Saving Grid Layout Preferences for Family Directory Screen

1. Log into ParishSOFT online and you should be at the main Home screen.

2. Click on the Family Directory tab. Your screen should appear similar to below:

3. Next, click the Filter icon, which is indicated below.

4. You will see the following filter popup, similar to below.

5. To the right of the Membership and Family Group designations, there is a yellow star. First, click the drop down arrow for Membership and select what you would like the default to be. Then, after the default is selected, click the yellow star. You will get a message similar to below:
6. After you have set the default filter, whenever you go from one screen in ParishSOFT BACK to the Family List, your default filter will apply. The screen shot below shows the view of the Family List after going away and moving back to the Family List.

In the example above, the “Registered/Active” families are shown as that is my default that was set.

Note: Please be aware that if you frequently view those families that are NOT listed in your default filter, you will need to clear the filter by clicking the filter icon with the red x, which will bring you back to ALL the records, regardless of the pre-set filter.