

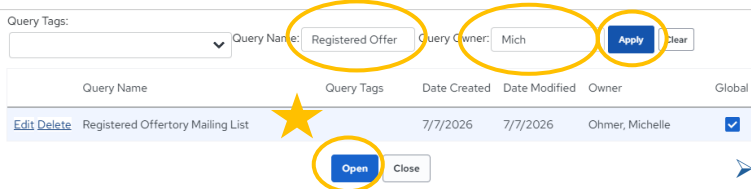
ParishSOFT Intelligent Query

Download Registered Offertory Mailing List

Description: These instructions will guide you through the process of copying an existing Intelligent Query to download a CSV file from ParishSOFT. The file contains the data needed to create a list of your church's registered offertory contributors. *Note: Unregistered contributors will not appear in the report.*

Church	Org ID	FundsID
Christ the Redeemer, Thibodaux	15963	966, 967
Holy Cross, Morgan City	15984	174, 175
Holy Family, Grand Caillou	15978	702, 703
Our Lady of Prompt Succor, Chackbay	15972	120, 2105, 108, 109
Our Lady of Prompt Succor, Golden Meadow	15977	504, 505
Our Lady of the Rosary, Larose	15981	1751, 1752
Sacred Heart, Cut Off	689	438, 439
St. Ann, Bourg	15970	636, 637
St. Bernadette, Houma	15959	1296, 1297
St. Bridget, Schriever	15988	207, 208
St. Eloi, Theriot	684	867, 868
St. Genevieve, Thibodaux	15964	1395, 1396
St. Hilary, Mathews	15986	339, 340
St. Mary's Nativity, Raceland	15987	306, 307
St. Thomas Aquinas, Thibodaux	15967	900, 901

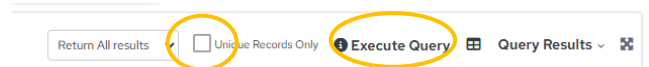
- Open ParishSOFT Family Suite
- Select **Intelligent Query**
- Select **My Queries**
- Search: Query Name: Registered Offer / Query Owner: Mich, Click **Apply**,
- My Queries



- Select: ★ **Registered Offertory Mailing List**
- Click **Open**
- Select **Save Query As**
- Rename Query: **Legacy Sunday 2026 (use your initials)** ex: Legacy Sunday 2026 MO
- (Do not check the Global Box)
- Click **Save**
- You will now be working inside YOUR query
- Look at the **Query Conditions** Box (This is the only box you should be using)
- Change the following: (see chart)
 - **Families.Owner Organization Organiza... is equal to**

- Use YOUR Church Org ID from the Chart (*click on the number to change it*)
- **Funds Fund ID is in list** _____
- Use YOUR Church Funds ID from the Chart (*click on the number to change it*)

➤ On the bottom right of your screen you will see:



- Select **Unique Records Only**, then click **Execute Query**



- Select **Query Results**, Choose **export to CSV**
- You will be prompted to save this file on your computer.
- Save it as **Legacy Sunday 2026 Mailing**.
- Open the **NEW** file
- Convert the CSV file into an excel spreadsheet (next page)

*After you review the excel spreadsheet and update your records in ParishSOFT, follow the blue bullets above to run the report again.



Converting a CSV to Excel with Filters and Frozen Header Row

1. Open Excel

- Or, double click on your CSV file to open – it will automatically open in Excel

2. Import the CSV file:

- Go to File → Open → Browse
- Select your .csv file and click Open. (file will open in Excel)

3. Save as an Excel Workbook:

- Once the data appears in Excel, go to File → Save As.
- Choose a location.
- In Save as type, select Excel Workbook (*.xlsx).
- Click Save.

4. Format your table for easier reading:

- Select your data. (Ctrl + A)
- Press Ctrl + T (or go to Home → Format as Table).
- Make sure “My table has headers” is checked.
→ This automatically includes filters and color formatting.



**Convert Excel
spreadsheet into
searchable table
with filters**

(Step-by-step version of number 4)

Add filters to the header row:

- Click anywhere in your data range.
- Go to the Data tab on the ribbon.
- Click Filter (the funnel icon).
→ Small dropdown arrows will appear in the first row cells.

Freeze the header row:

- Go to the View tab.
- Click Freeze Panes → Freeze Top Row.
→ This keeps the first row visible when you scroll.

(Delete Columns: Right click on the Column Header, Choose Delete)

Legacy Sunday 2026 Fields Cleanup

BOLD columns will be used for the Legacy Sunday mailing –
Review and update changes in ParishSOFT

See: [Standard Operating Procedures](#), pages 11-15 (formatting data)

- Options:
- 1.) Update both the excel spreadsheet and ParishSOFT records or
 - 2.) Review the list, update in ParishSOFT, rerun the Intelligent Query – The updates will appear on the new spreadsheet.

Families Envelope Number
 Families Informal Mailing Name (first and Last name)
Families Contact Info Primary Address 1
Families Family DUID
 Families Family Group Name
Families Contact Info Primary City
Families contact Info Primary State
Families Contact Info Primary Postal Code
 Families Contact Info Primary Phone
 Families Contact Info Email Address
 Families Last Name
 Families Formal Salutation (Titles and Last Name)
Families Informal Salutation (First Name(s))
Families Mailing Name (Title, Head/Husband first Name and Last Name)
 Families Contact Info Primary Address 2 (this should be blank)
 Families Contact Info Primary Zip Plus
 Families is Registered
 Families Do Not Call
 Families Do Not Solicit
 Families Organization ID
 Families Owner Organization Name

How to Delete Columns

Right click on the Column Header,
Choose Delete

Undo Delete

Use Ctrl + Z

Right Click is your Friend!

If your unsure where to find some
commands, right click to see more
choices.

Helpful Columns to help you determine your top 250

Contributions Total (since 2021)
 Contributions Count (number of Contributions since 2021)
 Contributions Payment Date Maximum (Latest Date offertory received)
 Contributions Payment Date Minimum (Earliest date offertory received since 2021)
 Contributions Payment Minimum (lowest offertory amount since 2021)
 Contributions Payment Maximum (largest offertory amount since 2021)
 Contributions Organization ID

(Next Step, Follow Instructions provided by Sarah Adams)

Create Email List for Flocknote

- Log in to **ParishSOFT**
- Click **Family Directory**
- Click **Member List**
- Select **Advanced Filter icon**:



- Update the following Criteria:
Membership Status: **Registered**
- Click **Apply**
- Click on **CSV icon**



- **Save the File**
- Name: **Legacy Sunday email list 2026**
- Follow instructions: **Converting a CSV to Excel with Filters and Frozen, Header Row – Step number 4**

Remove Duplicates

See top of screen/ribbon – Select Data,
Remove Duplicates (unselect ALL,
check Member email)

How to Delete Columns

Right click on the Column Header,
Choose Delete

Undo Delete

Use Ctrl + Z

Right Click is your Friend!

If you're unsure where to find some
commands, right click to see more
choices.

Member List Fields

Bold Fields are the columns used for the Legacy Sunday 2026 email list

Review and Update (delete names with NO email address)

Member Last	Family DUID	Plus 4
Member First	Home Phone	Age
Family Last Name	Mobile Phone	Birthdate
Member DUID	Work Phone	Registered Org ID
Registered	Gender	Organization of Registration
Family Group	Mailing Name	Grad Year
Member E-Mail	Address	Ethnicity
Member Status	City	Aux ID
Member Type	State/Region	
Envelope#	Postal Code	

Next Step, Follow Instructions provided by Sarah Adams