

ParishSOFT Newsletter - CN Family Suite Transition

1 message

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Mon, Jan 13, 2014 at 3:06 PM

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

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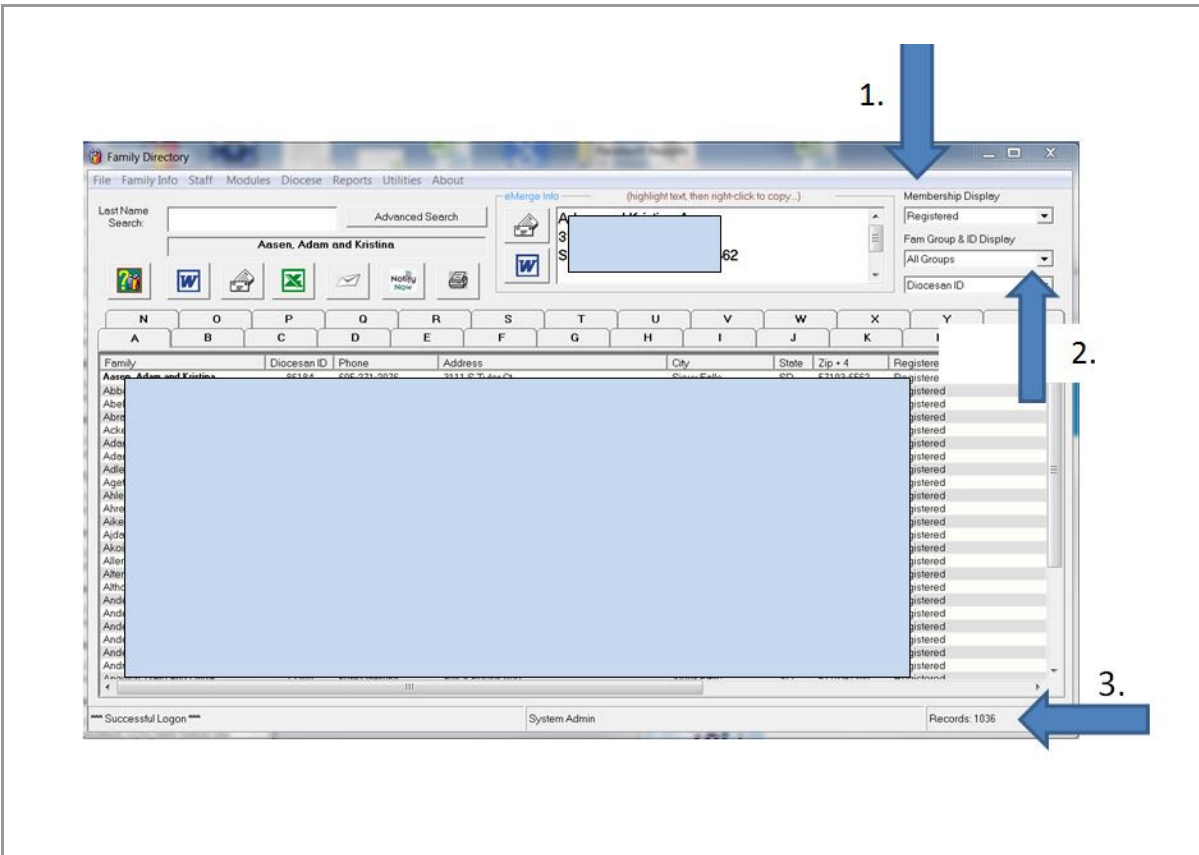
Catholic Diocese of Sioux Falls



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.



The screenshot shows the Family Directory application window. A large blue rectangular area covers the main data table. Three blue arrows with numbers point to specific UI elements: arrow 1 points to the search bar at the top; arrow 2 points to the 'Membership Display' dropdown menu on the right; arrow 3 points to the 'Records: 1036' status bar at the bottom right.

Open your Family Directory.

1. Membership Display shows Registered.
2. Fam Group as All Groups.
3. Note your Registered Records.

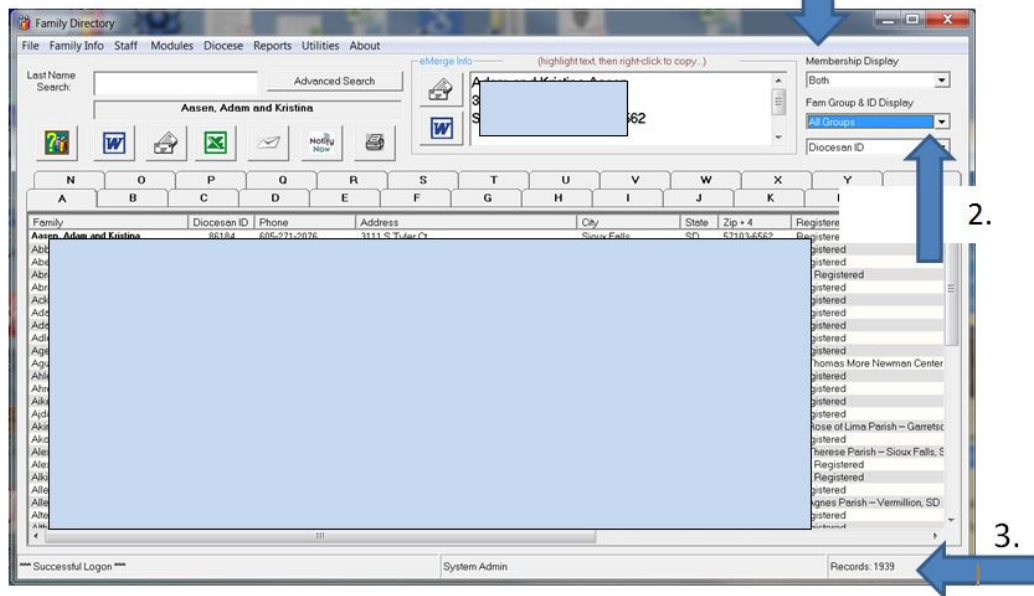
Number of Registered Families is: _____

The screenshot shows the Family Directory application window. At the top, a menu bar includes 'File', 'Family Info', 'Staff', 'Modules', 'Diocese', 'Reports', 'Utilities', and 'About'. Below the menu is a search area with 'Last Name Search' and 'Advanced Search' buttons. A search result for 'Aasen, Adam and Kristina' is displayed, showing a family ID of 62. To the right, there are three dropdown menus: 'Membership Display' (set to 'Registered'), 'Fam Group & ID Display' (set to 'Active'), and 'Diocesan ID'. A table below shows a list of families with columns for Family, Diocesan ID, Phone, Address, City, State, Zip + 4, and Registered. The table is mostly obscured by a large blue rectangle. At the bottom, a status bar shows 'Successful Logon', 'System Admin', and 'Records: 1028'. Three blue arrows with numbers 1, 2, and 3 point to the 'Membership Display', 'Fam Group & ID Display', and 'Records: 1028' respectively.

Make note of ALL Groups and their Membership counts.

1. Membership Display shows Registered.
2. Fam Group as Active.
3. Note your Registered and Active Records.

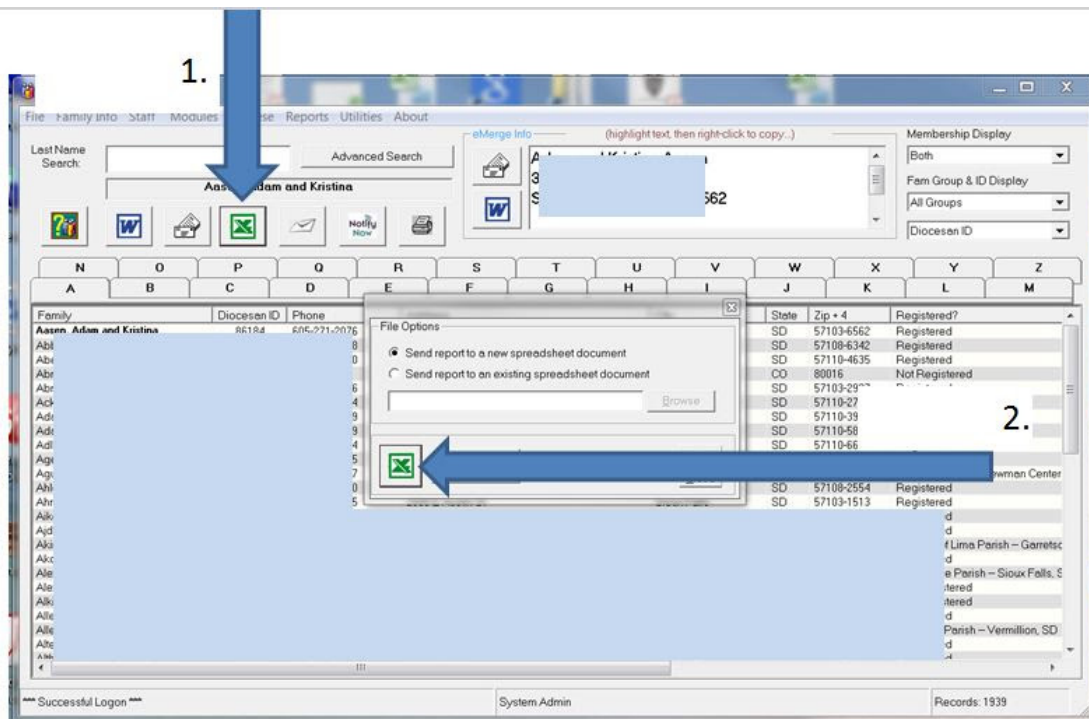
Number of Registered and Active Families is: _____



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.

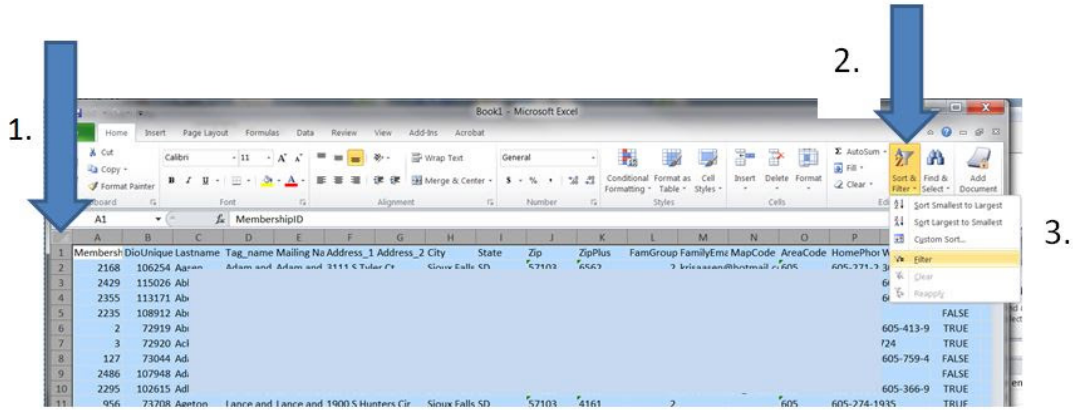
Number of Both and All Groups is: _____



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.

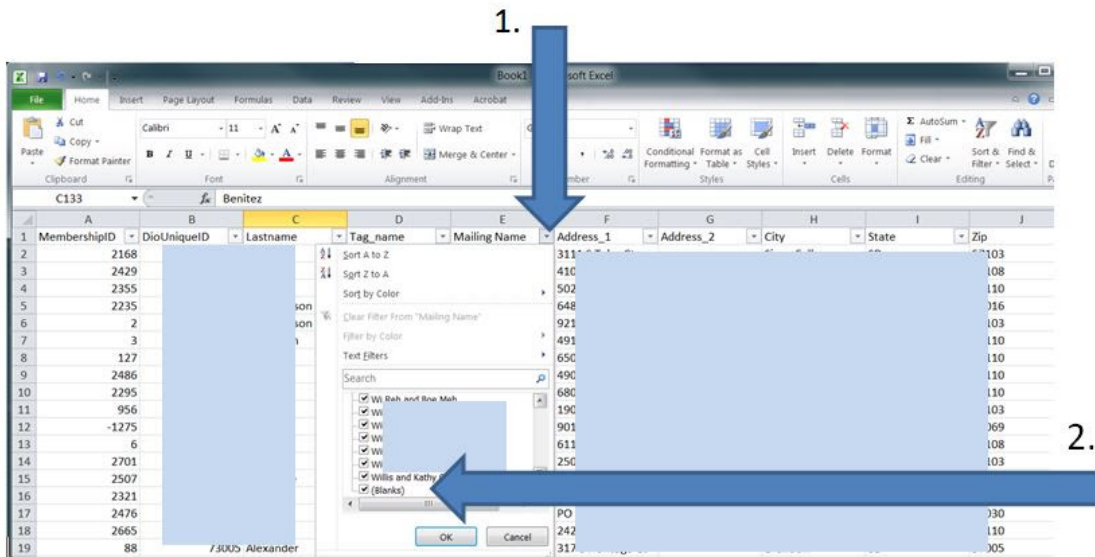
Depending on the size of your database, the export of your data to an Excel spreadsheet may take a few moments.



Excel will open displaying your data in an excel workbook.

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.

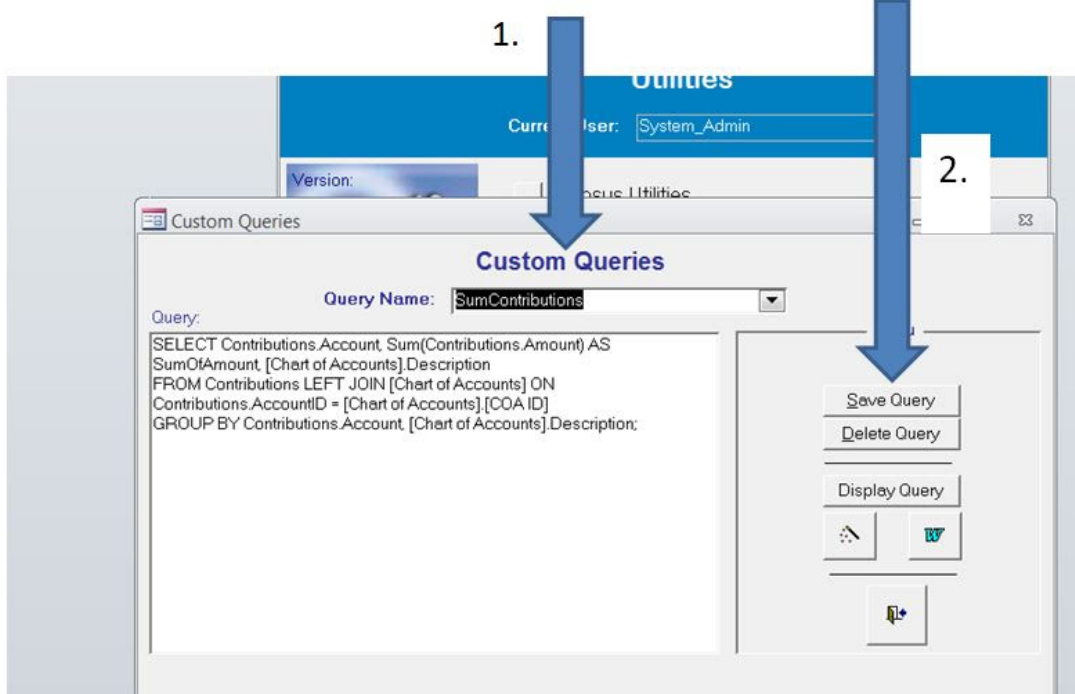
Your entire spreadsheet should now have a filter icon on each column.



1. Click on the drop down 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 what 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. 2. 3.

Account	SumOfAmount	Description	DioUniqueID
5-55-200-07	250		
555-2008	500		
910-03	0		
910-04	30	7.5 25 in F Drive	
400-05-08	9	92 All S	
400-06-01	9	.9 Asce	
400-05-15	9	02 Ash	
400-06-02	130	86 Assu	
900-06	4	25 Catl	
400-05-10		55 Catl	
444-01		77 Catl	
555-2003	54	35 CFS	
555-2004	70	25 CFS	
555-2005	61	75 CFS	
555-2006	7	3.5 CFS	
555-2007		34 CFS	
555-2008	86	53 CFS	
555-2009	86	53.94 CFS	

Record: 1 of 72 No Filter Search

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 exists but funds were posted to in.

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

1. 2.

Custom Queries

Query Name:

Query:

```
SELECT Contributions.Account, Contributions.Amount,
Contributions.Date, Contributions.Family_DUID, Contributions.MemberID,
Contributions.MembershipID
FROM Contributions
WHERE (((Contributions.Account)="5-55-200-07"));
```

Menu

Save Query
Delete Query
Display Query
[Icons: Refresh, Print]

3.

Let's see what 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.

sqldb cq_chkContribution

Account	Amount	Date	Family_DUID	MemberID	Membershipl
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.

Quarterly Contribution Report

Contribution Quarterly Report

Year: 2014

Account: 400-02

Choose Report: Monthly, Quarterly, Yearly Comparison

Print Report Exit Report

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

The screenshot shows a software window titled "Pledges Menu". At the top, there is a "Pledge Fund:" dropdown menu with "Doorway to their Future" selected. To the right of this menu is a red button labeled "Recalc Balances". Below this is a section titled "Fund Reports" containing four buttons: "Print Report - All Pledges", "Display Query - All Pledges", "Revenue Projection (5 Yr-Monthly)", and "Non Performing Pledges". Three blue arrows and numbers indicate the steps: 1. An arrow points to the "Pledge Fund:" dropdown. 2. An arrow points to the "Recalc Balances" button. 3. An arrow points to the "Print Report - All Pledges" button.

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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