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 Directory Screen](image1)

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)

![Member Details Screen](image2)

3. On the bottom half of the member’s screen, click on the tab that is marked **Sacraments**.
4. 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.

5. 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.
6. 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.

7. 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.
8. On the original Family/Member details screen, click **OK** if you’re prompted to update the existing record to reflect sacramental changed.

![Update Sacrament Changes](image)

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

![Member Details](image)

Alternate Sacramental Entry:

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

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.
2. 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:

3. 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.
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**.
5. Continue searching members and selecting them until you have all that you need under your Selected Members screen, as seen below.

6. 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

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