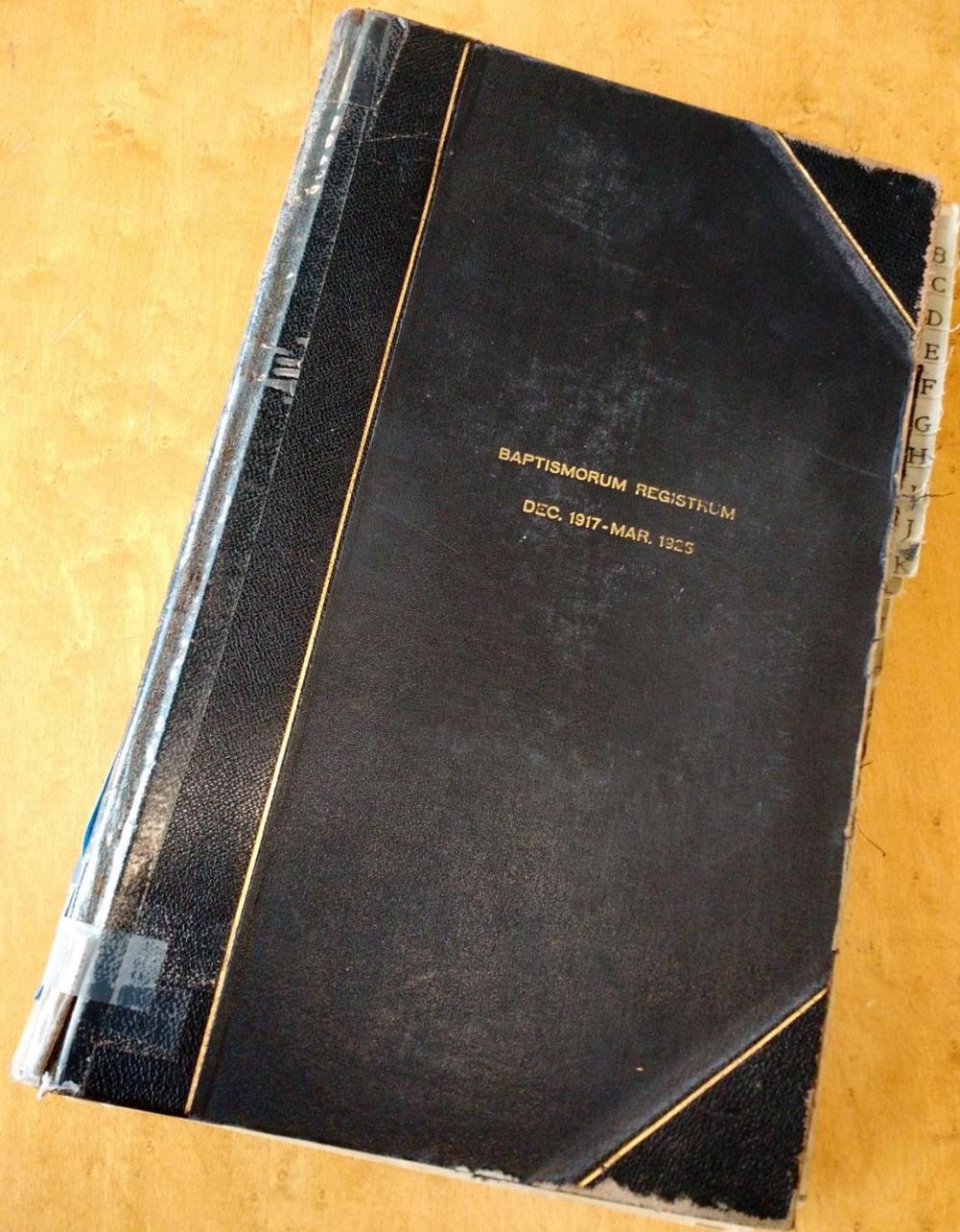


ParishSOFT Round Table

Fall 2015

Agenda

- Prayer
- Introduction
- Sacraments Continued (Marriage and Funerals)
- Diocesan Directory Review
- ParishSOFT as system of record
- Reports
- My Parish App and Parishes Online
- Pulling records from Parish to Parish
- Questions



BAPTISMORUM REGISTRUM
DEC. 1917 - MAR. 1925

B
C
D
E
F
G
H
I
J
K

46

Nov
23
1924

Pravdzik
nat. m. die 15 Nov. 1924. anno
ex. *Jan Pravdzik*
ex loco
et. *Anna Puzniatowska*
ex. loco
Patrini { *Stepania Puzniatowska*
Vincenty Pravdzik
Rev. *J. Switalski*

1936
married *Joan Ida*
Dillon in *St. Joe Church*
Sept. 16, 1950

47

Nov
24
1924

Ego infrascriptus baptizavi *Jozef Jan*
Waliewski
nat. m. die 15 Nov. anno 1924
ex. *Franciszek Waliewski*
ex loco
et. *Maryanna Sydlo*
ex loco
Patrini { *Adolf Nowicki*
Edwarda Budzinski
Rev. *J. Switalski*

Confirmed in this
Church April 26,
1936
The Most Rev. Roman
R. Atkieslani in the
Cathedral of St. John,
Milwaukee, Wis.
Conferred subdeaconate
May 28, 1949 to
Joseph John Waliewski

48

Dec
23
March
1924

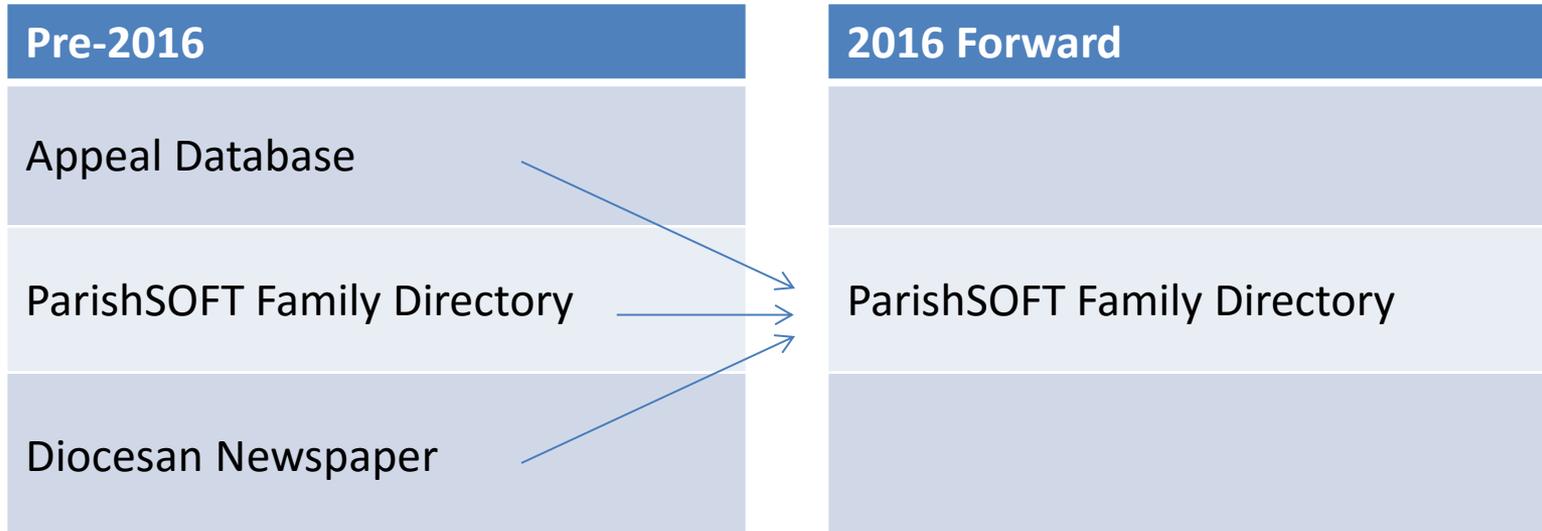
Ego infrascriptus baptizavi *Dorota Marga*
nat. a. m. die 26. Lutego anno 1924
ex. *Jozef Kapla*
ex loco. *Marga Frankowska*
et. *Marga Frankowska*

ParishSOFT census data for *Evangelization*

The value and importance of good data - examples

- Regis and McDonell Area Catholic Schools
 - Monthly spreadsheet of records of pre-school children celebrating birthdays and baptisms for mailings to create awareness of their Catholic schools
- TV Mass broadcast change (Sacred Worship Office)
 - Family records of 46 parishes in the deaneries of Marshfield, Stevens Point, and Wausau with members 70+ years old for notification of TV Mass broadcast change
- Reaching out to specific groups by age or gender for parish offerings?
- Reaching out to inactive families/individuals?
- Other inspirations?

CONTACT INFORMATION UPDATES



ParishSOFT → our “System of Record”
New level of importance

ParishSOFT Data



Data
integration
software



Diocesan appeal and publications database

The following are among the ParishSOFT fields used to export data for the appeal and diocesan publications, *and thus require highest attention.*

**Desktop version
FAMILY RECORD FIELDS**

Last Name

First Name(s)

Mailing Name

Primary Address

[Home, Mailing, Other]

Do not Send Mail

Primary Address 1

Primary Address 2

Primary City

Primary State

Primary Postal Code

Primary Phone

Email Address

Family Group

Currently Registered

Membership Date

Notes

Last Updated

The screenshot shows the 'Family Information' window in ParishSOFT. The 'Families' tab is selected and circled. The window contains the following fields and sections:

- Family ID:** 3
- Name Fields:** Last Name (Bailey), First Name(s) (Todd and Nancy), Mailing Name (Mr and Mrs Todd Bailey), Informal Name (Todd and Nancy Bailey), Formal Salutation (Mr. and Mrs. Bailey), Informal Salutation (Todd and Nancy).
- Address Section:** Primary Address: Home (selected), Do not Send Mail (checkbox). Fields include Address (403 Keech Ave), City (Ann Arbor), State (MI), Zip (48103 5534), Area Code (734), and Phone (734-555-1168).
- Contact Fields:** Primary Phone (734-555-1168), Emerg. Ph., Desc., and Email.
- Membership Fields:** Family Group (Active), Membership Date (01-01-1999), and a checked box for 'Currently Registered Family'.
- Registration:** Parish of Registration (Demo Parish -- Ann Arbor, MI 4810).
- Notes Section:** Includes tabs for Pastoral, WorkGroups, HealthInfo, Log File, and Ext. Family.
- Family Photo Section:** Includes buttons for Find Photo, Enlarge, and Remove, and checkboxes for Publish Phone, Publish Email, and Publish Address.
- Contributions Section:** Includes checkboxes for Send Contrib. Env. and fields for Env. # (19), Diocesan ID, and Annual Gift \$ (0). Buttons for Next Avail Envelope #, Skipped Envelopes, and Giving History are present.
- Footer:** Map Code field and Last Updated: 09-03-2015.

**Desktop version
MEMBER RECORD FIELDS**

- Gender
- Title
- First Name (Formal)
- First Name (Nickname)
- Last Name

- Role**
[Head or Husband essential]
- Birth Date
- Member Status
- Date of Death

Family Information

Help

Families **Members**

Family: (ID 3) Mr and Mrs Todd Bailey on 403 Keech Ave ---- Phone #: 734-555-1168

Todd Nancy Delores Shawn

Member ID: 3

Gender	Title	First	NickName	Middle	Last	Suffix	Maiden Name
M	Mr.	Todd	Todd		Bailey		

Role	BirthDate	Age	Member Status	Religion	Date of Death
Husband	08-16-1969	46	Active	Catholic	

Email Address Special Needs?

General Info | Sacraments | Time and Talent | Student Record | Offering

Contact Information

Home Phone: 734-555-1168
 Work Phone:
 Cell Phone:
 Pager:
 Fax:

E-Mail this Member:

UserName:

Change User Password

Vendor Integration ID:

First Language:

Photo:

Find Photo
Enlarge
Remove

Education and Career

Career Type: Details: Manage Lookups

Grad Year: 1987 Grade: -- School: Education:

Additional Info and Notes

SocSec Num:
 Aux ID:

Buttons: Add, Remove, Import, Update, Close, Cancel

Connect Now
FAMILY RECORD FIELDS

Notes

Details Modified On*

Family Group

Registration Status

Registration Date

Unregistered Date

Last Name

First Name(s)

Formal Mailing Name

Email Address

Primary Phone

Primary Address

[Home, Mailing, Other]

Postal Code

Address Line 1

Address Line 2

City

Send Mail

Mr and Mrs Dennis Anderson (395994) Env#: 3748

Family Details | Member Details (3) ▾

Family Information | **Notes**

 [Change](#)

Church of Registration: St. Jude, Grosse Pointe

Details Modified On: **Wednesday, September 09, 2015 2:09 PM**

Family Group: Active ▾
Registration Status:
Registration Date: 4/10/2006 
Unregistered Date:

Last Name*: Anderson
First Name(s)*: Dennis and Susan
Formal Mailing Name: Mr and Mrs Dennis Anderson
Informal Name: Dennis and Susan Anderson } Auto Fill
Formal Salutation: Mr. and Mrs. Anderson
Informal Salutation: Dennis and Susan
Email Address: demo@parishsoft.com
Primary Phone: 555-2222
Emergency Phone: 555-3333
Emer. Ph. Desc.:

Primary Address: Home Address ▾
Home | Mailing | Other
Country: United States
Postal Code: 48108
Address Line 1: 4979 W Dauber Dr
Address Line 2:
City: Ann Arbor ▾
State/Region: Michigan
Phone Number: 555-2222

Envelope #: 3748 [Next](#)
Annual Gift \$: 0 [Giving History](#)
Map Code:

Send Mail: Publish Address:
Send Contrib. Env.: Publish Photo:
Publish Phone: Send Magazine:
Publish Email:

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

Connect Now
MEMBER RECORD FIELDS

Gender
Title
First Name
Nick Name
Last Name

Role
[Head or Husband essential]

Status
Birth Date

Date of Death

Dennis Anderson

Family Details | **Member Details (3)**

Dennis | Susan | Kevin | Add | Import



Change

Member DUID: 873625
Special Needs:

Gender: Male
Title: Mr.
First Name: Dennis
Nick Name: Dennis
Middle Name: S.
Last Name: Anderson
Suffix:
Maiden Name:
Role: Husband

Status: Active
Birth Date: 1/20/1967
Birth Place:
Age: 48
Date of Death:
Religion: Catholic
Language:
Ethnicity:
Marital Status: Single
Envelope #: 0 Send?

General | Contact | Sacraments | Religious Ed. | Misc.

Contact Information

Email Address:
Home Phone: 555-1234
Cell Phone: 555-9090
Work Phone: 555-5678
Pager:
Fax:

Importance of the Family record “Mailing Name” to the head/member reconciliation

- When updating Member records, *especially the “Role” field of Husband/Head and spouse information*, make sure to make the corresponding changes in the Family record Mailing Name and related name fields.

This is critical to the diocesan export process needed to update the appeal and diocesan publications database.

Importance of the “Last Updated” field of the Family record

The “Last Updated” field is essential to identifying records that have been updated within a particular time frame.

When updating ONLY a Member record, e.g., the Birth Date or Member Status, it is necessary to

- return to the Family record
- activate the Update button
- click Update

To activate the Update button, tab through the address fields

Family Information

Help

Families Members

Family ID: 33

Last Name: Bonzak
First Name(s): George
Mailing Name: Mr. George Bonzak
Informal Name: George Bonzak
Formal Salutation: Mr. Bonzak (Auto Fill)
Informal Salutation: George

Primary Address: Home Do not Send Mail

Home Mailing Other

Address: 2345 Jonesville Rd
City: Ann Arbor State: MI
Zip: 48108 Area Code: 734
Phone: 734-458-9658 (Find Postal Code)

Family Notes: Moved from Illinois due to need for caregiver who is his daughter

Family Photo: Find Photo, Enlarge, Remove, Publish Phone, Publish Email, Publish Address, Edit Bank Account Info

Primary Phone: 734-458-9658
Emerg. Ph.: 734-458-6660 Desc: Work
Email: hbonzak@att.world.net

Family Group: Active Membership Date: 05-02-2001
 Currently Registered Family

Parish of Registration: Demo Parish -- Ann Arbor, MI 4810 ...

Send Contrib. Env. Diocesan ID: Env. # 0 Annual Gift \$ 0
Next Avail Envelope # Skipped Envelopes Giving History

Map Code: Last Updated: 10-19-2007

Update Close Cancel

In **Connect Now**, when updating a Member record only, return to the Family record, click “Edit Details” at the bottom, then click “Save” and verify that the date did indeed change to the current date.

Mr. Jason Abler (394549) Env#: 6491

Family Details | Member Details (5)

Family Information | Notes

Church of Registration: St. Jude, Grosse Pointe
Details Modified On: Wednesday, September 09, 2015 5:35 PM
Family Group: Active
Registration Status:
Registration Date: 4/8/2001
Unregistered Date:

Last Name: Abler
First Name(s): Jason and Tracey
Formal Mailing Name: Mr. Jason Abler
Informal Name: Mr. Abler
Formal Salutation: Mr. Jason J. Abler
Informal Salutation: Jason Abler
Email Address: demo@parishsoft.com
Primary Phone: 555-2222
Emergency Phone: 555-3333
Emer. Ph. Desc.:

Primary Address: Home Address
Country: United States
Postal Code: 48108
Address Line 1: 5048 Rudgate Blvd
Address Line 2:
City: Ann Arbor
State/Region: Michigan
Phone Number: 555-2222

Envelope #: 6491 Next
Annual Gift \$: 0 Giving History
Map Code:

Send Mail: Publish Address:
Send Contrib. Env.: Publish Photo:
Publish Phone: Send Magazine:
Publish Email:

Next

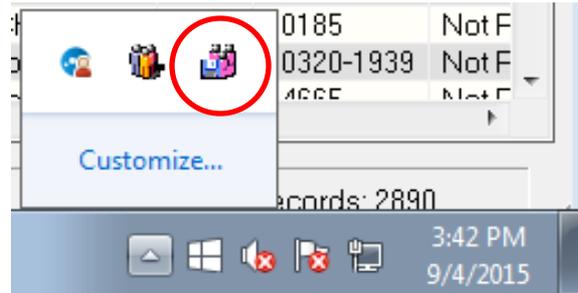
Send Mail: []
Send Contrib. Env.: []
Publish Phone: []
Publish Email: []

Map Code:

Save Save & Close Cancel Close

Checking Sync (Desktop Version Only)

- First Clue



How to check

- Click Diocese
- Synchronize Data to Diocese
- Click View Log File

- **IMPORTANT:** When you close out of the Sync/Backup tool it will ask you “Exit Application?” Click **No** on Master Computer.

2015_09_04_event_log - Notepad

```
File Edit Format View Help
770 15:33:11 REPORT 0TRANSFER
770 15:33:11 REPORT 0PULLED
770 15:33:11 REPORT 1AUTOSYNCENABLED
770 15:33:11 REPORT 0EXCLUDESTART
770 15:33:11 REPORT 0EXCLUDEEND
770 15:33:11 REPORT 0EXCLUDEDAYLIST:
770 15:33:11 REPORT 1INTERVAL: 10
770 15:33:11 SYNCEND

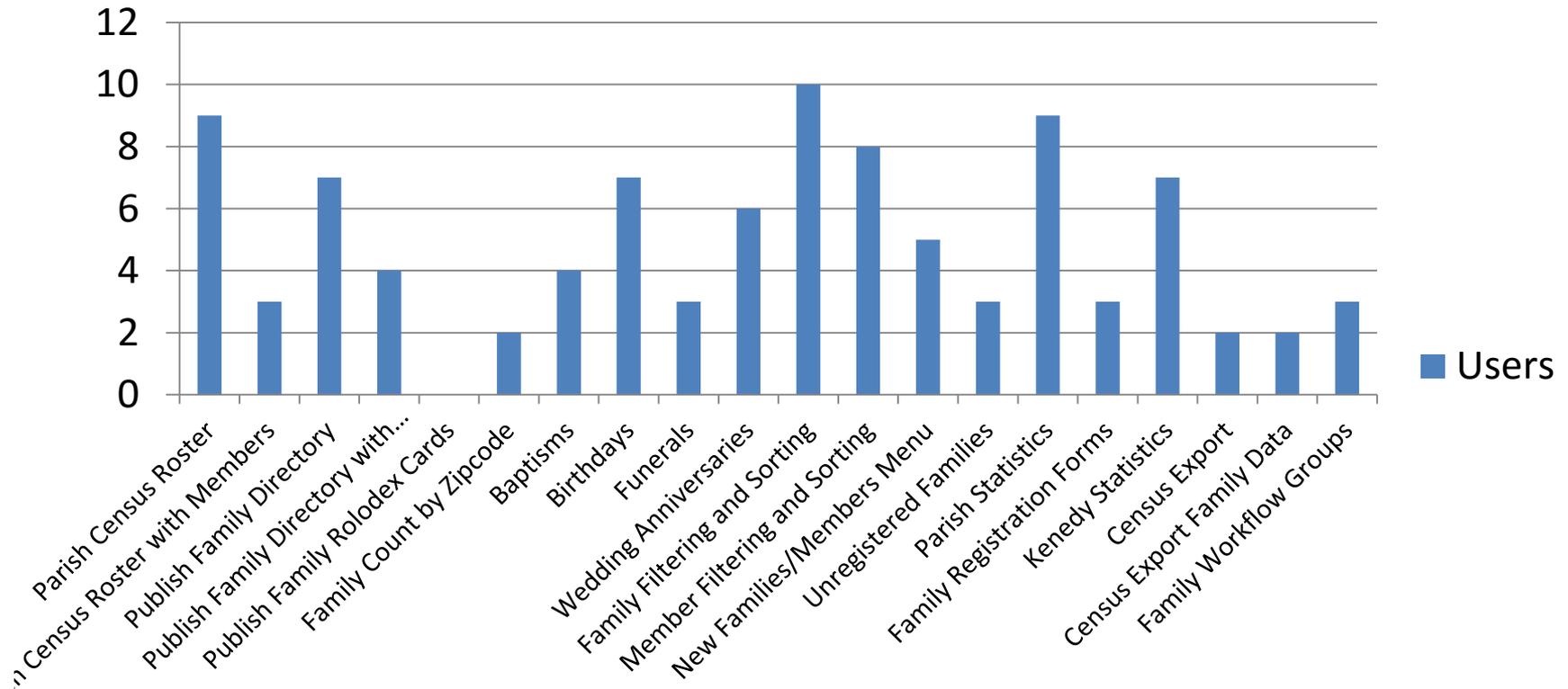
770 15:43:32 SYNCTYPE 1RUNSYNCHRONIZER

770 15:43:32 SYNCSTART
770 15:43:32 0
770 15:43:34 REPORT 1000PACKAGE SIZE
770 15:43:37 TOTALREADY 0
770 15:43:38 0
770 15:43:38 REPORT 0ERRORS
770 15:43:38 REPORT 0WARNINGS
770 15:43:38 REPORT 0TRANSFER
770 15:43:38 REPORT 0PULLED
770 15:43:38 REPORT 1AUTOSYNCENABLED
770 15:43:38 REPORT 0EXCLUDESTART
770 15:43:38 REPORT 0EXCLUDEEND
770 15:43:38 REPORT 0EXCLUDEDAYLIST:
770 15:43:38 REPORT 1INTERVAL: 10
770 15:43:38 SYNCEND
```

ParishSOFT Reports

ParishSOFT Family Directory Reports

Users



Requests for Reports

- Young adults 18-30 and 18-30 not confirmed.
- Children 3 years old as of Sept. 1, not yet 4
- 22 years or older listed as son or daughter
- School Age children, grouped by school, with grade, parents and contact information
- Information for Bishop's Report on fiscal year basis
- queries/reports relating to demographics – age and contributions

School Age children, grouped by school, with grade, parents and contact information

- The grade field on the Member record does not show up anywhere in reports
- Good example for Parish IQ

Parish IQ (Desktop Version)

- Additional Cost

Families	0-99	100-199	200-399	400-699	700-999	1000-1499	1500-1999
Purchase Price	\$190	\$210	\$270	\$320	\$400	\$450	\$500
Maintenance Cost	\$38	\$42	\$54	\$64	\$80	\$90	\$100

ConnectNow Request for Reports

- Contact List
- Mailing labels in zip order on 5160 w/o exporting and changing to RTF
- Concise family information for annual census
- Report user could manipulate to get fields required without having to have excessive MS Excel Skills

Parish IQ ConnectNow

- Additional Cost

Families	0-99	100-199	200-399	400-699	700-999	1000-1499	1500-1999
Cost/yr	\$55	\$63	\$79	\$95	\$119	\$134	\$150

- [Demo](#)

My Parish App/Parishes Online

ParishesOnline

- The former listing is gone
- LPI purchased ParishesOnline
- Seek and Find is now ParishesOnline
- Bulletin printed by LPI = listed on ParishesOnline

Claim Parishes Online Page

- Go to parishesonline.com
- Search for your parish
- On the right side click

Do you manage this organization?

Claim this listing to edit this page.

- Create an Account

What can I do with Parishes Online?

- Bulletin
- Contact Info
- Description
- Videos
- Photos

Example:

<http://www.parishesonline.com/find/st-joseph-the-workman>

RECENT PUBLICATIONS

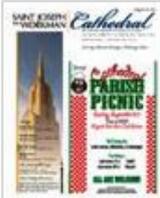
Get Widget

Manage

Subscribe



Sun, Sep 6th
Bulletin



Sun, Aug 30th
Bulletin



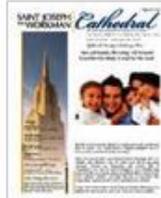
Sun, Aug 23rd
Bulletin



Sun, Aug 16th
Bulletin



Sun, Aug 9th
Bulletin



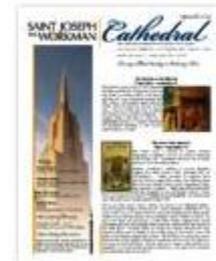
Sun, Aug 2nd
Bulletin

Show More

Our Weekly Bulletin

Get notified of new bulletins.

Subscribe Now



Sep 6 (Bulletin)

Brought to you by Liturgical Publications

Update contact information



Parishes Online

LPI Billing

Editing this information will only change your Parishes Online listing page. It won't affect your LPI billing address.

Address

City

State

Postal Code

Contact Role

Contact Name

Contact e-mail

This e-mail is not public. It allows the public to contact you through Parishes Online.

Phone number

ex. 999-999-9999 or 999-999-9999 x99999

Website Address

Facebook URL

Twitter Username

Cancel

Save

MyParish App

- <http://myparishapp.com/DIOLC/>

Pulling Families from Parish to Parish

Process (Desktop Version)

- Click Family Info
- Click Add New Family
- Type Last Name
- Type First Name (only if last name is very common, less specific the better)
- Click Submit Search Criteria
- Look through results
- Click on Family
- If Registered Family, check box
- Click Add to this Parish

Process (Connect Now)

- Add New Family
- Type Last Name
- Click the circle next to the one to add
- Click Move Selected Family
- Select as registered or as unregistered
- Click OK

Non-Registered Families

Family Information

Help:

Families Members

Family DiolD: 92584 | Local Family ID: 2913

Last Name: Test123

First Name(s):

Mailing Name:

Informal Name:

Formal Salutation:

Informal Salutation:

Primary Address: Home Do not Send Mail

Home Mailing Other

Addr:

City: (unknown) State:

Zip: 00000 Area Code:

Find Postal Code

Family Photo:

Publish Phone
 Publish Email
 Publish Address
 Send Magazine

Send Contrib. Env. Diocesan ID Annual Gift \$

Env. # 0

Next Avail Envelope # Giving History

Family Group: Inactive Unregistered Date: 01-11-2011

Currently Registered Family

Parish of Registration: Diocese of La Crosse -- La Crosse, WI

Map Code: Last Updated: 07-30-2013

Non-Registered Families

Ms. Kathy Aasen (397990)

Family Details Member Details (1) ▾

This family is not registered at the selected organization, therefore only data with red text can be edited.

Family Information Notes


[Change](#)

Church of Registration:
Details Modified On: Wednesday, December 16, 2009 9:59 AM
Family Group:
Registration Status:
Registration Date: 7/4/2009
Unregistered Date: Not Available

Last Name:* Aasen
First Name(s)* Kathy
Formal Mailing Name: Ms. Kathy Aasen
Informal Name: Ms. Aasen } Auto Fill
Formal Salutation: Ms. Kathy Aasen }
Informal Salutation: Kathy Aasen }
Email Address:
Primary Phone: 555-2222
Emergency Phone: 555-3333
Emer. Ph. Desc.:

Primary Address: Home Address ▾
Home Mailing Other
Country: United States
Postal Code: 48108
Address Line 1:
Address Line 2:
City: Ann Arbor ▾
State/Region: Michigan
Phone Number: 555-2222

Envelope #: 0 [Next](#)
Annual Gift \$: 0 [Giving History](#)
Map Code:

Send Mail: **Publish Address:**
Send Contrib. Env.: **Publish Photo:**
Publish Phone: **Send Magazine:**
Publish Email:

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

Non-Registered Families

- Can add families to Workgroups

Non-Registered Members

Family Information

Help

Families **Members**

Family: (ID 2913) on ---- Phone #:

Member ID: 6714

Gender	Title	First	NickName	Middle	Last	Suffix	Maiden Name
					Test123		

Role: Head BirthDate: Age: Member Status: **Inactive** Religion: Catholic Date of Death:

Email Address: Special Needs?

General Info | Sacraments | Time and Talent | Student Record | **Offering**

Contact Information:

Home Phone: Work Phone: Cell Phone: Pager: Fax:

E-Mail this Member: UserName: Change User Password:

First Language: Photo: End Photo: Enlarge: Remove:

Vendor Integration ID:

Education and Career: Career Type: Details: Manage Lookups: Grad Year: Grade: School: Education:

Additional Info and Notes: SocSec Num: Aux ID:

Add Remove Import Update Close Cancel

Non-Registered Members

Kathy Aasen

Family Details Member Details (1) ▾

Kathy Add Import


Change

Member DUID: 876276
Special Needs:

Gender*: Male ▾
Title: ▾
First Name*: Kathy
Nick Name: Kathy
Middle Name:
Last Name*: Aasen
Suffix: ▾
Maiden Name:
Role*: Head ▾

Status*: ActOther ▾
Birth Date: 8/18/1955 
Birth Place:
Age: 60
Date of Death: 
Religion: Catholic ▾
Language: ▾
Ethnicity: ▾
Marital Status: Single ▾
Envelope #: 0 [Next](#) Send?

General Contact Sacraments Religious Ed. Misc.

Contact Information

Email Address:
Home Phone: 555-1234
Cell Phone: 555-9090
Work Phone: 555-5678
Pager:
Fax:

Edit Details Close

Non-Registered Members

- In CN only these can edit member record:
 - Parish of Registration
 - Organization that created the record