ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Monthly Support & Check-In

January 11, 2024

ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

The Implementation Team's goal is to execute and support this database transition and software implementation with caution, collaboration, communication, and compassion.

AGENDA

- Opening Prayer
- Update
- Learning: Reports
- Upcoming Meetings

Prayer for Reaching a Goal

Dear God, today is a new day--a blank page, a clean slate. Let me start this day without worry or stress, but knowing you are walking with me through all the distractions. Help me to focus on my job goals today; staying disciplined in my actions and my words so that I might achieve a satisfying result from my work.

Open my eyes and my spirit to what you would like me to do and how I can be the most help to my colleagues and to your people who walk through our doors. Today is a new day. This is the day the Lord has made; let us rejoice and be glad in it. Psalm 118:24

UPCOMING MEETINGS

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

January Tuesdays at 1 pm

There will be special office hours with break-out rooms for <u>those needing help with running their giving statements out of ParishStaq</u> and Fund Management.

February 8 at 10 am – Sacrament logging

ParishStaq Team Monthly Check-in

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

LEARNING: REPORTS

- People Search
  Use cases: mailings; create an event for young adult group
- One or two of “pre-potted” reports

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Best Practices

- Pending Profiles
- In Parish De-Duping
- Cross Parish De-Duping
- Custom Report Using People Search
- Group Report Dropdown
- Event Report and Action Dropdown
- System Reports – A Few Good Ones
- Transaction Export – Giving Portal

ParishStaq™

Best Practices – Pending Profiles

What is a Pending Profile?

A Pending Profile is a Profile that has not been approved yet. Pending Profiles are originally created by a person, via Public Needs sign up or Public Schedule sign up, when logging into the My Church App for the first time, when giving through Pushpay Giving for the first time, or when giving a subsequent gift using information that doesn't match with their existing ChMS profile created from their first gift.

Created via:

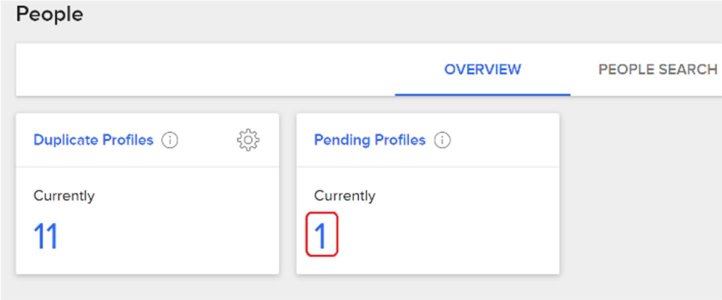
- Public Needs Sign Up
- Public Schedule Sign Up
- Logging into the Church App for the first time
- When giving through Pushpay Giving for the first time
- Or, when giving a subsequent gift using information that doesn’t match their existing ChMS Profile

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

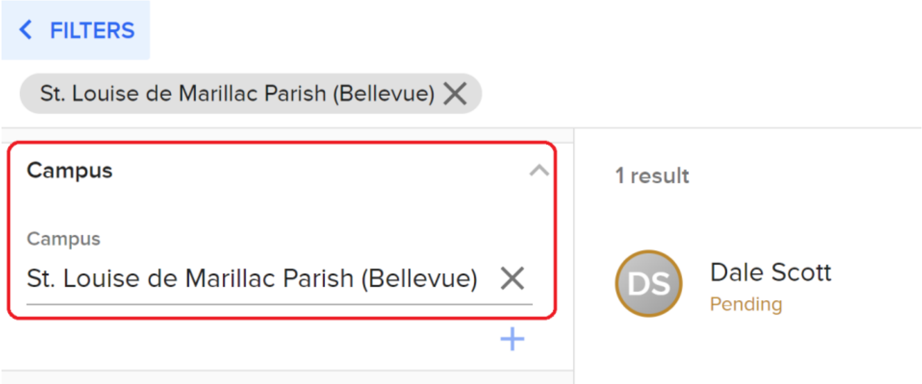
Best Practices – Pending Profiles

Access the Pending Profile Section

- Go to People on the left side menu and then select Overview along the top:



- Click on the number in blue underneath the word ‘Currently’ and then click on the drop down next to Campus and select your Campus Name:



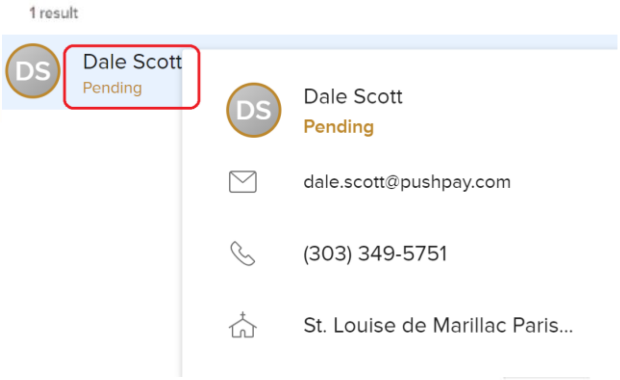
ParishStaq

ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

Best Practices – Pending Profiles

- Place your mouse over the name without clicking (hover):

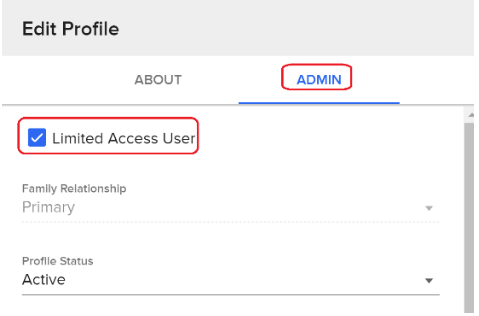


- If there are more than one, you may want to do a screen capture or print the list. This will assist you in merging duplicate profiles later, should this be necessary.

- General Best Practice would be to Approve these one at a time and then then manage the duplicate merge, where needed. Remember there is a periodic duplication check that takes place ‘behind the scenes’, so these will not show up as potential duplicates right away.

- You will want to view these profiles to assign a Membership Type and a Family Position, when appropriate.

- These profiles will come into the system with Limited Access User setting. If appropriate, uncheck the LAU checkbox:



ParishStaq

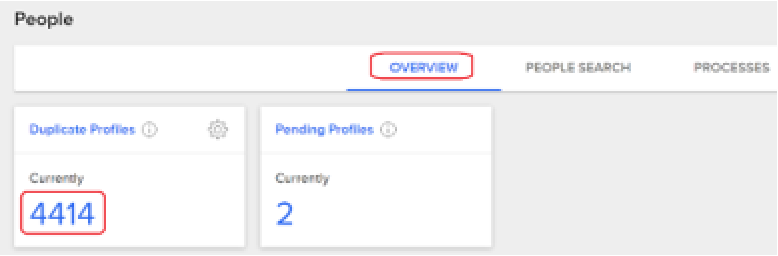
ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Best Practices – Deduping Within Your Campus

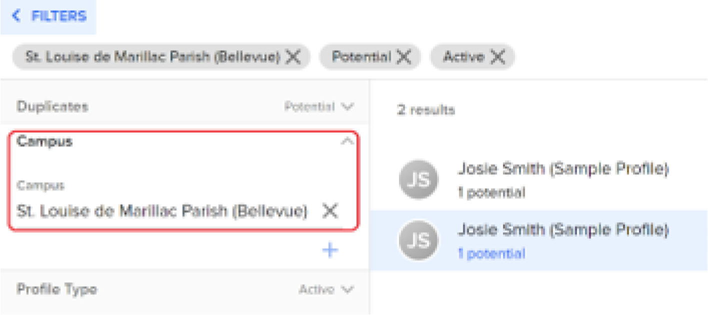
As we continue our migration to ParishStaq, there will be situations where potential duplicate records are created and migrated within your campus. The following steps will help you identify if duplicate profiles are contained within your campus or are cross-campus. Cross-campus duplicates require communication between campus admins on the two (or potentially more) campuses

Step 1: Determine if a Duplicate Profile is Within Your Campus

- Go to People on the left side menu and then select Overview along the top:



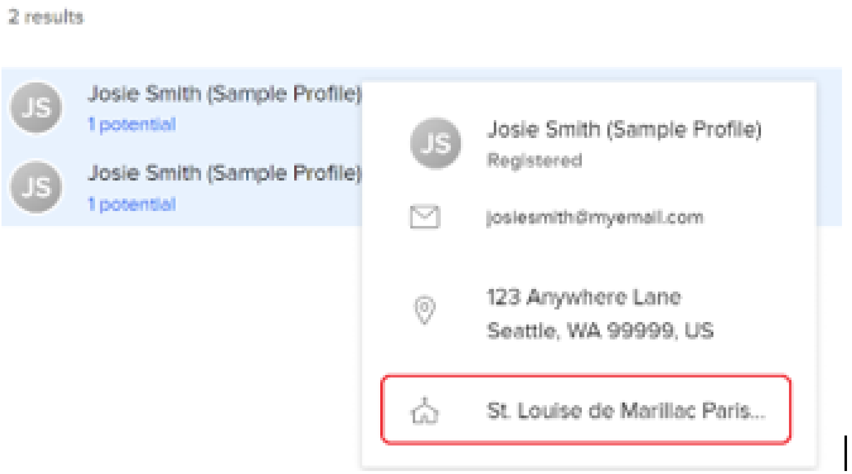
- Click on the number in blue underneath the word 'Currently' and then click on the drop down next to Campus and select your Campus Name:



ParishStaq

Best Practices – Deduping Within Your Campus

- Once selected, the profiles that are matched for de-duping will be listed on the right side, like the example profile 'Josie Smith (Sample Profile). Place your mouse over the name without clicking (hover):



You should see that this profile is in your campus, which is 'St. Louise de Marillac Parish (Bellevue), in our example.

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

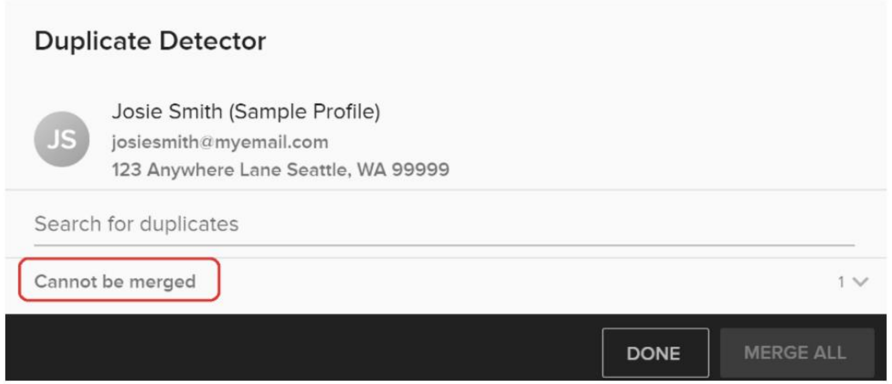
Best Practices – Deduping Within Your Campus

Step 2: Attempt to Merge the Duplicate(s):

- Click where you see '1 Potential' in our example to bring up the profile that is a potential duplicate. This number could be greater than 1, if there are multiple duplicates:

- If the profile shows up with 'Cannot be merged', the duplicated profile resides in a different campus:

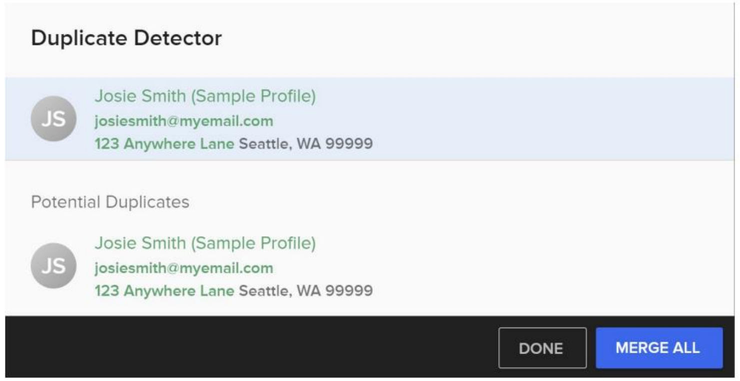
We cover this in next section



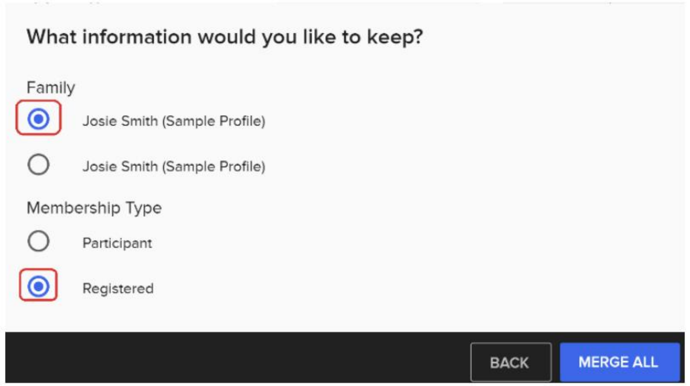
ParishStaq™

Best Practices – Deduping Within Your Campus

- If the profile shows up like the following, then both profiles reside within your campus(es):



- Click the MERGE ALL button and the program will bring up any fields that have information that does not match between the profiles. Select the value you want to retain from each unmatched field and then click MERGE ALL:



ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Best Practices – Cross Parish De-Duping

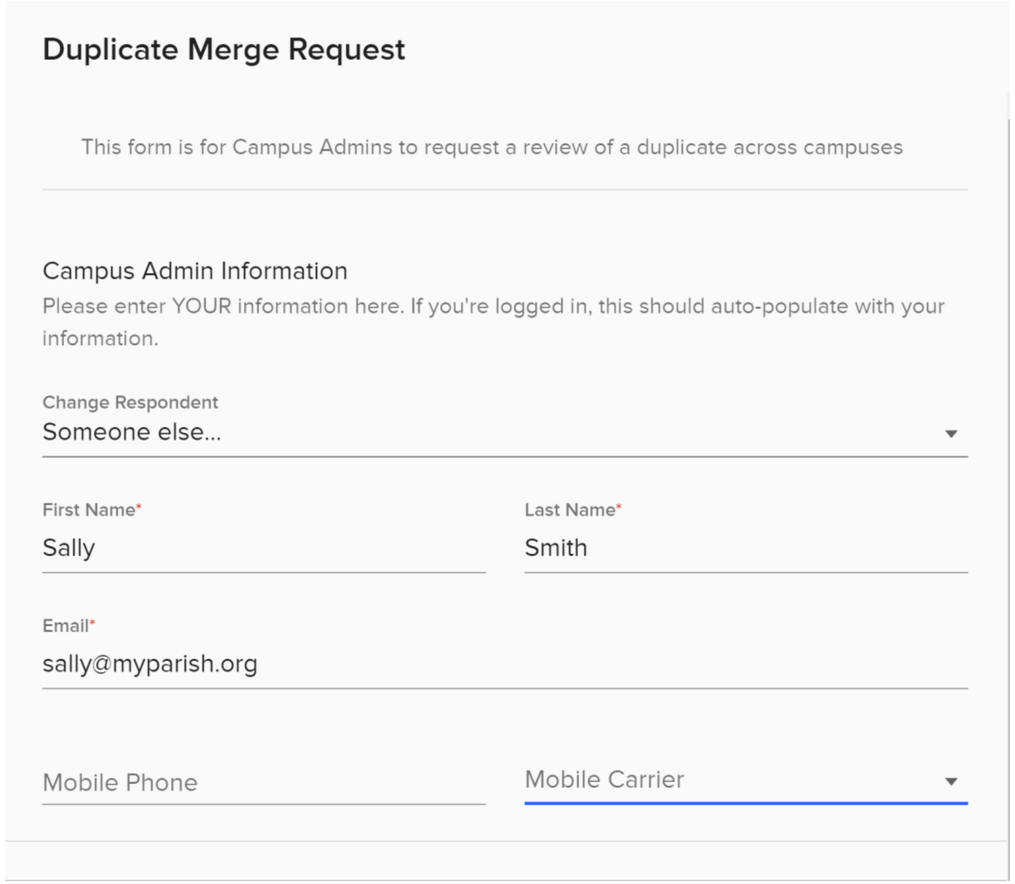
https://archseattle.ccbchurch.com/goto/forms/27/responses/new

ParishStaq

ARCHDIOCESE OF SEATTLE

PARISHIONER ENGAGEMENT

Best Practices – Cross Parish De-Duping



Duplicate Merge Request

This form is for Campus Admins to request a review of a duplicate across campuses

Campus Admin Information

Please enter YOUR information here. If you're logged in, this should auto-populate with your information.

Change Respondent

Someone else...

First Name*

Sally

Last Name*

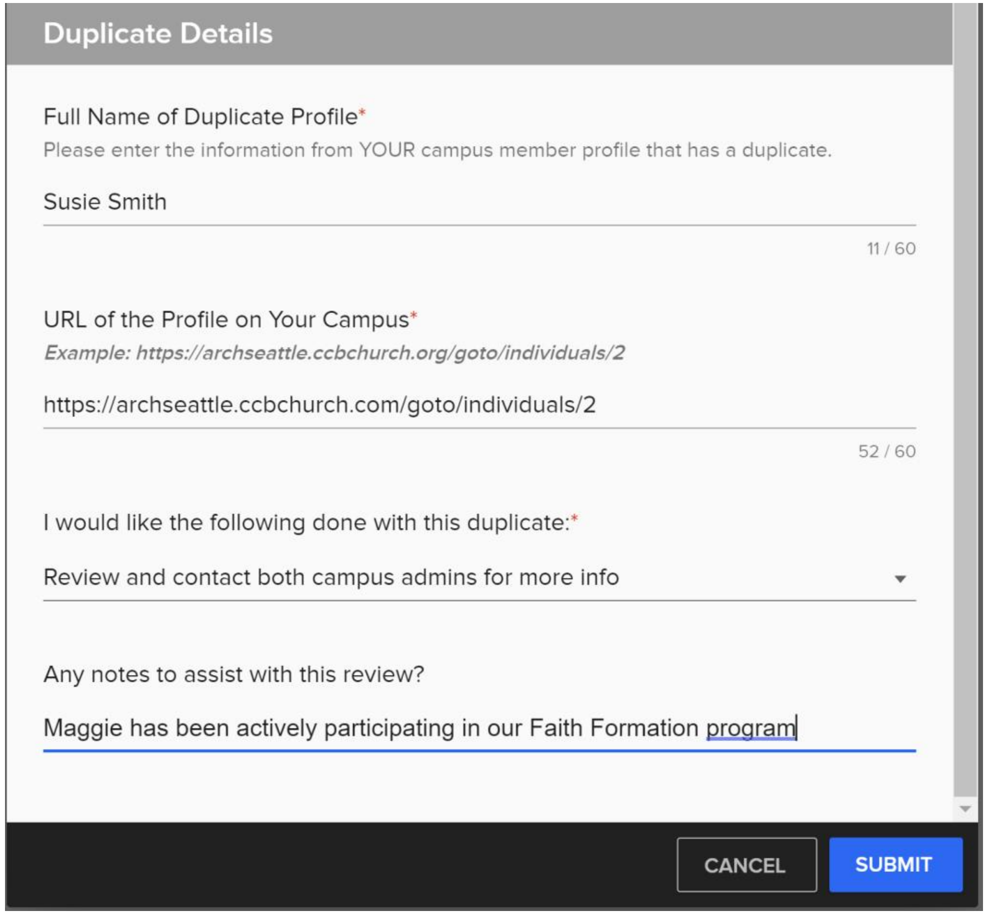
Smith

Email*

sally@myparish.org

Mobile Phone

Mobile Carrier



Duplicate Details

Full Name of Duplicate Profile*

Please enter the information from YOUR campus member profile that has a duplicate.

Susie Smith

11 / 60

URL of the Profile on Your Campus*

Example: https://archseattle.ccbchurch.org/goto/individuals/2

https://archseattle.ccbchurch.com/goto/individuals/2

52 / 60

I would like the following done with this duplicate:*

Review and contact both campus admins for more info

Any notes to assist with this review?

Maggie has been actively participating in our Faith Formation program

CANCEL

SUBMIT

ParishStaq™

Custom Reports Using People Search

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

A Special Event – Crab Feed for Young Adults

Goal: Send an Email to our Young Adults to Invite Them to a Crab Feed

Young Adult Crab Feed – You're Invited

All You Can Eat Crab Feed Fest for our Young Adults

Saturday, Feb 10th, 2024

6:00pm – 9pm

$60 Crab and Lasagna

$20 Lasagna Only

Dinner includes Coleslaw, Garlic/French Bread, Water, Soda, Beer, or Wine

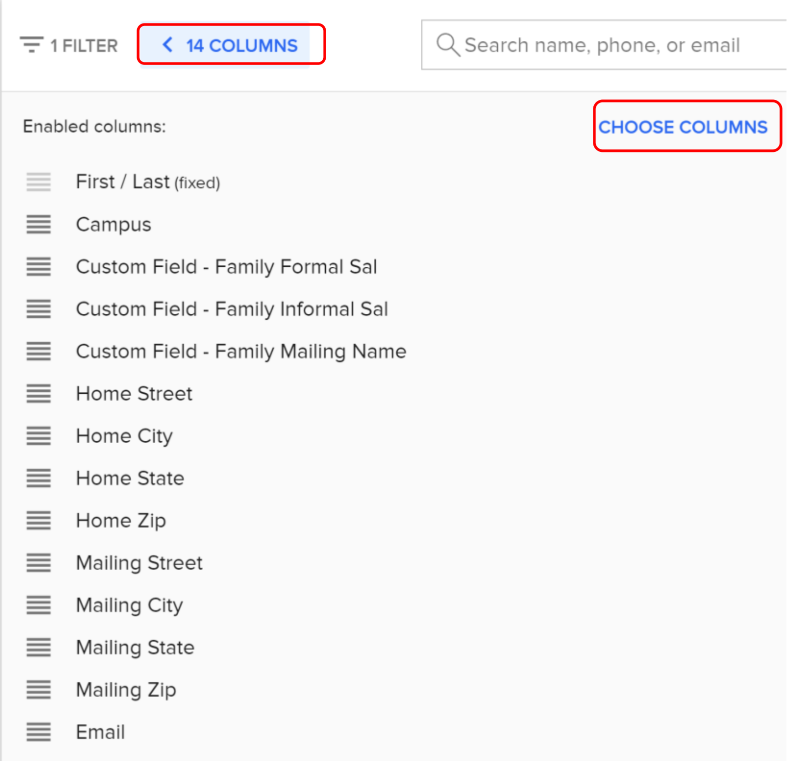
Please RSVP Crab Feed RSVP

ParishStaq™

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Creating a People Search Filter and Select Fields for Your Report

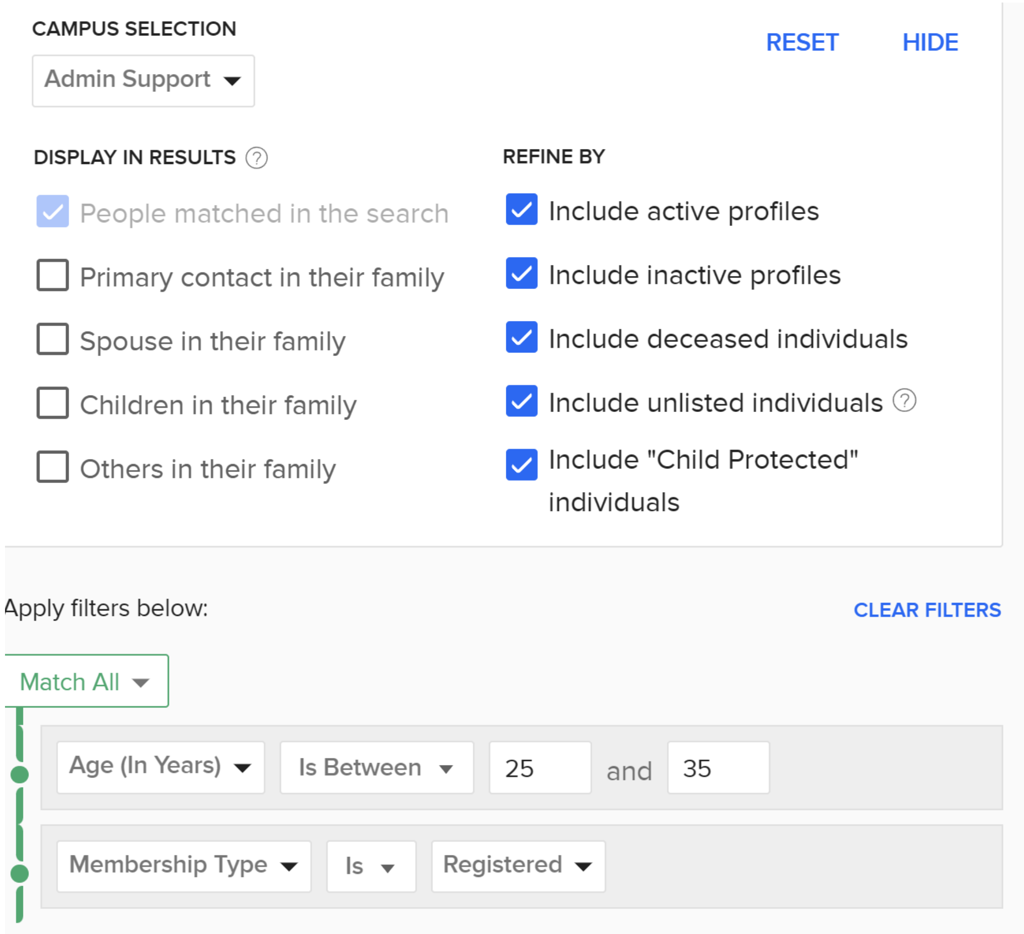
Select Your Fields for People Search



ParishStaq™

Creating a People Search Filter and Select Fields for Your Report

Set Your Filters for Young Adults

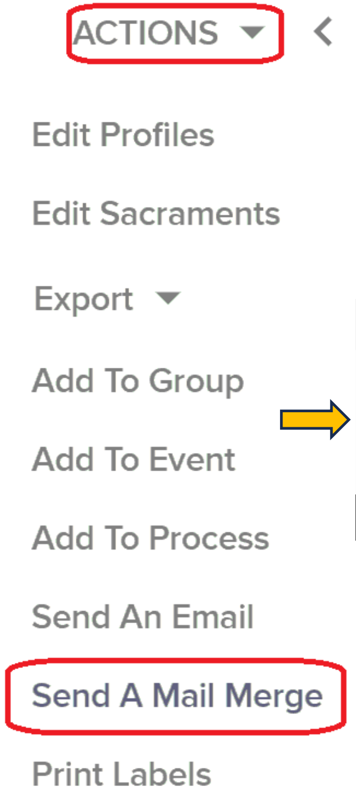


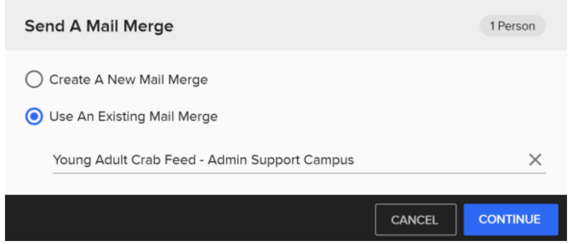
ParishStaq

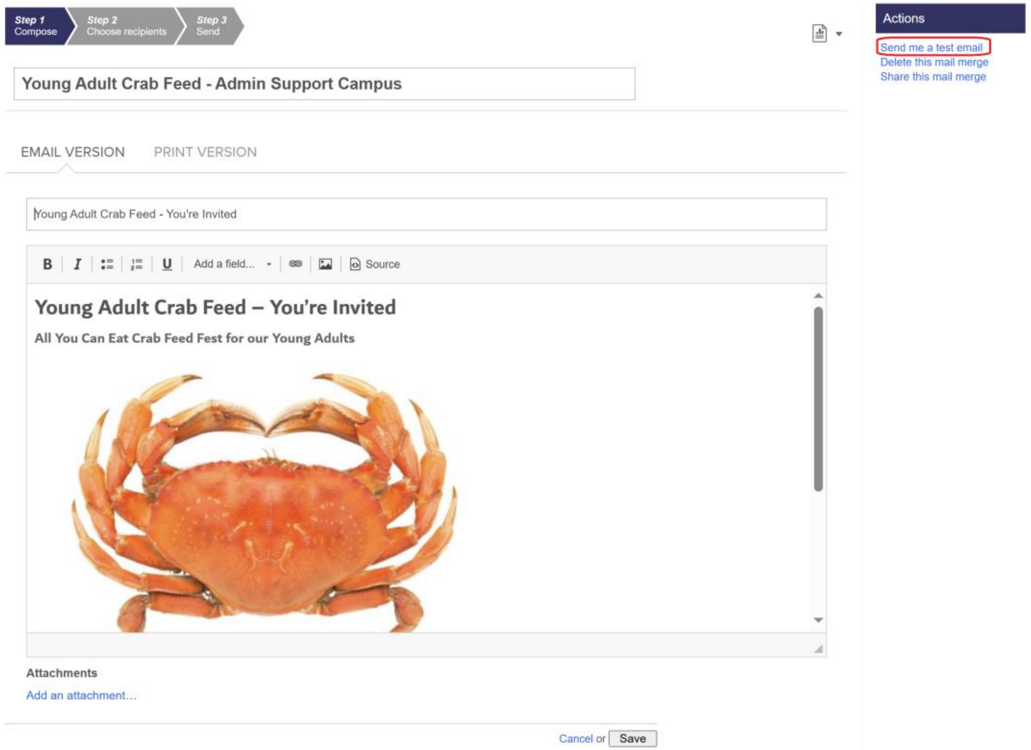
ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Creating a People Search Filter and Select Fields for Your Report

Actions -> Send Mail Merge Message to the Filtered Group



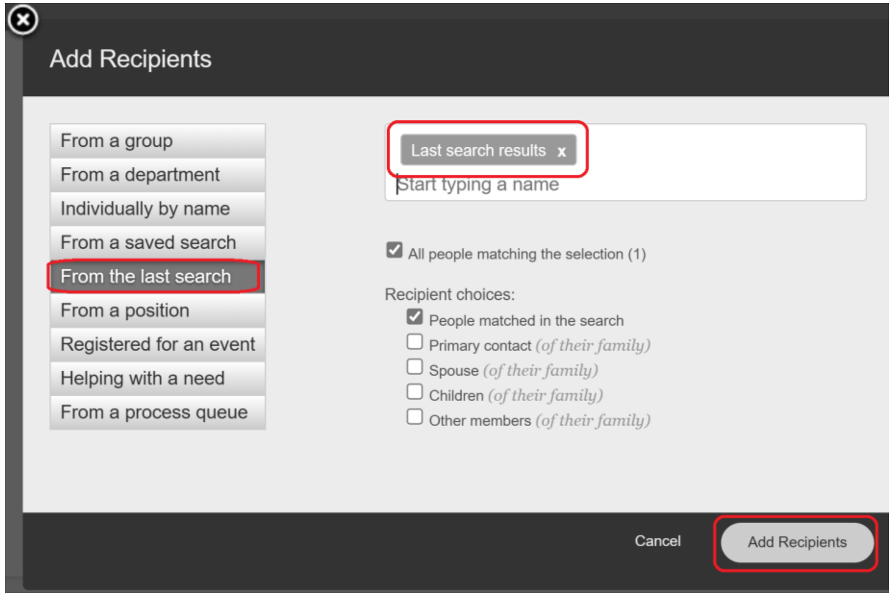


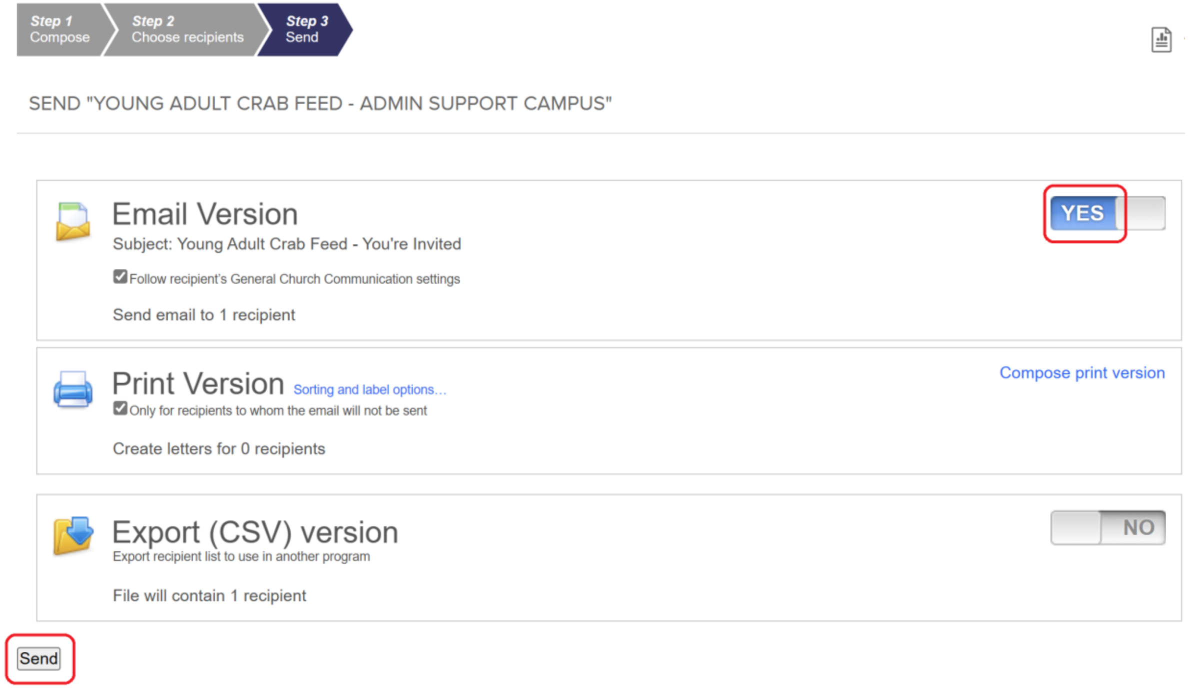


ParishStaq™

Creating a People Search Filter and Select Fields for Your Report

Actions -> Send Mail Merge Message to the Filtered Group

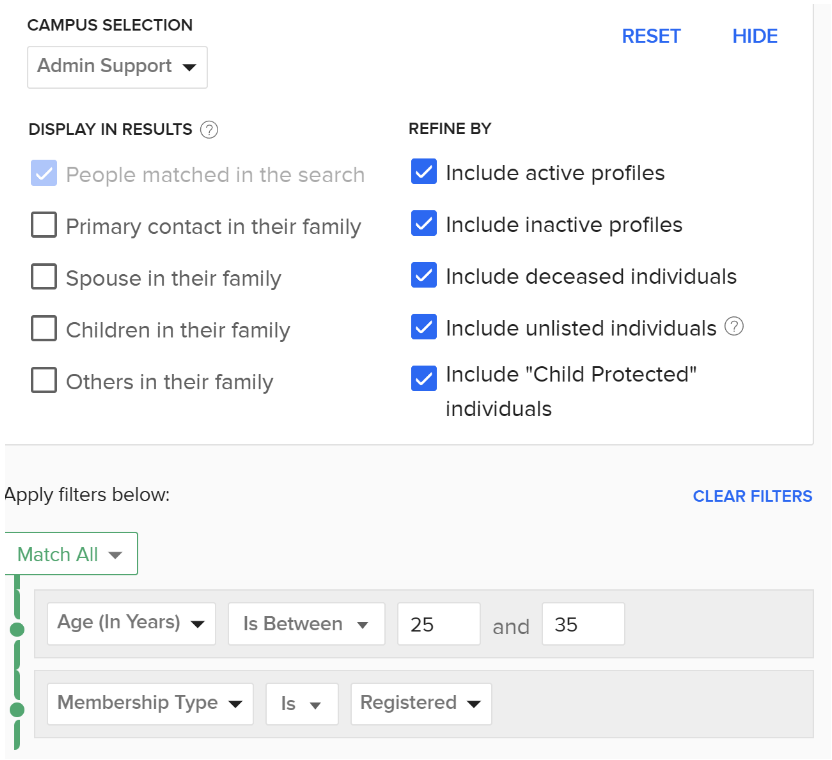


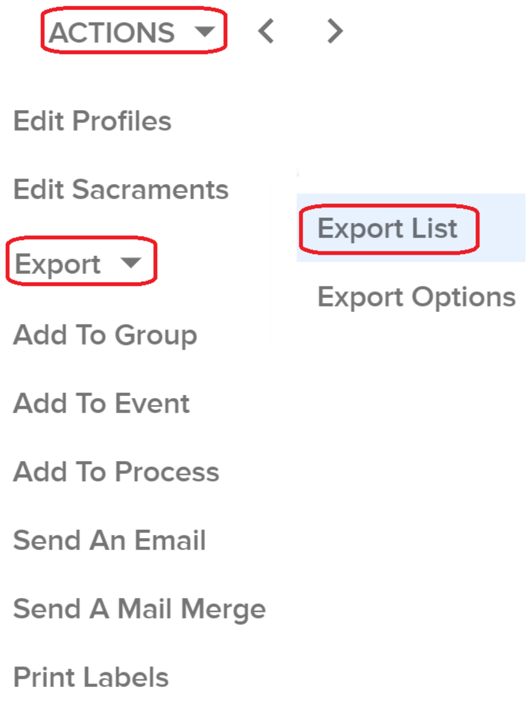


ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Creating a People Search Filter and Select Fields for Your Report

Actions -> Export List of Attendees



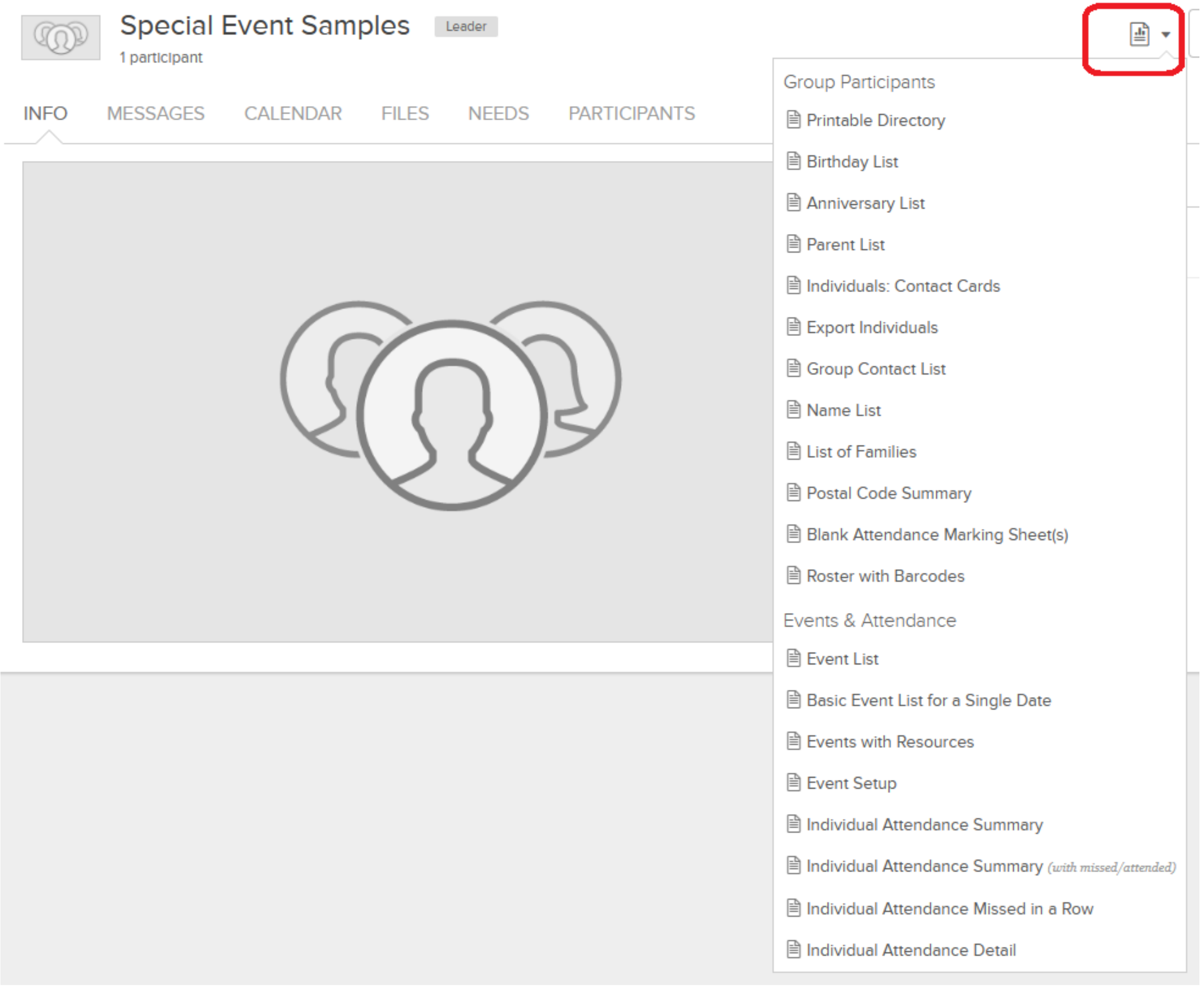


ParishStaq™

Group Report Dropdown

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Using Group Actions Dropdown for Reports

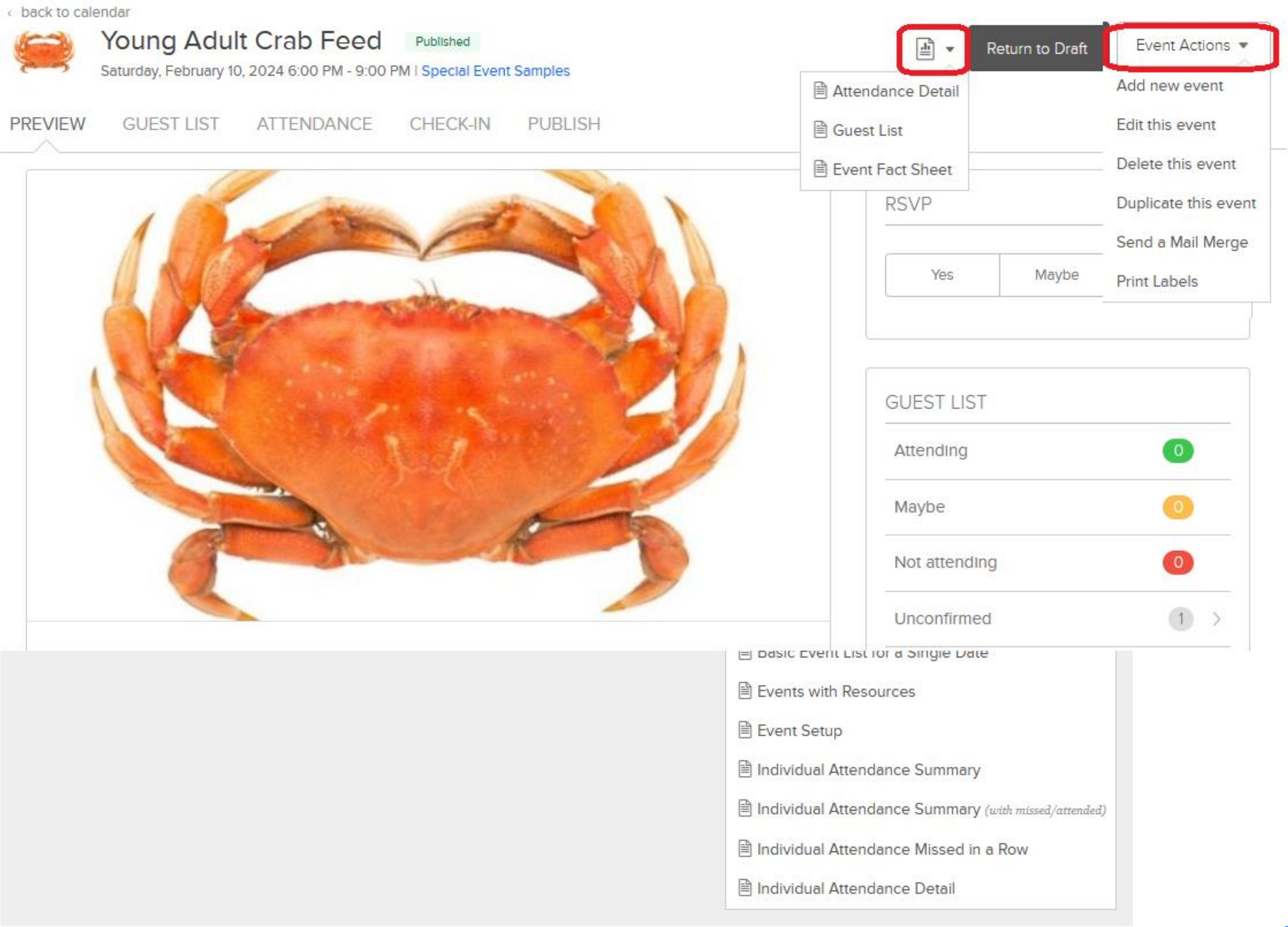


ParishStaq™

Event Report and Action Dropdowns

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Using Event Actions Dropdown for Reports

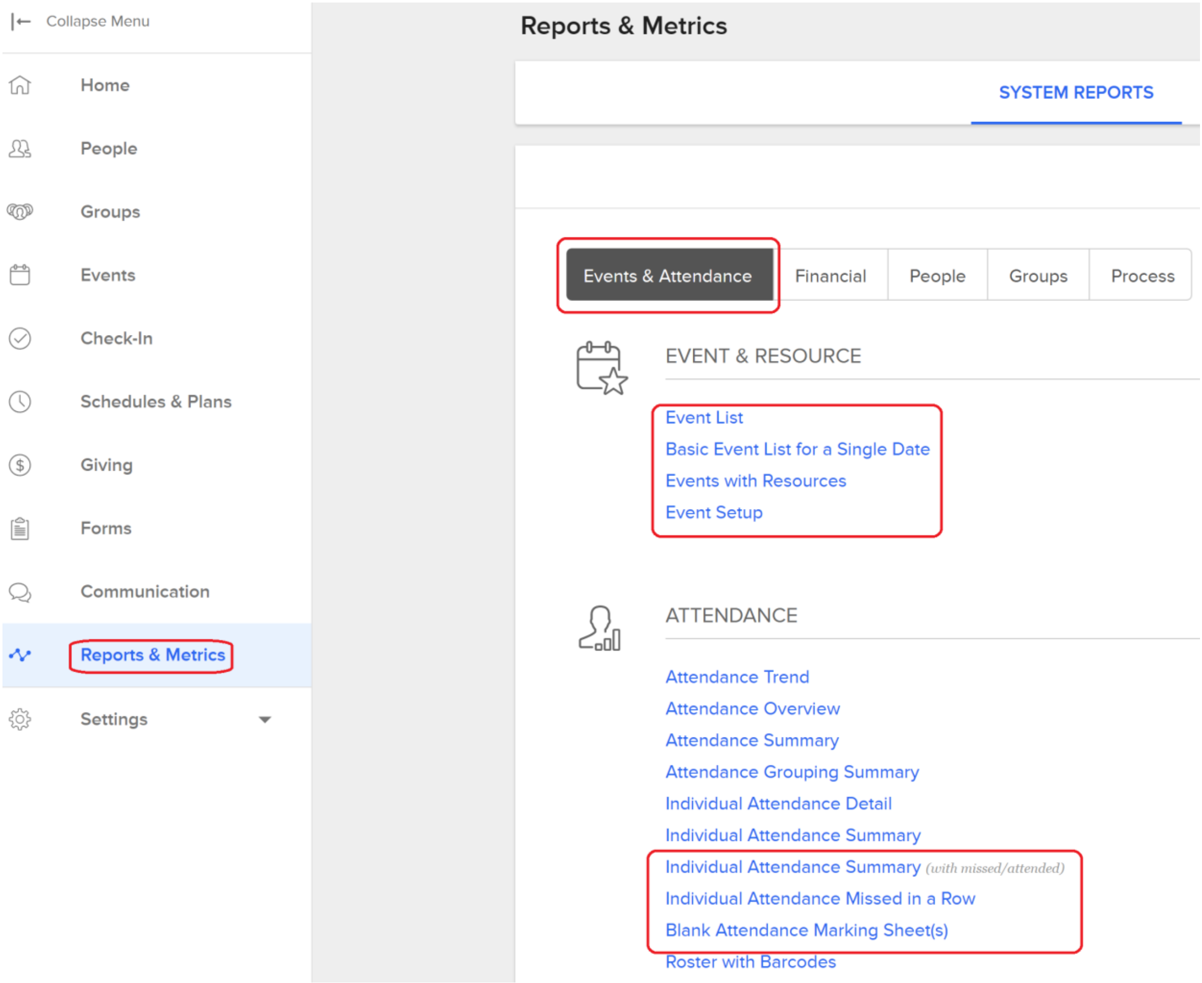


ParishStaq™

System Reports – A Few Good Ones

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Events & Attendance



ParishStaq™

Financial

Events & Attendance | Financial | People | Groups | Process

STATEMENTS & PLEDGES

- Giving Statements
- Giving Statement Summary
- Pledge Statements
- Pledge and Giving Detail
- Pledge and Giving Summary

TRANSACTIONS

- Transaction Summary
- Transaction Detail
- Transactions by Amount
- Transactions by Batch or Date Range
- Transactions by Category
- Annual Summary by Categories
- Bank Deposit List
- First/Last Transaction Detail
- Batch Report Summary

CHART OF ACCOUNTS

- Category Summary by Donor
- Category Summary by Batch or Date Range
- COA Statistics
- COA Category Summary by Month
- Chart of Accounts Detail
- Chart of Accounts List

ONLINE GIFTS

- Repeating Gifts Schedule
- Merchant Settlement Summary
- Merchant Transaction Detail

SPECIAL REPORTS

- Donor Analysis
- Contribution Amount Statistics
- Transaction Grouping Trend

People

Events & Attendance	Financial	People	Groups	Process

GENERAL

- Individual Profiles
- Individual Notes
- Printable Directory
- List of Individuals
- List of Families
- Significant Events
- Export Individuals or Change Log

STATS & PRIVILEGES

- Usage Stats
- Leadership Roles
- Member Privileges
- Quick Email Log

Groups

Events & Attendance	Financial	People	Groups	Process

GENERAL

Department Summary
Group Contact List
Name List
Birthday List
Anniversary List
Parent List
Postal Code Summary
Group Participants
Export Groups

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Process

Events & Attendance	Financial	People	Groups	Process

PROCESSES & QUEUES

- Queue Manager Breakdown
- Process Queues Breakdown
- Overdue Breakdown
- Queue Comparison
- Process Queue
- Process Detail
- Process Summary
- Process Manager List
- Queue Manager List

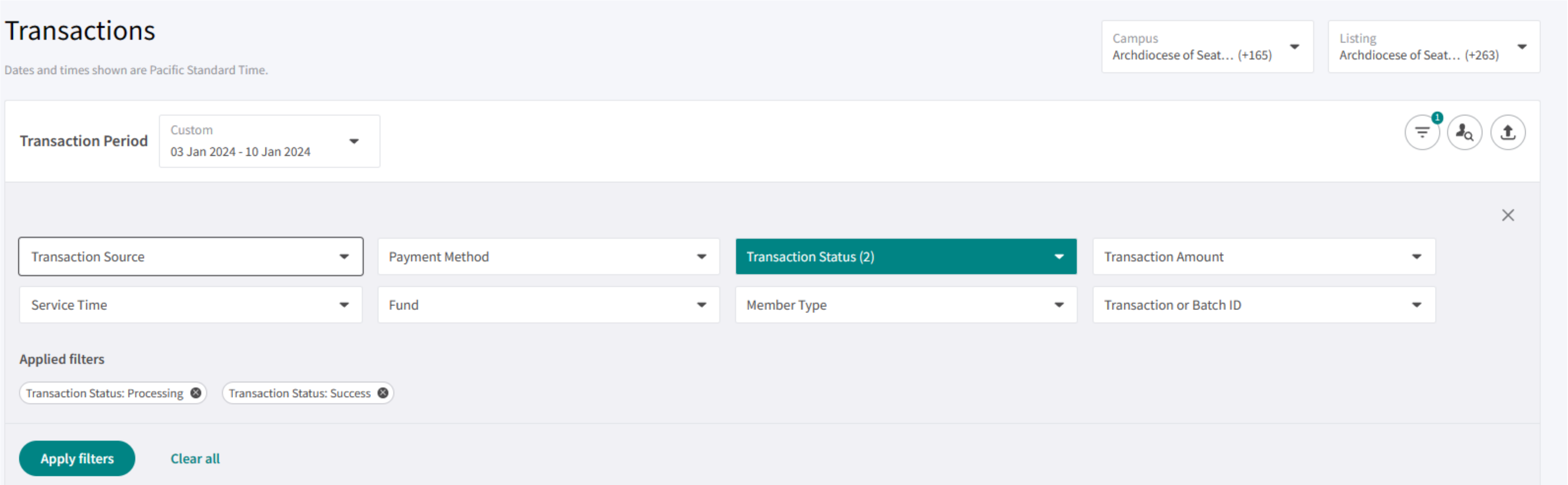
ParishStaq™

Transaction Export Giving Portal

ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

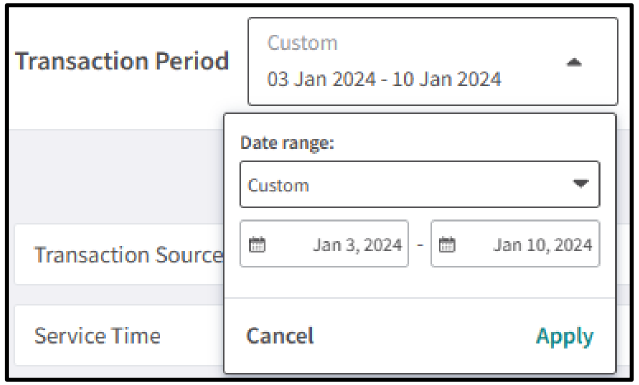
Using Transaction Export in the Giving Portal

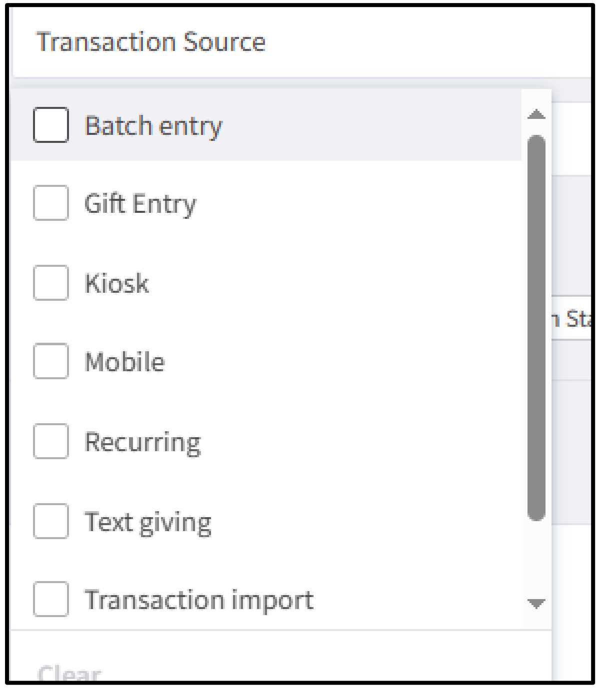
- Finance
  - Transactions
    - Then, Set Filters

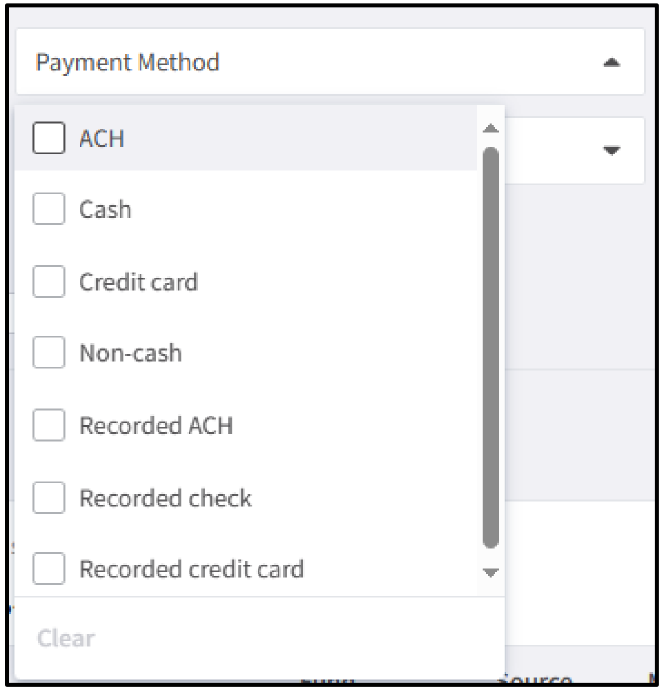


ParishStaq™

Using Transaction Export in the Giving Portal







ARCHDIOCESE OF SEATTLE
PARISHIONER ENGAGEMENT

Email the Support Team

We are still having trouble receiving all submissions to the parishstaq.support@seattlearch.org

Please Use

support@archdioceseofseattlepes.samanage.com

ParishStaq™