Ministry Brands®

Data Validation Checklist

In the Family Directory, you'll have access to the entire history of Families and Members. To ensure the accuracy of the newly imported data into the ParishSOFT Family Suite, please utilize the Validation Checklist provided below. The checklist is designed to help you confirm the information's validity.

The program includes various reports that facilitate a thorough review of your data. It is essential to disable any POP-UP blockers to ensure these reports are displayed properly.

Should you encounter any discrepancies, promptly report them by sending an email to the project manager or parishsoftservices@ministrybrands.com. When reporting, please include specific and detailed examples of the discrepancies, along with the Family or Member DUID. A rex examples will suffice for initial reporting. **Important Note:** In the event of multiple issues, we kindly request that you send a separate email for each individual issue. This will help us address each one with the attention it deserves.

Family DUID	**Member DUID**
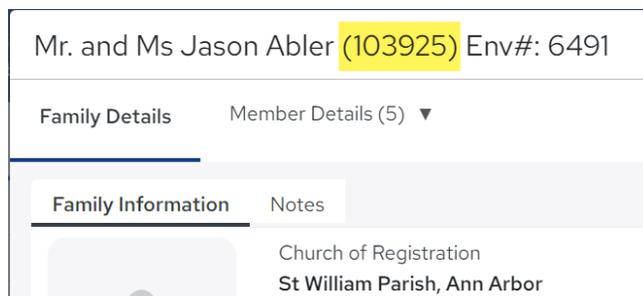
Click Here for Validation Video: **Validation Checklist**

NOTE: You may not have data for every module listed in the checklist. You only need to check those modules you have purchased and submitted data for.
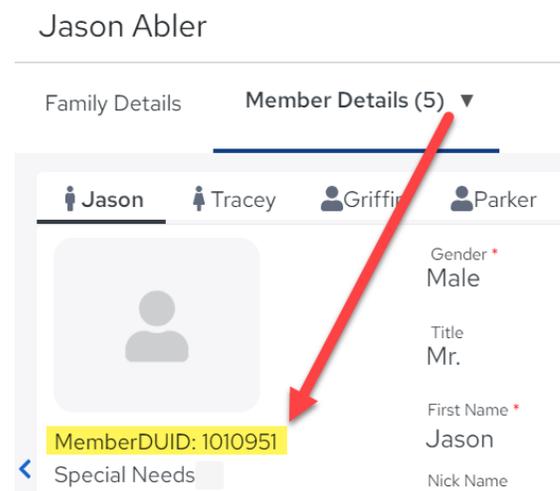
Help within the ParishSOFT Family Suite – Each page has a help icon.

Family Information

From Family Directory | Family List - Search for and Select a few families who you know have a lot of information in your old program.

❑ Click on their name in the family column and compare the family information for the same record in your old software application.
Family-List-How-to-search-for-a-family-record

Is the data correct in ParishSOFT Family Suite? _____.
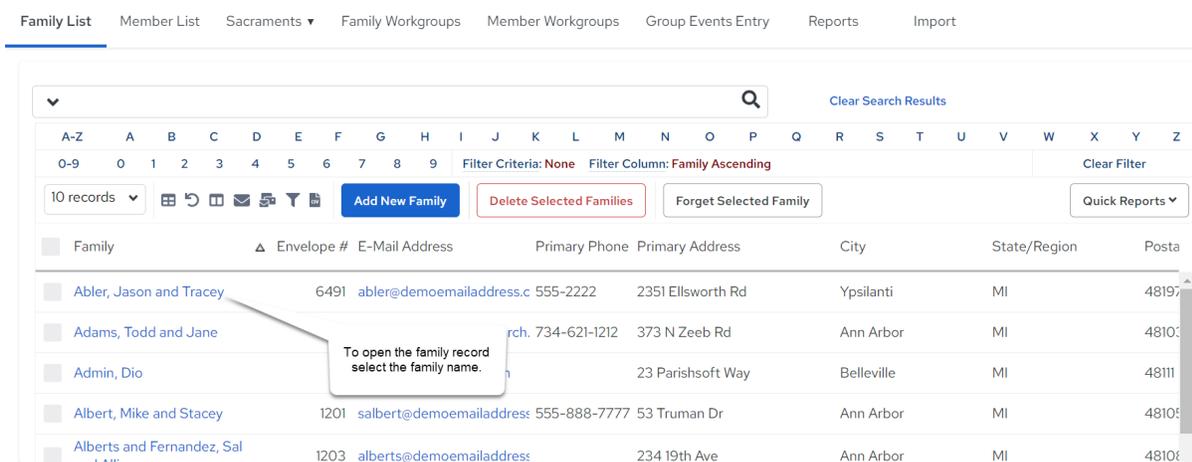
Envelope Numbers

☐ Check if the family's envelope number is correct **and** if they should be receiving envelopes.

Is the data correct in ParishSOFT Family Suite? _____

Member information

☐ Select a few members and verify their basic information.

Is the data correct in ParishSOFT Family Suite? _____

☐ While on the member tab check the information on the General tab – lower left-hand corner.

Is the data correct in ParishSOFT? _____

☐ Check the information on the Contact tab.

Is the data correct in ParishSOFT Family Suite? _____
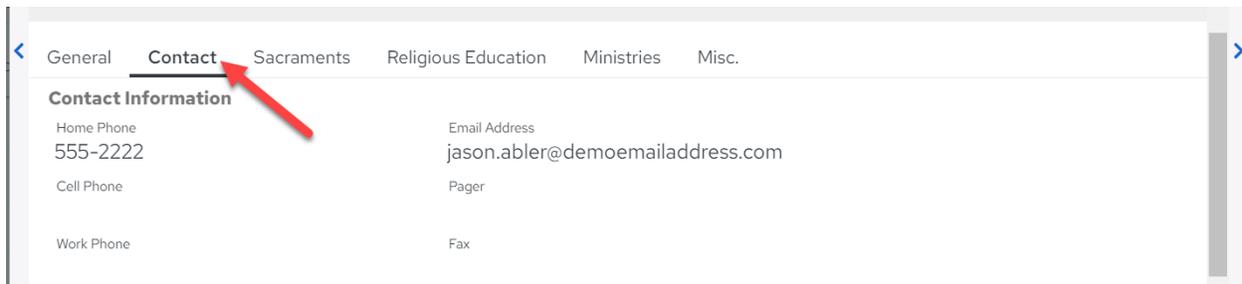
☐ Check the information on the Misc. Tab.
   Is the data correct in ParishSOFT Family Suite? _____
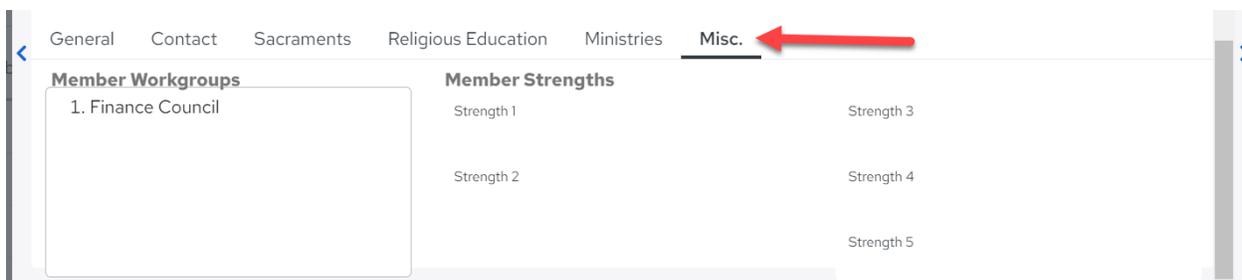
❑ Check the information on the Sacraments Tab.
   Is the data correct in ParishSOFT Family Suite? _____
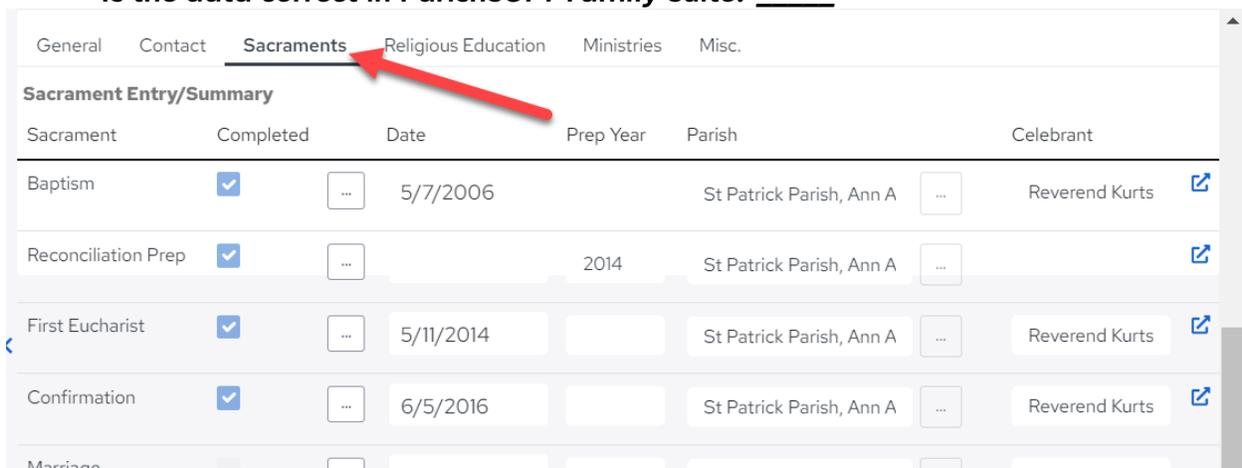
Family Directory Count

- From the Family List screen click on the funnel icon , in the Filter box that opens choose **Both** and **All Groups**, Click **Apply**.

❑ Check the count in the lower left-hand corner of the Family List Screen to view the
total records.
Is the data correct in ParishSOFT Family Suite?

_____

*Note: If you had a data integration without a holding org this number may be
different when combined with Diocesan data.*

- Next set the Family Filter to **Both**, **All Groups** and **Envelopes**, Click

Apply.

❑ Check the count in the lower left corner of the Family List Screen.
Is the data correct in ParishSOFT Family Suite? _____

*NOTE: If your data has been integrated with Diocesan data this number may be
different if the un-matched diocesan records remained in your parish.*

- From the ==Member List== screen click on the funnel icon , in the Filter box that opens choose **Both, Any Group,** and **Active** and Click **Apply**.

Filter

Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any values from the 'Search' box, or change the 'Quick filter' dropdowns if you do not want these additional constraints.

Membership Status
Both **(1)** ⭐

Member Envelopes
(Any)

Family Group
(Any Group) **(2)** ⭐

Maiden Name

Member Status
Active **(3)** ⭐

Full Name

Member Type
(Any)

Family Last Name

Address

(4) **Apply** Clear Cancel

❑ Check the count in the lower left-hand corner of the Member List Screen.
   Is the data correct in ParishSOFT Family Suite? _____

Page 1 of 35 ==(350 Records)== ‹ **1** 2 3 4 5 6 7 … 33 34 35 ›

Sacrament Information

- Click on the **Sacraments** tab from within Family Directory

- Check a member's sacraments – by choosing which Sacrament and Searching by Name.

☐ Click on the pencil box icon to View the Sacrament record.
   Is the data correct in ParishSOFT Family Suite? _____

Offering

Contribution Summary by Donor Report

- o   Select the **Offering** Tab to open the Offering Page.
- o   To get Family Giving Totals by Date Range run the **Analysis Report, Contribution Summary by Donor.**

Configure the report:
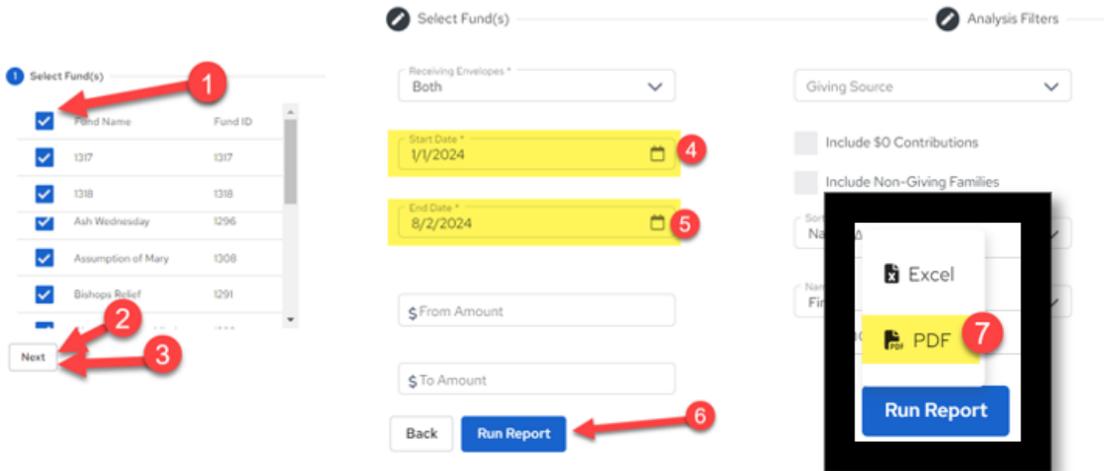
☐ Choose the PDF option and check several families' total contributions. Locate the file in your downloads and open it.
   Is the data correct in ParishSOFT Offering? _____

St William Parish

3767 Ranchero Drive Suite 100

Ann Arbor, MI 48108

Contribution Summary by Donor Report

Period: 1/1/2000 - 8/2/2024

All Donors

Total Given Range: (no min) - (no max)

All Groups

11 Funds Selected

Env #	Name(s)	Address		Home Phone	Total	Average
6491	Jason and Tracey Abler	2351 Ellsworth Rd	Ypsilanti, MI 48197 - 4855	555-2222	$7,676.58	$31.46
1129	Todd and Jane Adams	373 N Zeeb Rd	Ann Arbor, MI 48103 - 1552	734-621-1212	$10,855.00	$27.21
1201	Mike and Stacey Albert	53 Truman Dr	Ann Arbor, MI 48105	555-888-7777	$75.00	$37.50
1203	Sal and Allison Alberts and Fernandez	234 19th Ave	Ann Arbor, MI 48108		$2,785.00	$49.73
2349	Jennifer Albrecht	3810 Syracuse St	Dearborn, MI 48124 - 3324	313-694-4642	$50.00	$50.00
1155	Marion Allen	42 Vine Ave	Belleville, MI 48111	555-666-8888	$2,745.00	$49.91
1000	Paul and Andrea Allen	3 Jackson Blvd	Ann Arbor, MI 48108	545-2323	$55.00	$27.50
1025	Sarah Anderson	24 Gold Pl #45	Ann Arbor, MI 48108	555-888-9999	$80.00	$26.67
1013	Thomas and Andrea Anderson	8941 River Road	Ann Arbor, MI 48108	777-4444	$93.00	$31.00

Contribution Summary by Fund

- o   Select the **Offering** Tab to open the Offering Page.

o   To get Contributions for each fund, run the **Analysis Report, Contribution Summary by Fund Report**

❑   View fund totals for a particular date range.

Is the data correct in ParishSOFT Offering? _____

Configure the report:

Select Fund(s)   Analysis Filters   3 Report Filters

Start Date *
1/1/2020   6

End Date *
8/5/2024   7

Online Giving

ParishSOFT Giving

$ From Amount   Lockbox Import

$ To Amount   Other Import

Giving Source   Faith Direct

Include $0 Contributions   Excel   9

Back   Run Report   PDF

8

St William Parish

3767 Ranchero Drive Suite 100

Ann Arbor, MI 48108

Contribution Summary by Fund Report

Period: 1/1/2020 - 8/5/2024

Fund ID	Fund Name	Total Given	Contributions	Families	Avg Contribution	Avg Per Family
1349	Christmas Flowers	$375.00	7	7	$53.57	$53.57
1348	Easter Flowers	$375.00	7	7	$53.57	$53.57
1353	Offertory	$9,725.00	181	7	$53.73	$1,389.29
	Total	**$10,475.00**	**195**	**7**	**$53.72**	**$1,496.43**

Pledges

- o   Select the **Offering** Tab to open the Offering Page.
- o   To get Family/Member Pledge Reports run the **Pledge Report, Donor List.**

Pledge Reports   ⑤ ⬇

Select a Fund *		
Building Fund Campaign	① ⌄	
Start typing to search		

⑥ 📗 Excel

📕 PDF

| Select a Pledge Report | | |
| Donor List | ② ⌄ | |

Show Pledges That Start Between | Start Date | Start Date |
| 1/1/2000 ③ 📅 | and | 8/5/2024 ④ 📅 |

Donor List
St William Parish
Building Fund Campaign

Report Summary

Total Pledged:	$1,700.00
Total Paid:	$0.00
Pledge Balance	$1,700.00

Sustaining Gift Count: 0

☐ Scroll down the Excel file to compare the Initial Pledge, Adjustments, and Balance for several Pledges.
   Is the data correct in ParishSOFT Offering? _____

Donor List
St William Parish
Building Fund Campaign

$1,000		
$500		
	$0.00	$0.00
$0		

Env #	Pledge ID	Family ID	Family Name	Address	City	State	Zip	Start Date	Freq	Pledged	Adjustments	Paid	Balance
3330	63	103967	Flatoff, Jonathon and Traci	3752 S State Rd	Ann Arbor	MI	48108-1661	4/1/2017	Quarterly	$500.00	$0.00	-	$500.00
4249	62	103914	Spindler, Raymond and Kimberly	12 Truman Dr	Allen Park	MI	48102	4/1/2017	Monthly	$1,200.00	$0.00	-	$1,200.00
Report of 2 Pledges from 2 Givers										$1,700.00	$0.00	$0.00	$1,700.00

Religious Education Information

- **Sessions**
  - Select the **Religious Education** Tab
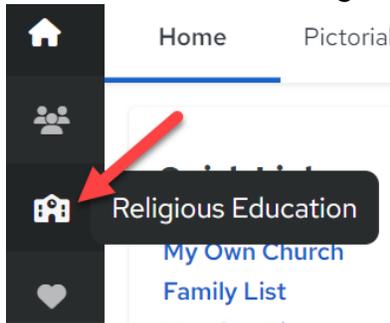
  - Select the Settings icon in the upper right of the screen.

  - Select Lookups and select the drop-down arrow.
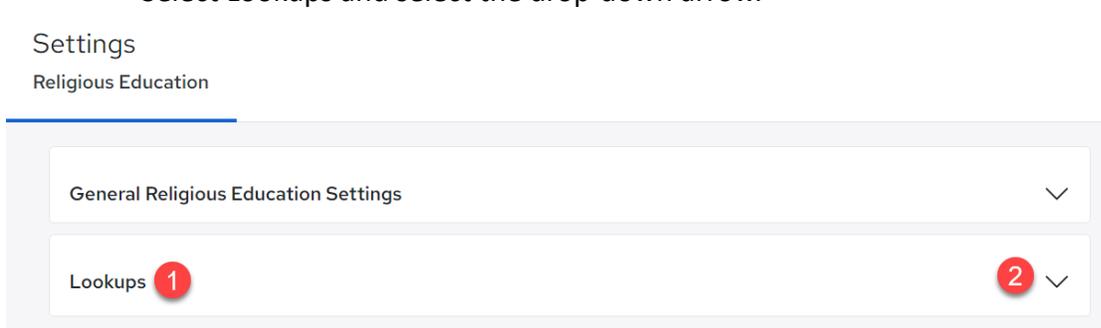
❑ Select term to verify your teams are listed.

   Is the data correct in ParishSOFT Religious Education? _____

Term 3	Building	Room	Department	Grade	Volunteer Role				
Name		Start & End Dates				Active	Default	Uses Sessions	+ Term
2016/2017		09/11/2016 – 06/04/2017				✓		✓	✏ 🗑
2019/2020		09/03/2019 – 06/12/2020				✓		✓	✏ 🗑
2020/2021		08/30/2020 – 04/25/2021				✓		✓	✏ 🗑
2022-2023		08/01/2022 – 07/01/2023				✓	✓	✓	✏ 🗑

Classes

- After selecting **Classes & Session**, select **Classes**, update the **Term**, and **Export** the report.

  Is the data correct in ParishSOFT Religious Education? _____

	A	B	C	D	E	F
1	Class Name	Session	Leader	Grades	Student Count	Capacity
2	1st Grade	Monday 4 PM	Madison Posey	1	4	15
3	2nd Grade	Monday 4 PM		2	3	15
4	3rd Grade	Monday 4 PM	Cristina Pepper	3	5	
5	4th Grade	Monday 4 PM	Armstrong McCoy	4	4	
6	5th Grade	Monday 4 PM	Clancy Yates	5	5	20
7	6th Grade	Monday 4 PM	Martha Goldsmith	6	7	
8	7th Grade	Monday 4 PM		7	8	
9	8th Grade	Monday 4 PM	Jason Abler	8	10	30
10	Confirmation	Sacramental Prep		7, 8	18	
11	RCIA	RCIA			0	

Student Directory

- After selecting **Students & Volunteers**, **Students,** update the **term** and **Export** the report.

☐ Note: not all programs have data that fits our structure so it might be in a different format, but you should be able to see historical information for your students.

Is the data correct in ParishSOFT Religious Education? _____

	Last Name	First Name	Session	Class	Enrollment Date	Unenrollment Date	Grade	Age	Gender	Family	Phone	Baptism Completed	Baptism Date
1	Last Name	First Name	Session	Class	Enrollment Date	Unenrollment Date	Grade	Age	Gender	Family	Phone	Baptism Completed	Baptism Date
2	Smith	Aaron	Monday 4 PM	7th Grade	9/12/2022		7	15	M	Steven and Rebecca Smith	333-7777	X	6/29/2017
3	Smith	Aaron	Sacramental Prep	Confirmation	10/31/2022		7	15	M	Steven and Rebecca Smith	333-7777	X	6/29/2017
4	Wong	Adam	Monday 4 PM	8th Grade	9/13/2022		8	15	M	Andrew and Anne Wong	888-999-5521	X	10/11/2008
5	Wong	Adam	Sacramental Prep	Confirmation	10/31/2022		8	15	M	Andrew and Anne Wong	888-999-5521	X	10/11/2008
6	Navarre	Alanna	Monday 4 PM	1st Grade	9/12/2022		1	9	F	Jason and Estelle Navarre	734-613-6574	X	5/30/2015
7	Anderson	Alexander	Sacramental Prep	Confirmation	10/31/2022		8	16	M	Peter and Ellen Stevenson		X	7/6/2008
8	Anderson	Alexander	Monday 4 PM	8th Grade	9/13/2022		8	16	M	Peter and Ellen Stevenson		X	7/6/2008
9	Johnson	Ashlee	Monday 4 PM	6th Grade	9/12/2022		6	13	F	Debbie Maddax			
10	Spindler	Brad	Monday 4 PM	5th Grade	9/12/2022		5	13	M	Raymond and Kimberly Spindler	555-444-7777		
11	Miller	Camden	Monday 4 PM	6th Grade	9/12/2022		6	13	M	Christopher and Erica Miller	734-480-1111		
12	Mueller	Cassandra	Monday 4 PM	4th Grade	9/16/2022		4	12	F	Eric and Rebecca Mueller	555-1212		
13	Oberhausen	Cecelia	Monday 4 PM	1st Grade	9/12/2022		1	8	F	Michael and Fran Oberhausen	313-564-8910	X	2/5/2017

Ministry Scheduler

Count of Ministries

- Select **Ministry Scheduler** Tab and **Minister Directory**
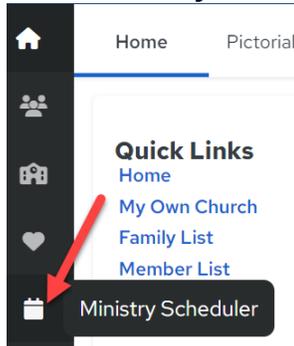
-
- Count of Ministries
- Select Ministry Directory, then the **Filter** icon

- From the Advanced Filter box that opens choose filters: Select **All Ministry Groups** and you can get a *count of all members in a ministry* or *choose different combination*s to see data and get counts.

- ❑ Export the report and open it.
  Is the data correct in ParishSOFT Ministry Scheduler? _____

A-Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
0-9	0	1	2	3	⑤	5	6	7	8	9			Filter Criteria: None		Filter Column: Ministr

10 records ⌄   ▦ ↺ ✉ 🖨 ▼ 📄 🔍 View Incomplete Minister Records   Quick Reports ⌄

- Filtered on Liturgy, Lector

Advanced Filter ⬅

Last Name:	
Ministry Group:	Liturgy ⌄ ①
Ministry:	Lector ⌄ ②
Ministry Role:	All ⌄
Ministry Event:	All ⌄
Trained:	Any ⌄
Sub Only:	Any ⌄
Volunteered:	Any ⌄
Date Filtering:	☐ Enable Date Filtering

Include or Exclude Selected Criteria

Select "Include" to include all ministers with the selected filter criteria

③ **Apply Filter**   Clear Filter   Cancel

❑ Export the report and open it.
Is the data correct in ParishSOFT Ministry Scheduler? _____

A-Z	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
0-9	0	1	2	3	⑤	5	6	7	8	9			Filter Criteria: None		Filter Column: Ministr

10 records ⌄   ▦ ↺ ✉ 🖨 ▼ 📄 🔍 View Incomplete Minister Records   Quick Reports ⌄

❑ **Count of Ministers**
Is the data correct in ParishSOFT Ministry Scheduler? _____

Configuration

❑ Ministry Scheduler - If you are a Time & Talent user, the **Ministry Scheduler Configuration** page initially displays values brought into Ministry Scheduler from Time & Talent.
Is the data correct in ParishSOFT Ministry Scheduler? _____
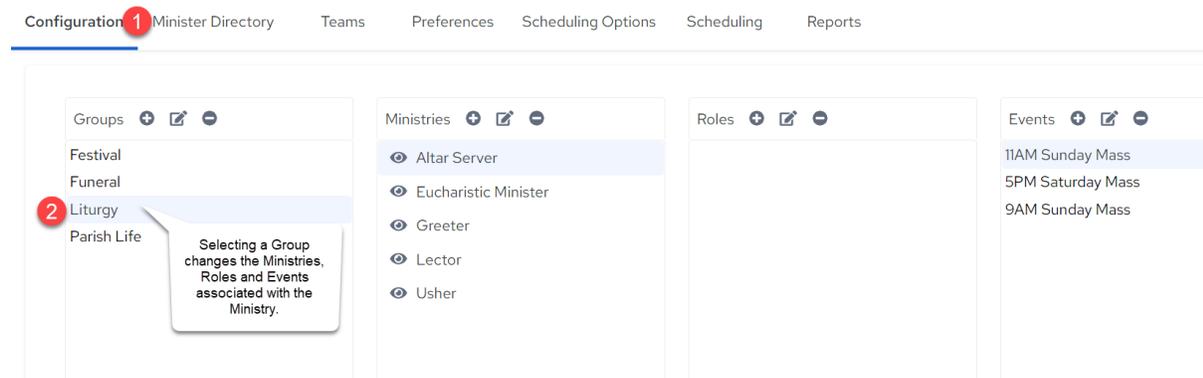
 Please email your project manager or parishsoftservices@ministrybrands.com with any missing or incorrect information and provide:

1. Two-Three examples of the concern
2. Family or member name (s)
3. Family or member DUID

NOTE: If you find multiple issues, we request that you send ==a separate email== for each issue.

If you are satisfied with your data, please respond to your **data review email** with your acceptance.

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At ParishSOFT, we are committed to supporting our customers' training needs. To this end, we provide a range of options that include complimentary resources and premium services available for purchase.

Introducing PATHFinder

PATHFinder is our dedicated learning management system, designed to streamline your training experience with ParishSOFT products. As a valued ParishSOFT user, you gain complimentary access to an extensive library of training videos and courses within PATHFinder. To take advantage of this resource, simply sign up.

Getting Started with PATHFinder

To register, use the PATHFinder self-sign-up link: https://parishsoft.litmos.com/self-signup/ (Note: This link is valid for a single use per computer). Once registered, you can log in at https://parishsoft.litmos.com. For ease of access in the future, we recommend bookmarking this page.

Access Code: Your sign-up code is: Welcome

ParishSOFT Success Lab
ParishSOFT Success Lab offers webinars and small group training courses to help you effectively use your software to its fullest potential. These sessions provide valuable insights and hands-on experience, allowing you to maximize productivity and efficiency. Previous Success Labs can be found in PATHFinder.

Knowledgebase
Have a question you need an answer to check out our Knowledgebase at https://www.parishsoft.com/support/. Search hundreds of articles to receive directions w/images to help you complete your tasks.

Support@parishsoft.com
Once you go live, if you need assistance, have a suggestion for an enhancement request or the program isn't functioning, please reach out to our support team.