

Entering in Sacraments in ParishSOFT

There are two ways of entering in Sacraments into ParishSOFT, via the member and via the bulk entry screen. The following how-to will discuss both methods. If you would like to view only Group Sacramental entry, please page down to page 5.

Member Sacrament entry:

1. After logging into your ParishSOFT site, click on the Family Directory tab and you will see a screen similar to below.

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
A La Cruz, Marquerita	3	alacruzfam@aol.com	Fam Primary	124 Main	Ann Arbor
Aberg, JudyAnn	31		aaa??23232-2348	324 Weatherstone Lane #12312	Marietta
Abler, Jason	30	Abler@demoemailaddress.com	734-555-2222,15f	5048 Rudgate Blvd Unit 2	Moreno Valley
Abney, Barbara		test@email.com;family@gmail.c		429 Hayes Ave	Ventura
Abney, Greg			555-2222	429 Hayes Ave	Ventura
Abramovicz, Katlin	212	Abramovicz@demoemailaddress		4952 Highpoint Dr	Stoneham
Abramovicz, Tom and Mary	4995	Abramovicz@demoemailaddress	555-2222	4952 Highpoint Dr	Stoneham
Abrams, Angela		angela@yahoo.com	555-2222	81 Fox Run	Ann Arbor
Abt, Shirley	27		734-555-2222	3767 Ranchero Dr Ste 3000	Ann Arbor
Achtárberg, Dean and Marci		lwaterburytest@gmail.com	555-2222	- No Address-Text On File -	Ann Arbor

2. Click on the **Family** details, and then open the member detail who you sacrament for. This may happen after entering in a new family into the system. (ex below: John Adam was just born and received baptism at the parish to the Robert and Barbara Adam family)

John Adam

Family Details | Member Details (4)

Barbara | Robert | John | Kimberly | Add | Import

Gender: Male | Title: Mr. | Status: Active | Birth Date: 5/1/2017 | Birth Place: Madison, WI 53562 | Age: 0 | Date of Death: | Religion: Catholic | Language: English | Ethnicity: | Marital Status: | Envelope #: 0 | Next | Send?

First Name: John | Nick Name: John | Middle Name: | Last Name: Adam | Suffix: | Maiden Name: | Role: Son

MemberDUID 1056929 | Special Needs

3. On the bottom half of the member's screen, click on the tab that is marked **Sacraments**.

John Adam

Family Details Member Details (4)

Barbara Robert John Kimberly Add Import

Gender: Male Status: Active
 Title: Mr. Birth Date: 5/1/2017
 First Name: John Birth Place: Madison, WI 53562
 Nick Name: John Age: 0
 Middle Name: Date of Death:
 Last Name: Adam Religion: Catholic
 Suffix: Language: English
 Maiden Name: Ethnicity:
 Role: Son Marital Status:
 Envelope #: 0 Next Send?

MemberDUID 1056929
 Special Needs

General Contact Sacraments Religious Ed. Misc.

Sacrament Entry/Summary

Sacrament	Completed	Date	Prep Year	Parish	Celebrant
Baptism:	<input type="checkbox"/>				
Reconciliation Prep:	<input type="checkbox"/>				
First Eucharist:	<input type="checkbox"/>				
Confirmation:	<input type="checkbox"/>				
Marriage:	<input type="checkbox"/>				

Edit Details Close

- Click the **Edit Details** button. Next, checkmark the box to the left of the **Baptism** description to indicate that the member has received the sacrament. Fill in the **Date**, then click the box with the ellipses to the right of the blank field below the **Parish** header to find and fill in the parish, then type in the start of the **Celebrant** name. (your screen should appear similar to below) Celebrants are added in by their formal name Ex: Rev. John, Most Rev. Donald, Deacon James, etc.
- Click the **Save** button and the system will generate the sacramental record for the member, as seen below. Note how there is now a **Details** link which, when clicked will open a new tab for the sacramental record you just created for the member. The sacramental record will have additional details on it beyond the basics on the member's Sacrament tab.

General Contact Sacraments Religious Ed. Misc.

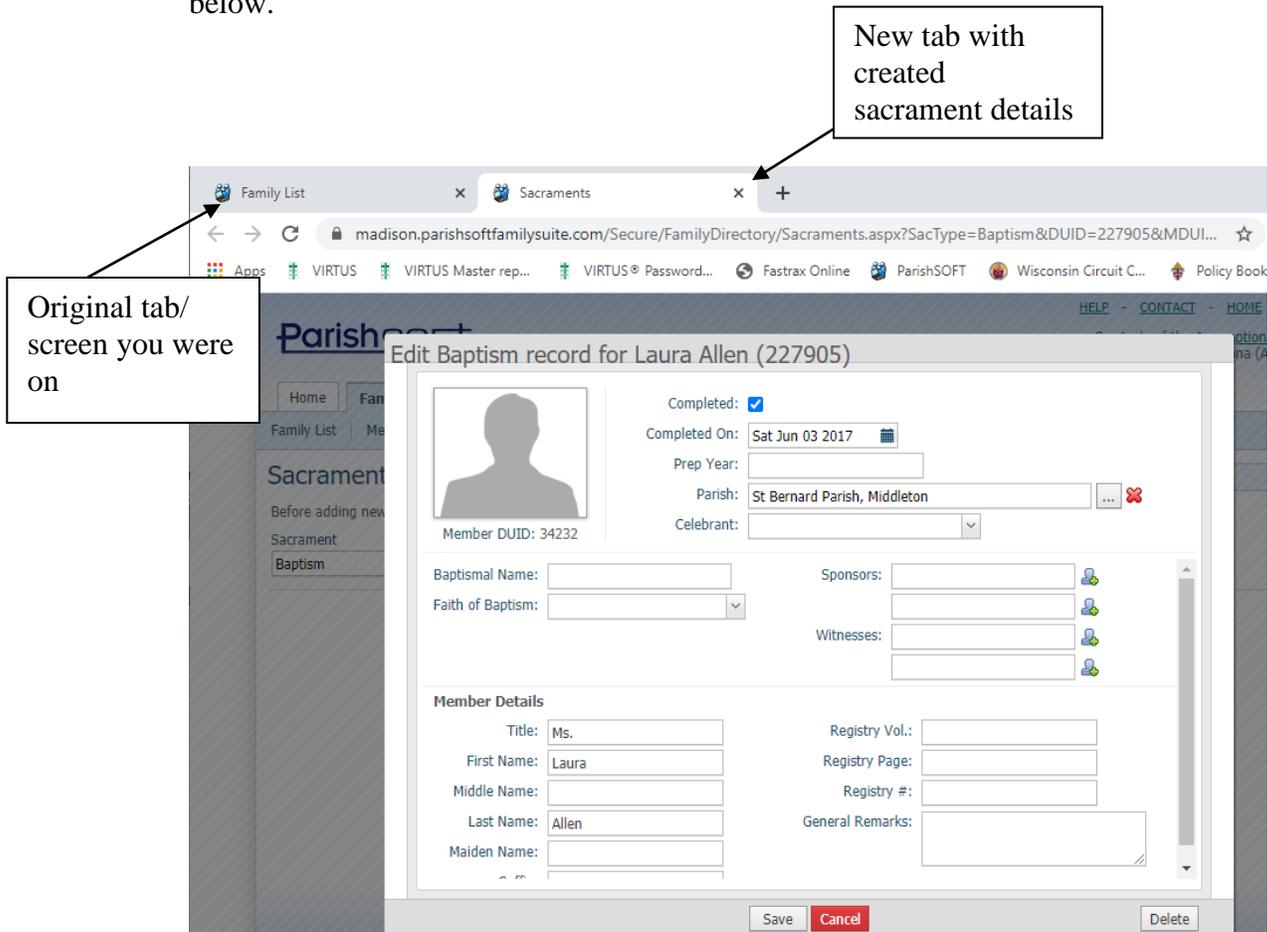
Sacrament Entry/Summary

Sacrament	Completed	Date	Prep Year	Parish	Celebrant
Baptism:	<input checked="" type="checkbox"/>	6/3/2017		St Bernard Parish, Middle	Fr. Angel M. Ruiz
Reconciliation Prep:	<input type="checkbox"/>				
First Eucharist:	<input type="checkbox"/>				
Confirmation:	<input type="checkbox"/>				
Marriage:	<input type="checkbox"/>				

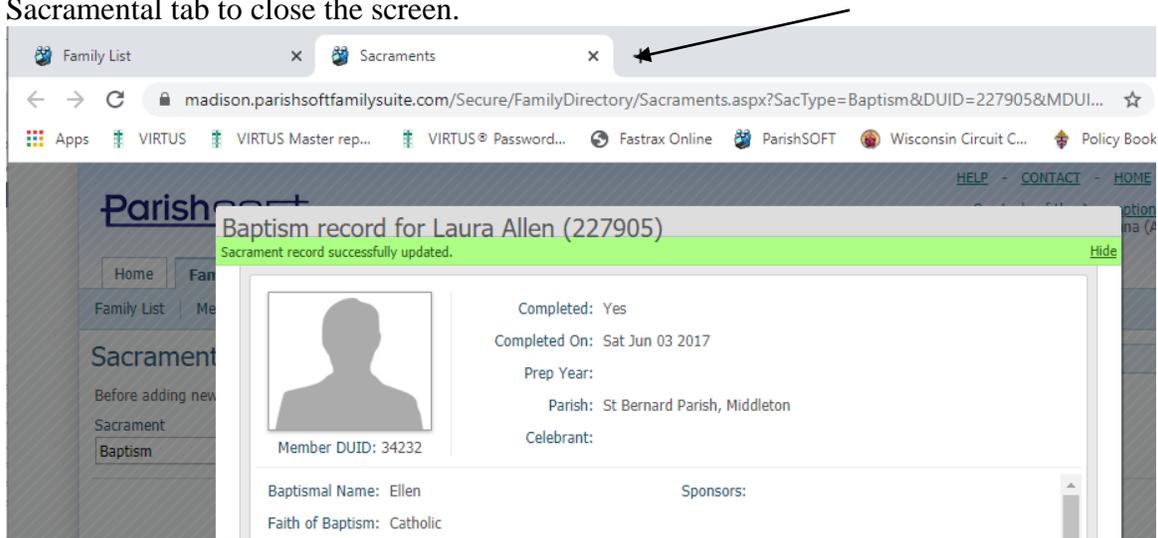
Edit Details Close

[Details](#)

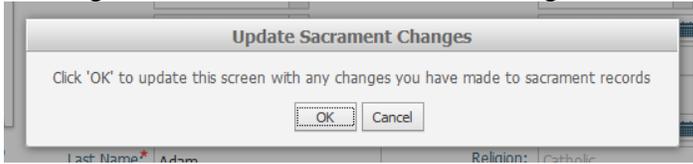
- To edit and add more details, after clicking the **Details** area when the sacrament was originally created you will see a new window open with the full sacrament record as seen below.



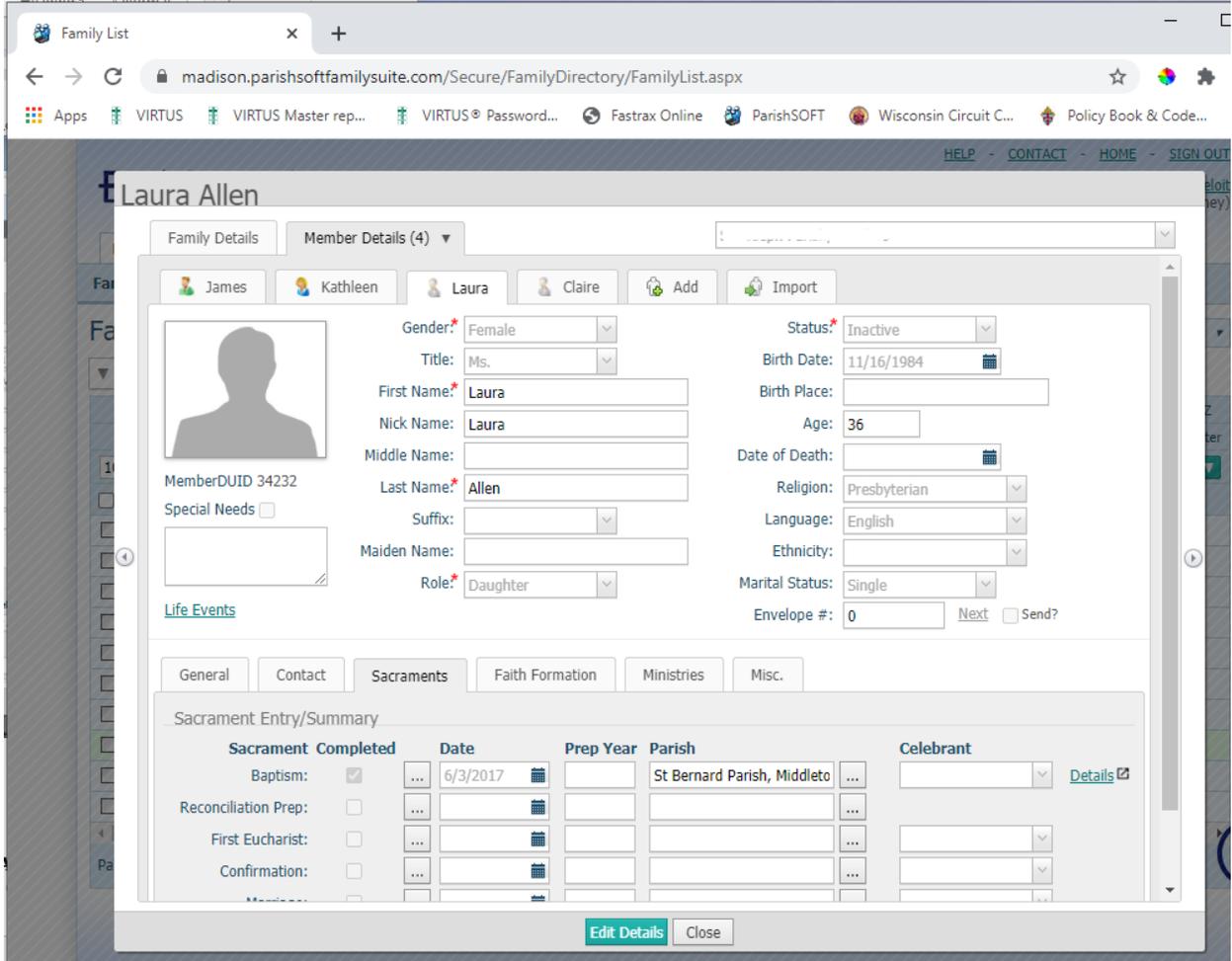
- Add in the additional details, like Registry Vol, or Sponsors, then click **Save** button at the bottom. The record will show at the top that it's been updated. Finally, click the X on the Sacramental tab to close the screen.



- On the original Family/Member details screen, click **OK** if you're prompted to update the existing record to reflect sacramental changes.



- Finally, close out of the Member details if there are no other sacraments to enter.



Alternate Sacramental Entry:

- From the main **Family Directory** tab, click on the **Sacraments** in the blue banner, then the **Add/Edit Sacrament** option.

HELP - CONTACT

ParishSOFT® Family Suite

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | **Sacraments** | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Sacraments

Before adding new sacrament records you must do a search to make sure it does not exist. Search below.

Sacrament: Last Name: Maiden Name: First Name: Completed On:

[Include Date Range](#)

2. Select the correct Sacrament in the list, you wish to add in, and double check by searching on the last name to verify that an existing sacrament is not already entered.

HELP - CONTACT

ParishSOFT® Family Suite

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | **Sacraments** | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Sacraments

Before adding new sacrament records you must do a search to make sure it does not exist. Search below.

Sacrament: Last Name: Maiden Name: First Name: Completed On:

[Include Date Range](#)

10 records

<input type="checkbox"/>	Completed On	Last Name	Maiden Name	First Name	Suffix	Member E-Mail
<input type="checkbox"/>	07/19/2017	Smith		Robert		
<input type="checkbox"/>	05/08/2007	Smith		Victor	Sr.	

Page 1 of 1 (2 Records) 1

3. If you do not find an existing sacrament, click the **Create New..... Record** button. Otherwise, if you see an existing record you may click the edit area, indicated above, and add details to the existing record.

Group Sacramental Entry:

1. In the main **Family Directory** tab, click on **Sacraments**, then **Group Sacrament Entry** as seen below.

ParishSOFT® Family Suite

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Family List | Add/Edit Sacrament | Group Sacrament Entry

Our Lady of La La, Arcata

10 records

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> A La Cruz, Marguerita	3	alacruzfam@aol.com	Fam Primary	124 Main	Ann Arbor
<input type="checkbox"/> Aberg, JudyAnn	31		aaa??23232-2348	324 Weatherstone Lane #12312	Marietta
<input type="checkbox"/> Abler, Jason	30	Abler@demoemailaddress.com	734-555-2222,156	5048 Rudgate Blvd Unit 2	Moreno Valley
<input type="checkbox"/> Abney, Barbara		test@email.com;family@gmail.c		429 Hayes Ave	Ventura
<input type="checkbox"/> Abney, Greg			555-2222	429 Hayes Ave	Ventura
<input type="checkbox"/> Abramovicz, Katlin	212	Abramovicz@demoemailaddress		4952 Highpoint Dr	Stoneham
<input type="checkbox"/> Abramovicz, Tom and Mary	4995	Abramovicz@demoemailaddress	555-2222	4952 Highpoint Dr	Stoneham
<input type="checkbox"/> Abrams, Angela		angela@yahoo.com	555-2222	81 Fox Run	Ann Arbor
<input type="checkbox"/> Abt, Shirley	27		734-555-2222	3767 Rancho Dr Ste 3000	Ann Arbor

- Click the **Sacrament to Update** section and select on the sacrament from the list, you wish to add in through the bulk entry method. In the example below, we will be adding in member's first Eucharist. So, we switch the sacrament to what is seen below:

ParishSOFT® Family Suite

Home | Family Directory | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Group Sacrament Entry

Please search for members for whom you'd like to add/edit sacramental data.

Step 1: Member Search

Sacrament to Update: First Eucharist | Prep Year: | Term: | Class: | Grade: | Age: From: | To: | Search | Clear

- If the members are all listed in a Religious Education class that is **ALREADY** entered into ParishSOFT, then we will search for that class under the **Term** and **Class** area listed above. Otherwise, if members fall within a specific age range, we would enter in that range under the **Age** area. But, if you have neither criteria, you can still click the **Search** button, which will take a bit longer as it's a broader search.

HELP - CONTACT - HOME - SIGN OUT

ParishSOFT® Family Suite

Home
Family Directory
Religious Education
Offering
Ministry Scheduler
Tuition
IQ
Administration

Family List
Member List
Sacraments
Family Workgroups
Member Workgroups
Group Events Entry
Reports

Group Sacrament Entry

Please search for members for whom you'd like to add/edit sacramental data.

Step 1: Member Search

Sacrament to Update: First Eucharist | Prep Year: | Term: | Class: | Grade: | Age: From: To: Search Clear

Step 2: Select Members

Member Records

	Last Name	First Name	Age
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	A La Cruz	Marguerita	
<input checked="" type="checkbox"/>	AAA	Cole	
<input checked="" type="checkbox"/>	AAAbner	AAaron	
<input checked="" type="checkbox"/>	AAaron	AAbner	
<input checked="" type="checkbox"/>	Aberg	JudyAnn	73
<input checked="" type="checkbox"/>	Abler	Griffin	17
<input checked="" type="checkbox"/>	Abler	Griffin	19
<input checked="" type="checkbox"/>	Abler	Jason	42
<input checked="" type="checkbox"/>	Abler	Jason	47
<input checked="" type="checkbox"/>	Abler	Jennifer	3

1 of 490 (12246 Members) < 1 2 3 4 ... 489 490 >

Selected Members

How Do I Add Members? Select members by clicking the **+** button from within the members grid to the left. After you have completed all selections, fill in the "Sacrament Information" section and click the "Save" button at the bottom of the page.

	Last Name	First Name	Age
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total Members: 0

4. To find a member, either type in their last name or first name, as seen below to narrow your system's search. Click the green plus sign next to the member to select the member and have their information show on the right side of the screen as a **Selected Member**.

Step 2: Select Members

Member Records

	Last Name	First Name	Age
<input type="checkbox"/>	<input type="text" value="abler"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Abler	Griffin	17
<input checked="" type="checkbox"/>	Abler	Griffin	19
<input checked="" type="checkbox"/>	Abler	Jason	47
<input checked="" type="checkbox"/>	Abler	Jason	42
<input checked="" type="checkbox"/>	Abler	Jennifer	3
<input checked="" type="checkbox"/>	Abler	Parker	16
<input checked="" type="checkbox"/>	Abler	Parker	16
<input checked="" type="checkbox"/>	Abler	Spencer	21
<input checked="" type="checkbox"/>	Abler	Spencer	21
<input checked="" type="checkbox"/>	Abler	Tracey	51

1 of 1 (11 Members) < 1 >

Selected Members

	Last Name	First Name	Age
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Abler	Jennifer	3

Total Members: 1

- Continue searching members and selecting them until you have all that you need under your **Selected Members** screen, as seen below.

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | **Sacraments** | Family Workgroups | Member Workgroups | Group Events Entry | Reports

Group Sacrament Entry

Our Lady of La La, Arcata

Please search for members for whom you'd like to add/edit sacramental data.

Step 1: Member Search

Sacrament to Update: First Eucharist | Prep Year: | Term: | Class: | Grade: | Age: From: | To: | Search | Clear

Step 2: Select Members

Member Records

	Last Name	First Name	Age
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Abler	Spencer	21
<input checked="" type="checkbox"/>	Abler	Spencer	21
<input checked="" type="checkbox"/>	Abler	Tracey	51
<input checked="" type="checkbox"/>	Abler	Tracey	51
<input checked="" type="checkbox"/>	Abney	Barbara	62
<input checked="" type="checkbox"/>	Abney	Grant	15
<input checked="" type="checkbox"/>	Abney	Gregory	63
<input checked="" type="checkbox"/>	Abramovicz	Katlin	30
<input checked="" type="checkbox"/>	Abramovicz	Mary	59
<input checked="" type="checkbox"/>	Abramovicz	Thomas	60

1 of 490 (12246 Members) | 1 2 3 4 ... 489 490

Selected Members

	Last Name	First Name	Age
<input checked="" type="checkbox"/>	Abler	Jennifer	3
<input checked="" type="checkbox"/>	anderson	james	
<input checked="" type="checkbox"/>	Balz	Stephanie	
<input checked="" type="checkbox"/>	Barden	Aloysius	
<input checked="" type="checkbox"/>	Smith	Alias	
<input checked="" type="checkbox"/>	Theisen	Sue	
<input checked="" type="checkbox"/>	Yaeger	Susan	
<input checked="" type="checkbox"/>	Zuelke	Phyllis	

Total Members: 8

Step 3: Enter First Eucharist Sacrament Information

Check the checkbox next to the fields you wish to update. You must select at least one to continue.

Completed: Yes | Completed Date: 12/16/2020 | Prep Year: | Place: Blessed Sacrament Parish, Madison | Celebrant: Fr. Francisco Hernandez

Note: Any fields updated here will overwrite previous data for selected members.

Save | Cancel

- Scroll down, as indicated above, on the right side to see the section for adding in the sacramental details, as seen below. Click the box before each field that you wish to update and select the information that is the same for all the member's sacraments. Finally, click **Save** to

Step 3: Enter First Eucharist Sacrament Information

Check the checkbox next to the fields you wish to update. You must select at least one to continue.

Completed: Yes | Completed Date: 12/16/2020 | Prep Year: | Place: Blessed Sacrament Parish, Madison | Celebrant: Fr. Francisco Hernandez

Note: Any fields updated here will overwrite previous data for selected members.

Save | Cancel

- You will see a similar message to the one below confirming that member sacraments were created and saved.

