What Everyone Needs to Know in GabrielSoft
Joseph Schmidt (January 30, 2023)

Each database works a little differently. There are a few key details that everyone needs to know about GabrielSoft in order to maintain the integrity of our data.

1. Family and Member data is linked between parishes

In GabrielSoft, there is ONE family record and ONE member record for each family or member, and these records are shared between parishes. A family can be ***registered in ONLY ONE parish,*** but the ***family is associated with every parish where they were ever registered, donated, received a sacrament, etc.***

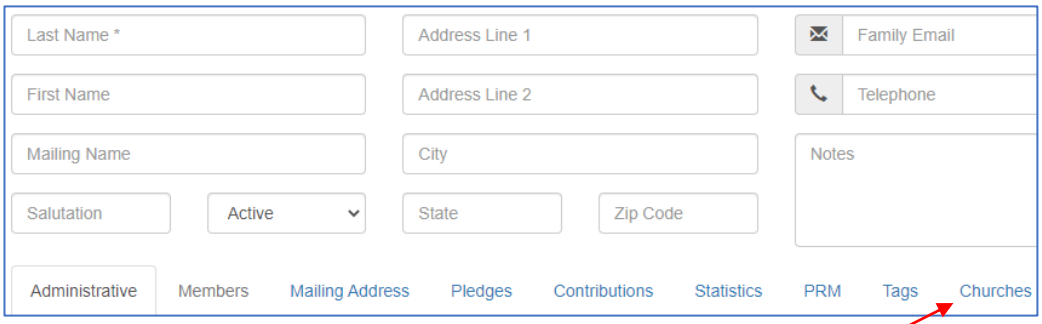
For example, if the Jones family switched from St. Peter Church to Holy Family Church, the family record will appear in both parish databases. ***And since it is one record, each associated parish will be able to view and edit the record.***

FAMILY RECORD

IMPORTANT: Whatever you update in one parish will be seen in the other parish.

This includes:

- Name
- Address
- Mailing Name
- Salutation
- Family Email
- Telephone
- Notes
- Administrative Info.
- Family Members
- Tags
- Church Memberships
- PRM Notes (unless marked private)



NOTE: All parishes where the family is associated are visible under the Churches tab.

The only exceptions are the following:

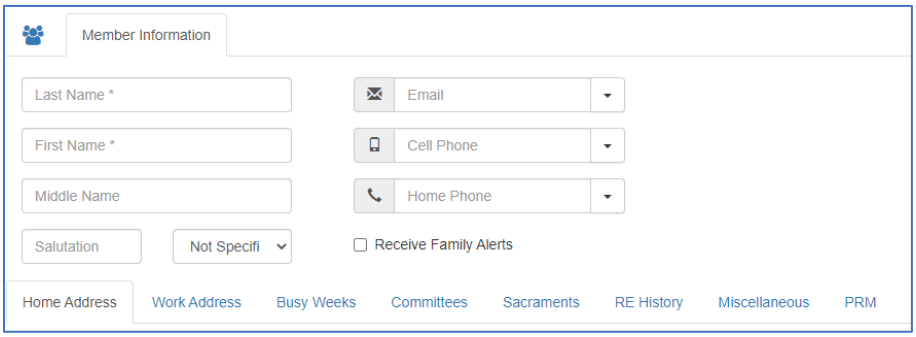
- Family status can be viewed from other parishes, but only changed within each parish database.
- Contribution data can only be viewed by the parish who entered the contributions.

MEMBER RECORD

IMPORTANT: Whatever you update in one parish will be seen in the other parish.

This includes:

- Name (First, Middle, Last)
- Member Status
- Email
- Cell Phone
- Home Phone
- Sacraments
- Miscellaneous (birthday, etc.)
- PRM notes (unless marked private)



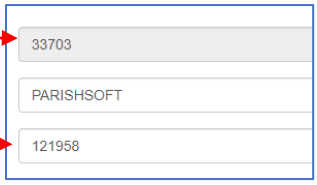
DIOCESAN RULE: DO NOT update member status of a person who is not registered at your parish, unless they are deceased. (Marking a former member/parishioner as Inactive, will change their current member status to Inactive in all parishes where the family is currently associated.)

2. ParishSoft ID numbers are recorded in GabrielSoft

For families that were transferred from ParishSoft, the Family DUID has been recorded. It can be found under the Administrative tab in the family record:

- GabrielSoft Family ID
  This number is automatically generated by the system and can't be altered.

- ParishSoft Family DUID
  This number is also listed as the System Family ID (see below).



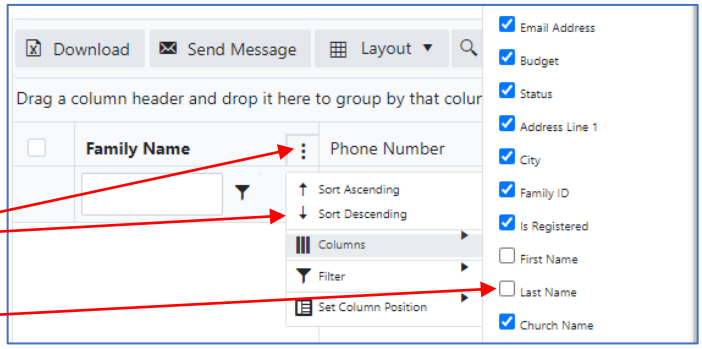
It is best to use the GabrielSoft Family ID for all parishioner information.

3. Customize the Family Explorer for Better Experience

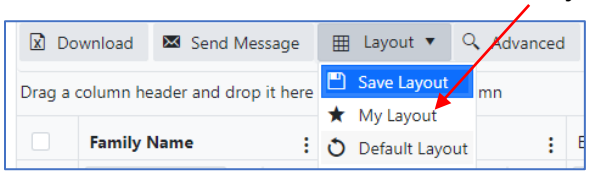
The Family Explorer includes much more information than is visible in the default layout. Customizing your layout might be helpful.

To add or remove additional columns:

- Click the stoplight button on any column
- Click on Columns
- Check the boxes
  next to each item you want to add (or remove)



- When finished, be sure to click Save Layout in the Layout menu pulldown



NOTE: Changing the layout does NOT change any of the data stored in your system. It only changes what you can see on your screen. You can revert to the original layout by clicking on Default Layout in the Layout menu pulldown.

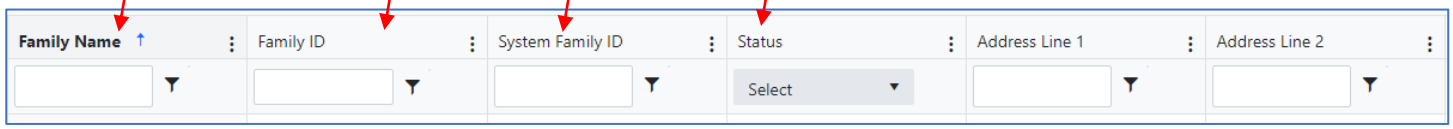
Sample layout: The following are the items I have found helpful. Your choices might be different.

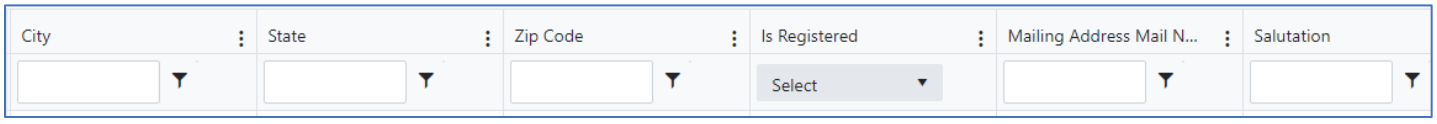
This column is required in the system

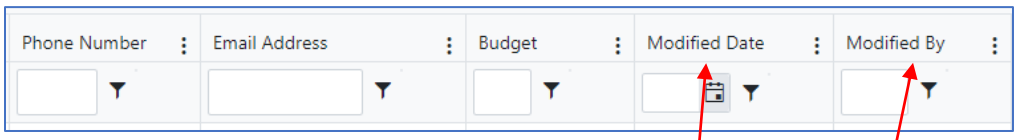
GabrielSoft Family ID

ParishSoft Family DUID

Status shows if the family is Active, Inactive, Sacrament Only, Deceased, Etc.







These two columns show you when the record was last modified and by whom.

REMEMBER: You can search in these columns by typing in the boxes, or sort by clicking on the column name.