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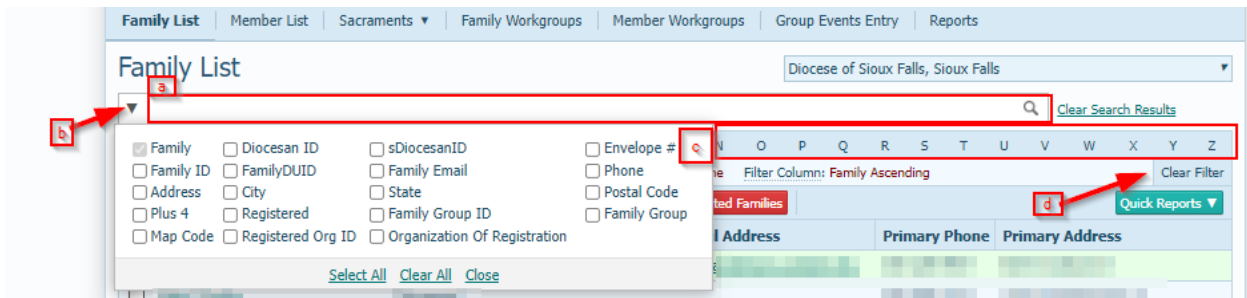
Family Suite Filters

1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.




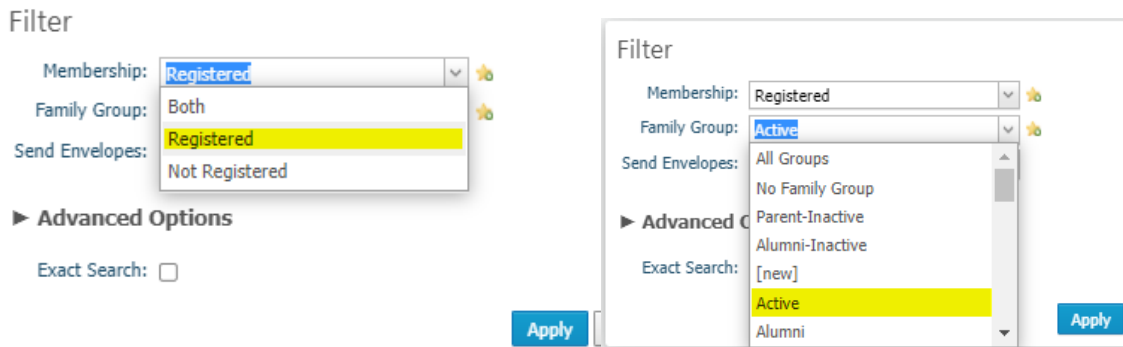
3. "Fuzzy" Search

- a. The Search box allows you to search for a specific family in the family directory. For example you could type Smith in the box and it would come back with all families who have Smith in the name including Smithwick.
 - i. You can put two names in if you wanted to find two families with different last names. This may come in handy when someone gets married and you are trying to find both of the parishioner's family records.
- b. If you click the ▼ at the left hand side of the search box it will give options of other things to search for. This I see used a lot to search for Envelope number. You can search by address but remember it will find all entries for it. Example if you search for 123 Andrew Drive it would give all addresses that contain 123, all addresses that contain Andrew and all Addresses that contain Drive.
 - i. If you want to search for a specific address you will be better off using the advanced search cover later in this document.
- c. You can also just select a letter on the Rolodex line to see all families whose last name start with that letter.
- d. To clear the filter and start over press the Clear Filter button on the right hand side of the screen.



4. Advanced Filter

- a. Click on the filter icon  to bring up the filter dialog box.
- b. If you are just searching for Registered and active families you will change the Membership dropdown to Registered and the Family Group dropdown to Active.



- c. Next click the ► next to the words Advanced Options to see all the filtering options.

- d. In the example show I am searching for anyone who lives on 8th Ave. I have put a space in front of the 8 otherwise it would come back with 438th Ave, 58th Ave, or 38th Ave. By putting a leading space it will give me just the 8th Ave addresses.
- e. You can search on the other options also as seen in the screenshot below. You will click Apply to search with the parameters you have set.

Filter

Membership:

Family Group:

Send Envelopes:

Family Work Groups

Bishops Bulletin

CFSA 2007

Education Formation

▼ Advanced Options

Filter By ID:

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date:

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:

5. Back at the main screen you should have your filtered results on the screen.
 - a. You can now review your results.
 - b. You can export the list out to a csv but clicking on the icon the arrow is pointing to. This way you can review it in Excel or review it for later. You can also use this list to make a mail merge in word for documents or labels.
 - c. If you are down with the results and need to clear the filter click on the icon to clear the parameters that were set.

Home **Family Directory** Religious Ed. Offering Tuition Administration Facility Calendar

Family List Member List Sacraments Family Workgroups Member Workgroups Group Events Entry Reports

Family List Diocese of Sioux Falls, Sioux Falls

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

100 records Add New Family Delete Selected Families Quick Reports

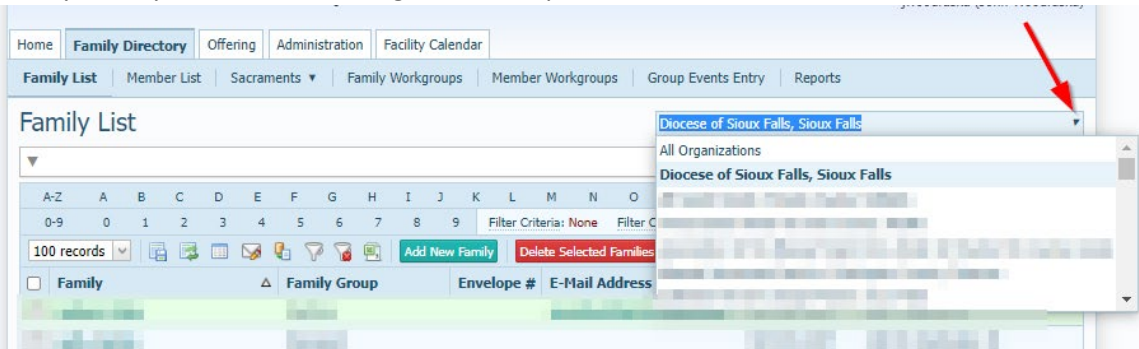
| Family | Family Group | Envelope # | E-Mail Address | Primary Phone | Primary Address |
|------------|--------------|------------|----------------|---------------|-----------------|
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |
| [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] | [REDACTED] |

Switching between parishes

1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.




3. You should now see a dropdown on the upper left hand corner of the grid.
4. When you click the dropdown it will show you which parishes you have access to. Each parish will only show you the families assigned to that parish.

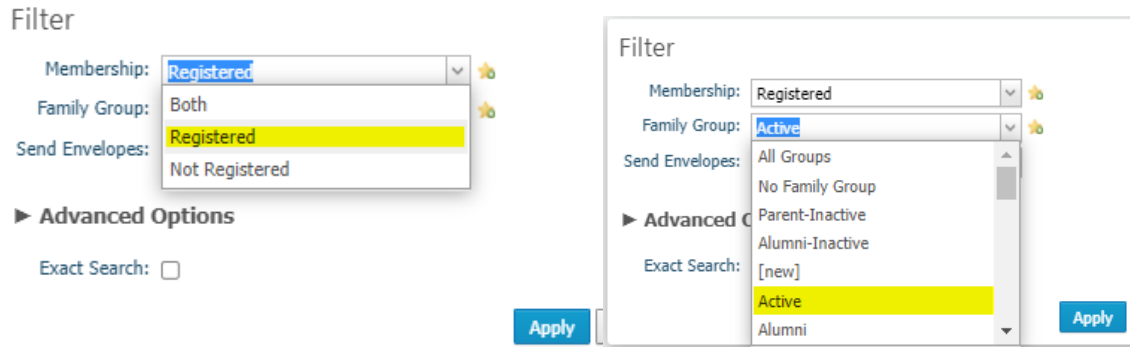


View Parishioners Status for Data Cleanup

5. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
6. Once logged in click on the Family Directory tab.



7. Once you see a list of parishioners in the grid you can click on the filter icon  to view only your registered parishioners. Select the “Registered” option in the Membership dropdown list and select “Active” in the Family Group dropdown list. Once both are selected click the blue Apply button.



Filter

Membership: Registered

Family Group: Both

Send Envelopes: Registered

Not Registered

► **Advanced Options**

Exact Search:

Apply

Filter

Membership: Registered

Family Group: Active

Send Envelopes: All Groups

No Family Group

Parent-Inactive

Alumni-Inactive

► **Advanced C**

Exact Search: [new]

Active

Alumni

Apply

8. This should take you back to the main screen with your list of Parishioners.
- This button will clear the filters that we had set in step 3 and will show all parishioners assigned to your parish including registered and all family groups.
 - This button will allow you to export a list into excel format if you feel more comfortable reviewing the list in this format. You will still have to make the changes individually within ParishSOFT though.

Home **Family Directory** Offering IQ Administration Facility Calendar

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

Family List

All Organizations

Clear Search Results

Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records Add New Family Delete Selected Families Quick Reports

| Family | Envelope # | E-Mail Address | Primary Phone | Primary Address | City |
|------------------------------------|------------|----------------|---------------|-----------------|------------|
| <input type="checkbox"/> Family 1 | 490 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 2 | 1 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 3 | 494 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 4 | 1 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 5 | 1103 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 6 | 1 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 7 | 1 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 8 | 801 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 9 | 1018 | [redacted] | [redacted] | [redacted] | [redacted] |
| <input type="checkbox"/> Family 10 | 896 | [redacted] | [redacted] | [redacted] | [redacted] |

Page 1 of 3649 (36490 Records) 1 2 3 4 5 6 7 8 9 10 ... 3645 3646 3647 3648 3649

- *You may also want to check some other membership and Family Group combinations. One example would be select Membership=Registered and Family Group= Deceased. **We do not want Deceased members to be registered so we would want to uncheck that and also double check that the Send Mail is not checked.**

Sioux Falls (2016/07)

Family Details Member Details (1) Diocese of Sioux Falls, Sioux Falls

Family Information Notes

Church of Registration:

Details Modified On:

Family Group: Inactive

Registration Status:

Registration Date: 1/1/2006

Unregistered Date: Not Available

Last Name: [Redacted]

First Name(s): [Redacted]

Formal Mailing Name: [Redacted]

Informal Name: [Redacted] } Auto Fill

Formal Salutation: [Redacted]

Informal Salutation: [Redacted]

Email Address: [Redacted]

Primary Phone: [Redacted]

Emergency Phone: [Redacted]

Emer. Ph. Desc.: [Redacted]

Primary Address: Home Address

Home Mailing Other

Country: United States

Postal Code: [Redacted]

Address Line 1: [Redacted]

Address Line 2: [Redacted]

City: Dimock

State/Region: South Dakota

Phone Number: [Redacted]

Envelope #: 0 [Next](#)

Diocesan ID: [Redacted]

Annual Gift \$: 0 [Giving History](#)

Map Code: [Redacted]

Send Mail:

Publish Address:

Send Contrib. Env.: Publish Photo for Pictorial Directory:

Publish Phone: Send Magazine:

Publish Email: Do Not Call:


MLNA: Do Not Solicit:

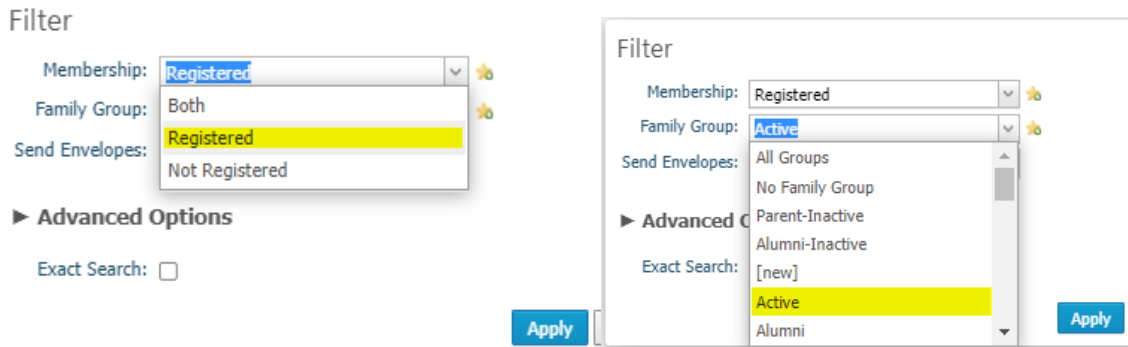
[Edit Details](#) [Close](#)

Retrieve Email list

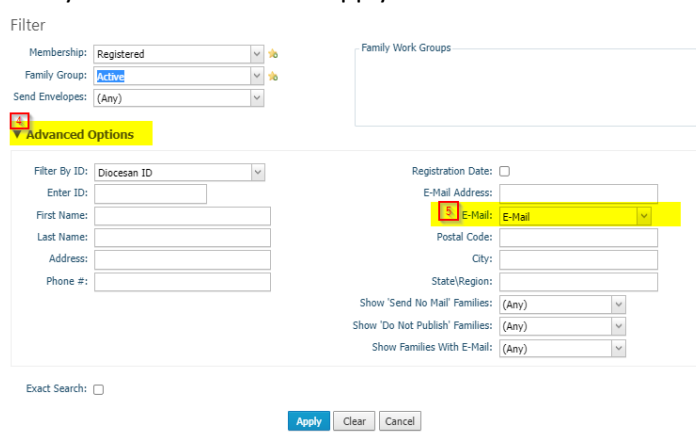
1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.



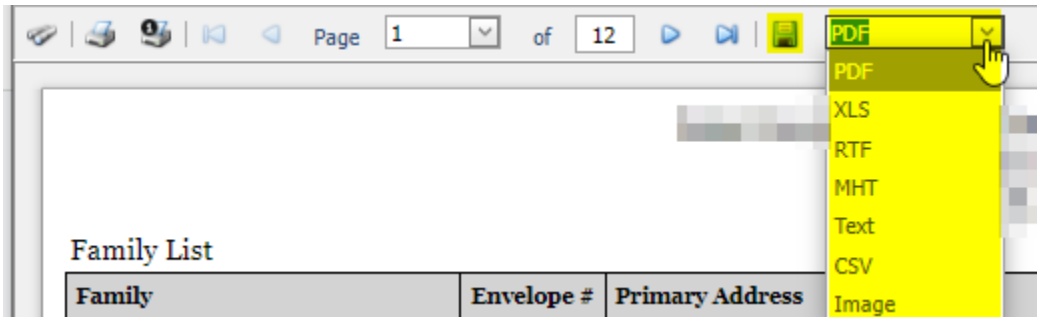
- Once you see a list of parishioners in the grid you can click on the filter icon  to view only your registered parishioners. Select the "Registered" option in the Membership dropdown list and select "Active" in the Family Group dropdown list.



- Next Click the ► next to Advanced Options to expand the other options.
- On E-Mail: dropdown select E-Mail. This will give you a list of all Families who have an email in the system. Click the blue Apply button at the bottom of the screen to use this filter.



- Now on the right hand side click the **Quick Reports** button and select Family list.
- You will now have a different screen. At the top you can change the export file type and then click the Save button to export.

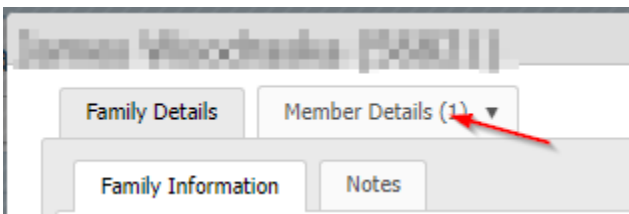


Process for Managing Deceased Parishioners

1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.




3. Use the search bar to find the parishioner's family record you are trying to locate and open the record.
4. Click on the Member Details tab.



5. Click the **Edit Details** button at the bottom of the screen
 - a. Change the "Status" dropdown to deceased
 - b. Enter in the "Date of Death" box the date of their death.

James Mikochanka

Family Details Member Details (1) Registration Status: Deceased



MemberDUID:

Special Needs:

[Life Events](#)

Gender: Male

Title: Mr

First Name:

Nick Name:

Middle Name:

Last Name:

Suffix:

Maiden Name:

Role: Head

Status: Deceased **a**

Birth Date: 4/30/1948

Birth Place:

Age: 70

Date of Death: 10/17/2018 **b**

Religion: Catholic

Language:

Ethnicity:

Marital Status: Single

Envelope #: 0 Send?

Contact Information

Email Address:

Home Phone:

Cell Phone:

Work Phone:

Pager:

Fax:

6. Click the button at the bottom of the screen.
7. If there are other members of the family go back to the family details screen and update the "First Name(s)", "Formal Mailing Name:", "Informal Name", "Formal Salutation", and "Informal Salutation" accordingly by clicking the button making the changes and then clicking on the button.
8. If this is the last member of the family click the button and change the "Family Group" to "Deceased" and Uncheck the box next to "Registration Status" and make sure to click the button once finished with your changes.

James Woodruff (2019)

Family Details Member Details (1) ▾

Family Information Notes

Church of Registration:

Details Modified On: Wednesday, February 13, 2019 1:41 PM

8 Family Group: Deceased ▾

Registration Status:

Registration Date: 1/1/2006

Unregistered Date: 2/13/2019

7 Last Name:

First Name(s):

Formal Mailing Name:

Informal Name:

Formal Salutation:

Informal Salutation:

Auto Fill

Email Address:

Primary Phone:

Emergency Phone:

Emer. Ph. Desc.:

Primary Address: Home Address ▾

Home Mailing Other

Country: United States ▾

Postal Code:

Address Line 1:

Address Line 2:

City:

State/Region: South Dakota

Phone Number:

9. If possible please fill out the sacrament information for the funeral. Even though a funeral is not a sacrament this is held under the Sacraments menu in ParishSOFT.
10. Go to Sacraments -> Add/Edit Sacrament

Home **Family Directory** Offering IQ Administration Facility Calendar

Family List Member List Sacraments ▾ Family Workgroups Member Workgroups

Family List

Add/Edit Sacrament

Group Sacrament Entry

11. Select Funeral from the sacrament dropdown and enter the last name and click the Search button

Before adding new sacrament records you must do a search to make sure it does not exist. Search below.

| Sacrament | Last Name | Maiden Name | First Name | Completed On |
|-----------|----------------------|----------------------|----------------------|----------------------|
| Baptism | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

[Include Date Range](#)

- Confirmation
- Marriage
- Anointing of the Sick
- Holy Orders
- Funeral**
- Rite of Reception
- Religious Profession

12. Click the "Create new Funeral Record".

10 records

| <input type="checkbox"/> | Completed On | Last Name | Maiden Name | First Name | Suffix |
|-----------------------------|--------------|-----------|-------------|------------|--------|
| No Sacrament Records found. | | | | | |

13. This will bring you to the member search Screen where you will search for and select the parishioner whose information you are filling in. NOTE: If you have set them as deceased already in the Family Directory of ParishSOFT you can use this as part of the member search filter.

Member Search

Last Name: Status: Deceased

| | Last Name | First Name | Status | Birthdate | MemberDUID |
|----------------------------------|----------------------|------------|----------|----------------------|----------------------|
| <input checked="" type="radio"/> | <input type="text"/> | James | Deceased | <input type="text"/> | <input type="text"/> |

1 of 1 (1 Records)

14. The next screen will have you fill in the funeral information along with Date of Death. If you can fill out the top section and Date of Death that would be helpful.

Co Create Funeral record for James Pankowski Pa

Member DUID: 70560

Completed: Completed On: Mon Oct 22 2018 Parish: ... Celebrant: Rev Andrew Swietochowski

Date of Death: 10/17/2018

Anointed:

Funeral Title: Burial Date: Burial Type: Next of Kin: Vigil Place: Vigil Celebrant:

Cemetery Name: Grave Details: Section Block Lot Grave Purchase Date Purchase Cost Cause of Death: Deed Issue Date: Deed Owner:

Member Details Title: Mr Registry Vol.:

Add Cancel

15. When filling out Parish Click the 3 dots next to the text box and do a search for the parish. Using postal code is easiest and if you cannot find the parish under the city postal code and it is a mission church use the Main parish in the cluster's parish postal code. Select the Radio button next to the parish you wish to select and click the accept button at the bottom.

Organization Search

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

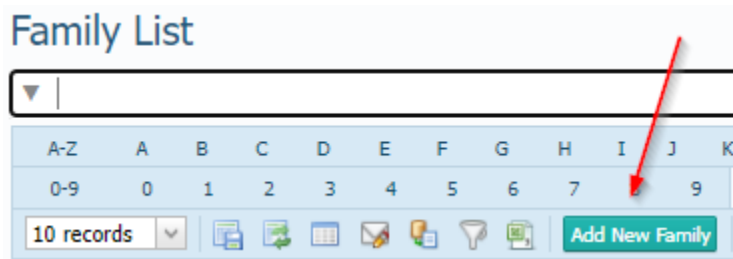
| Parish Name | Address | City |
|---|---------------------------------------|-------------------|
| <input type="radio"/> Immaculate Heart of Mary | 4919 - 51 Street, Box 87 | Bashaw |
| <input type="radio"/> Our Lady of Good Counsel | Junction of Highway 45 and Highway 83 | Lamont |
| <input checked="" type="radio"/> Our Lady of the Angels | 10004 - 101 Street | Fort Saskatchewan |
| <input type="radio"/> Our Lady of the Prairies | 5202 - 59 Street | Daysland |
| <input type="radio"/> Our Lady of the Rockies Mission | 780-827-3511 | Grande Cache |
| <input type="radio"/> St. Thomas d'Aquin | 8410 - 89 Street NW | Edmonton |
| <input type="radio"/> | | Thibodaux |
| <input type="radio"/> | | Saint Joseph |
| <input type="radio"/> | | Abbeville |
| <input type="radio"/> | | Glen Mills |

1 of 3281 (32804 Records) 1 2 3 4 5 6 7 ... 3279 3280 3281 Accept Cancel

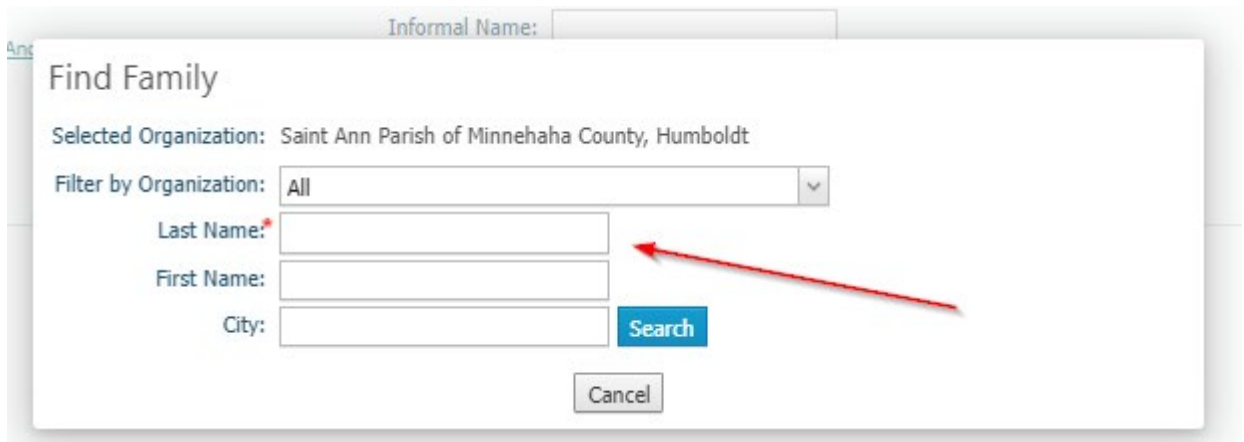
16. When searching for the celebrant Type in “Rev *Formal first name formal last name*” for example “Rev Thomas Hartman” not “Rev Tom Hartman”.
17. Once you have all the information filled out click the Add button at the bottom of the screen.

Add Contributor Only Parishioner

1. Click on the Add New Family button under Family List.



2. Search for the persons Last Name by typing it in the Last Name box and clicking the Search button.

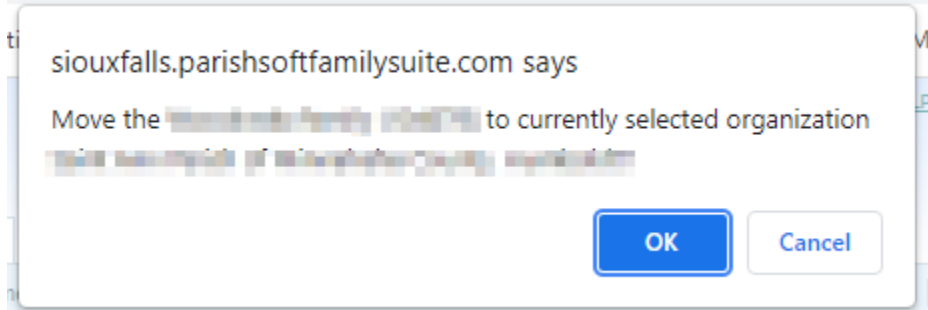


3. This will bring up a list of families that match your search.
 - a. Select the radio button next to the family you wish to add.
 - b. Click the ▼ next to “Add Selected Family” and select “As Unregistered”
 - i. Make sure you click the “As Unregistered”. This will give you a record to add a contribution too but will leave them registered in their current parish.

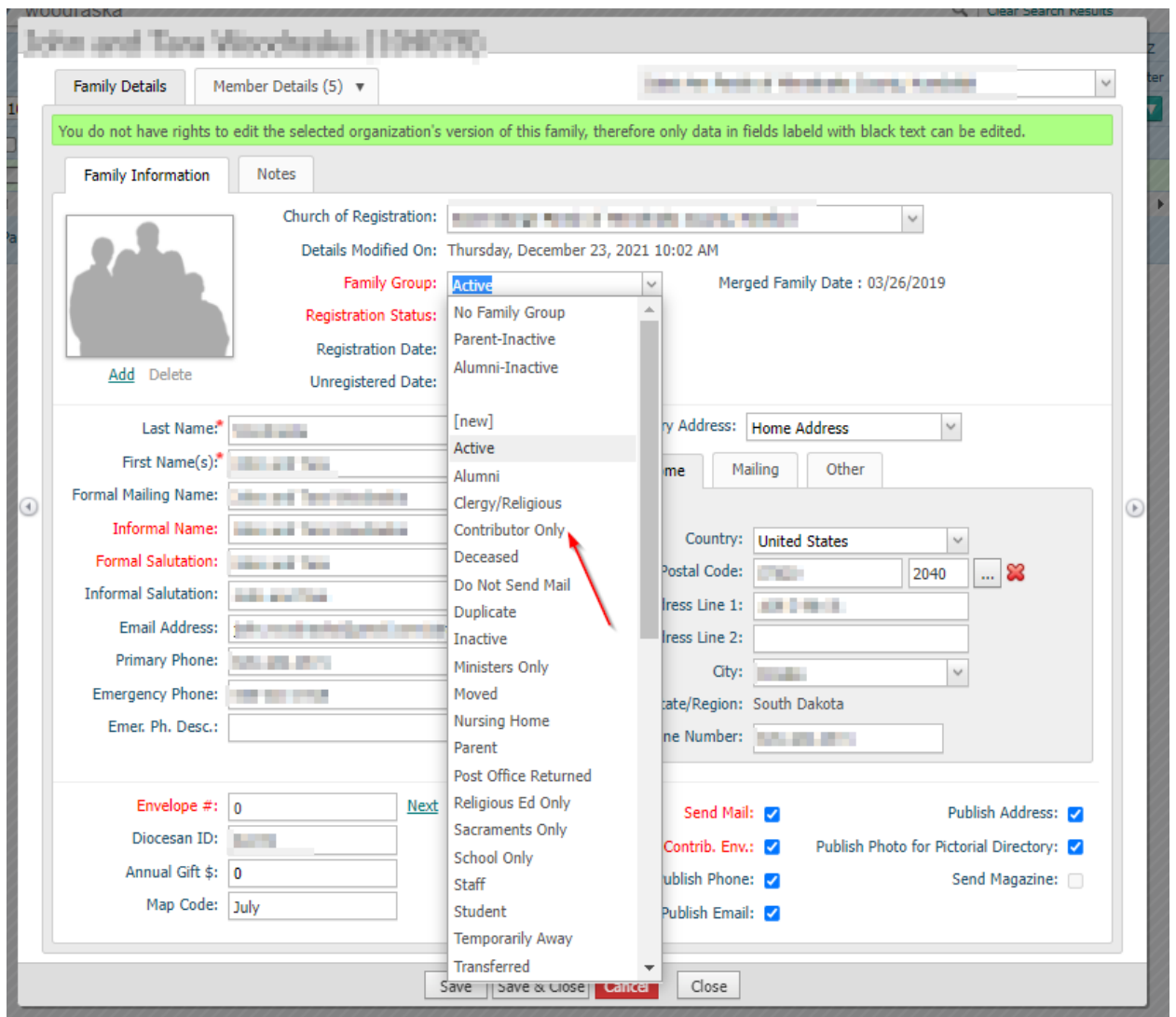
The screenshot shows a web interface titled "Find Family". At the top, there is a "Selected Organization" field with a dropdown menu. Below it is a "Filter by Organization" dropdown menu set to "All". There are three input fields: "Last Name:" (with a red asterisk), "First Name:", and "City:". A blue "Search" button is to the right of the "City" field. A red arrow labeled "A" points to the first row of the table below. The table has four columns: "Family Name", "Registered Organization", "Family DUID", and "Diocesan". The first row is highlighted. Below the table, there are three buttons: "Add New Family" (green), "Add Selected Family" (grey) with a dropdown arrow, and "Cancel" (grey). A dropdown menu is open from the "Add Selected Family" button, showing two options: "As Unregistered" and "As Registered". A red arrow labeled "B" points to the "As Unregistered" option.

| | Family Name | Registered Organization | Family DUID | Diocesan |
|-----------------------|-------------|---|-------------|----------|
| <input type="radio"/> | Bob | | | |
| <input type="radio"/> | | | | |
| <input type="radio"/> | | St. George Parish - St. Michael's Diocese | | |
| <input type="radio"/> | | | | |
| <input type="radio"/> | | St. George Parish - St. Michael's Diocese | | |

4. You will get a message that looks similar to the screenshot below. Just click the OK button.



5. Lookup the record in the Family list and Edit the details and change the Family group to "Contributor Only" and then click Save & Close.

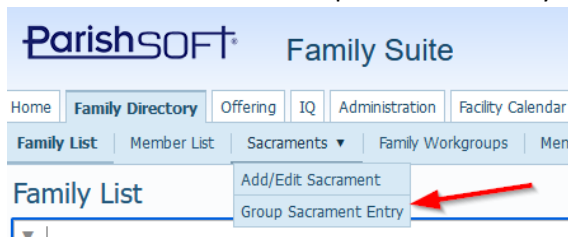


How to add a sacrament record for more than one person at a time (Group Entry)

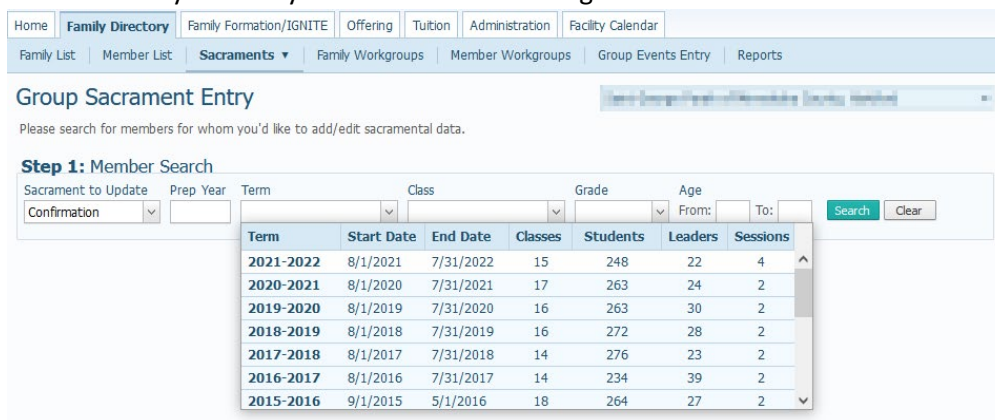
1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.






3. Click on Sacraments-> Group Sacrament Entry



4. Select the sacrament you are trying to update.
 - a. If you are using the Religious Education module to track students you can at this point pick the Term and Class to select a whole Religious Ed class for your search.
 - b. You can search by age range also to pick the member you want to add to the sacrament entry.
 - c. Once you have your search set click the green search button.



5. In step 2 you will now see a list of Member records that corresponds to the options you had put into your search terms.
 - a. Select all the members returned in the search by clicking on the topmost  symbol in the left hand window
 - b. You can select individual members also by clicking  symbol next to their name.
 - c. As you select members they will then populate the right hand window with the list you want to add the sacrament for.
 - d. If you click on the  symbol next to the record it will expand some extra information if you need to verify: Head of Household, Primary address, or Primary Phone.

Group Sacrament Entry








Please search for members for whom you'd like to add/edit sacramental data.

Step 1: Member Search

Sacrament to Update: Confirmation | Prep Year: | Term: 2021-2022 | Class: 11th Grade | Grade: 11 | Age: From: | To: | Search | Clear



Step 2: Select Members

Member Records

|  | Last Name | First Name | Age |
|---|---|------------|-----|
|  | [Redacted] | [Redacted] | 17 |
|  | Head of Household: [Redacted] Primary Address: [Redacted] Primary Phone: [Redacted] | | |
|  | [Redacted] | [Redacted] | 17 |
|  | [Redacted] | [Redacted] | 17 |
|  | [Redacted] | [Redacted] | 17 |
|  | [Redacted] | [Redacted] | 16 |

1 of 1 (15 Members) | < 1 >

Selected Members

|  | Last Name | First Name | Age |
|---|------------|------------|-----|
|  | [Redacted] | [Redacted] | 17 |

Total Members: 1

6. In step 3 you will enter the details of the sacrament
 - a. Check the boxes next to each of the details you will fill in for the sacrament.
 - b. The place will autofill with the Parish you are currently logged into
 - c. The celebrant will be in the form of "Rev <first name> <Last Name>" and then select them from the list. This will help keep that list cleaned up.
 - d. Once you have all the information set how you want click the save button at the bottom of the screen.

Step 3: Enter Confirmation Sacrament Information

Check the checkbox next to the fields you wish to update. You must select at least one to continue.

Completed: Yes | Completed Date: 5/2/2022 | Prep Year: | Place: [Redacted] |

Celebrant: Rev. Cesar Valencia PES | Rev. Cesar Valencia PES | Rev. Joseph Sheehan O CARM | Rev. Jeffrey Schulte | Rev. Darin Schmidt

Write previous data for selected members.

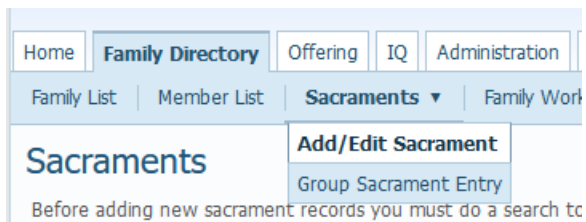
Save | Cancel

How to create a sacrament certificate

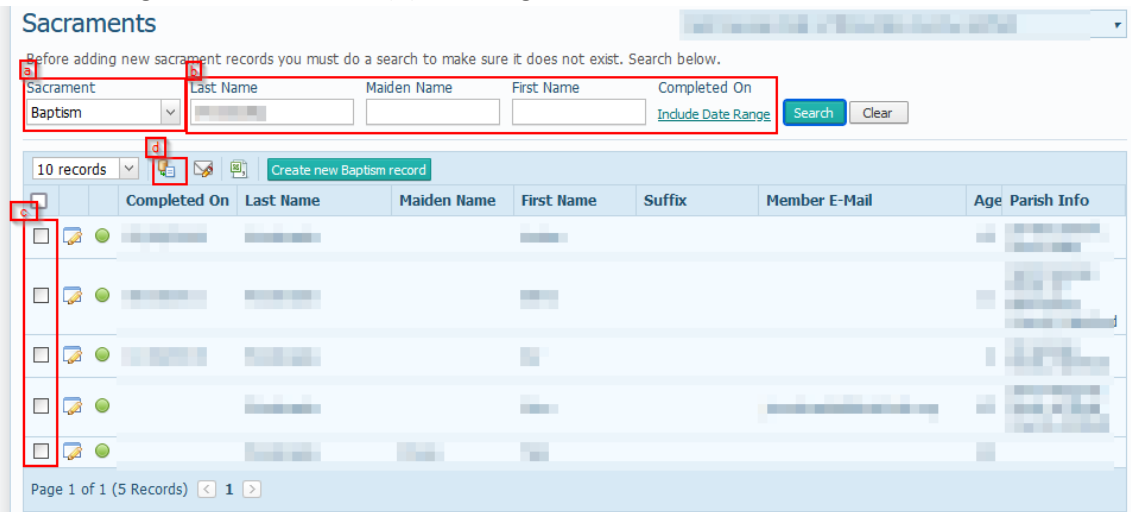
1. Login to <https://siouxfalls.parishsoftfamilysuite.com/> with your username and password.
2. Once logged in click on the Family Directory tab.



3. Click on the Sacrament->Add/Edit Sacraments























4. On the next screen
 - a. Select the sacrament you want to print a certificate for
 - b. Enter your search Criteria
 - i. One example would be a date range for confirmation class or First Eucharist class.
 - c. Select the records you would like to print the certificate for.
 - d. Click on the Mail Merge button to start the merge into the certificate document. Select either "Merge Selected Records (n)" or Merge All Records.



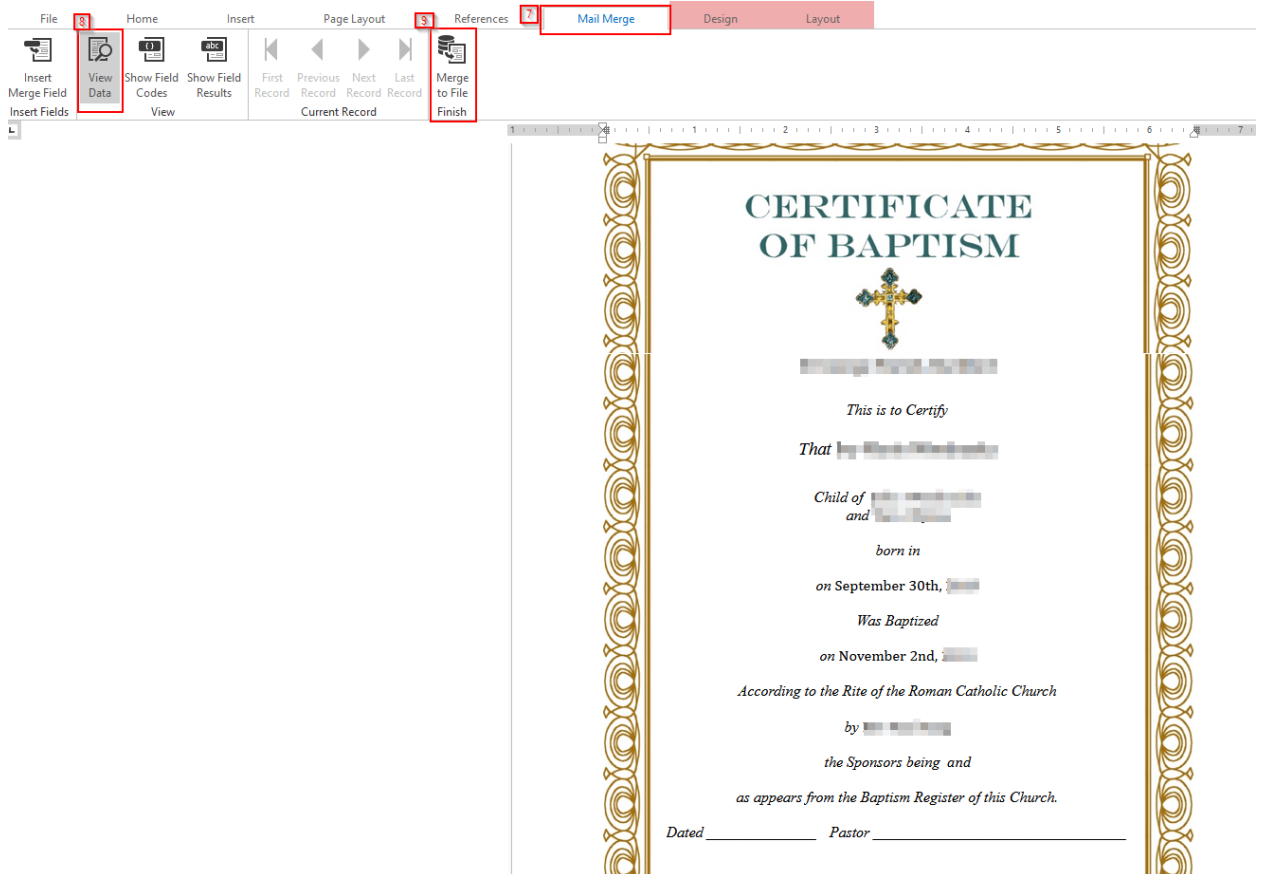
- This will bring you to the templates screen. At the top of the Screen click on ParishSOFT Templates.

My Templates Global Templates **ParishSOFT Templates** Mail Merge (1 Records)

Select a template below, [create a new one](#) or [open one](#).

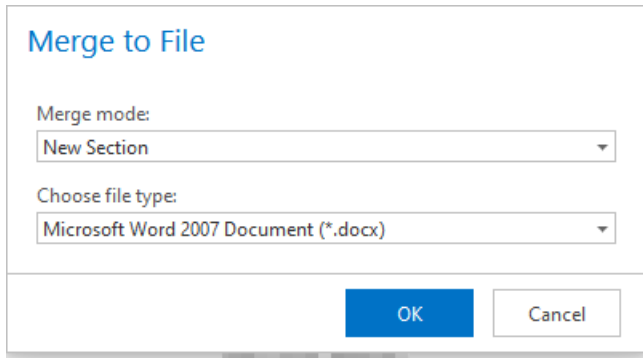
| | Template Name |
|---|---|
|   | Certificate of Baptism |
|   | Certificate of Baptism Full |
|   | Certificate of Reconciliation Preparation |
|   | Certificate of First Eucharist |
|   | Certificate of Confirmation |
|   | Certificate of Holy Orders |
|   | Certificate of Religious Profession |
|   | Certificate of RCIA |
|   | Certificate of Marriage |
|   | Certificate of Anointing |

- For our example I am going to select the certificate of Baptism.
- This will bring you to a screen that looks very similar to Microsoft Word. Click on the words Mail Merge.
- Click on View Data to see what the example will look like.
- Click on the Merge To File button. This will create a word document that you can edit or change before printing the file.



The screenshot shows the Microsoft Word Mail Merge interface. The ribbon includes File, Home, Insert, Page Layout, References, Mail Merge, Design, and Layout. The Mail Merge ribbon is active, showing options like View Data, Show Field Codes, Show Field Results, First Record, Previous Record, Next Record, Last Record, Merge to File, and Finish. The main area displays a 'Certificate of Baptism' template with a decorative border and a central cross. The text on the certificate includes: 'CERTIFICATE OF BAPTISM', 'This is to Certify', 'That [Name]', 'Child of [Name] and [Name]', 'born in', 'on September 30th, [Year]', 'Was Baptized', 'on November 2nd, [Year]', 'According to the Rite of the Roman Catholic Church', 'by [Name]', 'the Sponsors being and', 'as appears from the Baptism Register of this Church.', and 'Dated _____ Pastor _____'.

10. Once you click the Merge to File button the next screen will come up with a pop up that you can just click OK. This will download the file to your Downloads folder on your computer where you can open and edit the document to make any changes that you want before printing.



Merge to File

Merge mode:
New Section

Choose file type:
Microsoft Word 2007 Document (*.docx)

OK Cancel

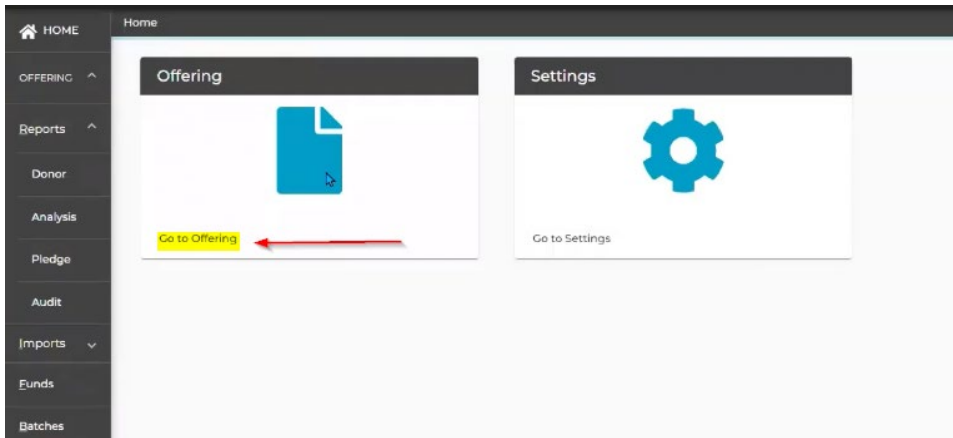
ParishSOFT create a fund

Create a new Fund (In this example we will create a CFSA 2022 fund.)

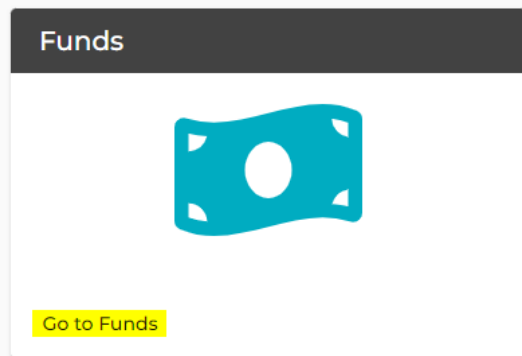
- a. Login into Parish Soft and click the offering tab.



- b. Once the page loads click on the “Go to Offering” link




- c. Click the Go To Funds text in the Funds card.



- d. Once the screen loads click on the plus sign in the upper right hand corner



- e. On the screen that comes up next Enter "CFSA 2022" as the Name field in the Account Number field with your account number for tracking for example "9001". Check the Fund is Active box. You can skip entering the "Fund Dates" if you want. Make sure the "This fund requires pledges" is unchecked and for this example make sure "This fund receives tax-deductible gifts" is checked. Uncheck the "Fund Accepts Sustaining Gifts" check box. Once you have entered all the information click the Save icon  in the upper right hand corner.

Fund Permissions

Fund ID

Fund Accepts Sustaining Gifts

Name *
CFSA 2022

Account Number *
9001

External ID

Diocesan ID

Fund is Active

Fund Dates

Start Date
MM/DD/YYYY

End Date
MM/DD/YYYY

This fund requires pledges

This fund receives tax-deductible gifts

- f. If you need a Non-Tax fund setup for CFSA 2022 then you would repeat the steps in step 3 above except change the name to CFSA 2022 Non Tax, change the account number if necessary, and make sure the “This fund receives tax-deductible gifts” is unchecked.

Fund
Permissions

Fund ID

Name *

Account Number *

External ID

Diocesan ID

Fund is Active

Fund Dates

Start Date

End Date

[Add Pledge End Date](#)

This fund requires pledges

This fund receives tax-deductible gifts

Fund Accepts Sustaining Gifts

Add a Pledge for a contribution

1. You can add a pledge directly in a batch to match to a contribution that you are entering.
2. Within the batch click the Pledges tab

| Contributions | Count | 1 / 1 | Pledges | Count | 0 / 0 |
|---------------|---------------|---------------------|---------|---------------|-----------------|
| | Amount | \$200.00 / \$200.00 | | Amount | \$0.00 / \$0.00 |

Contributions
Pledges

| | Family Id* | Amount* | Ck # | Pledge |
|--|----------------------|----------------------|----------------------|--------|
| | <input type="text"/> | <input type="text"/> | <input type="text"/> | |

3. Click the [+ Add Pledge](#) button to add a new pledge.
4. Fill out the ID by either typing in the envelope number or using the magnifying glass to look up the family.
5. Fill out all the information for the pledge putting the amount of the contribution as the Initial Pledge.

Fund: CFSA 2022

Start typing to search Donor type: Family Id

Donor: **Phone ID:** Pledge ID: New Pledge

Registered Organization:

Initial Pledge*: \$ Adjustments: + \$0.00 Current Pledge: = \$0.00 Total Paid: - \$0.00 Balance: = \$0.00

Pledge Date*: 1/18/2022

6. Towards the bottom of the form change the frequency to One Time Gift.

Start Date*: 1/18/2022 End Date:

Frequency*: One Time Gift # Months*: 12 # Contrib...: 1 Installment Amt*: \$ 200.00 Fulfillment Method*: Unknown (Parish)

Statement Months:
 Jan Feb Mar Apr May

 Jun Jul Aug Sep Oct

 Nov Dec

7. Click the button at the top of the form.

8. Click back to the contributions tab and click on the Pencil to edit the contribution you want to add the pledge for.

Family Id* Amount* 200 Ck # Pledge

Donor Info: Fund: CFSA 2022 Tax Deductible? Contribution Type: Cash Date: 01/18/2022

| <input type="checkbox"/> | Donor Type | Envelope # Name | Amount | Ck # | Pledge | Fund | Tax Deductible? | Contribution Type | Contribution Date | Initial Contribution? |
|--------------------------|------------|-----------------|----------|------|--------------------------|-----------|-------------------------------------|-------------------|-------------------|--------------------------|
| <input type="checkbox"/> | | 111 | \$200.00 | | <input type="checkbox"/> | CFSA 2022 | <input checked="" type="checkbox"/> | Cash | 01/18/2022 | <input type="checkbox"/> |

9. Under the pledge option you will see two hands shaking if everything is correct. Click the Save button to assign the pledge to the contribution. NOTE: If you didn't check the Batch Uses Pledges during batch creation you will not be able to link the Pledge to the contribution. On

10. Once you click save the details in the list below will have the Pledge checkbox checked.

| <input type="checkbox"/> | Donor Type | Envelope # Name | Amount | Ck # | Pledge | Fund | Tax Deductible? | Contribution Type | Contribution Date | Initial Contribution? |
|--------------------------|------------|-----------------|--------|------|-------------------------------------|------------|-------------------------------------|-------------------|-------------------|--------------------------|
| <input type="checkbox"/> | | 111 | 200.00 | | <input checked="" type="checkbox"/> | CFSFA 2022 | <input checked="" type="checkbox"/> | Cash | 01/18/2022 | <input type="checkbox"/> |

11. Click on the batch details button in the upper right hand corner. NOTE: If you filled out the pledge information when creating the batch you will not need to do this step. If you import the contributions and need to assign a pledge this will be a necessary step.



12. Update the Pledge Count and Pledge amount to match the pledges you have added. Fill in the Reason for updating the batch details by putting in something to the effect of "Add Pledge for contribution".

13. Once you have this all set click the save button in the upper right hand corner to make your changes.

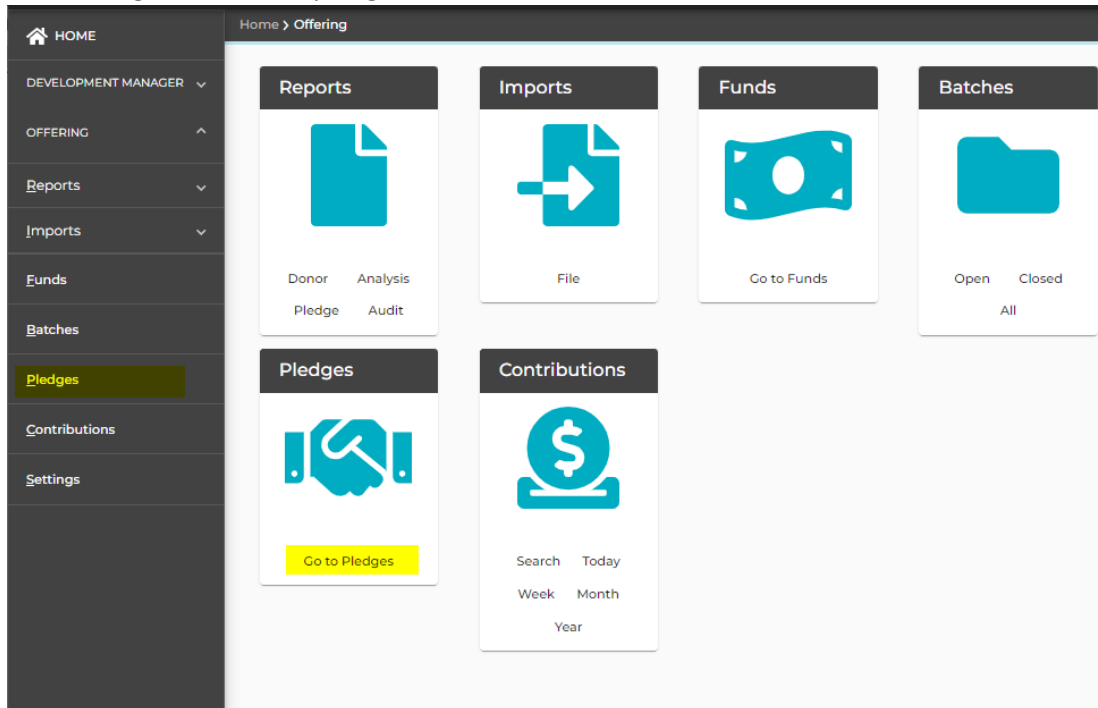




14. Finish by reviewing and closing your batches just as you would regularly.

Add Pledge After Contribution




Adding a pledge if contribution is already reviewed and closed.

1. Open up your Offertory module.
2. Go to Pledges tile or click pledges on the left hand side.




3. Click the  sign in the upper right hand corner and select Pledge. NOTE: If you do not have the plus sign you will need to go to the Settings link on the left hand side and uncheck the box “Require Pledge Batches” and then click the  Icon in the upper right hand corner.

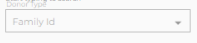

4. With the pledge screen now open fill in
 - a. The fund this will be whatever fund you are trying to add a pledge for.

- ID you can change the donor type to Envelope and use that or click on the  in the ID box to search by other criteria. Once you have selected a family the donor information should fill in with the family details.
- Enter the pledge amount. This will more often than not be the total contribution and pledge amount.
- Pledge date needs to be before or equal to the date of the contribution.
- Start date needs to be before or equal to the date of the contribution.
- Frequency will be more often than not a one time.
- Click the  icon in the upper right hand corner.
- Next click the eyeball  icon in the Total paid box.

Pledge Details



Organization: Chancery Office


Fund: 



Start typing to search
Family Id:  Donor: 


Phone: ID: Pledge ID: Now Pledge


Registered Organization:

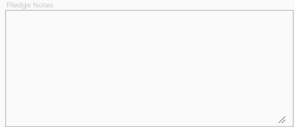
Adjustments:  \$0.00 

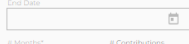
Current Pledge:  \$0.00



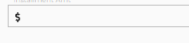

Total Paid:  \$0.00 

Balance:  \$0.00



Start Date:  7/1/22

Pledge Notes: 





End Date: 

Month:  # Contributions:  Installment Amt:  Fulfillment Method: 



Statement Months:




Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec  



Initial Contribution:

Amount:  \$ Contribution Type:  Check #:  Contribution Notes: 



5. This will bring up another screen.

- Click the  icon in the upper right hand corner of this screen.
- Next check box next to the contribution you want to connect. Nothing will show up here if the contribution date does not fall within Pledge date and start date criteria from the first screen.
- After you have selected the contribution click the  icon in the upper right hand corner and then close at the bottom
- Your Total Paid should now show your contribution amount.

Contribution History   

|  | Contribution Date | Amount | Check # | Memo | Pledge ID |
|---|-------------------|--------|---------|------|-----------|
|  | | | | | |

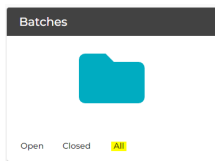
6. You should select Save in the upper right hand corner and this should be set.

NOTE: You can do the same thing in the Pledges batch also if you have a bunch to do. You will add pledges just like you would regularly in a batch but after you hit save at the top if there are contributions tied to this donor within the dates set on the pledge date and start date than the eyeball icon should go from  to .

Pledge with \$0 contributions

Gather all the pledges together and total up the pledges and count how many pledge cards will be in the batch. If you plan on running Non Giver Letter Reports you will need to do this so the Family will not show up on that report. This will add a contribution line so that they get credit for contributing to the Appeal.

1. Log into ParishSOFT and go to the offering module the same way we did when we setup the funds.
2. This time we will click on the All text in the Batches card.

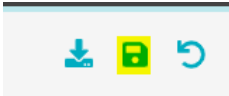


3. On the screen that opens click on the plus sign in the upper right hand corner.

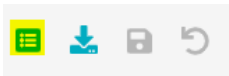


4. This will open up the batch details Screen.
 - a. Select your Fund. In this example we are using CFSA 2022 as the fund.
 - b. Enter a description for the batch. Enter CFSA and the date. I would also put OTG for One Time Gift, IP for installment payments, PO for pledge only, or Zero for a zero contribution batch.
 - c. Default Contribution Date can be whatever date you need. Using today's date would be best practice.
 - d. For this example of the batch we will want to make sure Batch uses pledges checkbox is checked.
 - e. Total up your total pledge count and total dollar amount and enter these into both the Pledge sections and the contribution sections. For a zero pledge contribution you need to make sure to put a 0 in the Contribution Amount box.



- You can fill in any comments you want to enter and check or uncheck the other two checkboxes but the above is the minimum you will need to do to process the pledges. Click the save icon in the upper right hand corner to save the batch.





- Next we will click the postings button that will appear after you hit save if everything was entered correctly above.




- On the next screen that comes up click on the pledges tab.

- Click on the  button.
 - Family search options.
 - Enter the Family ID, Member ID, or Envelope number in the ID box and press the Tab button or click in another field.
 - Click on the  icon and use the lookup screen to find the family you are entering the pledge for.
 - Double Check the donor information is correct and you have selected the correct family.

- c. Enter the Initial Pledge amount as 0.
- d. Select One Time Gift for frequency.
- e. Enter 0 into the Installment Amt box.

- 9. You can add in the pledge notes if they gave a reason such as praying for the appeal this year.
- 10. Click the  button to have the system save the pledge and add the initial contribution. Repeat the steps a-e under section 8 to add another family until you have all your Zero contributions entered.
- 11. Once you have entered all of your pledges double check everything at the top balances. In this example Contributions count 0/0 and Amount \$0/\$0. Pledges Count 1/1 and Amount \$0/0. Click the  icon to put the batch into review status.

| | | | | | |
|----------------------|---------------|---------------|----------------|---------------|---------------|
| Contributions | Count | 0/0 | Pledges | Count | 1/1 |
| | Amount | \$0.00/\$0.00 | | Amount | \$0.00/\$0.00 |

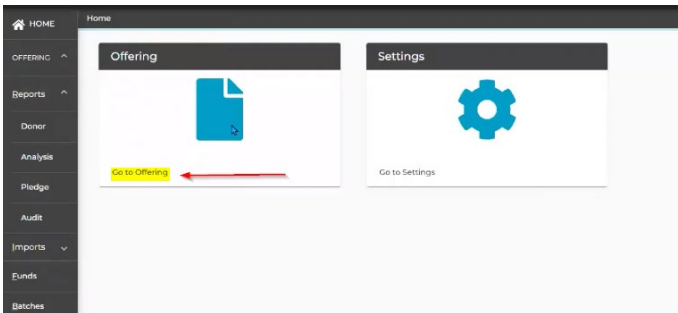
- 12. Once you feel that the batch is correct and ready to post click the  button for the batch and it will post. NOTE: Once you close the batch you will not be able to make any changes to the pledges or contributions. You will need to make a correction batch or add an adjustment to a pledge.

Correct a Pledge amount

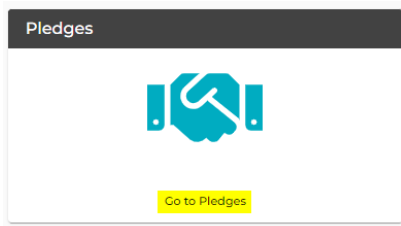
- 1. Login into Parish Soft and click the offering tab.



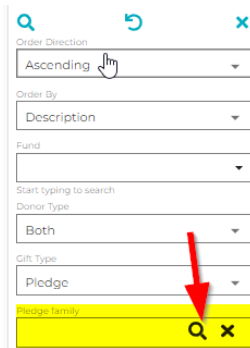
2. Once the page loads click on the “Go to Offering” link



3. Click on “Go To Pledges” on the Pledges card.



4. On the right hand side click on the magnifying glass for the “Pledge Family” text box.



5. Enter the family last name and click the  button in the bottom right hand corner.

Directory Search

Search Results

ID

First Name

Last Name
Woodraska


Address

Phone

Email

- On the results page click the last name to select the family you are trying to change the pledge for.



| Last Name | First Name |
|-----------|------------|
| Woodraska | John |

- Once it returns back to the main pledge screen click the  at the top of the right hand area where you searched for the family.
- If in grid view click on the blue highlighted ID number. If in card view click on the family name that is highlighted blue.

| ID | Type | Family ID | Member ID | Last Name |
|--------|-----------|-----------|-----------|-----------|
| 441772 | Grid View | 104078 | | Woodraska |

| | |
|-------------------------------------|---|
| ID: 441772 Woodraska, John and Tara |  |
| Fund: CFSA 2022 | |
| Family ID: 104078 | |
| Member ID: | |


- Once the pledge is open click on the pencil in the adjustments text box.

| | |
|--|--|
| Initial Pledge* | Adjustments |
| \$ 0.00 | + \$0.00  |
| Pledge Date* | Batch |
| 2/3/2022  | TEST (ID: 227774) |

- Next screen click the  in the upper right hand corner.

- Fill in all the boxes on this screen and click  in the bottom right hand corner.

Pledge Adjustments

| Pledge Date | Amount | Type | User | Comment |
|---|-----------|-------|----------------|------------------|
| 3/15/2022  | \$ 100.00 | Donor | John Woodraska | adjusting pledge |

12. After this you should see the adjustment on the main pledge screen with Current pledge being your new total pledge. Total paid being any payments toward the pledge and balance being what is left to be paid.

| | | | | |
|-----------------|-------------------|----------------|------------|------------|
| Initial Pledge* | Adjustments | Current Pledge | Total Paid | Balance |
| \$ 0.00 | + \$100.00 | = \$100.00 | - \$0.00 | = \$100.00 |
| Pledge Date* | Batch | | | |
| 2/3/2022 | TEST (ID: 227774) | | | |

13. If everything looks correct now click the  icon in the upper right hand corner to save the pledge adjustment.


Correction batches for “deletion”

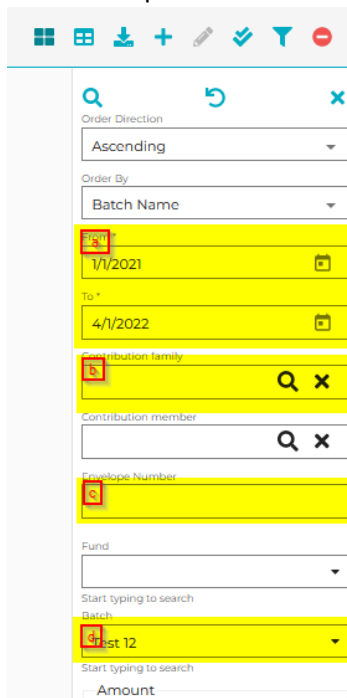
Correction batches are done through the Contributions page within the Offertory module, but you will need to gather a couple pieces of information beforehand so you can easily find the transactions you would like to reverse. NOTE: Corrections are for batches that have been reviewed and closed.

Things you can change

1. Donor – if you accidentally put a contribution to the wrong donor you can change this.
2. Fund – you can move from one fund to another
3. Contribution date – this probably comes more into play at the end of the year
4. Contribution type—we don’t usually concern ourselves but you could change from cash to check if needed.
5. Memo – I will use this to show how to reverse a batch that was double entered or to reverse a contribution that was put in in error.
6. Tax Deductible—change a contribution to a tax deductible or non-tax deductible contribution.

Find your contribution

1. You can search for your contribution in a couple of ways. Once you have your settings click the magnifying glass towards the top the filter screen to search.
 - a. You can look at a date range
 - b. Retrieve the contribution by Contribution Family name. Click the Magnifying glass  and then search for the family name
 - c. Enter the envelope number for the family
 - d. Enter the batch name the contribution was entered into the system with. Start typing the batch name then select the batch by clicking on the batch name in the drop down.



The screenshot shows a search filter interface with the following fields and options:

- Order Direction: Ascending
- Order By: Batch Name
- From: 1/1/2021
- To: 4/1/2022
- Contribution family: (Searchable field)
- Contribution member: (Searchable field)
- Envelope Number: (Searchable field)
- Fund: (Dropdown menu)
- Batch: (Dropdown menu showing "List 12")
- Amount: (Searchable field)

2. Next we will need to select the contribution we are trying to correct. You can select multiple contributions on this page.
 - a. All contributions can be selected that were returned in your search by clicking the Select All box. If you are going to do a whole batch make sure the number in the bottom right matches the number of items in the batch.

Items per page: 1-1 of 1 < >

- b. You can select a single contribution by clicking the box next to the contribution.

a Select All

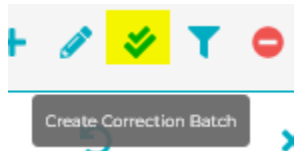
b **Env No: III Woodraska, John and Tara** 👤

Fund: CFSA 2022
Pledge ID: [441772](#)

Batch: Amount: \$0.00
Contribution Date: 03/09/2022 Giving Source: Manual Entry Tax Deductible:

Create the correction batch for a Memo to reverse contribution

3. The next step will create a batch with the contributions you have selected.
- a. Click on the double check in the upper right hand corner to start the batch creation.



4. This will bring up a “Create Correction Batch” screen.
- a. Check the box next to the information you are trying to change.
- b. Fill in the name for the correction batch. To make it easy to identify these correction batches we suggest starting the Correction Batch name with “CB” and then the batch name or family name and date.
- c. You will need to make the change to the information you want changed. For example in a reversal of a contribution I will use the Memo as my information and make note in the memo field we are reversing the contribution. If you were changing the date you would make the change to the Contribution date.
- d. You always need to put a Reason in for the correction batch. You can put whatever into here.

Create Correction batch 🔒 ↻

Correction Batch for 1 Selected Contributions

b Correction Batch Name
CB Woodraska 3/31/2022

Donor Lookup Type: Family
Donor Lookup:

Contribution Date: MM/DD/YYYY
Fund:


Contribution Type:
Tax Deductible:

Memo: This is a delete of a contribution **c**

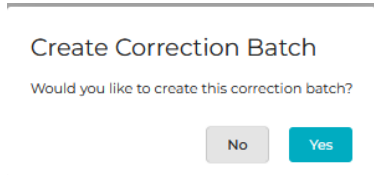
Reason*: Need to delete duplicate contribution **d**

a Edit Values

- Donor
- Fund
- Contribution Date
- Contribution Type
- Memo
- Tax Deductible




5. Once you have all the information needed filled in you can hit the  button in the upper right hand corner to save the batch.

6. Click Yes on the pop up to create the batch.



7. Batch details screen reverse contribution
 - a. You will need to change this number to the total number of contributions you are reversing. For example if you were reversing 100 contributions this would show 200 and you would need to change it to 100.
 - b. Contribution amount will be the total of the contributions you are reversing but with a negative sign in front of it. If you had 100 contributions you were reversing at \$20 a piece you would put -2000 in the contribution amount box.
 - c. Whenever you change something on this screen you will need to input a reason. For example you could put Change contribution amounts and counts.

| | |
|--|--------------------------------------|
| Organization Cathedral of the Most Blessed Sacrament | Pledge Count: 0 of 0 |
| Fund * All Souls | Pledge Amount: \$0.00 of 0 |
| Batch Id 533109 | Contribution Count 2000 of 100 |
| Description * Original Batch Name - reversal | Contribution Amount: \$0.00 of -2000 |
| Created 1/26/22, 11:29 AM | |
| Status Review | |
| Default Contribution Date * 1/26/2022 | Closed Date |
| Giving Source Manual Entry | Comments |
| <input type="checkbox"/> Display Check Number in Posting | |
| <input type="checkbox"/> Display Memo in Posting | |
| <input checked="" type="checkbox"/> Batch uses pledges | |
| Default Contribution Type * American Express | Reason * duplicate |
| Start typing to search | |
| Default Family Lookup | |

8. Once you have all the information needed filled in you can hit the  button in the upper right hand corner to save the batch.
9. Click on the  in the upper right hand corner now to look at the posting details.
10. Delete the positive entries to delete the batch.
 - a. At the right hand side of each entry there will be a little  icon. On each of the positive entries you will click this to delete that entry from the batch leaving only the negative entries.
 - b. The count and the amount give start to change as you delete the entries until they match up with the changes we made in the batch details screen.

Home > DM > Batches > Postings

Batch: Original Batch Name - reversal - Review

| Contributions | Count | Amount | Pledges | Count | Amount |
|---------------|---------|-------------------|---------|-------|-----------------|
| | 200/100 | \$0.00 / -2000.00 | | 0 / 0 | \$0.00 / \$0.00 |

Contributions: Family Id* [] Amount* [] Pledge [] Save Cancel

Donor Info: Fund: All Souls Tax Deductible?: Contribution Type: American Express Date: 01/26/2022 Change This Entry

As you delete each of the postings that have a positive amount, the count and amount at the top of the page will update.

| | Donor Type | Envelope # | Name | Amount | Pledge | Fund | Tax Deductible? | Contribution Type | Contribution Date | Initial Contribution? |
|--------------------------|------------|------------|---------------|---------|--------------------------|-----------|-------------------------------------|-------------------|-------------------|--------------------------|
| <input type="checkbox"/> | | | sawyer, Alexa | \$20.00 | <input type="checkbox"/> | All Souls | <input checked="" type="checkbox"/> | Cash | 06/09/2021 | <input type="checkbox"/> |
| <input type="checkbox"/> | | | sawyer, Alexa | \$20.00 | <input type="checkbox"/> | All Souls | <input checked="" type="checkbox"/> | Cash | 06/09/2021 | <input type="checkbox"/> |

- Once you have completed the process of deleting any entries with a positive amount, you now will have a batch that is the exact reverse of the original with the only difference being the updated memo field.
- At this point if the batch is in balance you will see a in the upper right hand corner to close the batch and you should have complete the process
- You can check the correction by running a Giving report and make sure the one of the families whose entry has been reversed is correct now and not doubled up.

NOTE: It doesn't technically reverse the batch but instead creates an offsetting entry with a negative amount to balance it out to zero.

Correction batches to make a change


Correction batches are done through the Contributions page within the Offertory module, but you will need to gather a couple pieces of information beforehand so you can easily find the transactions you would like to reverse. NOTE: Corrections are for batches that have been reviewed and closed.

Things you can change

- Donor – if you accidentally put a contribution to the wrong donor you can change this.
- Fund – you can move from one fund to another
- Contribution date – this probably comes more into play at the end of the year
- Contribution type—we don't usually concern ourselves but you could change from cash to check if needed.
- Memo – I will use this to show how to reverse a batch that was double entered or to reverse a contribution that was put in in error.

12. Tax Deductible—change a contribution to a tax deductible or non-tax deductible contribution.

Find your contribution

14. You can search for your contribution in a couple of ways. Once you have your settings click the magnifying glass towards the top the filter screen to search.
 - a. You can look at a date range
 - b. Retrieve the contribution by Contribution Family name. Click the Magnifying glass  and then search for the family name
 - c. Enter the envelope number for the family
 - d. Enter the batch name the contribution was entered into the system with. Start typing the batch name then select the batch by clicking on the batch name in the drop down.

15. Next we will need to select the contribution we are trying to correct. You can select multiple contributions on this page.
 - a. All contributions can be selected that were returned in your search by clicking the Select All box. If you are going to do a whole batch make sure the number in the bottom right matches the number of items in the batch.

Items per page: 1-1 of 1 < >

- b. You can select a single contribution by clicking the box next to the contribution.

Select All

[Env No: 111 Woodraska, John and Tara](#) 👤

Fund: CFSA 2022
Pledge ID: [441772](#)

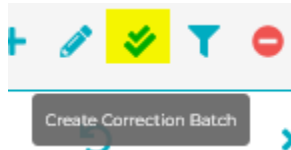
Batch:
Contribution Date: 03/09/2022

Amount: \$0.00
Giving Source: Manual Entry

Tax Deductible:

Create the correction batch for a Fund Change

16. The next step will create a batch with the contributions you have selected.
 - a. Click on the double check in the upper right hand corner to start the batch creation.



17. This will bring up a "Create Correction Batch" screen.
 - a. Check the box next to the information you are trying to change.

- b. Fill in the name for the correction batch. To make it easy to identify these correction batches we suggest starting the Correction Batch name with “CB” and then the batch name or family name and date.
- c. You will need to make the change to the information you want changed. For example in a fund change we would put the new fund in the fund box.
- d. You always need to put a Reason in for the correction batch. You can put whatever into here.

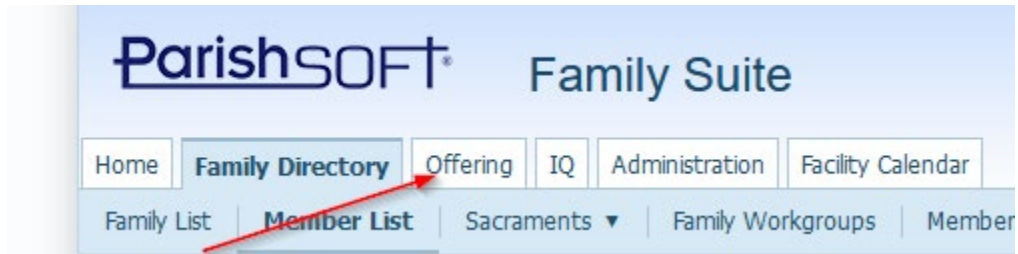
18. Once you have all the information needed filled in you can hit the button in the upper right hand corner to save the batch.
19. Click Yes on the pop up to create the batch.

20. Once you have all the information needed filled in you can hit the button in the upper right hand corner to save the batch.
21. Click on the in the upper right hand corner now to look at the posting details.
22. At this point if the batch is in balance you will see a in the upper right hand corner to close the batch and you should have complete the process
23. You can check the correction by running a Giving report and make sure the one of the families whose entry has been reversed is correct now and not doubled up.

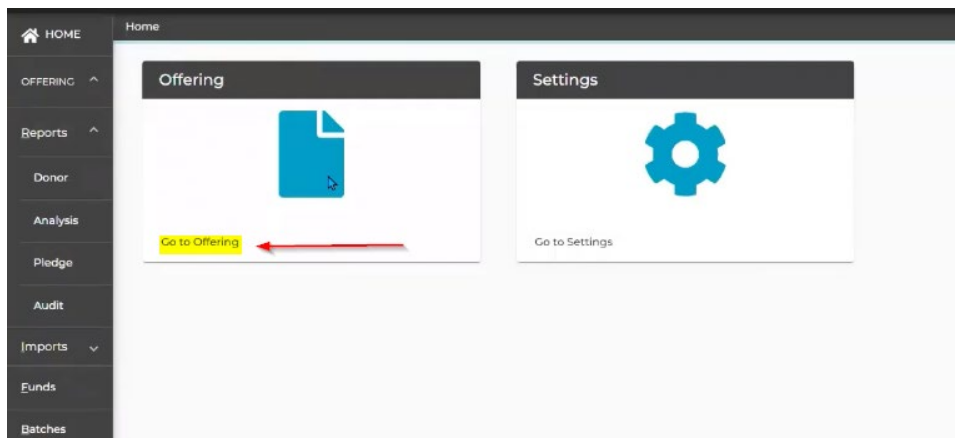
NOTE: It doesn't technically reverse the batch but instead creates an offsetting entry with a negative amount to balance it out to zero.

Generate Non Giver Reports

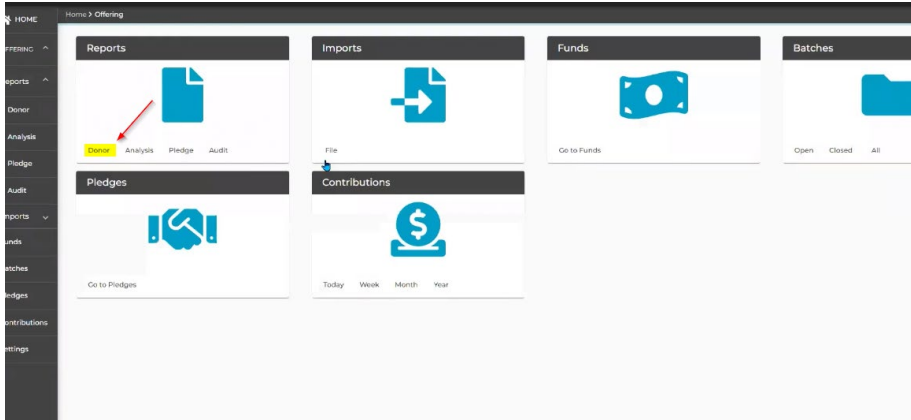
1. Login into Parish Soft and click the offering tab.



2. Once the page loads click on the "Go to Offering" link




3. On the Reports area click on Donor.



4. Select "Non Giver Letter Report" from the select a donor report dropdown.



5. Click on the  icon in the upper right hand corner and select filters.
 - a. Under the Include contribution types select all the items in this list unless you have some reason to exclude one for year end statements.

Report Filters

Include Contribution Types

- Cash
- Credit
- Soft Gifts
- Stock Gifts
- Check
- Direct Debit
- Matching Gifts

Other Filters

Cancel
Save & Close

- b. Under the Other filters set the options you would like. The main one to note is the include non-tax-deductible contributions should be unchecked if this is End of Year statements. **UNLESS, you want to show gifts that were given directly to the Diocese through online giving and were for the benefit of your parish, then you would want to include non tax deductible contributions*

c.

Report Filters


Include Contribution Types

Other Filters

- Include families with blank street addresses
- Include families with blank or invalid zip codes
- Include families with Send Mail unchecked
- Include zero dollar contribution line items
- Include non-tax-deductible contributions

Cancel
Save & Close



6. Click on the  icon in the upper right hand corner and select contents.
 - a. Select how you want the name to show up in the Mailing address. Selecting “Family Formal Mailing Name” from the dropdown is best for this process.







The screenshot shows the 'Report Contents' form with the 'Mailing Name Type' dropdown menu open. The menu options are: 'Family Formal Mailing Name' (highlighted with a mouse cursor), 'Family Informal Mailing Name', 'Family Formal Salutation', 'Family Informal Salutation', and 'Omit disclaimer'. Below the menu, there are fields for 'Letterhead', 'Signature', 'Body of Statement', and 'Printed Name', each with a pencil icon, a plus sign, and a minus sign. At the bottom right, there are 'Cancel' and 'Save & Close' buttons.

- b. Next is the Letterhead option. For this process select “Use Organization’s Name and address” from the drop down list.

The screenshot shows the 'Report Contents' form with the 'Letterhead' dropdown menu open. The menu options are: 'None', 'Use Organization's Name and Address' (highlighted with a mouse cursor), 'Graphical Letterheads', and 'No graphical letterheads found'. Above the menu, there is an 'IRS Disclaimer' section with three radio button options: 'No goods or services were received in exchange for these contributions.', 'No goods or services were received in exchange for these contributions except for intangible religious benefits.', and 'Omit disclaimer.' (which is selected). Below the menu, there are fields for 'Printed Name' and 'Signature', each with a pencil icon, a plus sign, and a minus sign. At the bottom right, there are 'Cancel' and 'Save & Close' buttons.

- c. Next option is the signature this takes some setup but takes a little more technical knowledge than this article is made for. It is possible to add the priests signature if they desire without signing every statement.
 - d. Body of statement dropdown is the next option. You can see below the dropdown the preview of the option you have selected. To change the current selection click the pencil icon. To add a new statement click the plus sign icon. These are the same options you would see for end of year statements. They use the same options for both of these reports so you will want to create a new entry.

signature

- None   
- 2018 statement for 2017
- 2019 for 2018 statement
- EOY Contributor only
- 2020 for 2019 Registered
- 2020 mailed in 2021   


I would like to thank you for your generous contributions to Saint George Parish. During this past year, with so many upheavals that have affected the life of the Church and our community, your support has been of the greatest importance in allowing the parish to offer the sacraments, continue the religious education of our children, and offer material support to those in need.

We have continued to set aside funds for future projects such as the sewage line, hall furnaces and long-term needs including the church roof, lighting and HVAC. We have been able to undertake the re-shingling of the parish hall and remodeling of the confessional in addition to other minor maintenance needs. I would like to thank the following for their support of the parish in different projects: the Knights of Columbus who financially sponsored the re-siding of the rectory, and donated time and work to make it possible; everyone who so generously supported the repair and repainting of the stations and statues; the parishioners who offered their time and craftsmanship to remodel the entrance area to the church, and who donated some of the materials for the project. On behalf of the parish, I wish to express my gratitude for their generosity.

In order to deduct any charitable donation, the Internal Revenue Service requires a taxpayer to have a written communication from the charity. No goods or services were provided to you. Saint George Parish is a 501(c)3 non-profit corporation.

Yours sincerely,

7. On the main screen.

- a. Below you can select whether to run for all parishioners (All Families). Only specific parishioners by selecting a list (Only Selected Families) or by Family DUID (Family ID).
- b. Make sure your dates are set to the range you would like to run the reports for, (for example 1/1/2021-12/31/2021). The bottom checkbox is for printing labels if you are not using window envelopes.
- c. These settings are set by clicking on the gear  in the upper right hand corner and clicking the contents option and explained in step 6.
- d. You can leave these as shown. This will run for registered and unregistered families and all Family WorkGroups.
- e. You will want to select all Funds and All Family Groups for these reports by clicking on the checkbox at the top of each list. This is the point you would only run it for CFSA 2022 or whichever year.

Donor Reports

Select a Donor Report
Contribution Detail Statement Report

Run Report For
Families

All Families
 Only Selected Families
 Family Id

Include Donors with My Own Church

Minimum Amount
\$

Maximum Amount
\$

Start Date *
1/1/2021

End Date *
12/31/2021

Print Statement Labels

Signature
Letterhead
Body of Statement
Printed Name

Report Type
All Details

Family Registration *
Both

Family Workgroup

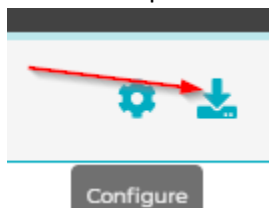
Select One or more Funds

| Fund Name | Fund ID |
|--|---------|
| <input type="checkbox"/> 2007 Intent | 1011 |
| <input type="checkbox"/> 2007 Intent ACH | 1010 |
| <input type="checkbox"/> Adoration Sisters Monastery | 7979 |
| <input type="checkbox"/> Advent Baby Shower | 7980 |
| <input type="checkbox"/> All Saints | 704 |
| <input type="checkbox"/> All Souls | 708 |
| <input type="checkbox"/> Ash Wednesday | 7779 |
| <input type="checkbox"/> Assumption | 701 |
| <input type="checkbox"/> Banquet Fee Support | 6875 |

Select One or more Family Groups

| |
|--|
| <input type="checkbox"/> Name |
| <input type="checkbox"/> Active |
| <input type="checkbox"/> Inactive |
| <input type="checkbox"/> Staff |
| <input type="checkbox"/> School Only |
| <input type="checkbox"/> Religious Ed Only |
| <input type="checkbox"/> Moved |
| <input type="checkbox"/> Visitor |
| <input type="checkbox"/> Clergy/Religious |
| <input type="checkbox"/> Ministers Only |

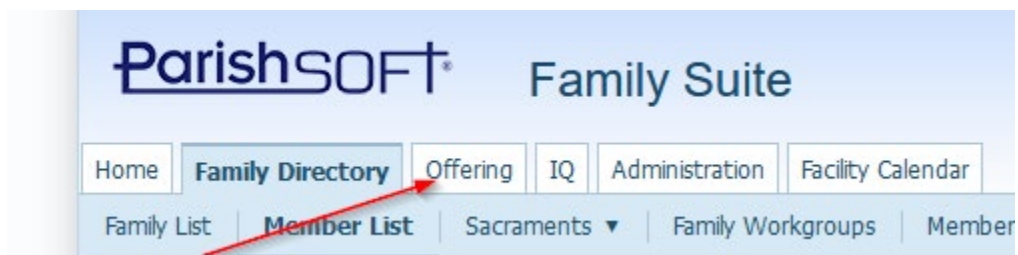
- At this point you should be able to click the export statements button in the upper right hand corner. If you had checked the box in step 7b this will also download the labels file. You should be able to open this PDF and print and mail them out to your parishoners.



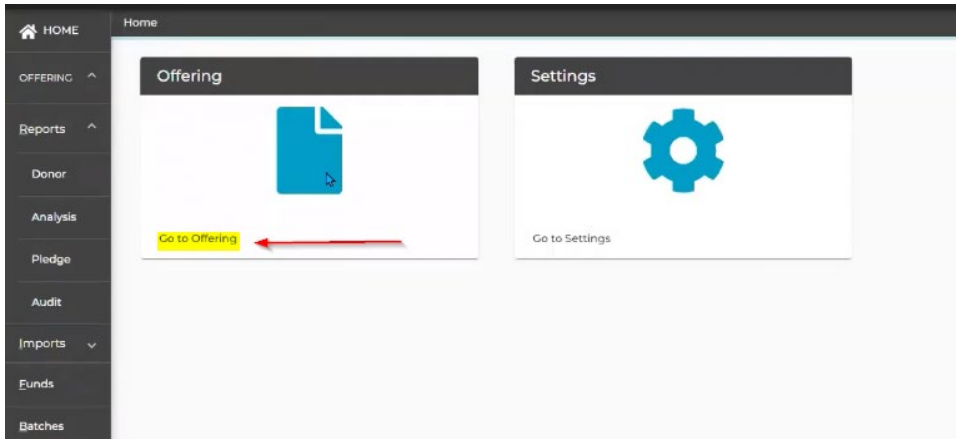
<https://support.parishsoft.com/hc/en-us/articles/360056859871-DMO-Statements-Donor-Reports-How-to-generate-a-list-of-non-givers>

Generate Contribution Reports

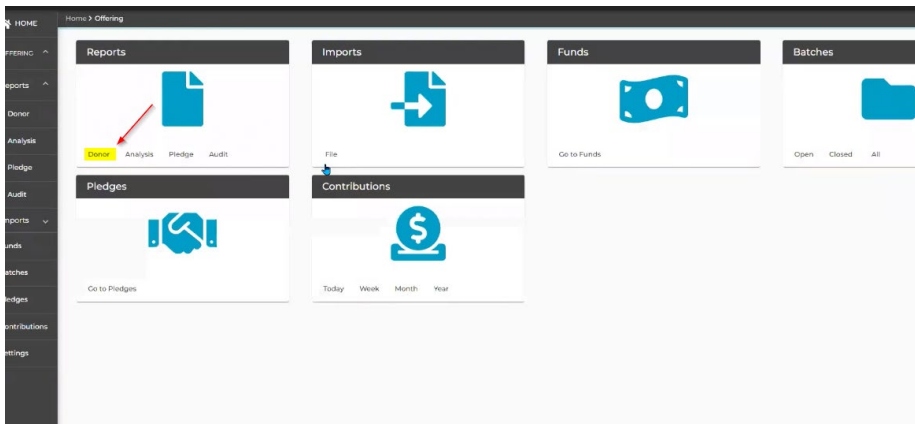
- Login into Parish Soft and click the offering tab.



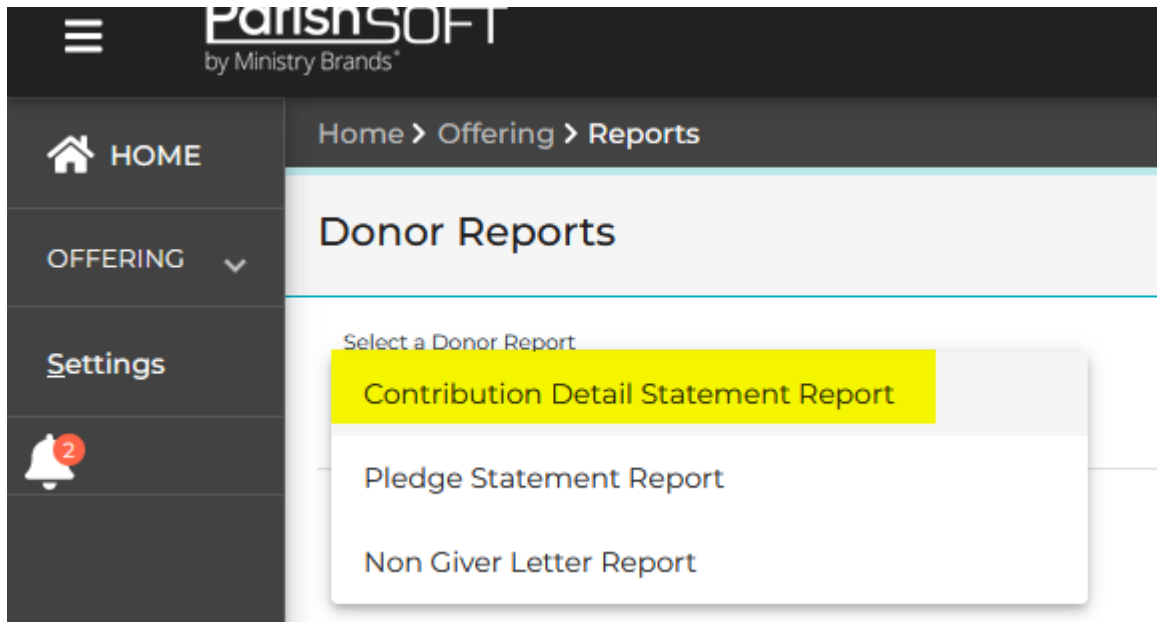
2. Once the page loads click on the "Go to Offering" link




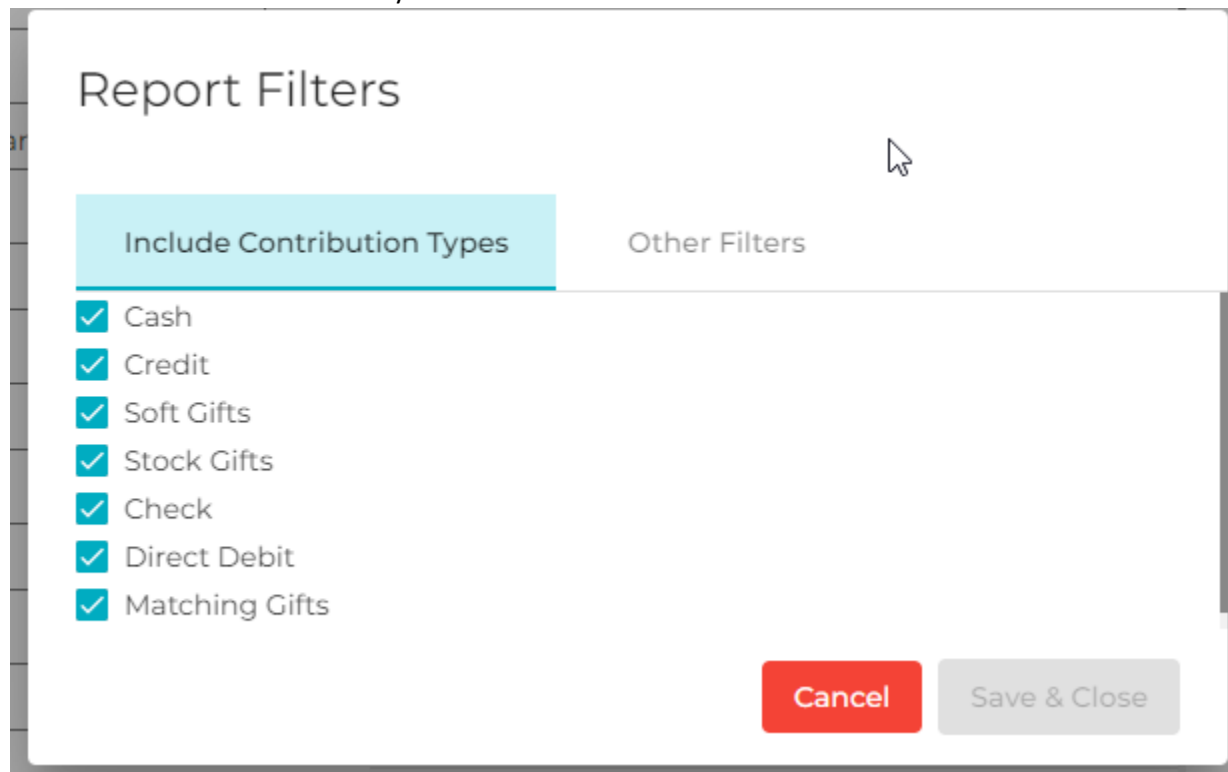
3. On the Reports area click on Donor.



4. Select "Contribution Detail Statement Report" from the select a donor report dropdown.



5. Click on the  icon in the upper right hand corner and select filters.
 - a. Under the Include contribution types select all the items in this list unless you have some reason to exclude one for year end statements.



- b. Under the Other filters set the options you would like. The main one to note is the include non-tax-deductible contributions should be unchecked if this is End of Year statements. **UNLESS, you want to show gifts that were given directly to the Diocese*

through online giving and were for the benefit of your parish, then you would want to include non tax deductible contributions


c.

Report Filters

Include Contribution Types Other Filters

- Include families with blank street addresses
- Include families with blank or invalid zip codes
- Include families with Send Mail unchecked
- Include zero dollar contribution line items
- Include non-tax-deductible contributions

Cancel Save & Close

6. Click on the  icon in the upper right hand corner and select contents.
- Select how you want the name to show up in the Mailing address. Selecting “Family Formal Mailing Name” from the dropdown is best for this process.

Report Contents

Statements

Mailing Name Type

- Family Formal Mailing Name
- Family Informal Mailing Name
- Family Formal Salutation
- Family Informal Salutation

Letterhead

Signature

Body of Statement

Printed Name

Cancel Save & Close

- You can select one of the Radio buttons for the “IRS Disclaimer” the first two options will be printed on your statements with the text shown and the 3rd option will omit the disclaimer. **The IRS does recommend a detailed contribution statement be sent and on*







the statement you should have some sort of language that indicates that no goods or services were provided by the organization.

- c. Next is the Letterhead option. For this process select “Use Organization’s Name and address” from the drop down list.

The screenshot shows a web form titled "Report Contents" with a "Statements" section. It includes a "Holding Name Type" dropdown, an "IRS Disclaimer" section with two radio button options, and a "Letterhead" section. The "Letterhead" section has a dropdown menu that is open, showing three options: "None", "Use Organization's Name and Address", and "Graphical Letterheads". The "Use Organization's Name and Address" option is selected. Below the dropdown are "Printed Name" and "Printed Address" fields, each with a pencil icon for editing and plus/minus icons for adding or removing items. At the bottom right of the form are "Cancel" and "Save & Close" buttons.

- d. Next option is the signature this takes some setup but takes a little more technical knowledge than this article is made for. It is possible to add the priests signature if they desire without signing every statement.
- e. Body of statement dropdown is the next option. You can see below the dropdown the preview of the option you have selected. To change the current selection click the pencil icon. To add a new statement click the plus sign icon.

signature

- None   
- 2018 statement for 2017
- 2019 for 2018 statement
- EOY Contributor only
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Yours sincerely,

7. On the main screen.

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- b. Make sure your dates are set to the range you would like to run the reports for, (for example 1/1/2021-12/31/2021). The bottom checkbox is for printing labels if you are not using window envelopes.



- c. These settings are set by clicking on the gear  in the upper right hand corner and clicking the contents option and explained in step 6.
- d. You can leave these as shown. This will run All details for registered and unregistered families and all Family WorkGroups.
- e. You will want to select all Funds and All Family Groups for these reports by clicking on the checkbox at the top of each list.

Donor Reports

Select a Donor Report
Contribution Detail Statement Report

Run Report For
Families

All Families
 Only Selected Families
 Family Id

Include Donors with My Own Church

Minimum Amount
\$

Maximum Amount
\$

Start Date *
1/1/2021

End Date *
12/31/2021

Print Statement Labels

Signature
Letterhead
Body of Statement
Printed Name

Report Type
All Details

Family Registration *
Both

Family Workgroup

Select One or more Funds

| Fund Name | Fund ID |
|--|---------|
| <input type="checkbox"/> 2007 Intent | 1011 |
| <input type="checkbox"/> 2007 Intent ACH | 1010 |
| <input type="checkbox"/> Adoration Sisters Monastery | 7979 |
| <input type="checkbox"/> Advent Baby Shower | 7980 |
| <input type="checkbox"/> All Saints | 704 |
| <input type="checkbox"/> All Souls | 708 |
| <input type="checkbox"/> Ash Wednesday | 7779 |
| <input type="checkbox"/> Assumption | 701 |
| <input type="checkbox"/> Banquet Fee Support | 6875 |

Select One or more Family Groups

| Name |
|--|
| <input type="checkbox"/> Active |
| <input type="checkbox"/> Inactive |
| <input type="checkbox"/> Staff |
| <input type="checkbox"/> School Only |
| <input type="checkbox"/> Religious Ed Only |
| <input type="checkbox"/> Moved |
| <input type="checkbox"/> Visitor |
| <input type="checkbox"/> Clergy/Religious |
| <input type="checkbox"/> Ministers Only |

- At this point you should be able to click the export statements button in the upper right hand corner. If you had checked the box in step 7b this will also download the labels file. You should be able to open this PDF and print and mail them out to your parishoners.



NOTE: For more detailed information and other support articles for End of Year in ParishSOFT browse to the following.

<https://support.parishsoft.com/hc/en-us/sections/441588107773-New-Offering-End-of-Year-DMO->