

The logo of the Archdiocese of Atlanta is a green shield-shaped emblem. At the top is a pointed Gothic archway with intricate tracery and two circular windows. Below this is a crown with a cross on top. The shield is divided into horizontal sections: a top section with a cross, a middle section with a crown, and a bottom section with wavy lines representing water. The entire emblem is rendered in a light green outline style.

Archdiocese of Atlanta

ParishSOFT Quick Reference Guide

ParishSOFT Help 1-866-930-4774 ext. 2

System Logon

- ⇒ Click Module Icon on your desk top
- ⇒ Enter your user name
- ⇒ Enter your password

Verify that *****Successful Logon***** appears in the lower left status bar of the ParishSOFT screen.

- If you see *No User Logged On*
 - Select Staff, Logon
 - Select your name
 - Enter your password.

**Family
Directory**

Family Directory

Add a New Family

- ⇒ Search your Family director to see if they are currently listed if not found
- Family Info
 - Add new family
 - Enter Search Criteria with proper Case and Salutation e.g - Last Name: Smith
First Name: John

NOTE: Always check your family directory before entering a new family; search criteria when entered will automatically populate the Family screen if creating a new family ;

- ⇒ When Family Information screen comes up TAB from last name and through First Name
- Data will populate mailing address.
 - YOU must add the salutation to the mailing Name
- ⇒ **never use** ampersand & ; / ; \ ; in the mailing name
- Mr. and Mrs. John Smith
 - Miss Samantha Smith (female under 16 yrs old)
 - Mr. Michael Smith (Single male)
 - Ms. Loren Smith (single female over 16yrs.)
 - Dr. and Mrs. John Smith (he is a doctor and she is not)
 - Dr. John and Dr. Mary Smith or Drs. John and Mary Smith (both doctors)
 - Mr. John and Dr. Mary Smith (he is not a doctor and she is)

Family Directory

Check list for adding New Family

1. *Did you Search your database—filtered for both, and all groups?*
2. *Did you search the Diocesan database?*
3. *Did you add complete family and member information?*
4. *Did you assign an envelope number?*
5. *Did you add sacraments, Time & Talent ?*
6. *Add to workgroups: Annual Appeal and GA Bulletin (mandatory)?*

Family Directory

Checklist for when a family moves or changes status

1. *Did you change their status on all members?*
2. *Did you remove their envelope number?*
3. *Did you put their old address in notes?*
4. *Did you uncheck registered?*
5. *Did you remove them from work groups? (Annual Appeal and GA Bulletin)*

Family Directory

Mailing Addresses

1. When entering Mailing address enter street
 - ⇒ Tab to Zip enter zip code
 - ⇒ Tab (City and state will be automatically entered)

Note: If you enter the wrong zip and want to change or delete zip enter 00000 and tab this step will allow you to use the postal code lookup button.

2. Snowbirds - click on the Other tab
 - ⇒ Enter date when parishioner is away
 - ⇒ Enter Address
 - ⇒ Click update
 - ⇒ Click close
 - ⇒ **To update Snowbird Mailing Addresses**
 - ⇒ Select Utilities Update "Snowbird" Mailing addresses
 - ⇒ Click Yes
 - ⇒ Click OK
 - ⇒ Press F5 to refresh details

Note: This should be done monthly before running envelope list.

Family Directory

Families and Member Status

Scenario	Family Group	<input checked="" type="checkbox"/> Currently Registered	Member Status
1. Standard active registered family	Active	Yes	Active
2. Non-member, not registered, contributor	Contributor	No	Inactive
3. Visitor, active in other church	Visitor	No	Inactive
4. Clergy, religious, not registered	Clergy / religious	No	Active
5. Staff that is a registered parishioner	Active	Yes	Active
6. Staff, not a parishioner	Staff	No	Active
7. School only	School Only	No	Family is Inactive but the member or Child is Active
8. Non-Catholic member of a registered family	Active	Yes	ActOTHER
9. Inactive registered family	Inactive	Yes	Inactive
10. Registered family that has moved	Moved	No	Inactive
11. Sacrament Only Family	Sacrament Only	No	Active
12. Religious Ed family that is not registered	Religious Ed Only	No	Family is Inactive but the member or child is Active
13. Visitor, not active in church	Visitor	No	Inactive
14. Clergy, religious, registered	Clergy / religious	Yes	Active

Note: *All Staff must be included in the Family Directory—and- Staff Directory
Both directories must be accurately maintained.*

Family Directory

Sacramental Details

All sacramental details need to be recorded in **both** the Sacramental Register and ParishSOFT

- ⇒ Member Tab
 - ⇒ Sacraments Tab
 - ⇒ Sacramental Details button
 - ⇒ Place a before the sacrament

To add a Church if it is not found in drop down list;

- ⇒ Select (Add Record) from the list
- ⇒ Type in name of Church = response is parish not in list add it now, say yes which brings up Online Catholic Directory screen.
- ⇒ Add City and State to limit search (for a list of parishes in a city do not include parish name)
 - ⇒ Highlight the correct parish from the drop down list
 - ⇒ Click on Accept button

Note: if this is a parish you access frequently once highlighted click on Add Selected Parish to Favorites List button.

3. Adoption and sacramental notations should be maintained in the general remarks field located on the Baptism tab in the sacramental details. Registry information should be included in the sacramental details on the Baptism tab.

Family Directory

Work Groups

To add a Family to a Work Group in Family Directory

- ⇒ Select Modules from Menu
 - ⇒ Select Family Workgroups
- ⇒ Select the group to which you want to add family
- ⇒ Click on Add Family
- ⇒ Select Family from directory
- ⇒ Click on Select this Family and
- ⇒ Click Yes

To add, edit or delete a Work group

- ⇒ Select Modules
- ⇒ Family Workgroups
- ⇒ Groups

Note: Workgroups are for ENTIRE families e.g. Annual Appeal, Georgia Bulletin, Baptismal Preparation Class. If you have individuals that need to be tracked it needs to be done in Time and Talent or Religious Education for Classes e.g. Marriage Prep, Confirmation Preparation.

Note: When adding a new family in Family Directory you must add them to Annual Appeal and Georgia Bulletin.

Offering & Pledges

Offertory and Contributions

Quick steps for posting

1. Open Offering Module
2. Select Posting Contributions Button
 - ⇒ Select Fund i.e. Offertory-2004 or World Missions
 - ⇒ Set Batch date (This will be the date of the Mass which you are posting.)
 - ⇒ Click on New Batch from the drop down menu
 - ⇒ Enter the Batch description e.g. 9AM Sunday
 - ⇒ Click OK
 - ⇒ Enter the grand total for that Mass and click OK

Note: *This total includes all tapes*

- ⇒ Click the Rapid Check entry box
- ⇒ Click into the search field
- ⇒ Enter either envelope number /name if on a 10Key pad enter between fields.

NOTE: *You will continue to enter items in the same order in which you currently post i.e. Envelopes with Checks; Envelopes Cash; Loose Checks and then Loose Cash.*

Offertory and Contributions

Quick steps for posting continued

To correct amount error in last entry click on Daily Postings button

- ⇒ Highlight the entry.
- ⇒ double click into the amount box and correct amount.

To correct a misspelled name or incorrect envelope number entry

- ⇒ If last entry you can click on the delete last entry button
- or
- ⇒ You may click on Daily Posting button
- ⇒ Select the row by highlighting it
- ⇒ Click on the Delete button

When balanced AND all adjustments have been made you need to close the batch.

Offertory and Contributions

Quick steps for posting continued

To close batch

- ⇒ Select Batch Processing from the menu bar
 - ⇒ select View Batch List
 - ⇒ Highlight the batch
 - ⇒ Click on Print Posted Contributions for Selected Batch
 - ⇒ Click on the 6 Print symbol
 - ⇒ Close the screen
- ⇒ Select Batch Processing from the main menu.
- ⇒ Select Close Batch. It will prompt you to verify you are sure you want to close. Say yes.
- ⇒ Repeat for each Mass or collection.
- ⇒ When finished posting close the Contribution screen. At the main Offering screen select Reports and ParishSOFT reports to run the daily postings reports.

Note: *You may choose to print and close the batches at the end of the days postings.*

Offertory and Contributions

Quick steps weekly posting reports

On the Main Offering screen select reports, ParishSOFT reports

1. On the Main Offering screen select reports, ParishSOFT reports.
2. Select the Contributions Report Menu
3. Select Date Range Contribution Reports
4. Enter the date range for the contributions posted.
 - e.g. search beginning 11-06-2004 search ending 11-07-2004
 - ⇒ Click on deselect all
 - ⇒ Select the funds for which you had postings
 - ⇒ Print Detail report with names
 - then—
 - ⇒ Print the Date range summary report

Offertory & Contributions

Weekly Reports

If you ran in PowerFlex...

Posting Report each Mass (F9)

Contribution Summary

Then you want to run in ParishSOFT

Batch report

At the end of the day's posting....

Date Range Contribution Report for day

Select all taxable funds

Print Detail w/names

Print Date Range Summary Report

Offertory & Contributions

Managing Pledges

- ⇒ Select the Fund to which the pledge is being made
 1. Click Add a Family
 2. Search by Last Name
 3. Highlight desired family
 4. Click Select This Family button
 5. Family now appears in list on left side of page.
 - ⇒ Highlight desired Family
 - ⇒ Set your pledge date e.g. Oct. 31 2004 (Commitment Sunday)
 - ⇒ Set your 1st payment date e.g. January 1, 2005 First date funds are to be collected for Offertory 2005
 - ⇒ Enter down payment if any.
 - ⇒ Enter total pledged
 - ⇒ Select term of pledge i.e. one time, weekly, monthly quarterly etc.
 - ⇒ Calculate payment (the program automatically divides by 12)

Note: UPDATE before changing screens. Do not hit post payment when making initial pledge.

Offertory & Contributions

Managing Pledges & Pledge Reports

Note: You should always create a pledge record for one time gifts. This ensures your pledge reports calculate correctly!

Pledge Reports

- ⇒ Select the fund you want to report on
 - ***** Don't forget to recalculate your balances
- ⇒ To print only one family statement
 - ⇒ Unclick the check box before Print All
 - ⇒ Select a family from the drop down menu
 - ⇒ Select Month and Year

Note: Pledge date should never be later than 1st payment date. This will create incorrect balances on pledge reports!

**Religious
Education**

Religious Education

Adding a Session

Open Religious Education Module

- ⇒ Select Setup from the Menu
- ⇒ Add/Edit Session
- ⇒ Select Year
- ⇒ Type in new session name in the drop down box Don't Forget to TAB
- ⇒ Enter the date the session begins.
- ⇒ Enter the date the session ends.
- ⇒ Enter the Start time
- ⇒ Enter the end time

Note: Sessions are always tied to TIME and DATE range.

Religious Education

Adding a Session continued

- ⇒ Select the day on which the class begins
- ⇒ Click Calendar Update Session Dates
 - ⇒ Unselect any dates you do not have class
 - ⇒ Click on Update
 - ⇒ Click on Close

Note: Calendar is Jan-Jun of the next year, August—December is current year

Note: Remember You will not see the year until you add a session;

- *You will not see a session until you add a class and*
 - *You will not see a class until you add students!*

Religious Education

Adding a Class

- ⇒ Select Setup from the Menu
- ⇒ Add/Edit Class
- ⇒ Select the Year

-DO NOT click in the left hand list this will cause a rapid blinking and shut down your system

- ⇒ Click on Add New
- ⇒ Enter the Name of the class you are creating. Don't forget to TAB
- ⇒ Enter the Grade e.g. PS3, AS = assorted, AD =Adult etc
- ⇒ Select the session in which it belongs
 - ⇒ Add your Catechist by click- ing on the button
 - ⇒ Update and refresh your class list

Religious Education

Adding a Student

In Religious Education Module

- ⇒ Click on Add Students to a Class
- ⇒ You can search by last name or age range
- ⇒ Select the child

Note: You may select multiple children by holding your shift +Ctrl keys while clicking.

- ⇒ Select the Year from the drop down menu
- ⇒ Select the Session to which you wish to add the Child
- ⇒ Click on Accept One or if choosing multiple Accept All Selected
- ⇒ Click on Close

Note: You will receive an alert box indicating for each student you selected you must acknowledge to proceed.

Religious Education

Adding Milestones

Milestones may be used for anything that requires tracking. Such as...

Baptismal Certificates,	Confirmation Service Hours,
L.I.F.E. Events,	Sponsor Letters,
Catechist Certification Completion	Background Screening

⇒ Milestones

⇒ Reports

⇒ ParishSOFT Reports

⇒ Religious Education Reports

⇒ Milestone Setup & Reports.

Religious Education

Extended Tuition

From the Religious Education Module

⇒ Select Reports

⇒ Custom Reports - Extended Tuition should open automatically

To Enter Payments

- Select post payment
- Select family
- Select fund and hit the enter key
- Enter date and press the enter key
- Enter Amount and press enter key

Note: *Custom Reports and Extended Tuition cannot be run on the same machine without reinitializing the database. This may only be done by a systems administrator*

**Time
& Talent**

Time and Talent

Add a Ministry Group

- ⇒ Open the Time and Talent Module
 - ⇒ Create/Edit Look up tables
 - Click Add
 - Type in group name e.g. Outreach Ministries
 - Click OK
 - ⇒ Highlight the newly added ministries group.
 - ⇒ Click the Ministries Tab
 - Click Add
 - Type in the Ministry name e.g. Medical Mission
 - Click OK
 - ⇒ Click Events Tab
- Note: Every ministry must have something under events tab if only n/a.***
- Click Add
 - Type in event name e.g. Bandage rolling
 - Click OK

Time and Talent

Add a Minister

On main screen of Time and Talent select Minister Directory

- ⇒ Click Add New Minister
- ⇒ Select Group, Ministry, Event from drop down menus
- ⇒ Fill in dates
- ⇒ Search for Members by Last Name
 - Highlight desired member
 - Click Accept
 - Close
- ⇒ Click done when finished.

Note: *Set Times Served Count to date on which the new minister is added.
Otherwise when using Liturgical Scheduler new ministers will be scheduled
until times served is equal to that of old ministers time served.*

Time and Talent

Liturgical Scheduler

Note: Before using scheduler you must add Mass times in lookup tables and members must have been added to the correct Mass time for scheduling purposes.

- ⇒ Click Weekly Minister Count Tab
- ⇒ Add the number of ministers needed for each Mass and Ministry

To use Auto Scheduler:

- ⇒ Fill groups and dates from drop down selection boxes
- ⇒ Make sure Ministers = All
- ⇒ Events = Mass Time
- ⇒ Click on Auto Select
- ⇒ Click on Schedule

To Schedule manually

- ⇒ Fill groups and dates from drop down selection boxes
- ⇒ Select desired Ministry you wish to schedule
- ⇒ Event
- ⇒ Select Members
- ⇒ Click Schedule

Time and Talent

Liturgical Scheduler continued

To Delete Scheduled Minister

- ⇒ Select name of minister on right side of screen under Weekly Schedule
- ⇒ Click Delete Selected Record
- ⇒ A confirmation box will appear—answer Yes

Export Schedule

- ⇒ Click Export Schedule button
- ⇒ Type in the date range you wish to export
- ⇒ Choose Spreadsheet or Web page

Spreadsheet

- Click Create spreadsheet
- Click OK (this automatically saves the file on your hard drive.)
Note: Name of Worksheet will appear in alert box
- Click View spreadsheet
- Select desired File

Web Page

- Click Create Ministry Web Page
Note: Name of file and path will appear in alert box
 - Click Yes, to view the page
- You can then export to your ParishesOnline web page if set up.

Reports

Reports

Census Menu

<i>Report</i>	<i>Where to find the report</i>
Family Filtering and Sorting	
Member Filtering and Sorting	
Census Roster (with/without Letter Headings)	Family Reports Menu
Census Roster with Members (with/without Letter Headings)	Family Reports Menu
Parish Directory	Family Reports Menu
Parish Directory with Members	Family Reports Menu
Baptisms	Member Reports Menu
Birthdays	Member Reports Menu
Funerals	Member Reports Menu
Wedding Anniversaries	Member Reports Menu
New Families	Other Reports (New Family/Member Menu)
New Families with Members	Other Reports (New Family/Member Menu)
New Family/Member Registration	Other Reports (New Family/Member Menu)
Unregistered Families	Other Reports
Parish Statistics	Other Reports
Family Registration Form	Other Reports

Reports

Religious Education Reports Menu

Student Directory Reports
Student Lists by Grade
Sacramental Prep Menu
Tuition Status Report
Student Baptismal Record Report
List of Childs Sacraments
Teacher Roster Reports
Milestone setup and reports

Time and Talent Ministries Menu

Liturgical Ministers - Alpha
Liturgical Ministers - by Service
Member Ministry Assignment Report
Minister Assignment Filtering and Sorting
Monthly Liturgical Minister Schedule
Weekend Ministry Schedule

Reports

Contributions Reports Menu

Date Range Contribution Report
Ind. Family Contribution Summary
\$0.00 Givers Menu
EOY Contribution Statements for Families
Contributions 3 Year Summary
Edit Body of Statement

Pledge Reports Menu

All pledges for a Fund
Projected Revenue for a Fund
Monthly Past Due for a Fund
Monthly Report
Variance Report
Memo for a Contribution (Prev. Month)
Memo of monthly statements

Reports

Utilities Menu

Census Export
Envelope Utilities
Installed PS Versions

Census Utilities
Contribution Utilities
System Utilities

Workgroup Mail Merge

Filtered Workgroup Mail Merge

Family Workflow Group

**System &
Utilities**

Utilities

Contribution Utilities

Sending the Envelope List (update

- ⇒ Reports
- ⇒ Utilities
- ⇒ Contribution Utilities
- ⇒ Envelope Utilities

Editing body of Statements

- ⇒ Reports
- ⇒ Utilities
- ⇒ Contribution Utilities
- ⇒ Edit body of Statements

Edit Income Accounts

- ⇒ Reports
- ⇒ Utilities
- ⇒ Contribution Utilities
- ⇒ Edit income accounts

Utilities

Census Utilities

Census Reports

- ⇒ Reports
- ⇒ Utilities
- ⇒ Census Utilities

Religious Ed Utilities

Clone Previous Year

- ⇒ Reports
- ⇒ Utilities
- ⇒ Religious Education Utilities

Utilities

System Setup Utilities

Organization Setup Screen

- ⇒ Where you would change the information that appears on the Letter and statement headings.

Build Custom Queries
Version Information
Pathing and Reset information

System Logoff

From the main menu select

- ⇒ File
- ⇒ Exit Family Directory Program
- ⇒ Click Yes

Note: *Before shutting down your computer make sure that ParishSOFT is not minimized on your tool bar!*

System Utilities

File Menu

- ⇒ About
 - ⇒ ParishSOFT System Info
 - ⇒ Backup
 - ⇒ Product Updates
 - ⇒ WebConnect

BackupDaily

Compact and RepairWeekly
(the Checks and Balances of ParishSOFT)

Note: everyone must be out of the system before running this utility!

SynchronizationAutomatically*
Configured on installation * Dial-up locations may vary

Training

Schedule additional training

ParishSOFT 1-866-930-4774 ext. 126
[www. ParishSOFT.com/training](http://www.ParishSOFT.com/training)

or

Christine Dandaraw 404-885-7259
Cell 404-790-4978
cdandaraw@archatl.com

Technical Help

ParishSOFT 1-866-930-4774 ext. 2