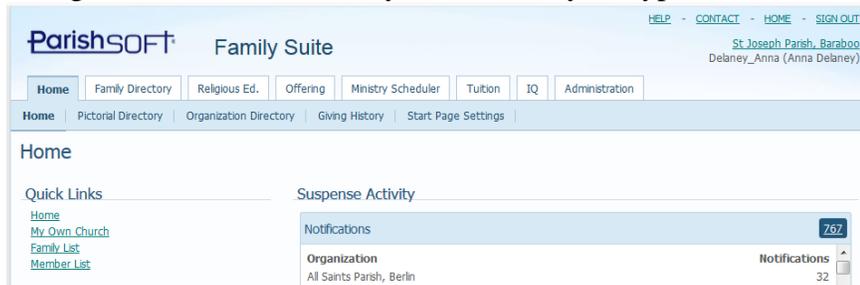
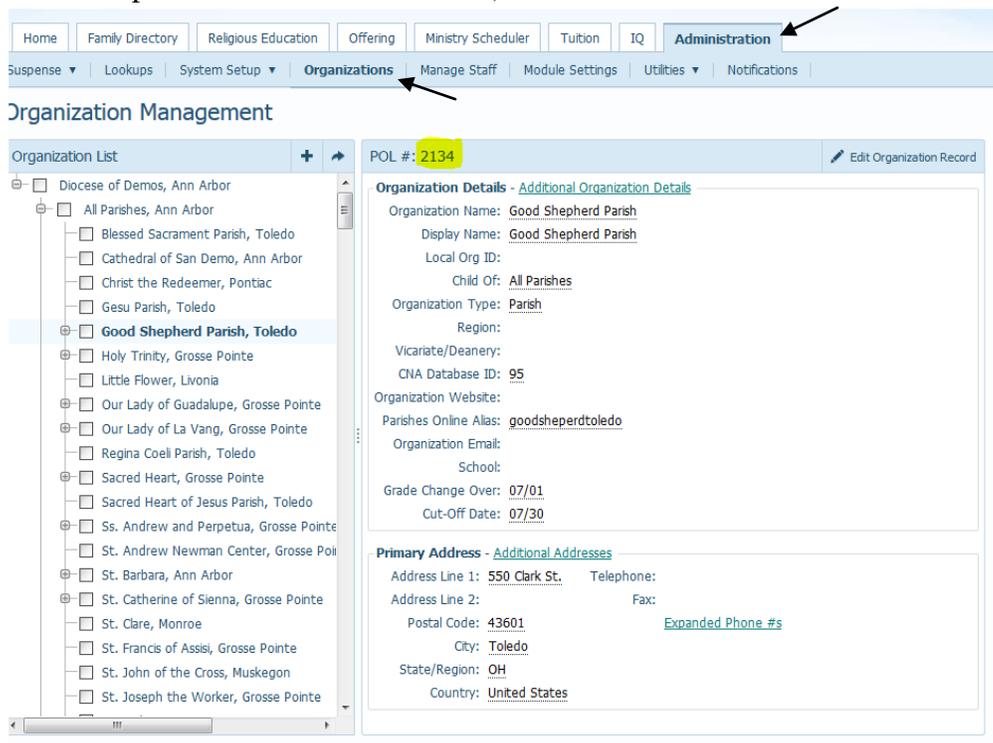


## Families overall giving by date range from IQ

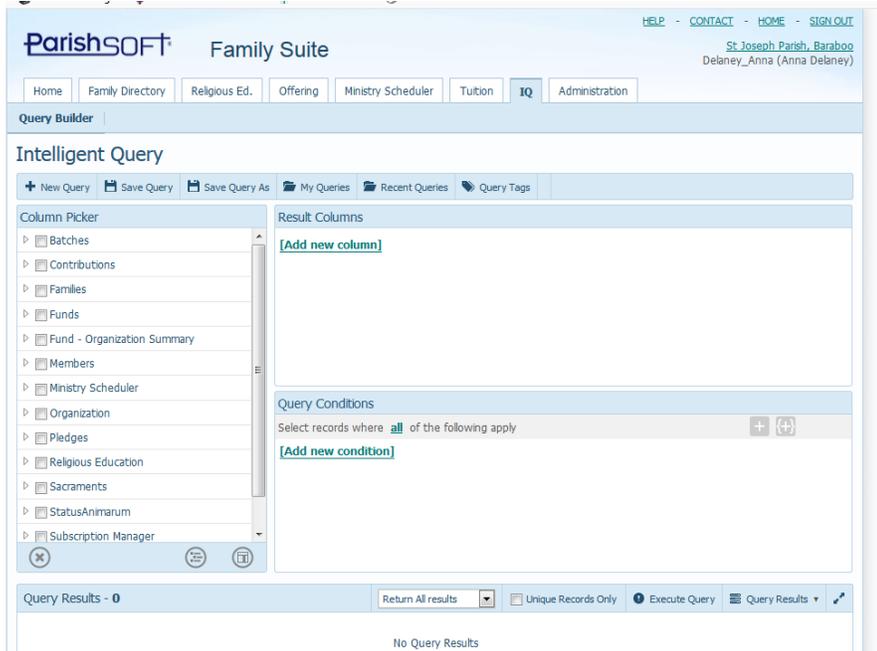
1. First, log into **ParishSOFT** and you will be at your typical home screen:



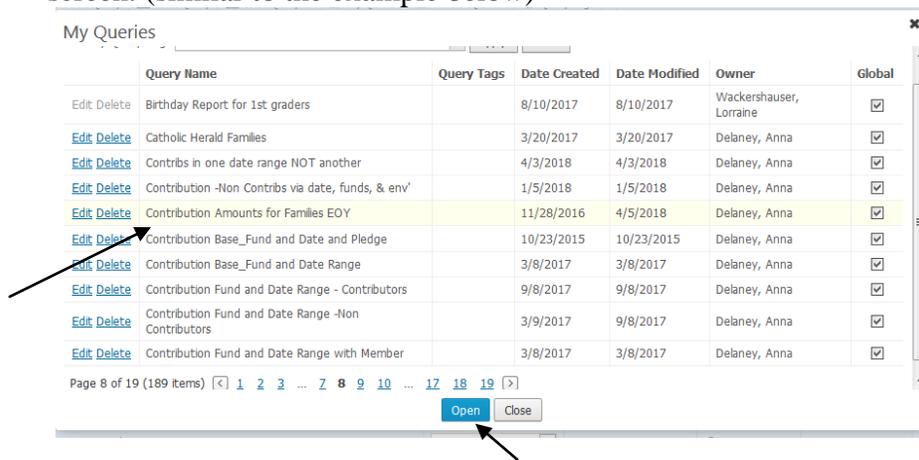
2. First, in order to run a query in your system you will need your Organization ID. To find the Organization ID, go to the **Administration** tab, as seen below, then click on the **Organizations** area. Next, in the middle of the screen, write down the POL# (highlighted below) which is your Organization ID number. (In the example below, Good Shepherd Parish is POL # 2134.)



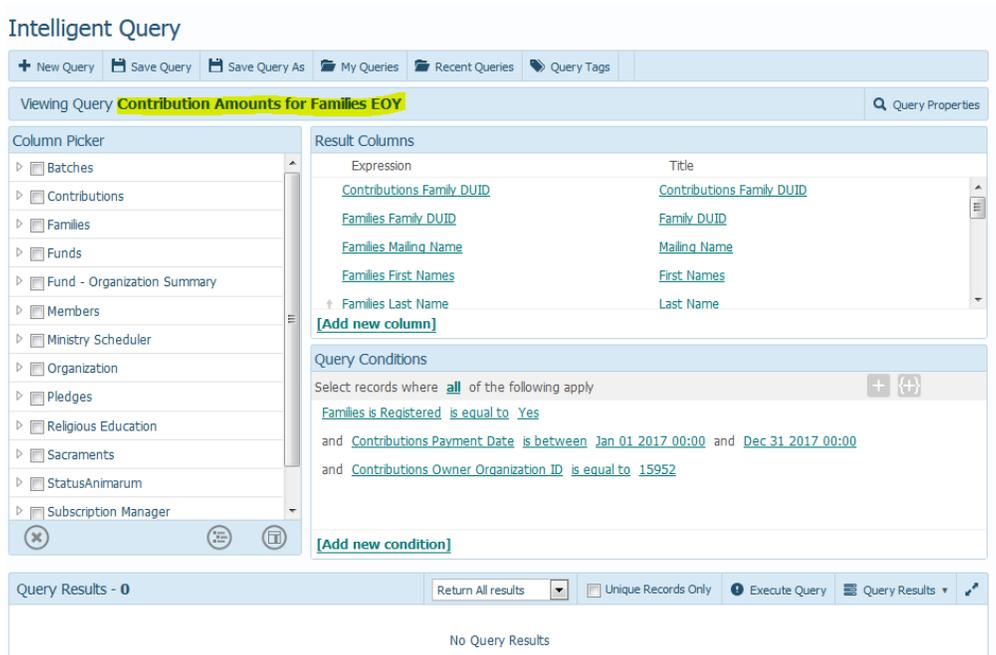
3. Next, we'll go search in IQ and run our query. Click on **IQ** tab and you will be in the main screen where you can open existing queries and create new queries. You may see the screen filling, wait a second or two and it should appear as seen below:



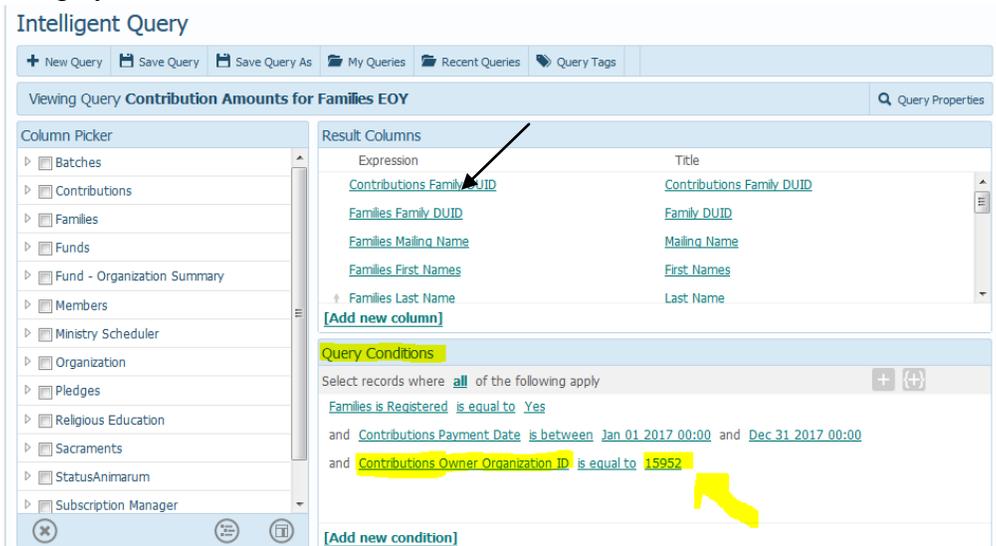
- Click the **My Queries** area, seen above and search for the query called: **Contribution Amounts for Families EOY** query. Click on the area where the name of the query is shown, to highlight it, then click the **Open** button at the bottom of the screen. (similar to the example below)



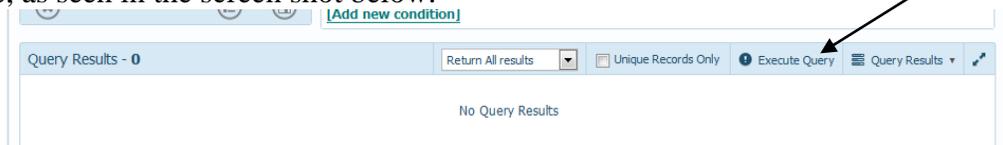
- You will see the query fill in the main area, similar to below. You can see the name of the query, highlighted in the screen shot below, in case you want to verify what query was opened.



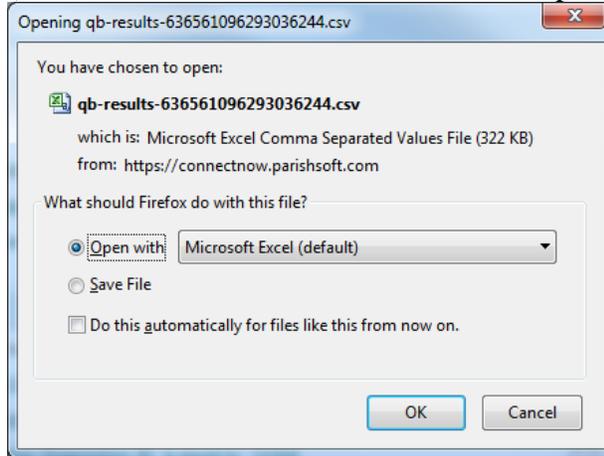
- In the **Query Conditions** area, indicated below, click in the area to the right of **Contributions Owner Organization ID**, (indicated by the highlighted arrow below) and fill in your parish's Organization ID. Click outside the box or press Enter to change your edited text back to the blue of the other criteria.



- After editing the Organization ID, click the **Execute Query** area, on the bottom right side, as seen in the screen shot below.



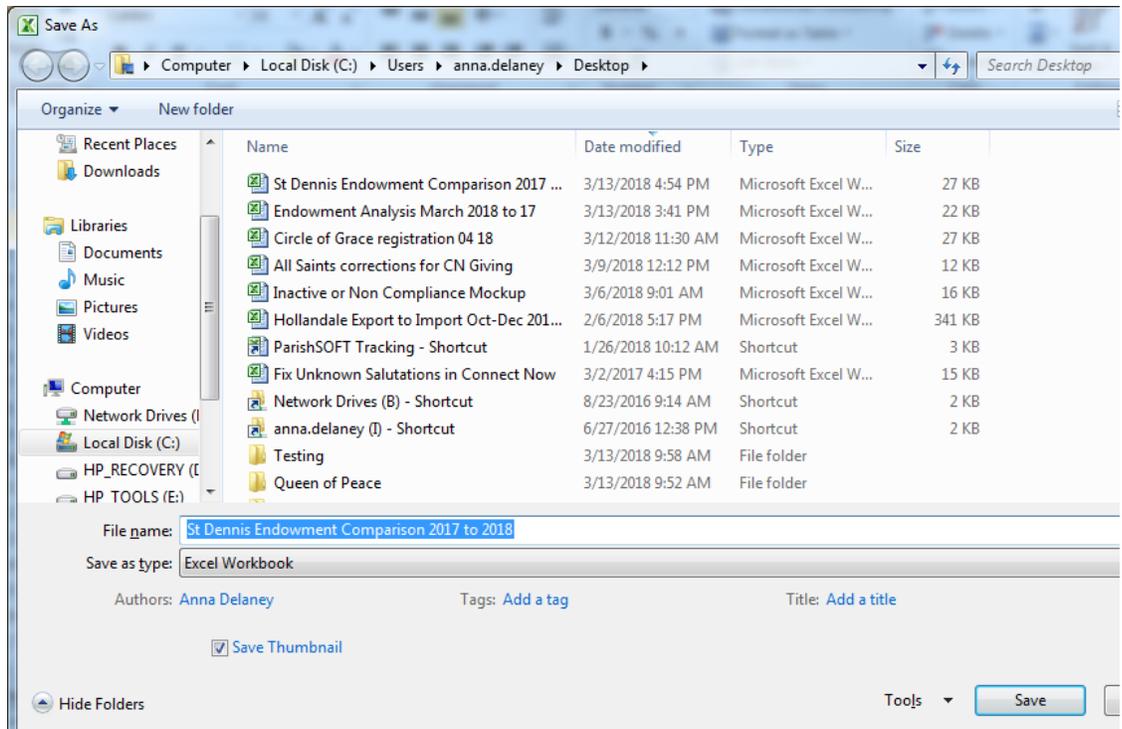
8. After running the query there are multiple options of what to do with your results/information. Two main options would be either the 1) **Export to CSV** or 2) **Mail Merge** the information within ParishSOFT. You would most likely export to CSV if you already had a document you've formatted and are comfortable using mail merge in your normal program.
9. To use the **Export to CSV** function, follow the steps below, otherwise go to 10.
  - a. Click the **Export to CSV**
  - b. Your web browser will ask you what you want to do with the file, as seen in the image below. Go ahead and click to Open the file in Microsoft Excel. (Where we will format the information for printing.)



- c. The file should now open in MS Excel (or your default program) similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Families	Families	F Address	1 City	State	Zip	Phone	Emergenc	Emergency	Phone	Desc					
2	Aalfey	Dean and	815 Camp	Middleto	WI	53562	608-123-4567									
3	Aaron	George	S1556A In	Middleto	WI	53562	608-123-4567									
4	Acker	Jean	600 Astec	Middleto	WI	53562	608-123-4-477-1558	cell 1/2017								
5	Adams	Paul and	E12628A	Middleto	WI	53562	608-123-4567									
6	Anderson	Michelle	800 Wald	Middleto	WI	53562	608-123-4567									
7	Ayer	David and	E10164	Te Middleto	WI	53562	608-123-4567									
8	Bonham	Mary	1352 15th	Middleto	WI	53562	608-123-4567									
9	Borkeha	Garv and	I 209 Washi	Middleto	WI	53562	608-123-4567									

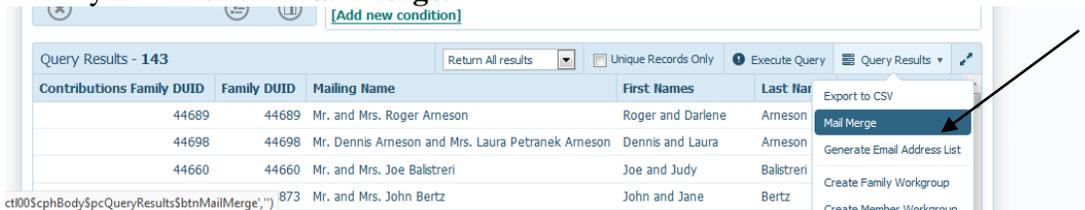
- d. Click **File** then **Save As** to save the file. Make sure, to save it in a location you know, with a name that makes sense. If you want to format this document and keep the formatting, then click the **Save As Type** (indicated below) and select **Excel Workbook**. (top option in the list) Then click **Save**.



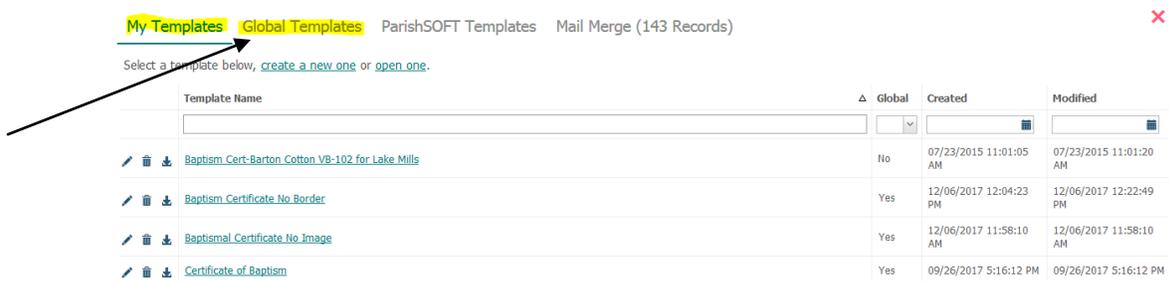
e. Finally, exit out of IQ in ParishSOFT and use the workbook as you wish in a mail merge, for sending a report, etc.

10. To use the **Mail Merge** function, follow the steps below.

a. To use the **Mail Merge** within ParishSOFT. Under the **Query Results** area, you will select **Mail Merge**.



b. You will see the **Mail Merge** utility opening. After the mail merge opens, you will see a screen similar to the one below. Please note there are different areas across the top which show different mail merge templates. The screen will automatically open up to your “My Templates” area, indicated below, but many of the templates you will want to use from the Diocese are located under Global Templates, seen below:



- c. After going to the Global Templates, you can select the **Contribution End of Year** template, if you'd like to use a starting template where the merge fields match the query run above. To open that query, click on the name of the query, as seen in the image below:

Template Name	Global	Created	Modified
<a href="#">Baptism Cert-Barton Cotton VB-102 for Lake Mills</a>	No	07/23/2015 11:01:05 AM	07/23/2015 11:01:20 AM
<a href="#">Baptism Certificate No Border</a>	Yes	12/06/2017 12:04:23 PM	12/06/2017 12:22:49 PM
<a href="#">Baptismal Certificate No Image</a>	Yes	12/06/2017 11:58:10 AM	12/06/2017 11:58:10 AM
<a href="#">Certificate of Baptism</a>	Yes	09/26/2017 5:16:12 PM	09/26/2017 5:16:12 PM
<a href="#">Certificate of Baptism Full</a>	Yes	10/19/2016 12:21:36 PM	09/26/2017 5:15:33 PM
<a href="#">Contribution End of Year</a>	Yes	04/05/2018 11:39:42 AM	04/05/2018 11:39:42 AM
<a href="#">Envelope #</a> <small>Open Template in Editor</small>	Yes	11/04/2014 4:27:46 PM	11/04/2014 4:28:56 PM
<a href="#">Non-Pledger letter</a>	Yes	11/16/2016 11:42:33 AM	11/16/2016 1:04:24 PM
	..	09/27/2017 11:19:54	09/27/2017 11:58:10

- d. Your template will open, as seen below. Please note that you're in the Mail Merge function already in the program.

The screenshot shows the software interface with the following elements:

- Top navigation bar: My Templates, Global Templates, ParishSOFT Templates, **Mail Merge (143 Records)** (indicated by an arrow).
- Ribbon: File, Home, Insert, Page Layout, **Mail Merge** (indicated by an arrow).
- Mail Merge ribbon: New, Open, Open (Local), Save, Save (Local), Save As, Print.
- Main content area: Preview of a letter template with the following text:
 

Thursday, April 05, 2018

<<Mailing Name>>  
 <<Address>>  
 <<City>>, <<State>> <<Zip>>

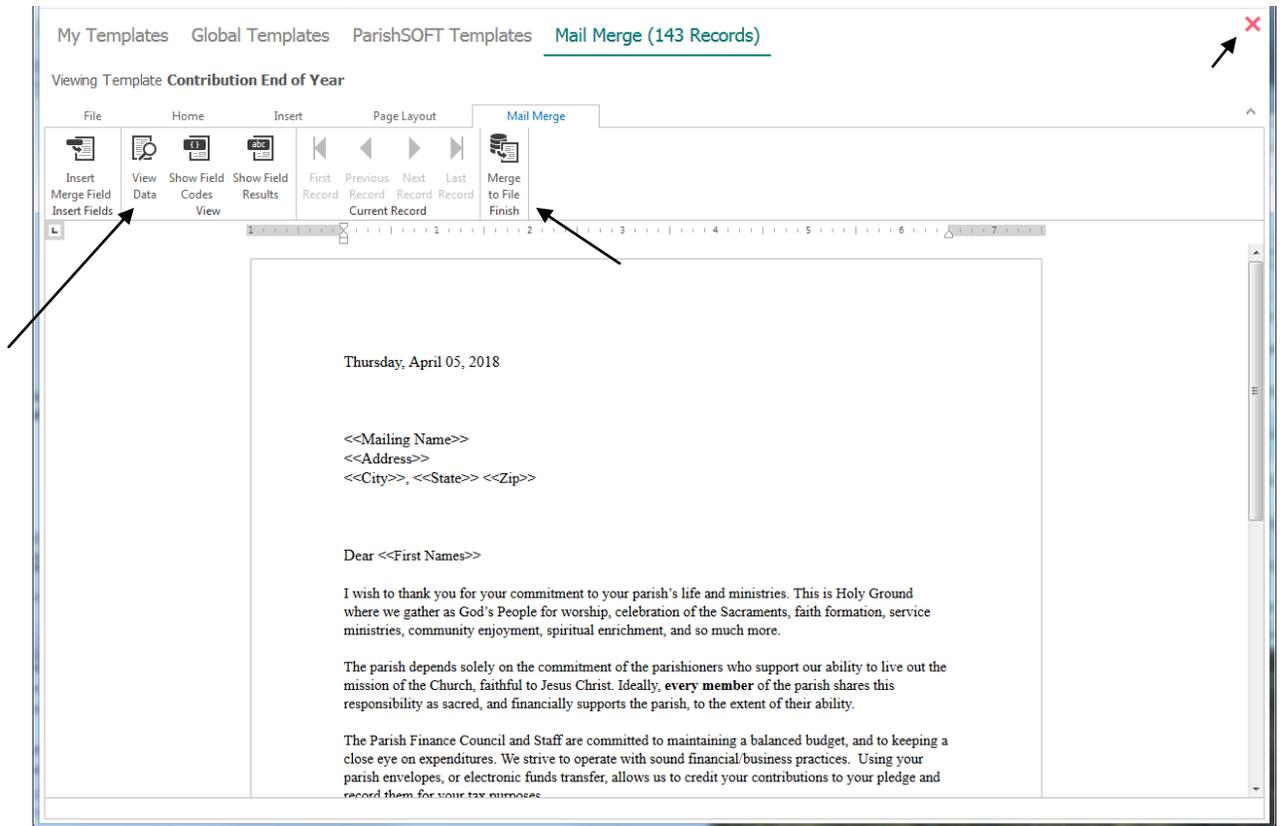
Dear <<First Names>>

I wish to thank you for your commitment to your parish's life and ministries. This is Holy Ground where we gather as God's People for worship, celebration of the Sacraments, faith formation, service ministries, community enjoyment, spiritual enrichment, and so much more.

The parish depends solely on the commitment of the parishioners who support our ability to live out the mission of the Church, faithful to Jesus Christ. Ideally, **every member** of the parish shares this responsibility as sacred, and financially supports the parish, to the extent of their ability.

The Parish Finance Council and Staff are committed to maintaining a balanced budget, and to keeping a close eye on expenditures. We strive to operate with sound financial/business practices. Using your parish envelopes, or electronic funds transfer, allows us to credit your contributions to your pledge and record them for your tax purposes.

- e. To see the different Mail merge functions, preview your merge, set new fields, etc. click on the **Mail Merge** area indicated above. Your screen will change, as seen below:



- f. Edit the document as necessary, and when finished, click the **View Data** button to see your records merged into this document. To print, you will click on **Merge to File**.
- g. When you are finished and have merged the file to MS Word, open the file locally and print the document. You can also close out of the Mail Merge area in ParishSOFT by clicking the red X in the image above.