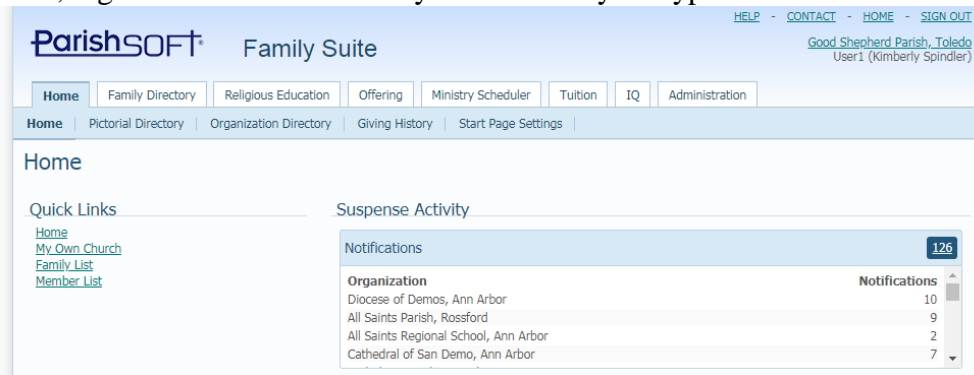


Printing Batch reports

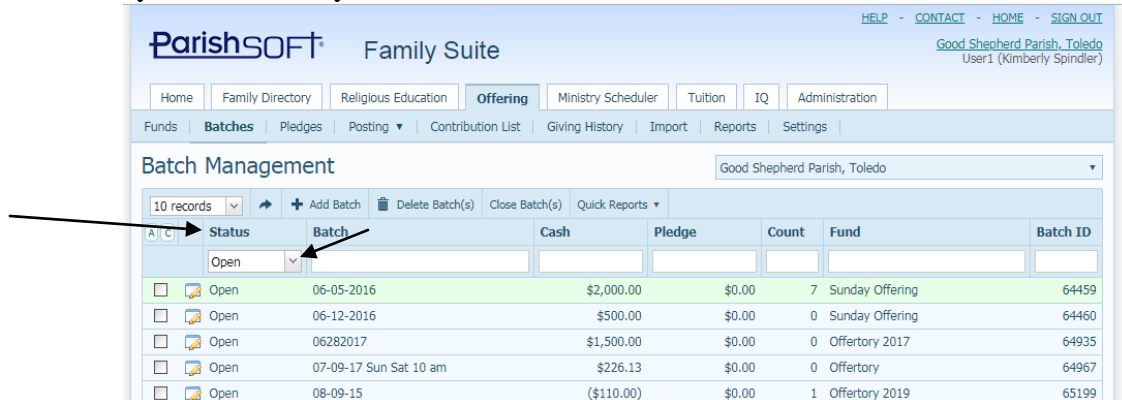
There are two ways to print off batch reports, the first way is “per batch” and will show the donations in the order that they were entered in. The second way will show the report “per fund” and will organize the donations alphabetically.

A) Per Batch Report-

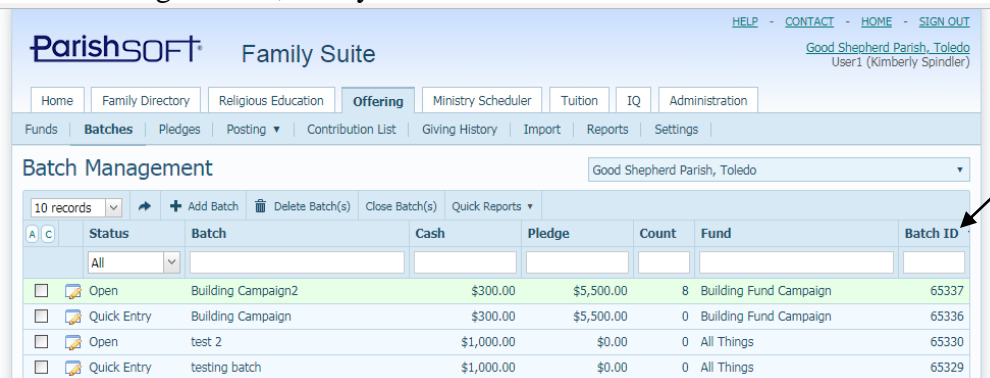
- 1) First, log into **ParishSOFT** and you will be at your typical home screen:



- 2) Next, click on **Offering** and then on **Batches** in the upper tabs. Your screen will be similar to below. Under the **Status** area, indicated below, click the down arrow and change the status from Open to **All (or Committed or Quick Entry)** so you can see all your batches.



- 3) Click on your **Batch ID** column twice to organize your batches from low to high, then from high to low, then you should see the most recent batch.



- 4) Click on the box next to the batch you wish to print off by checking the box as seen below. Click on the **Quick Report** button and select **View Batch Detail Report**

ParishSOFT Family Suite

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

Funds Batches Pledges Posting Contribution List Giving History Import Reports Settings

Batch Management Good Shepherd Parish, Toledo

10 records Add Batch Delete Batch(s) Close Batch(s) Quick Reports

A/C	Status	Batch	Cash	Pledge	Count	Fund	Batch ID
<input type="checkbox"/>	Open	Building Campaign2	\$300.00	\$5,500.00	8	Building Fund Campaign	65337
<input type="checkbox"/>	Quick Entry	Building Campaign	\$300.00	\$5,500.00	0	Building Fund Campaign	65336
<input type="checkbox"/>	Open	test 2	\$1,000.00	\$0.00	0	All Things	65330
<input type="checkbox"/>	Quick Entry	testing batch	\$1,000.00	\$0.00	0	All Things	65329
<input checked="" type="checkbox"/>	Committed	7-29-2018 9am Sunday	\$550.00	\$0.00	11	Envelope collection	65318
<input type="checkbox"/>	Closed	sPUD2	\$100.00	\$0.00	2	Envelope	65317
<input type="checkbox"/>	Committed	Spud	\$100.00	\$0.00	2	All Things	65316
<input type="checkbox"/>	Committed	2018-07-02 Office	\$805.00	\$0.00	10	Sunday Offering	65313
<input type="checkbox"/>	Committed	7-15-2018 9am	\$550.00	\$0.00	11	Offertory Plate Collections at Mass or Other Servi	65311
<input type="checkbox"/>	Quick Entry	2018-06-10 9am Sunday	\$550.00	\$0.00	0	Offertory	65309

- 5) The batch detail report for your batch should show up, as seen below. Please note that the “lines” are showing in the order you entered them in, with the “last” entry as the first line on the report.

https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx - Google Chrome

Secure | https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx

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Good Shepherd Parish
550 Clark Ave
Toledo, OH 43601

Batch Detail for 7-29-2018 9am Sunday (65318)
Date Range: 07/27/2018 - (no max)
Batch ID: 65318

Pledges (0)

Start Date	End Date	Total Pledged	Balance	Contribution Type	Family	Envelope #	Fund

Contributions (11)

Date	Amount	Contribution Type	Check #	Family	Envelope #	Fund	Comment
2018-07-27	\$50.00	Check		Cash, Loose		Loose collection	cash in the plate
2018-07-27	\$50.00	Check	136	Simpson, Charles and Miranda	6561	Envelope collection	
2018-07-27	\$50.00	Check	3241	Spindler, Raymond and Kimberly	4249	Envelope collection	Prayer candles
2018-07-27	\$50.00	Check	3241	Spindler, Raymond and Kimberly	4249	Envelope collection	
2018-07-27	\$50.00	Check	3578	Mueller, Eric and Rebecca	884	Building Fund	split per check memo
2018-07-27	\$50.00	Check	3578	Mueller, Eric and Rebecca	884	Envelope collection	split per check memo
2018-07-27	\$50.00	Check		Flatoff, John and Tracy	3330	Building Fund	
2018-07-27	\$50.00	Check		Hopp, Michael and Stacy	1299	Envelope collection	
2018-07-27	\$50.00	Check		Graf, Al and Eileen	1368	Envelope collection	
2018-07-27	\$50.00	Check		Rigden, Cathleen	5317	Envelope collection	
2018-07-27	\$50.00	Check		Adams, Todd and Jane	1129	Envelope collection	

Summary

	Pledges	Contributions	Transactions
Total	\$0.00	\$550.00	11

- 6) In the upper left corner, click on the printer icon seen below if you wish to print off this report. (there will be a summary total at the end of the document which should show your overall batch total)

Batch Detail for 7-29-2018 9am Sunday (65318)
Date Range: 07/27/2018 - (no max)
Batch ID: 65318

Pledges (0)

Start Date	End Date	Total Pledged	Balance	Contribution Type	Family	Envelope #	Fund

Contributions (11)

Date	Amount	Contribution Type	Check #	Family	Envelope #	Fund	Comment
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2018-07-27	\$50.00	Check	3241	Spindler, Raymond and Kimberly	4249	Envelope collection	Prayer candles
2018-07-27	\$50.00	Check	3241	Spindler, Raymond and Kimberly	4249	Envelope collection	
2018-07-27	\$50.00	Check	3578	Mueller, Eric and Rebecca	884	Building Fund	split per check memo
2018-07-27	\$50.00	Check	3578	Mueller, Eric and Rebecca	884	Envelope collection	split per check memo
2018-07-27	\$50.00	Check		Flatoff, John and Tracy	3330	Building Fund	
2018-07-27	\$50.00	Check		Hopp, Michael and Stacy	1299	Envelope collection	

B) Per Fund Batch Report-

- 7) To print of the batch, grouping it first by fund, then by name, please click on the **Contribution List** under the main **Offering** tab. You should see a screen similar to the one below:

ParishSOFT Family Suite

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

Funds Batches Pledges Posting **Contribution List** Giving History Import Reports Settings

Contribution List Filters: Start Date 07/01/2017 End Date 07/17/2017 ParishSOFT Giving Only View Contributions

Posting Date	Env #	Name	Amount	Fund	Batch
07/14/2017		Franzetti, Gina	\$0.00	CFSA 2017	
07/14/2017		Padlina, Edward and Louisa	\$0.00	CFSA 2017	
07/14/2017		lopez, bernie	\$0.00	CFSA 2017	
07/14/2017		estrada, laura	\$0.00	CFSA 2017	
07/14/2017		droste, Robert	\$0.00	CFSA 2017	
07/14/2017		Krueger, Susan	\$0.00	CFSA 2017	
07/14/2017		brown, albert & Carol	\$0.00	CFSA 2017	
07/14/2017		Adams, Pat and John	\$0.00	CFSA 2017	
07/14/2017	29	Delaney, Patrick and Anna	\$0.00	CFSA 2017	
07/14/2017		Linnebur, Isabella	\$0.00	CFSA 2017	

Page 1 of 247 (2464 Records) 1 2 3 4 5 6 7 ... 245 246 247

- 8) In the **Start Date** and **End Date** field, you will fill in the date that you posted your contributions to, which should be the same date as the “name” of your batch. Click the **View Contributions** button. You will now see your contributions, as indicated below:

The screenshot shows the ParishSOFT Family Suite interface. The 'Contribution List' page is active for 'Good Shepherd Parish, Toledo'. The filters are set to 'Start Date: 07/27/2018' and 'End Date: 07/27/2018'. A 'View Contributions' button is highlighted with an arrow. Below the filters is a table with 10 records. The table columns are: Posting Date, Env #, Name, Amount, Fund, and Batch. The first row is highlighted in green.

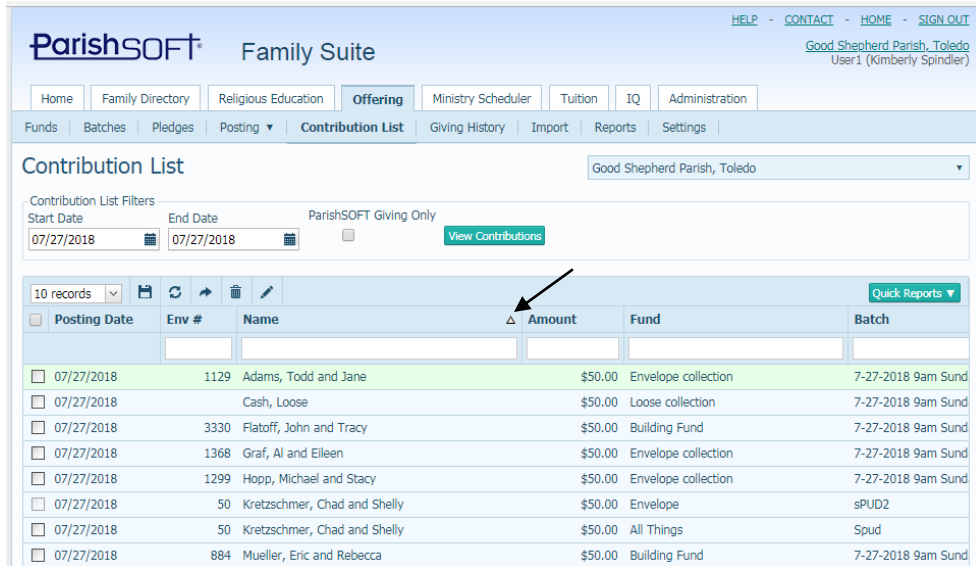
Posting Date	Env #	Name	Amount	Fund	Batch
07/27/2018		Cash, Loose	\$50.00	Loose collection	7-27-2018 9am Sund
07/27/2018	5561	Simpson, Charles and Miranda	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	4249	Spindler, Raymond and Kimberly	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	4249	Spindler, Raymond and Kimberly	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	884	Mueller, Eric and Rebecca	\$50.00	Building Fund	7-27-2018 9am Sund
07/27/2018	884	Mueller, Eric and Rebecca	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	3330	Flatoff, John and Tracy	\$50.00	Building Fund	7-27-2018 9am Sund
07/27/2018	1299	Hopp, Michael and Stacy	\$50.00	Envelope collection	7-27-2018 9am Sund

*Please note, that if you have more than one batch on a date, it will show all batches as seen in the “Batch” column above. If you wish to restrict the report to just one batch, then you will wish to type in the batch name EXACTLY as you entered it in, under the **Batch** header, as seen below, and it will restrict the postings to being only those that are from that batch.*

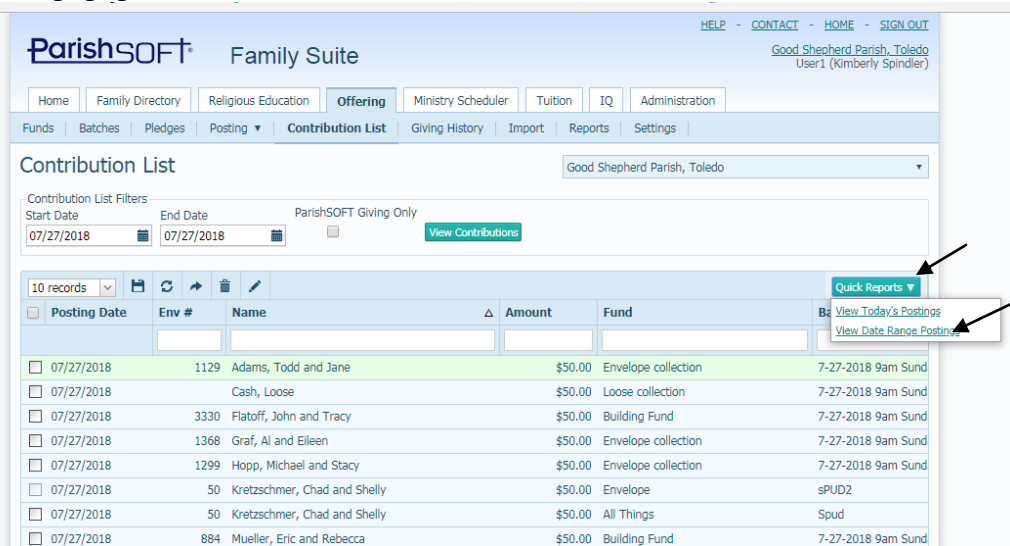
This screenshot is identical to the previous one, but with an arrow pointing to the 'Batch' column header in the table. The table data remains the same.

Posting Date	Env #	Name	Amount	Fund	Batch
07/27/2018		Cash, Loose	\$50.00	Loose collection	7-27-2018 9am Sund
07/27/2018	5561	Simpson, Charles and Miranda	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	4249	Spindler, Raymond and Kimberly	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	4249	Spindler, Raymond and Kimberly	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	884	Mueller, Eric and Rebecca	\$50.00	Building Fund	7-27-2018 9am Sund
07/27/2018	884	Mueller, Eric and Rebecca	\$50.00	Envelope collection	7-27-2018 9am Sund
07/27/2018	3330	Flatoff, John and Tracy	\$50.00	Building Fund	7-27-2018 9am Sund
07/27/2018	1299	Hopp, Michael and Stacy	\$50.00	Envelope collection	7-27-2018 9am Sund

- 9) Next, review your screen to make sure that the **Name** column has an arrow on it (indicating that the listings are sorted alphabetically) If not, click on the header, where it says **Name**, and the arrow should show up. (and the results will now appear alphabetized)



10) Next, click on **Quick Reports < View Date Range Postings**, and your report will show, similar to the image below. (this report is a popup report and will require your popups to be on)



11) There will be a pop up that will show, which will be a report similar to the one seen below. Please note that each Fund is broken out along with a summary of the contributions, and the families are alphabetized under the fund listing. At the end of each fund, there will be the fund name again and a total given to that fund, as seen highlighted below.

https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx - Google Chrome

Secure | https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx

Page 1 of 2 PDF

Good Shepherd Parish
550 Clark Ave
Toledo, OH 43601

Date Range Postings
07/27/2018 - 07/27/2018

Fund : All Things

Family	Envelope #	Amount	Fund	Pledge ID	Check #	Batch	Date
Kretzschmer, Chad and Shelly	50	\$50.00	All Things	1210886		Spud	07/27/2018
Weinberger, Fady and Eva	51	\$50.00	All Things	1210399	3578	Spud	07/27/2018

Summary : All Things 07/27/2018 - 07/27/2018

2 Contributions Total Given : \$100.00 Average Contribution : \$50.00

2 Families Average Family Total : \$50.00

Fund : Building Fund

Family	Envelope #	Amount	Fund	Pledge ID	Check #	Batch	Date
Flatoff, John and Tracy	3330	\$50.00	Building Fund	1210886		7-27-2018 9am Sunday	07/27/2018
Mueller, Eric and Rebecca	884	\$50.00	Building Fund	1210399	3578	7-27-2018 9am Sunday	07/27/2018

Summary : Building Fund 07/27/2018 - 07/27/2018

2 Contributions Total Given : \$100.00 Average Contribution : \$50.00

2 Families Average Family Total : \$50.00

Fund : Envelope

Family	Envelope #	Amount	Fund	Pledge ID	Check #	Batch	Date
Kretzschmer, Chad and Shelly	50	\$50.00	Envelope			sPUD2	07/27/2018

Summary : Envelope 07/27/2018 - 07/27/2018

1 Contributions Total Given : \$50.00 Average Contribution : \$50.00

1 Families Average Family Total : \$50.00

12) To print the report, click the print icon indicated in the upper left side. To export the report, choose your method for exporting (PDF or typically Excel (CSV)) on the far right side, then click the save icon (the on the far right side, the smaller icon indicated below)

https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx - Google Chrome

Secure | https://sandbox.parishsoftfamilysuite.com/ReportViewers/ViewOfferingReport.aspx

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Good Shepherd Parish
550 Clark Ave
Toledo, OH 43601

Date Range Postings
07/27/2018 - 07/27/2018

Fund : All Things

Family	Envelope #	Amount	Fund	Pledge ID	Check #	Batch	Date
Kretzschmer, Chad and Shelly	50	\$50.00	All Things	1210886		Spud	07/27/2018
Weinberger, Fady and Eva	51	\$50.00	All Things	1210399	3578	Spud	07/27/2018

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2 Contributions Total Given : \$100.00 Average Contribution : \$50.00

2 Families Average Family Total : \$50.00

Fund : Building Fund

Family	Envelope #	Amount	Fund	Pledge ID	Check #	Batch	Date
Flatoff, John and Tracy	3330	\$50.00	Building Fund	1210886		7-27-2018 9am Sunday	07/27/2018
Mueller, Eric and Rebecca	884	\$50.00	Building Fund	1210399	3578	7-27-2018 9am Sunday	07/27/2018

Summary : Building Fund 07/27/2018 - 07/27/2018

2 Contributions Total Given : \$100.00 Average Contribution : \$50.00

2 Families Average Family Total : \$50.00