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.

Member DUID

MemberDUID: 1010951

Special Needs

First Name *

Jason

Nick Name

Mr. and Ms Jason Abler <mark>(103925)</mark> Env#: 6491	Jason Abler
Family Details Member Details (5) ▼	Family Details Member Details (5) ▼
Family Information Notes	🛊 Jason 🕴 Tracey 💄 Griffir 💄 Parker
Church of Registration St William Parish, Ann Arbor	Gender * Male
Click Here for Validation Video: <u>Validation</u>	Mr.

Checklist

Family DUID

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.

<u>@</u>	St Wil Ann Ar	liam I bor	n Parish pr												2 3 KS											
A	Family List Member List Sacraments • Family Workgroups Member Workgroups Group Events Entry Reports Import										Family Directory Help															
::::																										Help with this Page
^	~																		Q		Clear Search Results				My Own Church Admin Help	
iPh	A-Z		А	в	с	D	Е	F	G	н	1	J		к	L	м	N	0	Р	Q	R	s	т	U	v	About
-	0-9		0 1	2	3	4	5	6	7	8 9	F	Filter C	Criteria	a: Non	e Filt	ter Coli	umn: Fai	nily Asc	ending							Clear Filter

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? _____.

Family List Member List Sacramen	ts 🔻 Family Workgroups Member Workgroups	Group Events Entry	Reports Import		
~		Q	Clear Search Results		
A-Z A B C D	EFGHIJKLM	1 N O P Q	R S T U	V W X Y	z
0-9 0 1 2 3 4 9	5 6 7 8 9 Filter Criteria: None Filter	Column: Family Ascending		Clear Filter	
10 records 👻 🖽 🗂 🖬 🖉 🎜	Add New Family Delete Selected Famili	es Forget Selected Family		Quick Report	rts 🗸
Family 🛆 Er	nvelope # E-Mail Address Primary Phon	e Primary Address	City	State/Region P	Posta
Abler, Jason and Tracey	6491 abler@demoemailaddress.c 555-2222	2351 Ellsworth Rd	Ypsilanti	MI 4	18197
Adams, Todd and Jane	rch. 734-621-1212	373 N Zeeb Rd	Ann Arbor	MI 4	18103
Admin, Dio	select the family name.	23 Parishsoft Way	Belleville	MI 4	18111
Albert, Mike and Stacey	1201 salbert@demoemailaddress 555-888-777	7 53 Truman Dr	Ann Arbor	MI 4	18105
Alberts and Fernandez, Sal	1203 alberts@demoemailaddress	234 19th Ave	Ann Arbor	MI 4	18108

Envelope Numbers

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

~					Q	Clear Search	Results			
A-Z A B C	D E F	GHIJ	K L M	N O	P Q	R S	T U	v w	х	Y Z
0-9 0 1 2 3	4 5 6	7 8 9 Filter Crite	ia: None Filter Co	olumn: Family Asce	ending				Clear Filt	ter
10 records 👻 🖽 🖱 🔳 🖿	i 5• T 6	Add New Family Delete	Selected Families	Forget Sel	lected Family				Quick Re	eports 🗸
Family	▲ Envelope #	E-Mail Address	Primary Phone	Primary Addres	S	City		State/Regi	on	Posta
Abler, Jason and Tracey	6491	abler@demoemailaddress.	555-2222	2351 Ellsworth F	Rd	Ypsilanti		MI		48197
Adams, Todd and Jane	1129	adamsfamily@demochurch	734-621-1212	373 N Zeeb Rd		Ann Arbor		MI		4810:
Admin, Dio		training@parishsoft.com		23 Parishsoft W	lay	Belleville		MI		48111
Albert, Mike and Stacey	1201	salbert@demoemailaddres	555-888-7777	53 Truman Dr		Ann Arbor		MI		48105
Alberts and Fernandez, Sal and Allison	1203	alberts@demoemailaddres	E	234 19th Ave		Ann Arbor		MI		48108

Mr. and Ms Jason Abler (103925) Env#: 6491 St William Parish, Ann Arbor × Member Details (5) 🔻 Family Details Family Information Notes Church of Registration Modified On: Tuesday, October 31, 2017 4:21 PM St William Parish, Ann Abor Family Group Active Registration Date 3/29/2017 Registration Status Unregistered Date Last Name * Primary Address Home Address Abler First Name(s)* . Jason and Tracey Home Mailing Other Formal Mailing Name . United States Mr. and Ms Jason Abler < Informal Name Postal Code plus 4 Jason and Tracey Abler 4855 48197 Auto Fill Formal Salutation Address Line 1 Mr. and Ms Abler 2351 Ellsworth Rd Informal Salutation Address Line 2 Jason and Tracey Email Address City abler@demoemailaddress.com ۲ Ypsilanti Primary Phone State/Region: Michigan 555-2222 Phone Number Emergency Phone 555-3333 Send Mail 🗸 Publish Address 🗸 Emer. Ph. Desc Send Contrib. Env. 🗸 Publish Photo for Pictorial Publish Phone 🔽 Directory Publish Email 🔽 ~ Envelope # Annual Gift \$ Send Magazine 0 6491 Next Giving History Map Code Edit Details Close

Is the data correct in ParishSOFT Family Suite?_____

Member information

□ Select a few members and verify their basic information.

	Todd Adams		St William Parish, Ann Arbor								
	Family Details Mer	mber Details (4) 🔻	t each name to view the members da	ata.							
	† Todd † Jane	Benjamin Maria 2+ Add	Mimport								
<	MemberDUID: 1011042 Special Needs Special Needs Details	Gender * Male Title Mr. First Name * Todd Nick Name Middle Name Eric	Status • Active Birth Date 1/15/1980 Age 44 Marital Status Married Language English	Birth Place Wixom, MI 48393 Date of Death Religion Roman Catholic Ethnicity Caucasian	>						
	Life Events	Last Name * Adams Suffix Maiden Name Role * Husband	Envelope # O	Next Send?							
	General Contact	Sacraments Reliaious Educati	on Ministries Misc.		•						

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? _____

	General Contact Sacrame	nts Reli	gious Education	Ministries	Misc.		•
	General & Communication		Education & C	areer		Additional Information	
	Father Name		Career Type			Username	
	Mother Name		Details			Soc Sec #	~
<	Maiden Name		School			Aux ID	>
	Responsible Adult		Education			Vendor ID	- 1
	Sacrament Remarks Created through new membe creation process	r 📕	Grad Year			Member Notes	
			College & Grad	uate School			•

Check the information on the Contact tab.
 Is the data correct in ParishSOFT Family Suite? _____

<	General Contact Sacraments	Religious Education Ministries Misc.	>
	Contact Information Home Phone 555-2222	_{Email Address} jason.abler@demoemailaddress.com	- 1
	Cell Phone	Pager	
	Work Phone	Fax	

Check the information on the Misc. Tab. Is the data correct in ParishSOFT Family Suite? _____

General Contact Sacraments	Religious Education Ministries Misc.	_	•
Member Workgroups 1. Finance Council	Member Strengths Strength 1	Strength 3	
	Strength 2	Strength 4	
		Strength 5	

Check the information on the Sacraments Tab.
 Is the data correct in ParishSOFT Family Suite? _____

	General Con	tact Sacram	ents	Religious Education	Ministries	Misc.		
	Sacrament Entry	//Summary						
	Sacrament	Completed		Date	Prep Year	Parish	Celebrant	
	Baptism	~		5/7/2006		St Patrick Parish, Ann A	 Reverend Kurts	ď
	Reconciliation Pre	p 🔽			2014	St Patrick Parish, Ann A		ď
¢	First Eucharist			5/11/2014		St Patrick Parish, Ann A	 Reverend Kurts	ď
	Confirmation			6/5/2016		St Patrick Parish, Ann A	 Reverend Kurts	ď
	Marriago							

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**.

Membership <mark>Both</mark>	1 → ★ Family Work Groups	
Family Group All Groups	2 → ★	
Send Envelopes (Any)		
dvanced Options		

□ 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?

 4													
Page 1 of 13 (126 Records)	<	1	2	3	4	5	6	7	 11	12	13	>	

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

	Filter												
	Membership			1~	• 📩 🕴	-amily V	Vork Gro	oups					
	Family Group All Groups			2~	-) •] ★	Churc Schoo	h Cleanup ol Families					•	
	Send Envelopes				3 ~	Schoo	ol Families 2 Birds	2015-2016				•	
	✓Advanced Opti	ons											
	Filter By ID Diocesan ID				~	Registra	tion Date						
	- Enter ID					E-Mail A	ddress —						
	First Name					(Any)						• •	
Apply				4	Apply	Clear	ancel					,	
Check the	count in th	e low	er left	cornei	r of th	e Fam	ily List	: Scre	en.				
Is the date	a correct in	Pari	shSOF1	^r Fami	ily Sui	te?							
Page 1 of 11 <mark>(107</mark>	Records)	1	2	3	4	5	6	7		9	10	11	>

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**.

y values from the 'Search' box, or change	e the 'Quick filter' dropdowns if you do not want these additi	onal constraints.
Membership Status Both	(Any) Member Envelopes	~
Family Group (Any Group)	2 → ★ Maiden Name	
Member Status Active	3 ♥ ★	
Member Type (Any)	Family Last Name	
	Address	

□ 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.

Before adding new sacrament	t records you must do a se	arch to make sure it does not exist. Se	arch below.	
Sacrament 1	abler 2	Maiden Name	First Name	Include Date Range
3 Search Clear				

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

Completed Or Last Name	Maiden Name	First Name	Suffix	Member E-Mail	Age Parish Info
03/24/2004 Abler		Griffin			20 St James Pa Arbor
04/28 Select the pencil icon to vie record.	ew the sacrament	Parker			16 St James Pa Arbor
08/02/2009 Abler		Spencer			15 Demo Churc Arbor
Edit Baptism record f	for Spencer Gre	gory Abler (36	576)		2
	Completed	~			5
	Completed On – Sun Aug O2 2	2009			
Member DUID: 1011095	Prep Year				
	Parish Demo Chur	ch, Ann Arbor			
	Celebrant Rev Priest Ca	tholic			}
					~
Baptismal Name Spencer Gregory Abler			_{Sponsor 1} Maria Brenda Adams	6] ≛≛ 🗧
Faith of Baptism Roman Catholic		~	Sponsor 2 Todd Eric Adams		L+1-
			Witness 1		

Offering

Contribution Summary by Donor Report

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

Configure the report:

		Select Fund(s)		Ø A	nalysis Filters
Select Fund(s)	1	Receiving Envelopes * Both	~	Giving Source	~
Pond Name	Fund ID	C Start Date *		Include \$0 Contributions	
1317	1317	1/1/2024			97
1318	1318	< End Date *		Include Non-Giving Fami	nes
Ash Wednesday	1296	8/2/2024	5	Na	/
Assumption of Mary	800			B Excel	
 Bishops Relief 	1291	A Francisco A second		Fin	1
Next 2	•	S Prom Amount		🖻 院 PDF	2
		\$To Amount			
		Back Run Report	6	Run Repor	t

□ 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						
		37	67 Ranchero Drive Suite 100						
	Ann Arbor, MI 48108								
Contr	ibution Summary by Dor	or Report							
Period	: 1/1/2000 - 8/2/2024								
All Dor	nors								
Total G	Given Range: (no min) - (no m	nax)							
All Gro	lins								
All Gro	oups								
All Gro 11 Fun	oups nds Selected								
All Gro 11 Fun Env #	oups nds Selected Name(s)	Address		Home Phone	Total	Average			
All Gro 11 Fun Env # 6491	pups nds Selected Name(s) Jason and Tracey Abler	Address 2351 Ellsworth Rd	Ypsilanti, Ml 48197 - 4855	Home Phone	Total \$7,676.58	Average \$31.46			
All Gro 11 Fun Env # 6491 1129	pups nds Selected Name(s) Jason and Tracey Abler Todd and Jane Adams	Address 2351 Ellsworth Rd 373 N Zeeb Rd	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552	Home Phone 555-2222 734-621-1212	Total \$7,676.58 \$10,855.00	Average \$31.46 \$27.21			
All Gro 11 Fun Env # 6491 1129 1201	bups Inds Selected Name(s) Jason and Tracey Abler Todd and Jane Adams Mike and Stacey Albert	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105	Home Phone 555-2222 734-621-1212 555-888-7777	Total \$7,676.58 \$10,855.00 \$75.00	Average \$31.46 \$27.21 \$37.50			
All Gro 11 Fun Env # 6491 1129 1201 1203	https https https://www.analysical https://www.anal	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr 234 19th Ave	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105 Ann Arbor, MI 48108	Home Phone 555-2222 734-621-1212 555-888-7777	Total \$7,676.58 \$10,855.00 \$75.00 \$2,785.00	Average \$31.46 \$27.21 \$37.50 \$49.73			
All Gro 11 Fun Env # 6491 1129 1201 1203 2349	Add Selected Name(s) Jason and Tracey Abler Todd and Jane Adams Mike and Stacey Albert Sal and Allison Alberts and Fernandez Jennifer Albrecht	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr 234 19th Ave 3810 Syracuse St	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105 Ann Arbor, MI 48108 Dearborn, MI 48124 - 3324	Home Phone 555-2222 734-621-1212 555-888-7777 313-694-4642	Total \$7,676.58 \$10,855.00 \$75.00 \$2,785.00 \$50.00	Average \$31.46 \$27.21 \$37.50 \$49.73 \$50.00			
All Gro 11 Fun Env # 6491 1129 1201 1203 2349 1155	Add Selected Name(s) Jason and Tracey Abler Todd and Jane Adams Mike and Stacey Albert Sal and Allison Alberts and Fernandez Jennifer Albrecht Marion Allen	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr 234 19th Ave 3810 Syracuse St 42 Vine Ave	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105 Ann Arbor, MI 48108 Dearborn, MI 48124 - 3324 Belleville, MI 48111	Home Phone 555-2222 734-621-1212 555-888-7777 313-694-4642 555-666-8888	Total \$7,676.58 \$10,855.00 \$75.00 \$2,785.00 \$50.00 \$2,745.00	Average \$31.46 \$27.21 \$37.50 \$49.73 \$50.00 \$49.91			
All Gro 11 Fun Env # 6491 1129 1201 1203 2349 1155 1000	Add Selected Name(s) Jason and Tracey Abler Todd and Jane Adams Mike and Stacey Albert Sal and Allison Alberts and Fernandez Jennifer Albrecht Marion Allen Paul and Andrea Allen	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr 234 19th Ave 3810 Syracuse St 42 Vine Ave 3 Jackson Blvd	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105 Ann Arbor, MI 48108 Dearborn, MI 48124 - 3324 Belleville, MI 48111 Ann Arbor, MI 48108	Home Phone 555-2222 734-621-1212 555-888-7777 313-694-4642 555-666-8888 545-2323	Total \$7,676.58 \$10,855.00 \$75.00 \$2,785.00 \$50.00 \$2,745.00 \$55.00	Average \$31.46 \$27.21 \$37.50 \$49.73 \$50.00 \$49.91 \$27.50			
All Gro 11 Fun Env # 6491 1129 1201 1203 2349 1155 1000 1025	Add Selected Name(s) Jason and Tracey Abler Todd and Jane Adams Mike and Stacey Albert Sal and Allison Alberts and Fernandez Jennifer Albrecht Marion Allen Paul and Andrea Allen Sarah Anderson	Address 2351 Ellsworth Rd 373 N Zeeb Rd 53 Truman Dr 234 19th Ave 3810 Syracuse St 42 Vine Ave 3 Jackson Blvd 24 Gold PI #45	Ypsilanti, MI 48197 - 4855 Ann Arbor, MI 48103 - 1552 Ann Arbor, MI 48105 Ann Arbor, MI 48108 Dearborn, MI 48124 - 3324 Belleville, MI 48111 Ann Arbor, MI 48108 Ann Arbor, MI 48108	Home Phone 555-2222 734-621-1212 555-888-7777 313-694-4642 555-666-8888 545-2323 555-888-9999	Total \$7,676.58 \$10,855.00 \$75.00 \$2,785.00 \$50.00 \$2,745.00 \$55.00 \$80.00	Average \$31.46 \$27.21 \$37.50 \$49.73 \$50.00 \$49.91 \$27.50 \$26.67			

Contribution Summary by Fund

 \circ Select the **Offering** Tab to open the Offering Page.

- To get Contributions for each fund, run the **Analysis Report, Contribution Summary by Fund Report**
- View fund totals for a particular date range.



	St Williar	n 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
Fund ID Fund Name 1349 Christmas Flowers	Total Given \$375.00	Contributions 7	Families 7	Avg Contribution \$53.57	Avg Per Family \$53.57
Fund ID Fund Name 1349 Christmas Flowers 1348 Easter Flowers	Total Given \$375.00 \$375.00	Contributions 7 7	Families 7 7	Avg Contribution \$53.57 \$53.57	Avg Per Family \$53.57 \$53.57
Fund ID Fund Name 1349 Christmas Flowers 1348 Easter Flowers 1353 Offertory	Total Given \$375.00 \$375.00 \$9,725.00	Contributions 7 7 181	Families 7 7 7 7	Avg Contribution \$53.57 \$53.57 \$53.73	Avg Per Family \$53.57 \$53.57 \$1,389.29

<u>Pledges</u>

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

Pledge Reports					5 🕹
Select a Fund * Building Fund Campaign Start typing to search Select a Pledge Report	1× 2×			6	🖹 Excel
Show Pledges That Start Between	Start Date	3 a	End Date8/5/2024	4	
		Donor List St William Parish Building Fund Campaign			
Report Summary					
		Total Pledged:	\$1,700.00		
		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?

				В	Don St Will uilding F	ior L iam Pa ⁷ und Ca	ist arish mpaign					
\$1,000 \$500 \$0		\$0.00 \$0.00										
Env # Pledge ID 3330 63 4249 62 Report of 2 Pledges	Family ID 103967 103914 5 from 2 Give	Family Name Flaton, Jonathon Spirituer, Kaymond and Kimberly	Address 3752 S State Rd 12 Truman Dr	City Ann Arbor Allen Park	State MI MI	Zip 48108- 1661 48102	Start Date 4/1/2017 4/1/2017	Freq Quarterly Monthly	Pledged \$500.00 \$1,200.00 \$1,700.00	Adjustments \$0.00 \$0.00 \$0.00	Paid - - \$0.00	Balance \$500.00 \$1,200.00 \$1,700.00

Religious Education Information

Sessions
 Sele

Select the Religious Education Tab



• Select the Settings icon in the upper right of the screen.



• Select Lookups and select the drop-down arrow.

Settings

Religious Education

General Religious Education Settings	\checkmark
Lookups 1	2 ~

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	\checkmark	~	A	Î
2019/2020	09/03/2019 - 06/12/2020	\checkmark	\checkmark	A	Ť
2020/2021	08/30/2020 - 04/25/2021	\checkmark	\checkmark	A 2	Î
2022-2023	08/01/2022 - 07/01/2023	~ ~	\checkmark		Î

Classes

• After selecting **Classes & Session**, select **Classes**, update the T**erm**, and **Export** the report.

Is the data correct in ParishSOFT Religious Education?

** 3	Students & Voluntee	Classes & Sessions	2022-2023 ~ 3			
Ω	Classes & Sessions 🚹	2 Classes Sessions				
Ø /	Attendance	_				
	Registration	All Sessions V	epartments Grades II Departments	 ✓ All Locat 	ions 🗸	+ 0
۲ ا	Reports ^					
	Roster	Name	✓ Session	Leader	Grade	Capacity
-		<u>1st Grade</u>	Monday 4 PM	Madison Pos	ey 1	4 / 15
	Labels/List	2nd Grade	Monday 4 PM		2	3 / 15
	Attendance		······, ····		_	- /
	Registration	<u>3rd Grade</u>	Monday 4 PM	Cristina Pepp	per 3	5/
	А	В	С	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.

**	Students & Voluntee	S	Studer	nts & Vo	lunte	ers 2	022-2023	3 ~ (3)							+ Add
Ω	Classes & Sessions 1	2 s	itudents	Volu	nteers										
ø	Attendance			_											4
ľ	Registration		Q	Search N			All Sessions	ons 🗸	•	All Classes	~	All	^{des} Grades	×	
⊵	Reports	^		First	~										A
	Roster			Name		Last Name		Session	(Class	Grade	Age	Gender	Sacraments	Family
	Labels/List			<u>Aaron</u>		<u>Smith</u>		Monday 4 PM	2	7th Grade +1	7	15	М	0 15 2 15	Smith, Steven and Rebecca
	Attendance			<u>Adam</u>		<u>Wong</u>		Monday 4 PM	8	8th Grade +1	8	15	М	0 15 1 15	Wong, Andrew and Anne
	Registration			<u>Alanna</u>		<u>Navarre</u>	=	Monday 4 PM	1	<u>Ist Grade</u>	1	9	F	0590	Navarre, Jason and Estelle
	Statistics			_											Ť
			< 1	23	> 9	Show: 10	~								Showing: 1 - 10 of 46

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? _____

	А	В	С	D	E	F	G	Н	1	J	K	L	M
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	х	6/29/2017
3	Smith	Aaron	Sacramental Prep	Confirmation	10/31/2022		7	15	M	Steven and Rebecca Smith	333-7777	х	6/29/2017
4	Wong	Adam	Monday 4 PM	8th Grade	9/13/2022		8	15	M	Andrew and Anne Wong	888-999-5521	х	10/11/2008
5	Wong	Adam	Sacramental Prep	Confirmation	10/31/2022		8	15	M	Andrew and Anne Wong	888-999-5521	х	10/11/2008
6	Navarre	Alanna	Monday 4 PM	1st Grade	9/12/2022		1	9	F	Jason and Estelle Navarre	734-613-6574	х	5/30/2015
7	Anderson	Alexander	Sacramental Prep	Confirmation	10/31/2022		8	16	М	Peter and Ellen Stevenson		х	7/6/2008
8	Anderson	Alexander	Monday 4 PM	8th Grade	9/13/2022		8	16	М	Peter and Ellen Stevenson		х	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	М	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	х	2/5/2017

Ministry Scheduler

Count of Ministries

Select Ministry Scheduler Tab and Minister Directory



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 combinations to see data and get counts.

Q View Incomplete Minister Records

Quick Reports 🗸

Advanced Filter

Last Name:			
Ministry Group:	All	3 ~	
Ministry:	All	~	
Ministry Role:	All	~	
Ministry Event:	All	~	
Trained:	Any	~	
Sub Only:	Any	~	
Volunteered:	Any	~	
Date Filtering:	Enable Date F	iltering	
Include or Exe	clude Select	ted Crit	teria
Select "Include" to include	all ministers with the	selected filte	r criteria
4 Apply Fi	lter Clear Filte	r Cance	el

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

10 re	cords 🔹	• 🖽	Ċ	\sim 5	T	CSV	Q View	Incomp	olete N	Ainist	er Reco	ords	Quick	Reports	~		
0-9	0	1	2	3		5	5	6	7	,	8	9	Filter	Criteria: N	Vone	Filter Colum	n: Ministr
A-Z	А	В	С	D	Е	F	G	Н	I.	J	К	L	М	Ν	0	Р	Q

• Filtered on Liturgy, Lector

Advanced Filte	er 🔶 🗕		
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	9	
Include or Exe	clude Selected (Cri	teria

Select "Include" to inclu	de all mi	nisters with the sel	ected filter criteria
3 Apply F	Filter	Clear Filter	Cancel

Export the report and open it.

Is the data correct in ParishSOFT Ministry Scheduler?

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A-Z	А	В	С	D	E	F	G	н	1	J	К	L	М	Ν	0	Р	Q

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 <u>parishsoftservices@ministrybrands.com</u> 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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Access Code: Your sign-up code is: Welcome

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<u>Support@parishsoft.com</u>

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