ACS Financial Suite Parochial Report

Parochial Report

The ACS Parochial Report module is used to track information that you must report to your diocese. The Parochial Report module interfaces with ACS People, Contributions, Attendance, and General Ledger.

To start using Parochial Report, view the Parochial Report - Startup Outline. You can also view one of the common tasks below, search Parochial Report help, or view a topic in the Table of Contents.

Parochial Report - Startup Outline

To submit the Parochial Report, use the following outline:

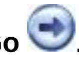
- Define days, service types, places, and celebrants, officiants, and preachers
- Add service information
- Set up membership, attendance, and service information in the Parochial Report
- Set up stewardship and Financial information in the Parochial Report
- Enter your church's certification information
- Enter membership, attendance, and services in the Parochial Report
- Enter stewardship and financial information in the Parochial Report
- Print the Parochial Report
- Archive the Parochial Report

Defining Parochial Report Lists

When adding information to the Register of Church Services, several fields are customized lists. In Define Lists, you can set up dates, service types, places, celibrants, officiants, and preachers for Parochial Report. You can edit these items and print lists of them from the Define Lists area. If needed, you can delete items as long as they are not assigned to a Register of Church Services entry.

Defining Days in Parochial Report

The Define Lists window in Parochial Report displays a list of the Holy Days available for services as listed in the book of Common Prayer, but you can add, edit, or delete days as necessary.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Day**, then click **Add**.
4. In the **Field Description** text box, enter a unique description for the Holy Day.
5. To add another Holy Day, select **Add Another**.
6. Click **OK**.
7. Once all items are added, clear **Add Another**, then click **Cancel**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Day**.
4. Select the Holy Day that you want to change, then click **Edit**.
5. In the field text box, enter the new field description or clear the **Active** checkbox.
6. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Day**.
4. Select the Holy Day that you want to delete, then click **Delete**.
5. When the confirmation message displays, click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Day**, then click **Print**.

Defining Service Types in Parochial Report

In Parochial Report Define Lists, you can set up service types.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Service Type**, then click **Add**.
4. In the **Field Description** text box, enter a unique description for the Service Type.
5. Under **Service Type**, select the type of service you are adding (Holy Eucharist, Daily Office, Marriage, Burials, or Other).
6. To add another Service Type, select **Add Another**.
7. Click **OK**.
8. When finished, clear **Add Another**, then click **Cancel**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Service Type**.
4. Select the Service Type that you want to change, then click **Edit**.
5. In the field text box, enter the new field description, clear the **Active** checkbox, or select the appropriate service type.
6. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Service Type**.
4. Select the Service Type that you want to delete, then click **Delete.**
5. When the confirmation message displays, click **OK.**

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Service Type**, then click **Print.**

Defining Places in Parochial Report

In Parochial Report Define Lists, you can set up the places or locations where your services are held.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Place**, then click **Add**.
4. In the **Field Description** text box, enter a unique description, such as Activity Center, Chapel, or Courtyard, for the place.
5. To add another place or service location, select **Add Another**.
6. Click **OK**.
7. Once all items are added, clear **Add Another**, then click **Cancel**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Place**.
4. Select the service location or place that you want to change, then click **Edit.**
5. In the field text box, enter the new field description or clear the **Active** checkbox.
6. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Place**.
4. Select the service location or place that you want to delete, then click **Delete.**
5. When the confirmation message displays, click **OK.**

1. Under Advanced Tools, click the **Define Lists** tab.

2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Place**, then click **Print**.

Defining Celebrants, Officiants, and Preachers in Parochial Report

In Parochial Report Define Lists, you can set up a list of the people who can serve as celebrants, officiants, or preachers for your services. A celebrant leads the worship service. In a Eucharist, the celebrant is the bishop, or someone who the bishop appoints to lead the service. In a service of Morning Prayer, the celebrant may be either lay or clergy.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Celebrant or Officiant or Preacher**, then click **Add**.
4. In the **Field Description** text box, enter the worship leader's name.
5. To add another worship leader, select **Add Another**.
6. Click **OK**.
7. Once all items are added, clear **Add Another**, then click **Cancel**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Celebrant or Officiant or Preacher**.
4. Select the individual whose information you want to change, then click **Edit**.
5. In the field text box, enter the new field description or clear the **Active** checkbox.
6. Click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select Parochial and click **Go** .
3. Under **Available Fields**, select **Celebrant or Officiant or Preacher**.
4. Select the individual that you want to delete, then click **Delete**.
5. When the confirmation message displays, click **OK**.

1. Under Advanced Tools, click the **Define Lists** tab.
2. In the drop-down list, select **Parochial** and click **Go** .
3. Under **Available Fields**, select **Celebrant or Officiant or Preacher**, then click **Print**.

Working with the Register of Church Services

The Register of Church Services is a complete list of all services that you hold at your church during the year. It includes the total attendance at each service and details about each service, such as the date, time, and place.

You can also record additional information about each service. This information includes the number of Communions distributed and the names of the celebrant, preacher, and server.

In the Register of Church Services window, you can add, edit, or delete church services for the Parochial Report. To customize the fields that display on the grid, right-click inside the grid, then click **Customize**. Then, you can select the fields you want to display and clear those you don't want to display.

You can also print or export a list of services and service information.

Adding Service Information in Parochial Report

Use Add/Edit Services to add service information to the Register of Church Services. You can record the number of people who attend Saturday evening services (with a starting time of 5:00 p.m. or later) and all Sunday morning services in the column for All Sunday and Saturday Evening Services. You can also record the service type. Each service type corresponds to a column on the Register of Church Services.

You can add the number of In Person, Present, and Online Present people. When you use In Person and Online, the event displays as a Hybrid event in Parochial Report.

Once you enter the service information, you can select **Add Another** to save the information that you entered and add another service.

1. Under Manage Records, click the **Transactions** tab in the Financial Suite. Click the **Tasks** tab in the People suite.
2. In the drop-down list, select **Parochial Services**, then click **Go** .
3. Click **Add**. The Add/Edit Services window displays.
4. In the **Date** field, select the service date.
5. In the drop-down lists, select the **Day** and **Service** for the service. You can select **Online Only** for virtual services.
6. In the **Place** drop-down list, select the location of the service. If necessary, for private Holy Eucharist services, select **Private**.
7. In the **Hour** field, enter the time the service began.
8. In the **Number Present** field, enter the number of people who attended.
9. In the **Communions** field, enter the number of people who received communion.
10. In the **Celebrant or Officiant** field, enter the name of the celebrant or officiant who led the service.
11. In the **Preacher** field, enter the preacher's name.
12. If necessary, enter additional information in the **Memo** field. For example, if you record low attendance for a service, you can enter possible reasons for low attendance in the Memo field. You can also enter the names of the bride and groom for a wedding service.
13. When finished, click **OK**.

Editing Service Information in Parochial Report

You can edit service information that you entered in the Register of Church Services.

1. Under Manage Records, click the **Transactions** tab in the Financial suite. Click the **Tasks** tab in the People suite.
2. In the drop-down list, select **Parochial Services** and click **Go** .
3. In the **Year** drop-down list, select the year that contains the service that you want to edit.
4. Select the service that you want to edit, then click **Edit.**
5. Make the necessary changes in each field, then click **OK**.

Deleting Service Information in Parochial Report

You can delete service information that you entered in the Register of Church Services.

1. Under Manage Records, click the **Transactions** tab in the Financial suite. Click the **Tasks** tab in the People suite.
2. In the drop-down list, select **Parochial Services** and click **Go** .
3. In the **Year** drop-down list, select the year that contains the service that you want to delete.
4. Select the service that you want to delete and click **Delete**.
5. When the confirmation message displays, click **Yes**.

Printing the Register of Church Services

As you enter information in the Register of Church Services, you create a database of historical information about your church. You can format and print reports of the information in the Services Register.

Once you format the print grid, you can save your settings for future use so that you do not have to format the grid settings again.

1. Under Manage Records, click the **Transactions** tab in the Financial suite. Click the **Tasks** tab in the People suite.
2. In the drop-down list, select **Parochial Services** and click **Go** .
3. In the **Year** drop-down list, select the year of the register to print.
4. To customize the information that prints on the grid, right-click inside the grid, then click **Customize**. When finished, click **OK** to return to the Register of Church Services window.
5. Click **Print Grid**.
6. The Service Register report displays. To format the report for printing, use the buttons at the top of the window.
7. Once the report is formatted, click the **Print** button.

Exporting the Register of Church Services

You can export the Services Register to Microsoft® Excel. Once the data is in Excel, you can create validation tables and reports to determine trends in attendance, schedules, or any other criteria you need.

ACS OnDemand

Files exported within the OnDemand environment will open in OpenOffice instead of Microsoft Office.

1. Under Manage Records, click the **Transactions** tab in the Financial suite. Click the **Tasks** tab in the People suite.
2. In the drop-down list, select **Parochial Services** and click **Go** .
3. In the **Year** drop-down list, select the year that you want to export.

4. Click **Excel Export**.
5. In the **Save In** dialog box, navigate to the folder in which you want to save the export, and enter a file name for the export.
6. Click **Save**, then **OK**.

Setting up the Parochial Report

To generate accurate Parochial Reports, you must record your data correctly in the ACS People, Contributions, and General Ledger modules as well as in the Services Register.

ACS uses the information that you enter in these modules to create the Parochial Report. ACS links the information that you enter on the Add/Edit Individuals window in the ACS People module to Parochial Report membership increases and decreases.

ACS also links the pledge and contribution information that you enter in the ACS Contribution module to the Parochial Report stewardship information. If you do not correctly enter your pledge and contribution information, ACS cannot generate accurate stewardship information for the year.

You can enter your ACS General Ledger account numbers in Parochial Report Setup to link your financial information to the Parochial Report module. To generate accurate parochial reports, you must enter correct account numbers.

Setting up Membership, Attendance, and Services in Parochial Report

On the **Setup** tab, in the Membership, Attendance, and Services area, select the appropriate options so that the Parochial Report can pull statistics for your church membership, attendance, and church services.

To generate accurate reports, you must enter the correct data in the ACS modules. The Date of Birth and M ember Status fields are in People records by default. You also need to keep track of Date Joined, Joined
How, Date Removed, How Removed, Date Baptized, and Date Confirmed using Additional Fields. Page 2 of the Parochial Report captures the People data as well as the services data from the Register of Church Services in the Parochial Report module. However, you can manually change this data on the **Report** tab, under **Membership, Attendance, and Services**.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. On the **Setup** tab, click **Membership, Attendance, and Services (Page 2)**.
5. Select the appropriate options. To learn more, see the Additional Field Information below.
6. When finished, click **Generate**.
7. To view your totals, click on the **Report** tab, then select **Membership, Attendance, and Services (Page 2)**. On this tab, you can make any necessary adjustments or overrides.

Additional Field Information

UEID Number
Enter the Universal Episcopal ID number assigned to your parish by the national church.

Increases (Line 1)

Member Status
To include the total increases in the Total Active Baptized Members total for the year, select all of the member statuses that apply. Increases are based on the Date Joined for the selected year and the member statuses selected.

Decreases (Line 2)

Member Status
To include the total decreases in the Total Active Baptized Members total for the year, select all of the member statuses that apply. Decreases are based on the Date Removed for the selected year and the member statuses selected.

Date Removed
Select the field name that you defined for date removed in the People module. Click the Down Arrow to include all individuals in the total decreases number.

How Removed
Select the field name that you defined for how individuals are removed in the People module. Click the Down Arrow to select how the individuals are removed.

Communicants in good standing (Lines 2, 4, and 5)

Use saved search criteria
Select to use the saved criteria from a search that you perform in the People module. ACS executes the search when you generate the membership, attendance, and services information.

Use saved search results
Select to use the saved results from a search that you perform in the People module.

Use selection below
Select to include only those that pledged, only those that gave, or those that gave and pledged.

Member Status
To include member statuses in the search, select all that apply. ACS uses the member status and Contribution selections you make to execute a search for matching records.

Others that are active (Line 6)

Exclude members added after:
Enter the last day of the year.

Member Status
Select all of the member statuses that you want to include from line 5 of the Parochial Report.

Attendance (Lines 7 and 8)

Enter number of Sundays for the year
Enter the total number of Sundays on the calendar for the year, 52 or 53.

Membership Rites (Lines 17 through 21)

Date Baptized
Select the field name you defined in the People module for Date Baptized from the drop-down list. Click the Down Arrow to include all individuals in the number of baptisms.

Date Confirmed
Select the field name you defined in the People module for Date Confirmed from the drop-down list. Click the Down Arrow to include all individuals in the number of confirmations.

Joined How for Received by Bishop (line 21)
Select the member statuses defined in the People module for Received by Bishop.

Education (Lines 22 and 24)

Master Group
If your parish provides church education, enter the group name. If you select a master group, you can select the sub-groups that you want to include.

Setting up Stewardship and Financial Information in Parochial Report

On the **Setup** tab, in the Stewardship and Financial area, you can select or enter information to generate the totals for Stewardship and Financial Information (Page 3) of the Parochial Report.

With the exception of lines 1 and 2, the amounts on each line of Stewardship and Financial Information (Page 3) links to accounts in your General Ledger Chart of Accounts. The totals that ACS generates and prints on the report are the balances, or total debits, or total credits in the accounts that you select for each line.

Some lines on the Parochial Report combine balances from several General Ledger account numbers. Before getting started with the account selection, ACS Technologies recommends that you print a list of your chart of accounts. Beside each account number, record the correct line number from Page 3 of the Parochial Report.

If all of the accounts under a heading in your chart of accounts are reported on the same line of Page 3 of the Parochial Report, you can assign the line number from Page 3 to the heading level. You can change the line number of any account under a heading. You can use the total debits, total credits, or the balance to generate totals for a line in the report, then assign the appropriate line number to the proper column. When you generate the report, ACS adds the total debits, total credits, and balances of all accounts with the same assigned line number. The total for each line number prints on the corresponding line of the Parochial Report.

If you need to manually edit your totals, you can do this on the **Report** tab, under **Stewardship and Financial (Page 3)**.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. On the **Setup** tab, click **Stewardship and Financial (Page 3)**.
5. Select the appropriate options. To learn more, see the Additional Field Information below.
6. When finished, click **Generate**.
7. To view your totals, click on the **Report** tab, then select **Stewardship and Financial (Page 3)**. On this tab, you can make any necessary adjustments or overrides.

Reviewing and Overriding Parochial Report Information

ACS pulls the information on the **Report** tab from the selections you made when setting up the Parochial Report. However, you can view and manually override this information if a total is incorrect.

To verify that the information is correct, you can generate and print the Parochial Report as many times as you need to.

We recommend generating the Membership, Attendance, and Services page and the Stewardship and Financial page on a monthly or quarterly basis to identify and correct any errors that may occur with data entry in the other ACS modules. If you cannot identify the error, you can enter an override for any line of the parochial report. When you enter an override, enter the reason for the override, the date of the override, and your name. Print the override report to file with the parochial report as an audit trail.

Entering Certification Information in Parochial Report

The first step of completing the Parochial Report is entering your certification information.

The Certification window is divided into two sections, Contact Information and Certification. The information for your organization in the Utilities/Site Information window displays in the appropriate fields in the Contact Information section. You can change or add information in the appropriate fields, or you can exit the Parochial Report module to make the corrections in the Utilities/Site Information window.

In the Certification section, the information is blank, and you must complete these fields. Information you must enter includes the names and phone numbers of the people who prepared the Parochial Report. Other fields are the names of those who certified the report and the dates on which they certified it.

After you enter certification information, you can view and enter membership, attendance, and service information in Parochial Report.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. Click **Certification**.
5. In the **Contact Information** fields, enter any missing information or corrections that you want to make.
6. In the **Certification** fields, enter the following information:
    - Names and phone numbers of those individuals who prepared the Parochial Report.
    - Names of those individuals who certified the Parochial Report.
    - Dates the Parochial Report was certified by each person.
7. To save your changes, click another page or tab in the ACS Parochial Report window. When the confirmation message displays, click **Yes**.
8. When finished, click **Membership, Attendance, and Services (Page 2)** to view and edit that information.

Entering Membership, Attendance, and Services in Parochial Report

The Membership, Attendance and Services page is page 2 of the Parochial Report. Some of the information on this page comes from the data that you entered in the ACS People module, and some of the information is based on the options chosen in Setup. The remaining information on this page comes from the data that you entered in the Register of Church Services.

The Membership, Attendance and Services (Page 2) window is divided into six sections. Each section pertains to a different group of information. The following items display in the window:

- The label for each line on the parochial report.
- The total that ACS generates from the data that you entered.
- The override number for any overrides that you entered.

After entering this information, you can view and edit stewardship and financial information in the Parochial Report.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.

3. In the drop-down list, select **Parochial** and click **Go** .
4. Click **Membership, Attendance, and Services (Page 2)**.
5. View the information and make any changes as necessary. To make changes, click in the **Override** field beside the area you want to change and enter the new information. ACS prompts you to save the changes.
6. After making changes, click **Generate** to update your report with the new totals.
7. When the confirmation message displays, click **OK.** Then, click on the **Stewardship and Financial (Page 3)** link to view and edit stewardship and financial information.

Entering Stewardship and Financial Information in Parochial Report

The information on the Stewardship and Financial window is reported on page three of the parochial report. The data on this page comes from information that you enter in the ACS Contributions and General Ledger modules.

The Stewardship and Financial window is divided into six sections. The first section contains data from the ACS Contributions module. The remaining sections contain data from the ACS General Ledger module.
The following items display in the window:

- The label for each line on the Parochial Report
- The total that ACS generates from the data that you entered
- The override amount for any overrides that you entered

Next, you can enter information about your priest and associate priest.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. Click **Stewardship and Financial (Page 3)**.
5. View the information and make any changes as necessary. To make changes, click in the **Override** field beside the area you want to change and enter the new information. ACS prompts you to save the changes.
6. To update your report with the new totals, click **Generate**.
7. When the confirmation message displays, click **OK.** Then, click on the **Priest** link to enter information about your congregation's priests.

Entering Priest Information in Parochial Report

After entering Membership, Attendance, and Services information, then entering Stewardship and Financial Information, it's time to enter information about your Priest and Associate Priest. This information prints on the Parochial Report.

After entering your priest's information, you can print and review the Parochial Report.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. On the **Report** tab, click **Priest**.
5. Enter the priest and associate priest's information. To save your changes, click **Close**, or click on another tab in the Parochial Report.

Common Parochial Report Questions

If I have one account in which I deposit money for multiple funds, how can I separate the amount on my report?

ACS is not designed to allow you to select transactions within an account to apply to a line on the parochial report. This situation occurs, not only when multiple funds are involved, but also when mixed transactions to the same fund - some that do apply to the Parochial Report and others that do not apply - are entered into a single account. However, if this occurs, there are two options:

Option 1: Add new accounts to separate the amount between the multiple funds and associate the line with the correct account.

1. Under Manage Records, click the **Chart of Accounts** tab.
2. From the drop-down list, select **Add Account** and click **Go** .
3. Enter an **Account Code**.
4. Enter an account **Name**.
5. Select **Account Headings**, **Departments**, **Funds**, **Committees**, and **Areas** as necessary.
6. If this is a checking account, select **Checking**. Select the bank account associated with the checking account.
7. If necessary, enter any **Comments** about this account.
8. Click **OK**.

Option 2: Attach the line and enter an override for the amount and give a brief explanation of the override.

1. In the Parochial Report, on the **Stewardship and Financial Page 3**, locate the line.
2. In the **Override** field, enter the amount.
3. In the Override Explanation field, enter a brief explanation of the override.
4. Click **OK**.

When I print the Exceptions Report, I am missing a line for one of my accounts.

You need to attach the line to the appropriate account.

1. On **Stewardship and Financial Page 3**, select the **Setup** tab.
2. Locate the account number.
3. Click the line and assign it to the **Balance**, **Debits**, or **Credits** fields.
4. Click **Report**.
5. Click **Yes** to save your settings.

How can I verify that the number of signed pledge cards for the reporting year is correct?

To verify the number of signed pledge cards, print the Contributions Pledge Detail Listing Report. The total contributors should match the total on the line if there are no records with a zero amount pledge. Remember to only select the Funds included on the Parochial Report, and Include Deactivated Contributors.

1. Log into the ACS People Suite.
2. Under Searches and Reports, click the **Reports** tab.
3. In the drop-down list, select **Contributions Reports** and click **Go** .
4. Expand **Lists**, then select **Pledge Detail Listing**.
5. On the **Report Options** tab, select the year or date range to run the report for.
6. Select **Include Deactivated Contributors**.
7. Select **Selected Funds**, then click **Select** and use the right red arrow to choose the desired Funds. When finished, click **Return**.
8. Click **Preview** to display the report.

> The last page of the report displays a total count of Contributors who have a pledge record for the selected year and fund. The Pledge Detail Report does not include zero pledge records, only records that have a dollar amount.
>
> The Current Detail Report from the Parochial Report prints each individual that makes up the generated total. This report can include zero pledges if that option is selected.

How can I verify if the total dollar amount pledge for the reporting year is correct for line 2 of the Parochial Report?

Use the above steps to print the Pledge Detail Listing. On the last page of the report, the Total Pledge Amount column should match the amount showing on line 2 of the Parochial Report.

Printing the Parochial Report

After setting up the Parochial Report, viewing and editing any membership, attendance, and service information (as well as stewardship and financial information), and entering your priests' information, you can preview and print the report.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. On the **Print** tab, select the report you want to print (The current report, a blank form, or the current detail for the Membership, Attendance, or Services page or the Stewardship and Financial page). Yo u can also print an exceptions list, override report, setup information, or an archived report.
5. To preview the report before printing, click **Preview**. Otherwise, click **Print**.

6. When the printer dialog box displays, click **OK**.

Archiving the Parochial Report

After generating and printing the Parochial Report, you can archive it. Archiving the report saves a copy of the Parochial Report and the detail report, and you can print these reports later. It also advances the report year to the next year. For these reasons, you should only archive the report after completing and submitting it, however, you can edit the report after archiving it. If you do need to make changes after archiving the report, you will need to set back the year in Setup, then archive the report again, which will overwrite the existing report.

Before archiving the report, you must:

- Set up the report.
- Enter your certification information.
- View and edit any membership, attendance, service, stewardship, and financial information. Generate the report after making edits.
- Enter priest information.
- Print the report and review the printed copy to ensure accuracy, making changes and reprinting if needed.

1. On the People menu, click **Searches and Reports**, then click the **Reports** tab.
2. On the Financial menu, click **Generate Reports**, then click the **Reports** tab.
3. In the drop-down list, select **Parochial** and click **Go** .
4. On the **Report** tab, click **Archive**.
5. When the confirmation message displays, click **Yes**.