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ParishSOFT Newsletter - CN Family Suite Transition

1 message

Catholic Diocese of Sioux Falls - Carla Haiar <chaiar@sfcatholic.org> Mon, Jan 13, 2014 at 3:06 PM
Reply-To: Catholic Diocese of Sioux Falls - Carla Haiar <chaiar@sfcatholic.org>
To: Carla Haiar <chaiar@sfcatholic.org>

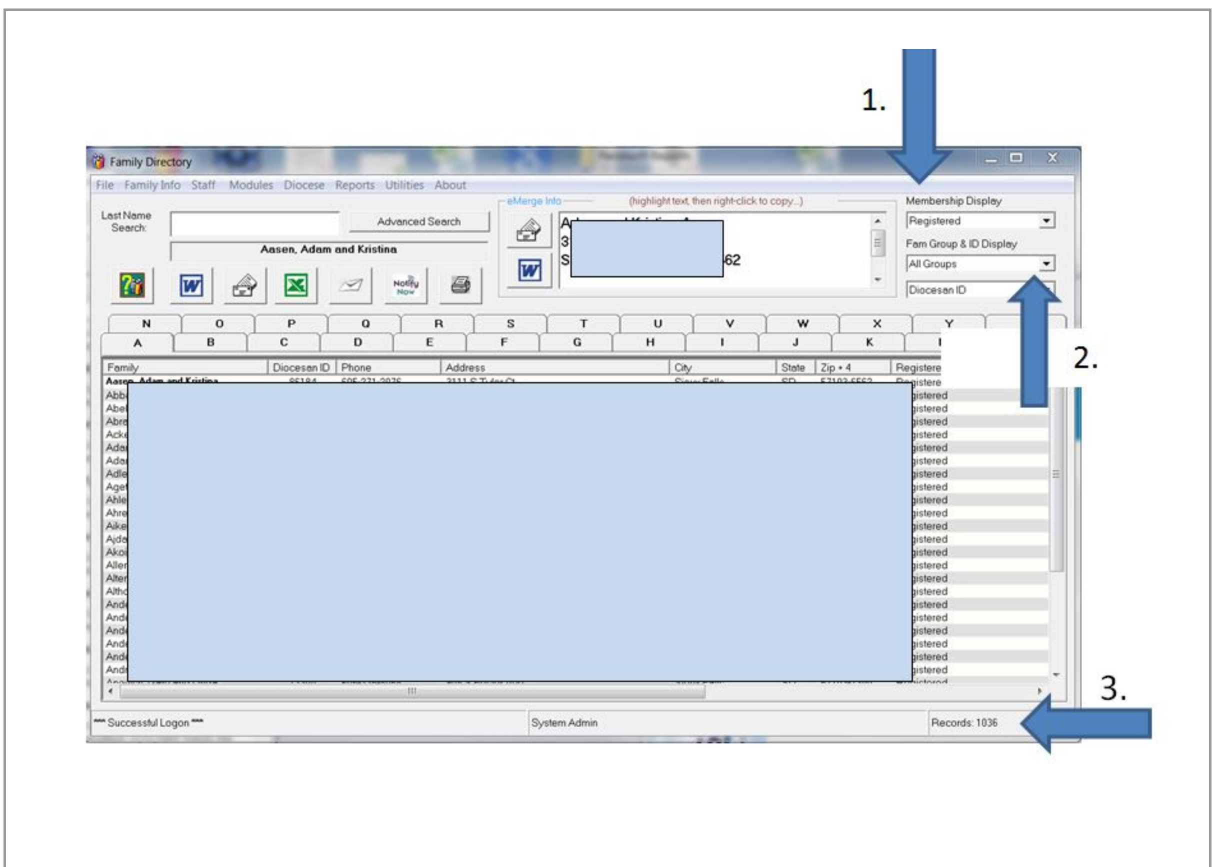
Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This new sletter w ill be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

View this email in your brow ser

CN Family Suite Transition

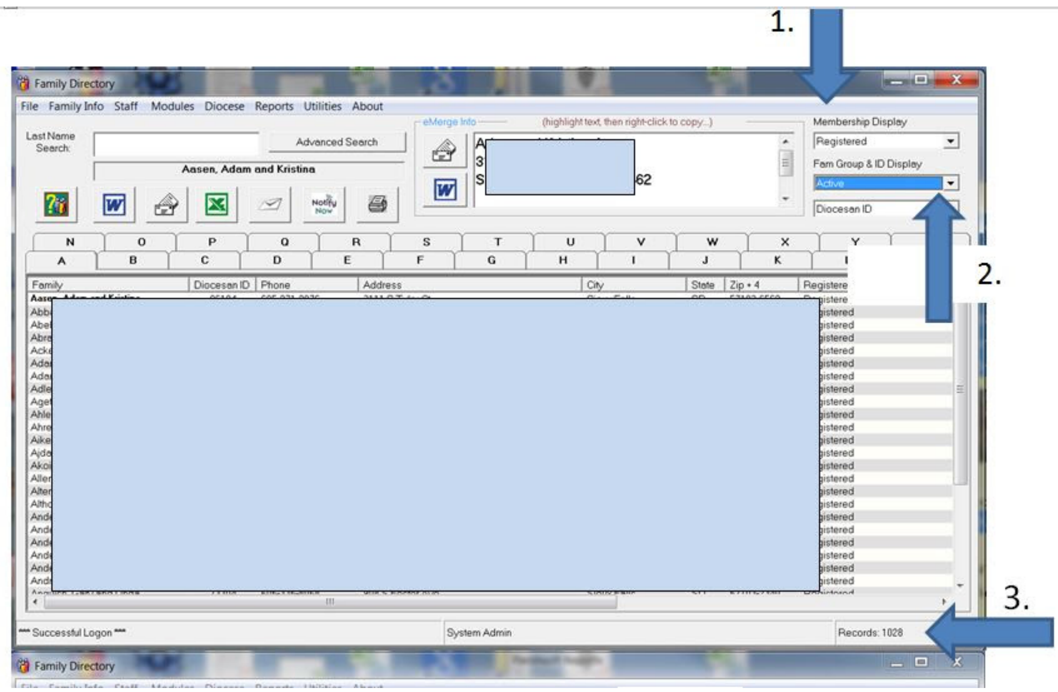
Let's review your database BEFORE the transition to CN Family Suite -- a clean database will enable a cleaner transition!

NOTE! All your data is in the local database which ParishSOFT will have as a backup.



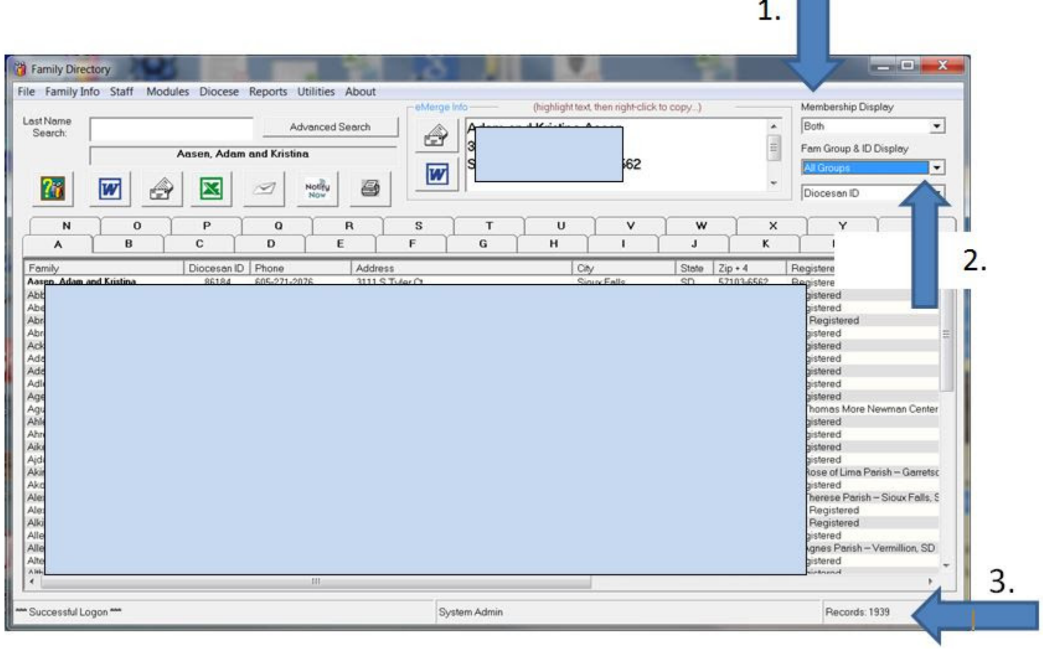
Open your Family Directory.
1. Membership Display show s Registered.
2. Fam Group as All Groups.
3. Note your Registered Records.

Number of Registered Families is: ______________



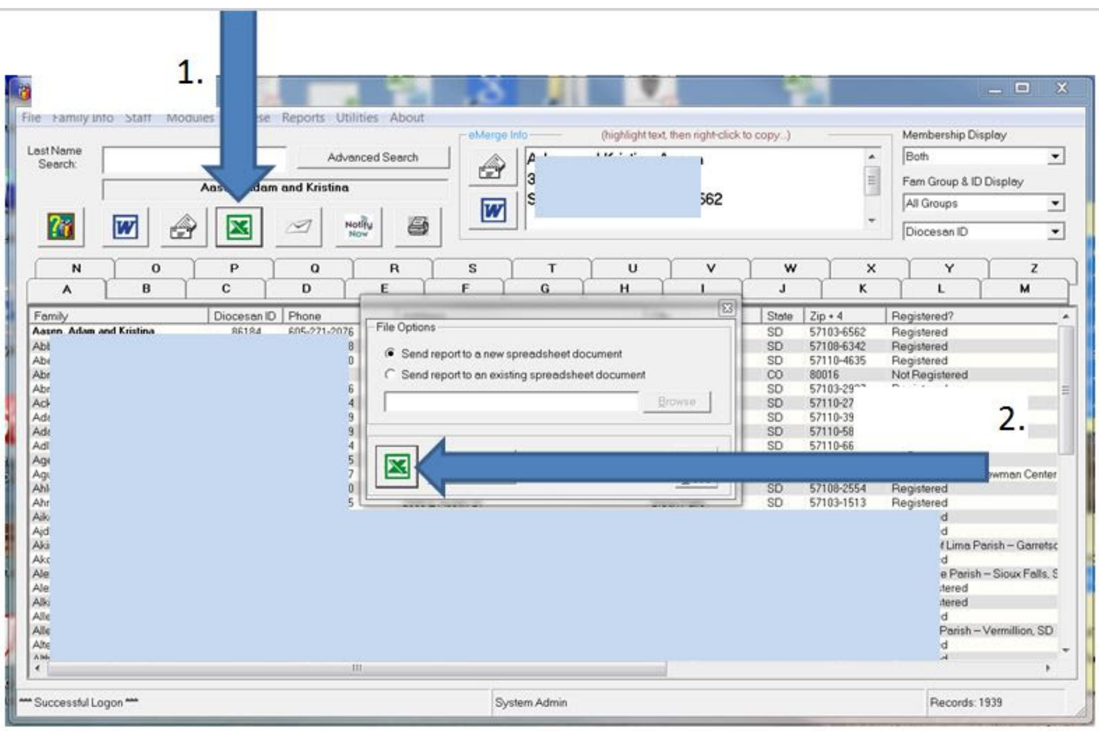
Make note of ALL Groups and their Membership counts.
1. Membership Display show s Registered.
2. Fam Group as Active.
3. Note your Registered and Active Records.

Number of Registered and Active Families is: ______________

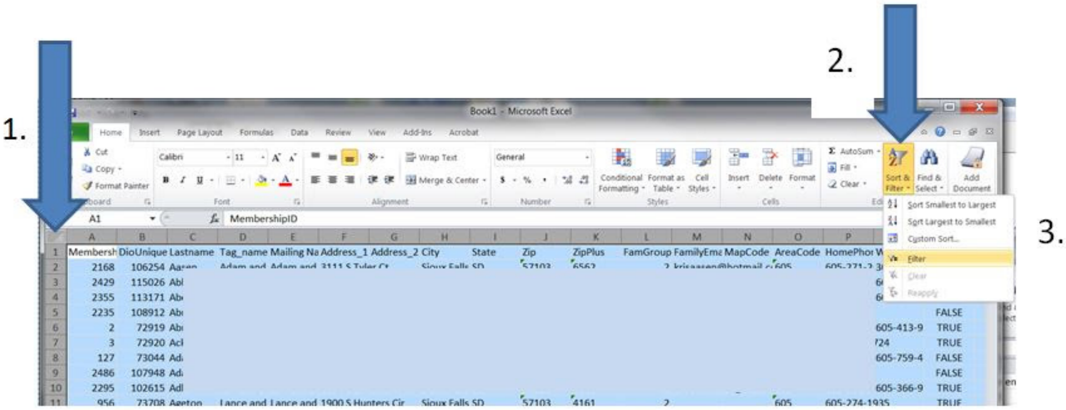


Make note of Both and ALL Groups and their Membership counts.
1. Membership Display show s Both.
2. Fam Group as All Groups.
3. Note your Both and All Groups Records.

Number of Both and All Groups is: _______________

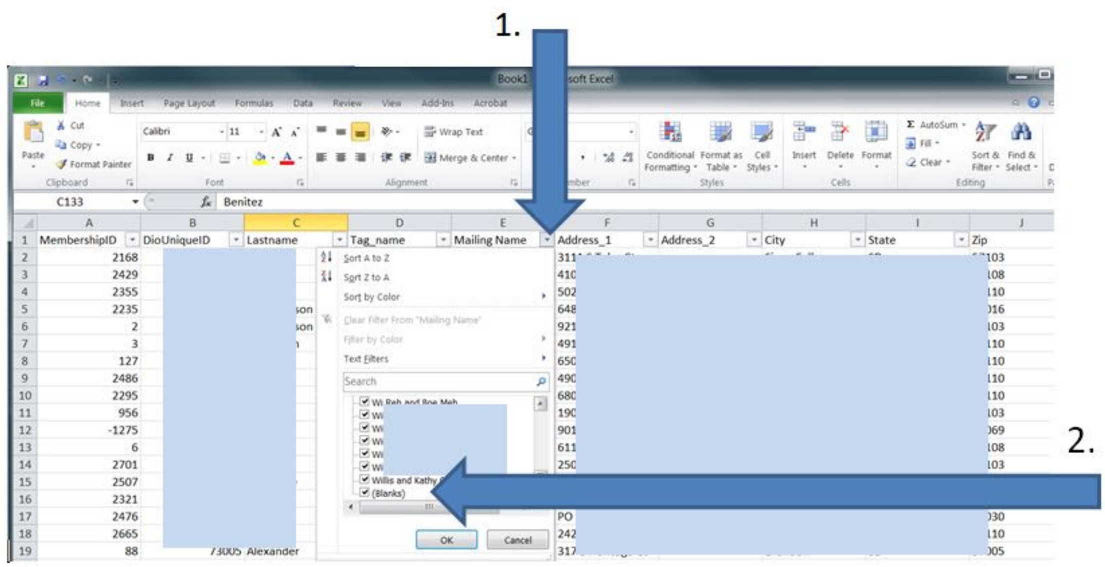


Let's export to an Excel Spreadsheet to check out Missing Last Names, Mailing Names and Send No Mail.
1. Click Excel Icon
2. Click Excel Icon again to create a new spreadsheet.
Depending on the size of your database, the export of your data to an Excel spreadsheet may take a few moments.



Excel w ill open displaying your data in an excel w orkbook.
1. Click on the box in the upper left hand corner of the spreadsheet to select the entire sheet.
2. Home tab should be displayed, click on Sort & Filter.
3. Select Filter.

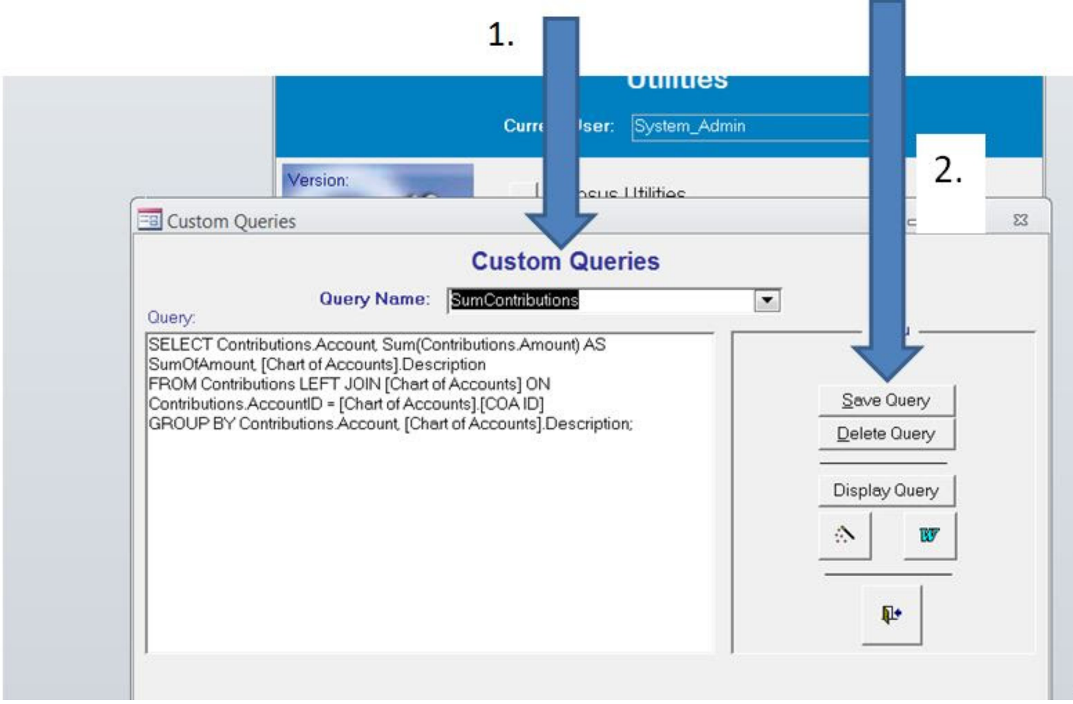
Your entire spreadsheet should now have a filter icon on each column.



1. Click on the drop dow n box after Mailing Name. Click on Select ALL to uncheck ALL boxes.
2. Scroll to bottom of list until you see {Blanks}. Check this box to see w hat family records in your database do NOT have a Mailing Name. Please correct these records.

Continue to check the columns in the Excel sheet for {Blanks}. Fields that should be checked are Last Name, Tag_Name and Mailing Name.

Check Fund Balances.

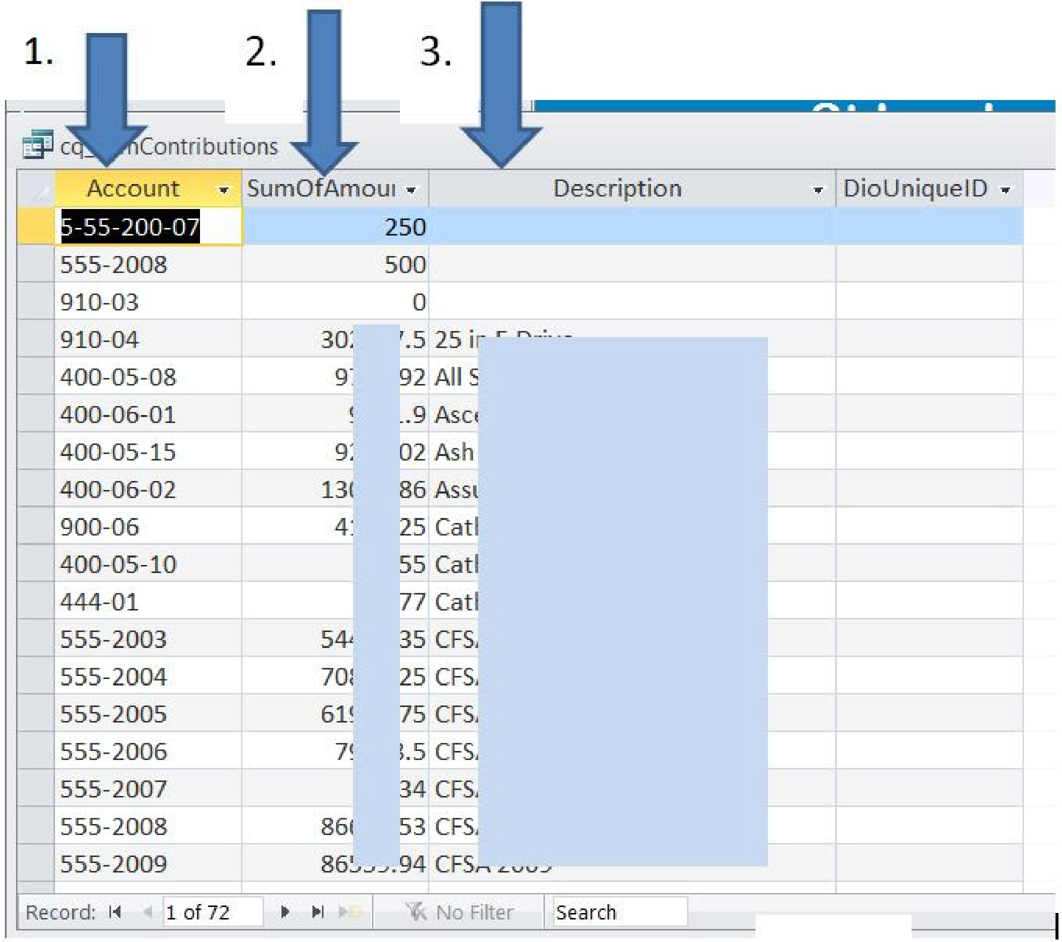


Let's check out some reports.
In Family Directory, click on Reports, ParishSOFT Reports.
In Reports, click on Utilities, Build Custom Queries.

1. Type in a query name such as Sum Contributions. Paste Query into box.
SELECT Contributions.Account, Sum(Contributions.Amount) AS SumOfAmount, [Chart of Accounts].Description, [Chart of Accounts].DioUniqueID
FROM Contributions LEFT JOIN [Chart of Accounts] ON Contributions.AccountID = [Chart of Accounts].[COA ID]
GROUP BY Contributions.Account, [Chart of Accounts].Description, [Chart of Accounts].DioUniqueID
ORDER BY [Chart of Accounts].Description;

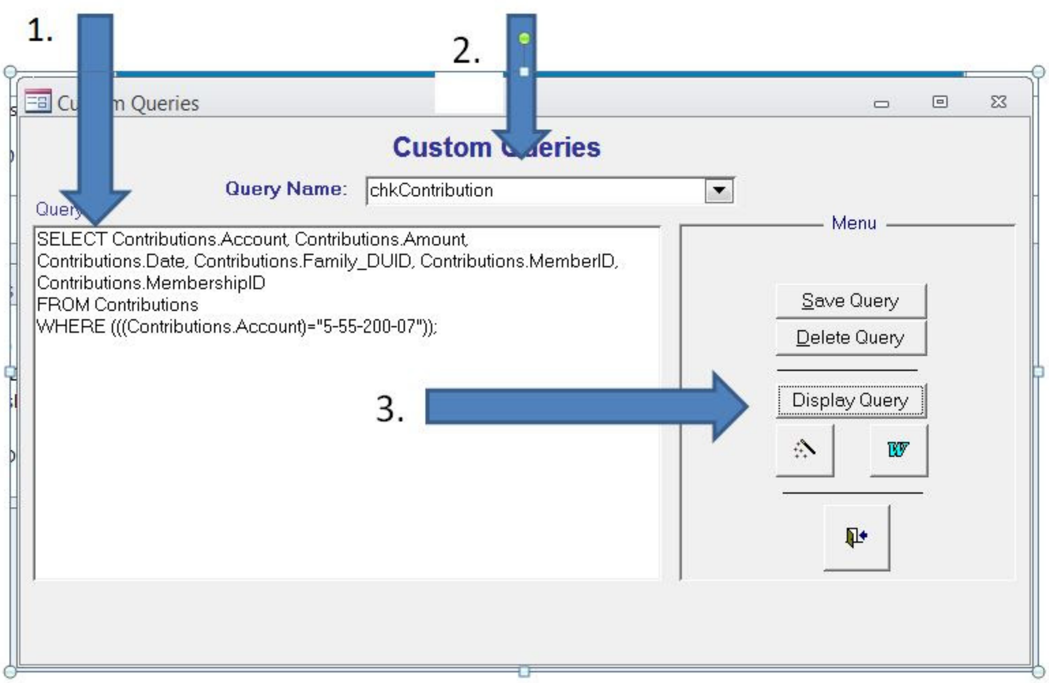
2. Click Save Query.

Click Display Query results.



1. Account Name
2. Sum of Amounts for this Account
3. Description of the Account, if this blank this may indicate this account no longer exits but funds w ere posted to in.

Best to query on these accounts to see if you should concerned about the dollars.



Let's see w hat posting no longer has a valid account.

1. Paste in the Select Statement below :
SELECT Contributions.Account, Contributions.Amount, Contributions.Date, Contributions.Family_DUID, Contributions.MemberID, Contributions.MembershipID
FROM Contributions
WHERE (((Contributions.Account)="5-55-200-07"));
2. Change the Query name.
3. Click Display Query.

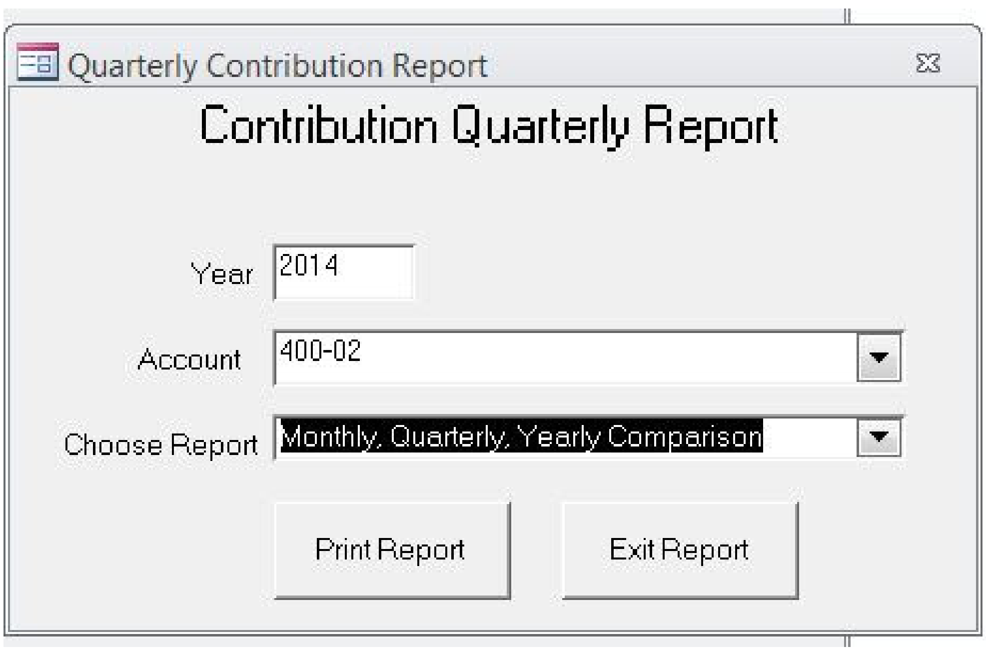
Best to query on these accounts to see if you should concerned about the dollars.

cq_chkContribution

Account	Amount	Date	Family_DUID	MemberID	MembershipI
5-55-200-07	0	3/18/2007	50258	0	2111
5-55-200-07	250	11/5/2007	50258	0	2111

Review the records displayed. You may look up the family in your Family Directory by Membership Id. This would be the Family ID in your Advanced Search.

The Date on the entry is 2007, you may determine that it is no longer of any importance and can be ignored.

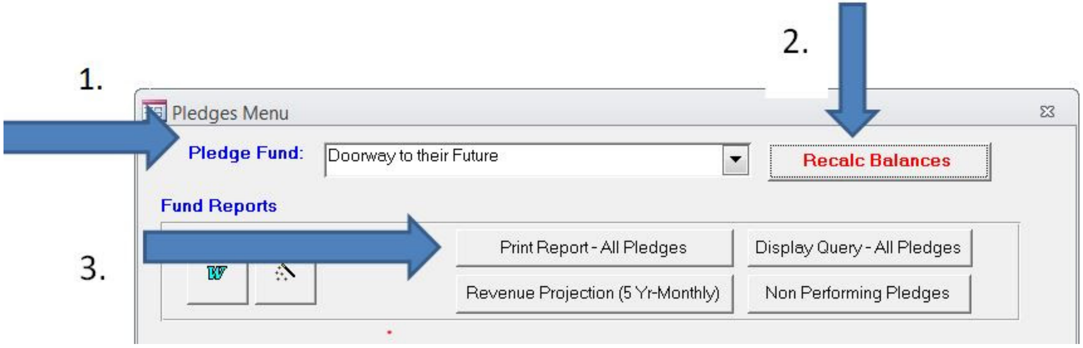


For your primary posting accounts, execute the Contribution Quarterly Report, print and save for your review .

From Reports menu, Contribution Reports, Contributions Monthly, Quarterly, Yearly.

Enter the Parameters and print the report.

Pledges



Print the Pledge Report for ALL pledges that are still active.

Reports, Pledge Reports Menu.

1. Select your active Pledge Fund.
2. Click on Recalc Balances.
3. Print Report - All Pledges.

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