

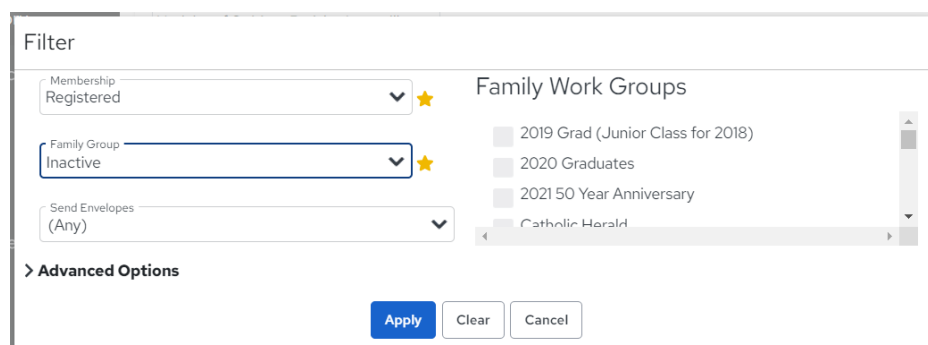
ParishSOFT Basic Clean UP prior to data export-

Check Family Registration and Family Group Status

Verify that all the appropriate families are correctly marked with their Registration status. We've found that some users miss the **Registration** checkbox when adjusting a **Family Group** to something like Inactive. Please follow the steps below to verify your families have a correct Registration status.

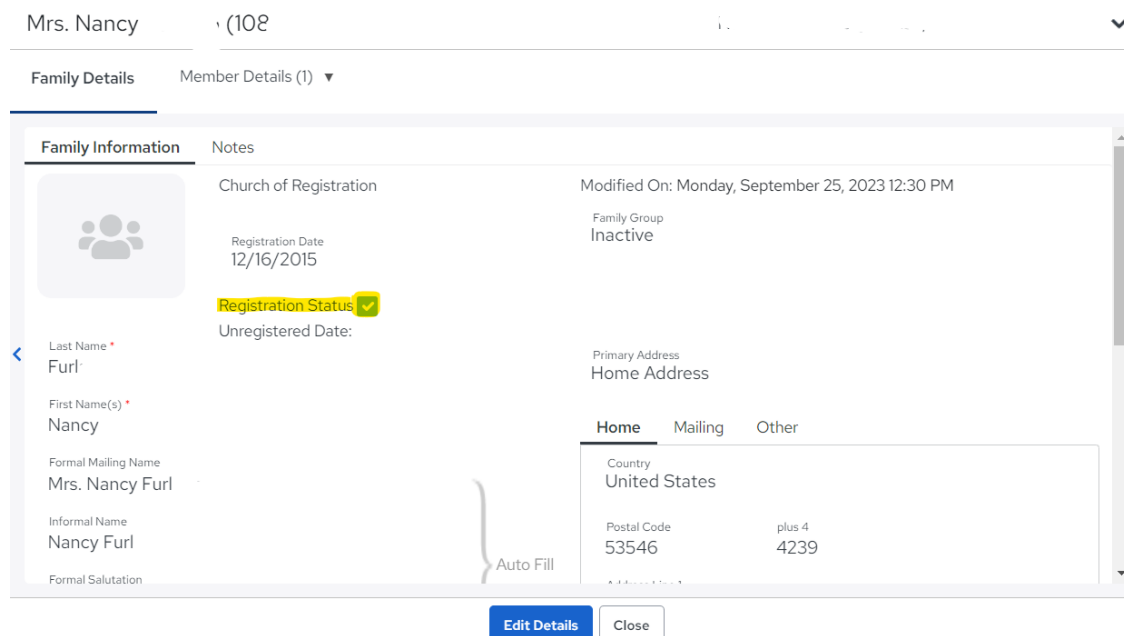
- 1) Going to **Family Directory < Family List**, after clicking on the filter icon (the small white funnel) select the **Membership: Registered** and then the **Family Group** of anything that is NOT Active.

Some of the combinations are: Registered/Inactive, Registered/Contributor, Registered/Fam Deceased, Registered/School Only, etc. All of these combinations should have NO families listed.



- 2) If any families are listed, we'll want to update the record so the family is Not Registered. To do that select the family information to open the family so you see the family details as seen below. Next, click **Edit Details** and then **Un-check** the **Registration** checkbox to un- Register the family.

Do this for all families that are not Registered/Active. Registered is ONLY associated with Active records.



Check for Families that may have an Incorrect Family Group

Are there any families that are marked as Active but that are not registered also in your parish? A family may be marked this way if it was registered in another parish and we never saw a Notification that their parish of registration changed. (there is a very small percentage of people that are Active at more than one location and you will know if that is the case on any of these families.) Otherwise, all families marked as Not Registered/Active should be switched to Inactive.

- 1) Under the **Family Directory < Family List**, go to the Filter icon seen below:

The screenshot shows the 'Family List' tab selected in the top navigation bar. Below the navigation bar is a search bar with a dropdown arrow and a 'Clear Search Results' link. Below the search bar is a filter bar with a dropdown arrow, a search icon, and a 'Clear Filter' link. Below the filter bar is a table of filter criteria: 'Filter Criteria: None' and 'Filter Column: Family Ascending'. Below the table is a row of buttons: 'Add New Family', 'Delete Selected Families', and 'Quick Reports'. A yellow circle highlights the 'Filter' icon in the bottom row of buttons.

- 2) Set the filters on **Membership** to: **Not Registered** and the **Family Group** to **Active** as seen below.

The screenshot shows the 'Filter' dialog box. The 'Membership' filter is set to 'Not Registered' and the 'Family Group' filter is set to 'Active'. The 'Send Envelopes (Any)' filter is also visible. The 'Advanced Options' section is expanded, showing a list of family work groups: '2019 Grad (Junior Class for 2018)', '2020 Graduates', '2021 50 Year Anniversary', and 'Catholic Herald'. The 'Apply' button is highlighted.

- 3) After clicking **Apply** you may see families that fit this criteria, as seen below. Click on each family's name (the blue links) to open the details of the record.

The screenshot shows the 'Family List' tab selected in the top navigation bar. Below the navigation bar is a search bar with a dropdown arrow and a 'Clear Search Results' link. Below the search bar is a filter bar with a dropdown arrow, a search icon, and a 'Clear Filter' link. Below the filter bar is a table of filter criteria: 'Filter Criteria: None' and 'Filter Column: Family Ascending'. Below the table is a row of buttons: 'Add New Family', 'Delete Selected Families', and 'Quick Reports'. Below the buttons is a table of family records. The table has columns: 'Family', 'Primary Address', 'Primary Phone', 'Envelope #', and 'E-Mail Address'. The first two rows of data are visible: 'Johnson, Ric' and 'Riess, Caylie'.

Family	Primary Address	Primary Phone	Envelope #	E-Mail Address
Johnson, Ric	4126 N	619- 7179	110	johnson@hotmail.com
Riess, Caylie	1764 Gat	269 491		

- 4) Next, after clicking **Edit Details**, change the **Family Group** to correctly show **Inactive** to reflect that it's no longer a Registered/Active family in your parish. If it prompts you to **Inactive** the members in the system, say yes and then click **Save & Close**.