CSV (highlighted), and Image.

Env #	Name(s)	Address	Home Phone	Total	
1234	Aaland,Thomas	2516 Aldringham Rd	Ypsilanti, MI 48197	555-1111	\$1,100.00
6491	Abler,Jason and Tracey	5048 Rudgate Blvd	Ann Arbor, MI 48108	555-2222	\$1,470.00
2901	Abney,Greg and Barb	4632 Wyndwood Dr	Ann Arbor, MI 48108	555-2222	\$150.00

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# A. Overview

- Offertory is the biggest source of funds for most parishes
- Understanding trends in offertory giving is key to the sustainability of the parish
- FamilySuite enables the parish to understand offertory giving at the individual contributor level
- All contributions and donations should be entered into donor accounts in FamilySuite
- The bookkeeper should routinely produce and analyze offertory trend reports from FamilySuite for review by the pastor and the Finance Council
- The pastor should use the reporting to plan his interactions with parishioners to encourage offertory giving and express gratitude

## B. Key internal controls

- No individual should have responsibility for both cash handling and recordkeeping. For example,
  - Offertory counter who handles cash should not enter donations into FamilySuite
  - Individual who enters donations into FamilySuite should use empty envelopes or other documents, not actual undeposited checks
  - Individual with FamilySuite responsibility should not participate in the offertory count or the handling of donations/contributions delivered or mailed to the parish office
  - The Pastor or bookkeeper should periodically review the FamilySuite contribution record of the individual who enters contribution data into the system to verify the contributions are bona fide
- Volunteers and employees who have access to parishioner donations and donation records should sign the archdiocese [confidentiality agreement](#)
- Offertory donations in FamilySuite should be reconciled to offertory income in ParishSoft Accounting

# C.1. Parish administrator for FamilySuite adds the bookkeeper

1. In Administration Tab, Click **Manage Staff** to display the Staff List page



2. In the toolbar, click **+**



3. Type your search criteria. Then, click **Search**

## Find Member

Organization: All

Last Name\*: Smith

First Name: James

City:

**Search**

Cancel

Note: If you see the name of the individual you want to add, it means that the software located a member record for the individual in the database

4. Select the member by marking the radio bullet to the left of the name

## Member Search

Last Name\*: smith

First Name: james

**Search**

	Member Name	First Name	Last Name	EmailAddress	Address	City
<input checked="" type="radio"/>	Smith, James	James	Smith	James@demoemail	123 Main St	Hous
<input type="radio"/>	Smith, James	James	Smith		10105 Westlake Cir	Belle
<input type="radio"/>	Smith, James	James	Smith		123 Main Street	Rock

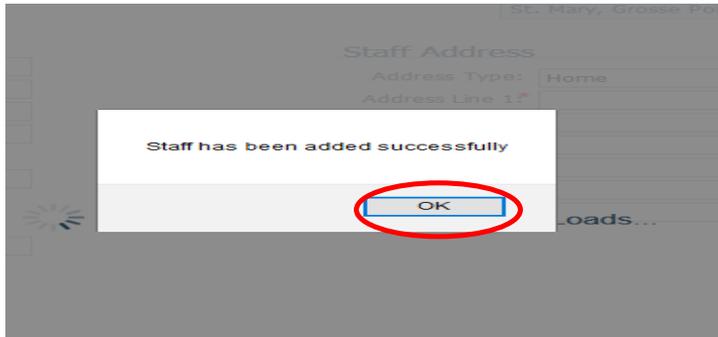
5. Click **Accept**.

Page 1 of 1 (4 Records) < 1 >

Add New Staff **Accept Selected Member** Cancel

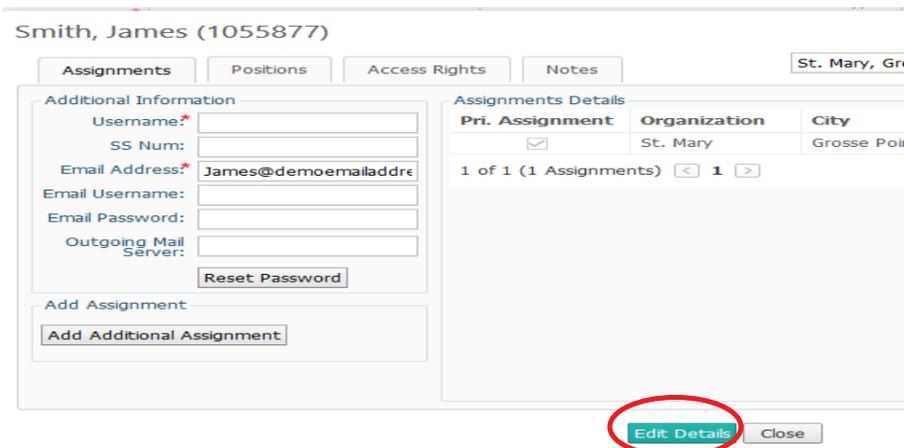
# C.1. Parish administrator for FamilySuite adds the bookkeeper

6. Click **OK** to dismiss the message



Note: If the software added the member to your staff, the new Staff Record is displayed

7. Click **Edit Details** to switch to edit mode and add the required information for this staff

A screenshot of the 'Staff Record' page for 'Smith, James (1055877)'. The page has tabs for 'Assignments', 'Positions', 'Access Rights', and 'Notes'. The 'Assignments' tab is active. On the left, there is an 'Additional Information' section with fields for 'Username', 'SS Num', 'Email Address' (containing 'James@demoemailaddre'), 'Email Username', 'Email Password', and 'Outgoing Mail Server'. Below this is an 'Add Assignment' section with an 'Add Additional Assignment' button. On the right, there is an 'Assignments Details' section with a table showing one assignment. The 'Edit Details' button at the bottom of the page is circled in red.

Pri. Assignment	Organization	City
<input checked="" type="checkbox"/>	St. Mary	Grosse Poi

## Helpful links

[What the different staff permissions mean](#)

[PSFS Administration - Manage Staff: How to add positions to and remove positions from a staff member's record](#)

# D.2. Dollar Range Report

*How many donors and what percentage of total donors give at each of the pre-set dollar levels?*

**St. Mary**  
123 Main St.  
Grosse Pointe, MI 48224

## Contribution By Dollar Range

Period : 01/01/2019 - 12/31/2019

Fund(s) : Sunday Collection

Dollar Amounts	Count	Percent	Amount
Between \$0.00 and \$50.00	1	% 7.1	\$20.00
Between \$50.00 and \$100.00	5	% 92.9	\$260.00
Between \$100.00 and \$150.00	0	%	\$0.00
Between \$150.00 and \$200.00	0	%	\$0.00
Between \$200.00 and \$500.00	0	%	\$0.00
Between \$500.00 and \$1,000.00	0	%	\$0.00
Between \$1,000.00 and \$5,000.00	0	%	\$0.00
Between \$5,000.00 and \$999,999.00	0	%	\$0.00

*Publish the Dollar Range Report to parishioners once each year to encourage an increase in giving*

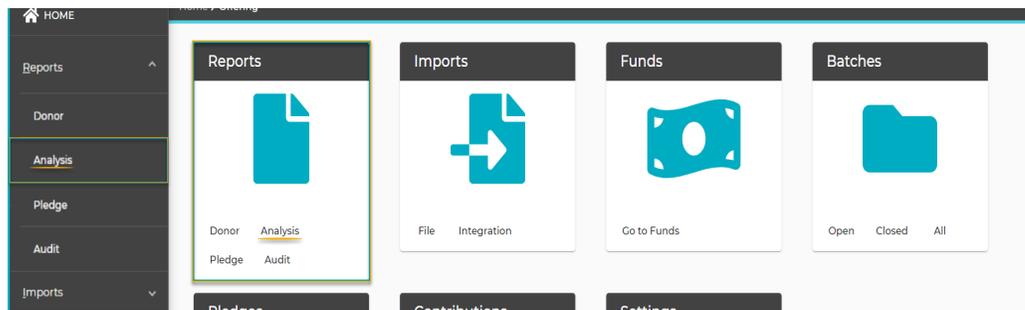
## D.2. Dollar Range Report



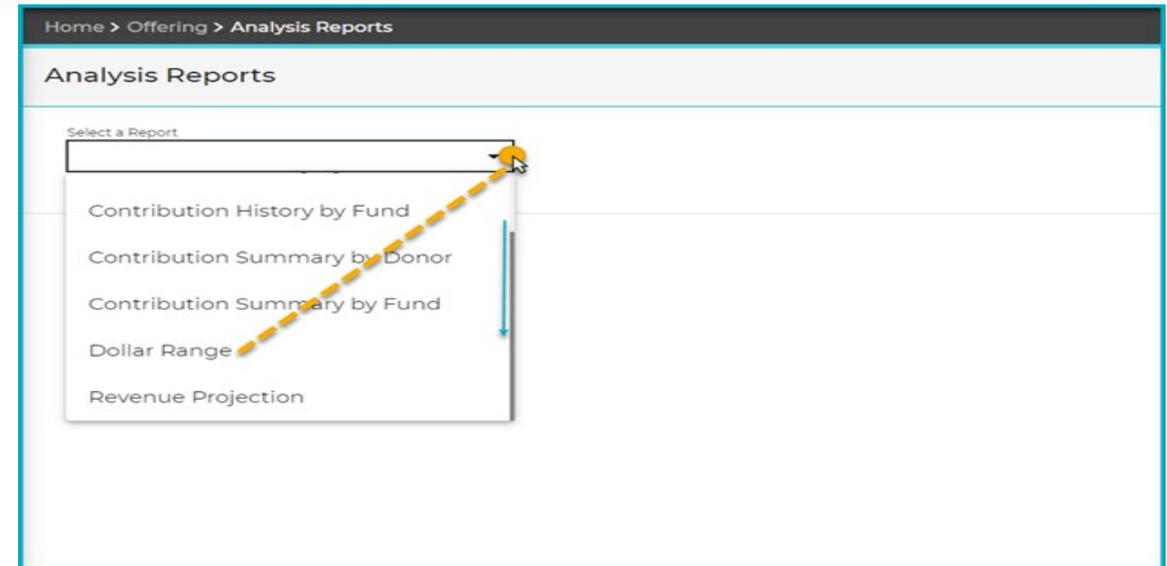
- Go to the Analysis Reports page.Using the **Navigator Bar**, select **Reports** → **Analysis**.

-or-

- Using the **Reports Card**, select **Analysis**.



Select the **Dollar Range** report.



Select the fund or funds on which you wish to report. Then, click Analysis Filters in the center top of the screen or click Next in the lower-left corner of the page to display the Analysis Filters page.

## D.2. Dollar Range Report

1 Select Fund(s) — Analysis Filters — 3 Report Filters

Fund Name	Fund ID
<input checked="" type="checkbox"/> 2020 Deacon's Fund	57
<input checked="" type="checkbox"/> 2020 Missions Fund	
<input checked="" type="checkbox"/> 2020 Tithe	
<input checked="" type="checkbox"/> A Pledge Fund 2020	
<input type="checkbox"/> Abigail Ministries	3677
<input type="checkbox"/> Advent	3688
<input type="checkbox"/> All Saints	3662
<input type="checkbox"/> All Souls	3663
<input type="checkbox"/> Annual Appeal	3679

Use the check box to the left of **Fund Name** to select all funds or click each one you want to include.

Next

On the Analysis Filters screen: select from each of the filters then click Report Filters in the upper right or Next.

Select the Family Registration status: Both, Yes, No  
Select the Family Workgroup if this applies, or leave it blank to select all.

Select one or more Family Groups.

2 Analysis Filters — 3 Report Filters

Family Registration \*  
Both

Family Workgroup

Select One or more Family Groups

Name
<input checked="" type="checkbox"/> Active
<input type="checkbox"/> Inactive
<input type="checkbox"/> Staff
<input type="checkbox"/> School Only

Use the checkbox to the left of Name to select all Family Groups or click each one you want to include.

Back Next

•On the **Report Filters** page, fill out each field to narrow down the results to the records that you would like to analyze. When ready, click the **Run Report** link at the bottom left.

## D.2. Dollar Range Report

Home > Offering > Analysis Reports

Analysis Reports

Select a Report  
Dollar Range

Select Fund(s) Analysis Filters Report Filters

From \* 1/1/2020  
To \* 12/31/2020

Amount Ranges Reset to Default  
Greater Than or Equal To

20  
200  
2000

Click + to add a new dollar amount to the Amount Range.

Click [X] to remove a dollar amount from the Amount Range.

See the report examples below to see how the Amount Ranges are used to populate the report.

Back Run Report

## Example of the PDF report

PDF

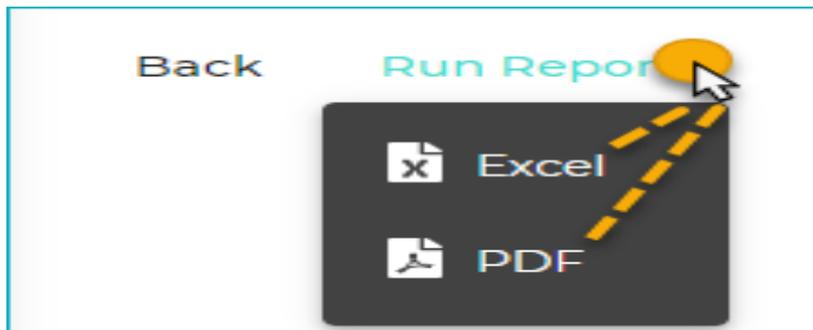
**St. Isidore Church**  
87922 North St  
Macomb, MI 48042

**Contribution By Dollar Range**  
No Dates Selected  
Funds: Multiple Funds

Dollar Amounts	Count	Percent	Amount
Less than \$20.00	29,514	12.51%	\$209,223.01
Between \$20.00 and \$200.00	22,162	46.68%	\$780,710.95
Between \$200.00 and \$2,000.00	962	30.35%	\$507,525.01
Greater than \$2,000.00	50	10.47%	\$175,050.28

## Example of the Excel Report

Select between PDF and [Excel](#) for the report output.



	A	B	C	D	E
1	Excel				
2		<b>St. Isidore Church</b>			
3		87922 North St			
4		Macomb, MI 48042			
5					
6	<b>Contribution By Dollar Range</b>				
7	No Dates Selected				
8	Funds: Multiple Funds				
9	<b>Dollar Amounts</b>		<b>Count</b>	<b>Percent</b>	<b>Amount</b>
10	Less than \$20.00		29,514	12.51%	\$209,223.01
11	Between \$20.00 and \$200.00		22,162	46.68%	\$780,710.95
12	Between \$200.00 and \$2,000.00		962	30.35%	\$507,525.01
13	Greater than \$2,000.00		50	10.47%	\$175,050.28
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# D.2. Dollar Range Report

Take the Next Step poster created by ADW Development using the Dollar Range Report



75% of donors believe they give more or the same as others, but 72% of donors give less than the average

Blackbaud Institute, 2018

*Children love to ask their parents “which step are we on?”*

# D.3. Three Year Summary Report

*Who are the largest donors?*

*How have their donations varied over the last three years?*

*How does the Pastor interact with donors to encourage giving?*

**St. Mary**  
123 Main St.  
Grosse Pointe, MI 48224

## Contribution 3 Year Summary

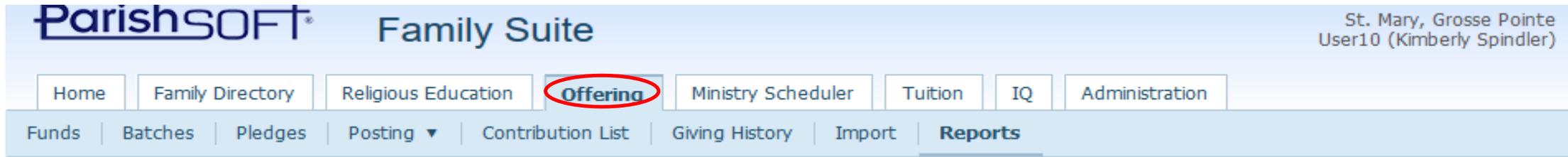
2018 - 2020

Fund(s): Sunday Collection

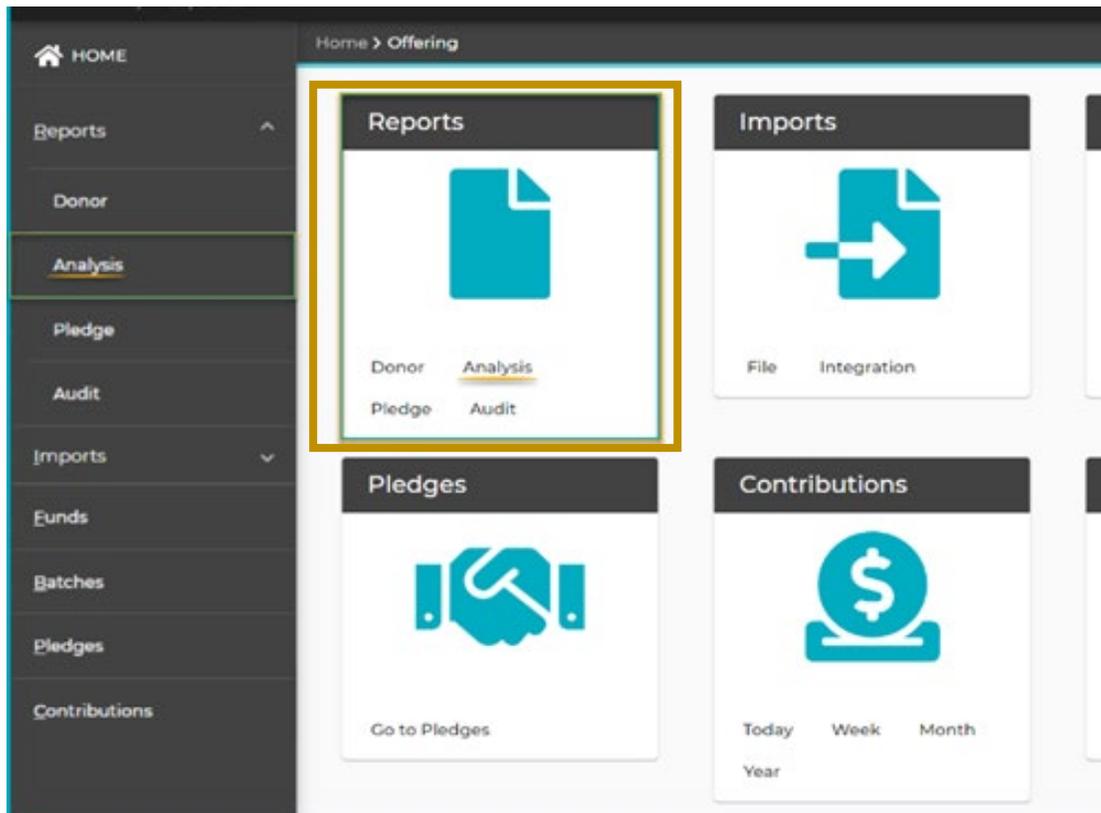
Env #	Name(s)	2018	2019	2020
	Aaland, Thomas	\$631.00	\$286.22	\$255.00
6491	Abler, Jason and Tracey	\$0.00	\$0.00	\$0.00
2977	Abney, Greg and Barb	\$1,920.00	\$1,860.00	\$2,400.00
4995	Abramovicz, Tom and Jane	\$0.00	\$0.00	\$0.00
1125	Achterberg, Dean	\$259.00	\$20.00	\$140.00
6367	Adam, Kevin	\$0.00	\$0.00	\$0.00
2545	Adams, David and Jen	\$838.00	\$677.00	\$422.00
5541	Adams, Mary	\$0.00	\$0.00	\$0.00
1129	Adams, Todd and Jane	\$319.00	\$238.00	\$60.00
8914	Adamski, Frank and MaryAnn	\$660.00	\$590.00	\$700.00
957	Ahles, Richard and Betty	\$0.00	\$0.00	\$0.00
5233	Alland, Donald and Cynthia	\$50.00	\$0.00	\$0.00
5552	Allen, Jim and Cheryl	\$0.00	\$0.00	\$0.00
5631	Allen, Mary	\$0.00	\$0.00	\$0.00
5577	Allen, Michael and Randi	\$120.00	\$0.00	\$0.00
5549	Allen, Veronica	\$0.00	\$0.00	\$0.00

*Publish the Three Year Summary Report every year to help the pastor plan his interaction with donors to encourage giving*

## D.3. Three Year Summary Report



1. Go to the Analysis Reports page.
  - Using the Navigator Bar, select Reports → Analysis.



2. Select the **Contribution History by Donor** report.



3. Select the fund or funds on which you wish to report. Then, click Analysis Filters in the center top of the screen or click Next in the lower-left corner of the page to display the Analysis Filters page.

## D.3. Three Year Summary Report

1 Select Fund(s)      Analysis Filters      3 Report Filters

Fund Name	Fund ID
<input checked="" type="checkbox"/> 2020 Deacon's Fund	57
<input checked="" type="checkbox"/> 2020 Missions Fund	
<input checked="" type="checkbox"/> 2020 Tithe	
<input checked="" type="checkbox"/> A Pledge Fund 2020	
<input type="checkbox"/> Abigail Ministries	3687
<input type="checkbox"/> Advent	3688
<input type="checkbox"/> All Saints	3662
<input type="checkbox"/> All Souls	3663
<input type="checkbox"/> Annual Appeal	3679

Next

4. On the **Analysis Filters** screen: select from each of the filters then click **Report Filters** in the upper right or **Next**.

Select the **Family Registration status**: Both, Yes, No

Select the **Family Workgroup** if this applies, or leave it blank to select all.

Select one or more **Family Groups**.

Select Fund(s)      2 Analysis Filters      3 Report Filters

Family Registration \*  
Both

Family Workgroup

Select One or more Family Groups

Name
<input type="checkbox"/> Name
<input checked="" type="checkbox"/> Active
<input type="checkbox"/> Inactive
<input type="checkbox"/> Staff
<input type="checkbox"/> School Only

Back      Next

5. On the Report Filters page, fill out each field to narrow down the results to the records that you would like to analyze.

- When ready, click the Run Report link at the bottom left.

Image of report filters

6. Select between PDF and Excel for the report output.

PDF

Sample Parish  
3767 Ranchero Drive Suite 100  
Ann Arbor, MI 48108

### Contribution History by Donor

\*\* Year columns will appear based on if contributions exist for that year.

2017 - 2020

Fund(s): Multiple Funds

Env #	Name(s)	2017	2018	2019	2020
1008	Smith, Steven and Rebecca	\$510.00	\$150.00	\$330.00	\$390.00
1000	Allen, Paul and Andrea	\$1,130.00	\$540.00	\$0.00	\$0.00
1002	De La Cruz, Leo and Maria	\$905.00	\$280.00	\$545.00	\$70.00
1007	Bloom, Alan and Kathy	\$325.00	\$375.00	\$200.00	\$0.00
1006	Balk, Michael and Sharon	\$350.00	\$0.00	\$0.00	\$0.00
6491	Abler, Jason and Tracey	\$146.00	\$29.00	\$0.00	\$0.00
1011	Braun, Steven and Julie	\$541.00	\$564.00	\$1,035.00	\$1,811.00
1012	Fisher, Christopher and Janeen	\$2,205.00	\$1,035.00	\$1,300.00	\$720.00
1015	Smith, John	\$46.00	\$0.00	\$0.00	\$0.00

# D.4. Contribution query for a custom date range

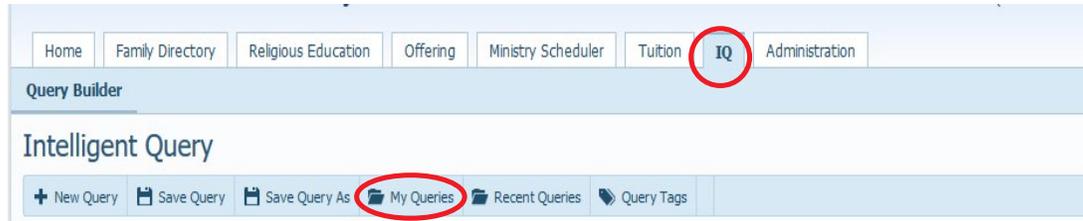
*How to view a report that will provides a list of the top givers during a specify date range.*

*The report displays Families Envelope Number, Name and the total contribution, and sorts the results alphabetically or by contribution amount.*

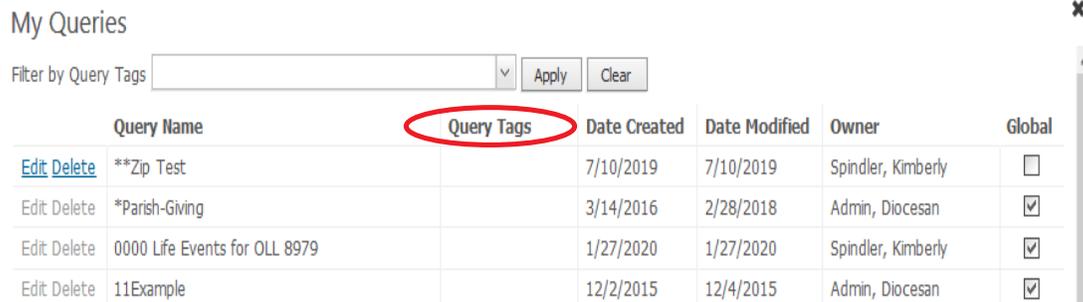
Families Envelope Number	Families Family DUID	Families First Names	Families Last Name	Contributions Payment	
				Amount	Sum
1808	992	Dawn	Abbott		130
20010	23079	Lorraine	Abdo		180
413	25258	Marie	Abell		8
1859	49713	Nancy	Abell Sr.		10
8307	51040	Shirley	Abogadie		60
1861	53126	Virginia	Achacoso		23
8409	59489 A.	Jeff and Deirdre	Ache		24
20062	66609 A.	Marian	Acosta		40
1	73115 A.	Curtis and Paula	Adaba		75
5088	73119	Aaron and Claire	Adams		420
1053	73124	Abs and Lia	Adams Sr.		225
1923	73129	Adewale	Adia		150
3526	73130	Adolfo and Nancy	Adimbo		330
1753	73131	Adrian & Catherine	Ager		180
	73134	Adrian and Margaret	Agunyebo		280
24	73136	Agnes	Aiello		785
3891	73140	Alan and Carolina	Albanesi		90
29	73142	Albert and Hedy	Alessandrini		90
33	73143	Albert and Juanita	Alho		240
2824	73148	Albert and Lori	Alicea		80
47	73152	Alexander and Lorelyn	Allen		390
1931	73153	Alfred	Alvarez		120
20000	73154	Alfred and Matilda	Alvey		20
4255	73159	Alice	Amachree		430
5931	73161	Alicia	Amanyeywe		345
3894	73163	Allison	Amon		405
58	73165	Amanda	Anastasi		321
1497	73168	Amelia	Anderson		60
3897	73173	Ammon and Eleanor	Anderson		250
2264	73176	Amy	Anderson		20
70	73177	Amy	Andrews		25
3150	73178	Amy	Angus		200
	73180	Andrea	Antonioni		1500
77	73184	Andrea-Maria	Antwi		125
3538	73189	Andrew	Anyanwu		15
4587	73191	Andrew	Anyanwu		1290
87	73192	Andrew & Hayley	Apori		359
4032	73193	Andrew and Gail	Applegarth		100
91	73195	Andrew and Mary Anne	Araujo		280
	73201	Andrey and Joanna	Aristy		300
4263	73202	Angela	Arisumi		145
213	73208	Angela	Arnold		90
1367	73215	Anita	Arvizo		25
1412	73216	Ann	Ash		240
1415	73219	Anna Maria	Ashby		90
1417	73229	Anne	Askins		50
3162	73233	Anselma	Askins		100
910	73234	Anthony	Atielu		85
1418	73236	Anthony	Atzeyinku		430
1783	73249	Anthony & Olga	Aud		220
151	73252	Anthony and Blessing	Augustine		90
1433	73258	Anthony and Heather	Baer		350
156	73259	Anthony and Jacquelyn	Bagileo		165
160	73262	Anthony and Josephine	Bagnall		250
1945	73263	Anthony and Leticia	Baker		125
162	73264	Anthony and Susan	Baker		5495
963	73265	Antoinette	Bakke		80
2564	73266	Anton & Melanie	Balaban		285
1099	73268	Antonio and Sandra	Balarabe		50
1436	73269	Antonio and Wilma	Bald		150
1169	73273	Apollonio and Lourdes	Baldwin		160
392	73279	Ariene	Baldwin		110

## D.4. Contribution query for a custom date range

1. Click the IQ Tab
2. My Queries



3. Click the **Query Tags** twice to display all of the tags in ascending order



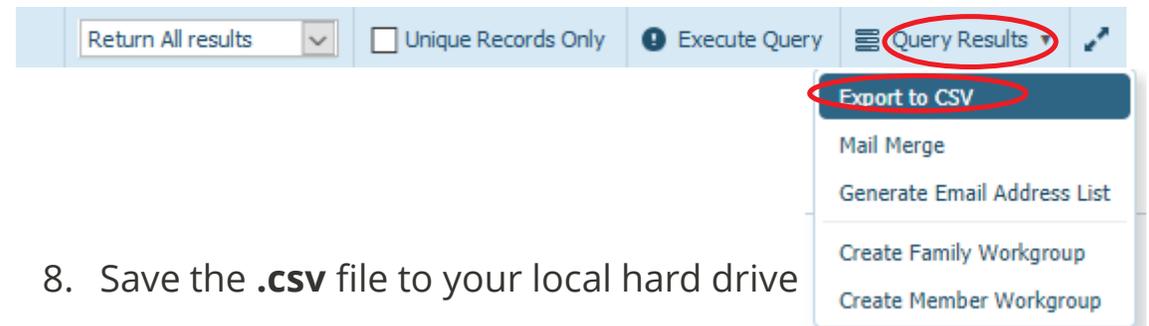
4. Select the query, then click Open



5. Edit the date range
6. Click **Execute Query** to run the query.



7. Click **Query Results** export the results to a .csv file, then select the **Export to CSV** option.



8. Save the **.csv** file to your local hard drive
9. Open the file in Excel and make changes, if necessary