

Salt Lake City RoadShow 2018

EXERCISES

Hands-On Training

ParishSOFT Family
Directory: How to Manage
Your Families

Cole Janisch, Jeff Bachelor

Exercise 1 – Create your own family for you and a spouse

1. From Family List, click **Add New Family** and click **search**
2. From results window, click **Add New Family**
3. Add New Family screen:
 - a. Family Member
 - i. Enter required information for first member (Title, First Name, Last Name, Type)
 1. Use **Husband** or **Wife** as the “Type”
 - ii. After entering info for first member, click **Add Another** link
 - iii. Enter required information for second member (Title, First Name, Last Name, Type)
 1. Use **Husband** or **Wife** as the “Type”
 - iv. **Do not** click Add Another link. Leave member information displayed in required fields.
 - b. Family Information
 - i. Leave Registration settings as they are
 - ii. Click **Auto Fill Family Names** to populate name/salutation fields
 - c. Family Address
 - i. Enter **street address** and **postal code**
 - ii. Press **Tab** key to populate City, State, Country fields
 - d. Save
 - i. Click **Save & Finish** to finalize your family record

Exercise 2 – Add member to existing Family (choose a family or use the one you just created)

1. Family Details
 - a. Enter family last name in search box (use either a common last name or your own to view the family you just created)
 - i. Click **name** to open record
2. Click Member Details
 - a. Select add **new member**
 - b. Enter in their **first** and **last name** (John Smith)
 - c. Select the **Role** (son)
 - d. Choose a **birth date, religion, language, and ethnicity**

Exercise 3 – Filtered Envelope Numbers report for Registered and Active Families

1. From Family List, click **white funnel**
 - a. Registration Status – select **Registered**
 - b. Family Group – select **Active**
 - c. Click **Apply**
2. Back on Family List, click **Quick Reports**
 - a. Select **Filtered Envelope Numbers** report

Exercise 4 – Member List report for Registered, Active, Active members ages 6-20

1. Open **Member List**
2. Click **white funnel**
 - a. Registration Status – **Registered**
 - b. Family Group – **Active**

- c. Member Status – **Active**
 - d. Click **Advanced Options**
 - e. Check box beside **Age Range**
 - i. From – **6**
 - ii. To – **20**
 - f. Click **Apply**
3. Back on Member List, click **Quick Reports**
 - a. Select **Member List** report

Exercise 5 – Parish Directory report for Active, Clergy, Staff, and include members

1. Open **Reports**
2. Click **Census**
3. Select **Parish Directory**
 - a. Check boxes beside **Active, Clergy, and Staff**
 - b. Check box beside **Include Members**
4. **Click here** to generate report