PARISHSOFT NEWSLETTER

Brought to you weekly by the Diocese of Salt Lake City

Our Goal is to make ParishSOFT information easily accessible to all Parishes in the Diocese, and guide all with simple tips & tricks when using ParishSOFT **9**

Our Weekly Focus: How to Look up Family & Member Giving History

This week we will be looking at how to look at the Giving History and the ways you can look up this information for families and members in your parish.

METHOD 1: HOME SCREEN

From the Home Screen you can select the tab "Giving History"

n	Diocese of Salt Lake C Salt Lake City	ity				
🔒 Home		Home	Pictorial Directory	Organization Directory	Giving History	User Settings

This will bring up the 'Family List' Giving History for your Parish:

	Con Carlo Cry																	
A	Home	Home	Pictoria	al Directory	Organ	ization Directo	ory Giv	ing History	User Se	ttings								
*	Family Directory	Blessed S	acrament	Catholic C	hurch. Sar	ndv			~									
ŵ	Development																	
	Intelligent Query	A-Z	A	8	с	0 Ε	F	G	н	1 J.	к	L.	м	N	0	P	Q	R
•	Intelligent Query	0-9	0	1	2	3	4	5	6	7	8	9	Filter Crite	ria: None	Filter Colum	n: Family A	scending	
5	Subscription Manager	10 reco	rds 🗸	•														
•	Administration	Family					Δ	Family DUID	E-Ma	il Address			Pr	rimary Ph	ione			
-		Doe, Joe	and Jane					12345	jjdoe	@nomail.cor	n		8	01-123-	4567			
0																		

You can search and select the Family, and it will open the "Family Giving":

Mr. and Mrs	Joe & Jane I	Doe (12345)	В	essed Sacrament	Catholic Churc	h, Sandy 🗸
Family Giving	Joe Doe	Jane Doe					
Giving for: All Include Men Contributi	Family Giv	ing	✓ Tax Deductible	[Kocesan Target		×
							- 1
Date 🛦	Amount	Fund	Member Fir	st Name	Check No	Memo	
12/28/2016	\$ 20.00	Offertory					
03/02/2015	\$ 20.00	Offertory					
04/14/2014	\$ 20.00	Offertory					
12/30/2013	\$ 20.00	Offertory					
			Save & Close Close]			



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You are able to search the Giving History Funds and for a particular year : (Please note Funds will differ per family)

Giving for: Family Giving			
Alt V	All V		Veran
All	Piceran Toront	~	All
Offertory Non-Cash Contributions Other Diocesan Coll Black and Native American Catholic Relief Services Propagation of the Faith		Tax Deductible	All 2006 2007 2008 2009
Missionary Cooperative Retired Priests Intermountain Catholic Retire the Debt Campaign	Member First Name Check No Memo		2012 2013 2014 2015

The Giving History will be listed by 'Contributions' and 'Pledges':

Date 🔺	Amount	Fund	M	ember First Nan	ne Che	ck No Memo	
08/08/2020	\$0.00	DDD 2020					
08/08/2020	\$300.00	DDD 2020					
					Total Contribu	tions: \$300.00	Þ
ledges							
Fund		Pledge Amount	Balance Due	Payments Remaining	First Payment- Date	Pledge Date 🛦	Adjust
		\$300.00	\$0.00	0	08/08/2020	08/08/2020	
DDD 2020							

You are able to look at a 'Member' Giving History as well, by selecting on the name of the family member:

Mr. and Mrs. Joe & Jane Doe	(12345)		Blessed Sacrament Catholic Church, S	and 🗸
Family Giving Joe Doe	Jane Doe			
Giving for: Joe Doe Funds All	~	Years All		~
		Tax Deductible		
Contributions				
No data available				
4				•
			Total Contributions: \$0.00	
Pledges				
No data available				
4				•
			Total Pledges: \$0.00	
	Save & Close	Close		



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METHOD 2: FAMILY DIRECTORY

From the Family Directory you can search and select from the 'Family List':

6	•	Diocese of Salt Lake Ci Salt Lake City	а										ۍ و
•			Family List Member List	Sacraments •	Family Workgroups	Member Workgroups	Group Events Entry Re	ports Import •					
-	Family D	Directory	Blassed Starsmoot Catho	Le Church Sandy									
. ۴.	Develop	pment		ine Graneri, Garraj			Q Clear S	earch Results					
lia.	Intellige	ent Query	A-Z A	вс	D E F	6 н	I J K L	M N	0 P Q	R S	T U	v w	х у :
5	Subscrip	ption Manager	0-9 0	2 3 0 2 5 T B	4 5 6 Add New Family	7 8 9 Delete Selected Families	Filter Criteria: None Filter Colun s Forget Selected Family	In: Family Ascending					Clear Filter Quick Reports
٠	Administ	tration	Family	▲ Envelope	# E-Mail Address	Primary Phone	Primary Address	City	State/Region	Postal Code	Plus 4 R	Registered Fam	ily Group Map
0	COLLAPS	æ	Doe, Joe and Jane	10	jjdoe@nomail.com	801-123-4567	1234 State St	Sandy	UT	84070		Yes 4	Active

Once you have selected the family, the 'Family Details' will open and at the bottom of the box will be the option "Giving History":

Mr. and Mrs. Joe Doe (12345)	Blessed Sacrament Catholic Church, Sandy
Family Details Member Details 🔻	
Last Name * Unvegistered Date: Doe	Primury Address Home Address
First Name(x) * Joe and Jane	Home Mailing Other
Formal Maling Name Mr. and Mrs. Joe Doe	Country United States
Informal Name Joe Doe Formal Substation Format S	Postal Code plus 4 84070 Address Line 1
Informal Substation Joe and Jane	1234 State St Address Line 2
C Email Address jjdoe@nomail.com	Sandy
Pinary Phone 801-123-4567	State/Region: Utah Phone Number 801-123-4567
Emergency Phone Drec. Ph. Desc.	Send Mail Publish Address Send Contrib. Env. Publish Photo for Pictorial Publish Phone Directory
Cinetope # Annual Gift \$ 10 0 Next Giving History	Publish Ernail MLNA Send Magazine Do Not Call Do Not Call
Map Code	Un Not Solicit
Edit Details	Close

This will open the 'Family Giving' box:





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METHOD 2: FAMILY DIRECTORY

Again you are given the 'Filter Options' so that you can select a fund and a specific year:

Filter Options		
Funds: All	~	✓ Tax Deductible
Years: All 🗸		Include Member Information

PLEASE NOTE! You can only access the Giving History via the 'Family List' tab and **NOT** the 'Member List' tab on the Family Directory page. Member's giving history will reflect in the 'Family Giving" box:

Family Giving Members Joe Doe	Giving for: Joe Doe Filter Options Funds: All Years: All Contributions	
	Pledges No data available	

ParishSOFT Latest Update

For more information on training and updates, you can visit the ParishSOFT website via the links provided for their **Success Lab** and **Home Support Page**.

For All ParishSOFT FamilySuite related matters, contact:

Kersten Dowling <u>kersten.dowling@dioslc.org</u> (801) 456-9381



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