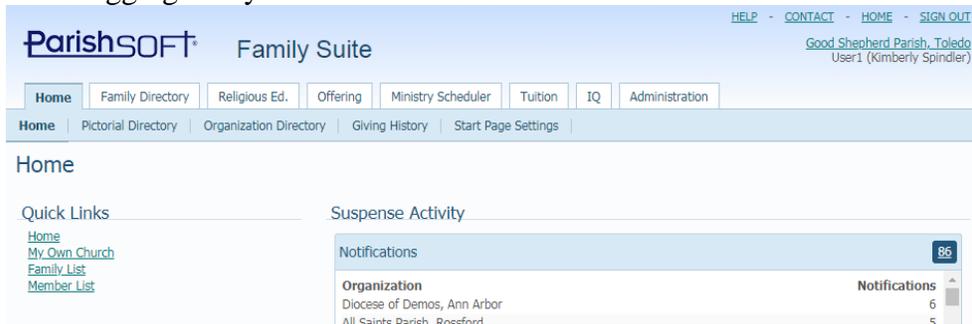
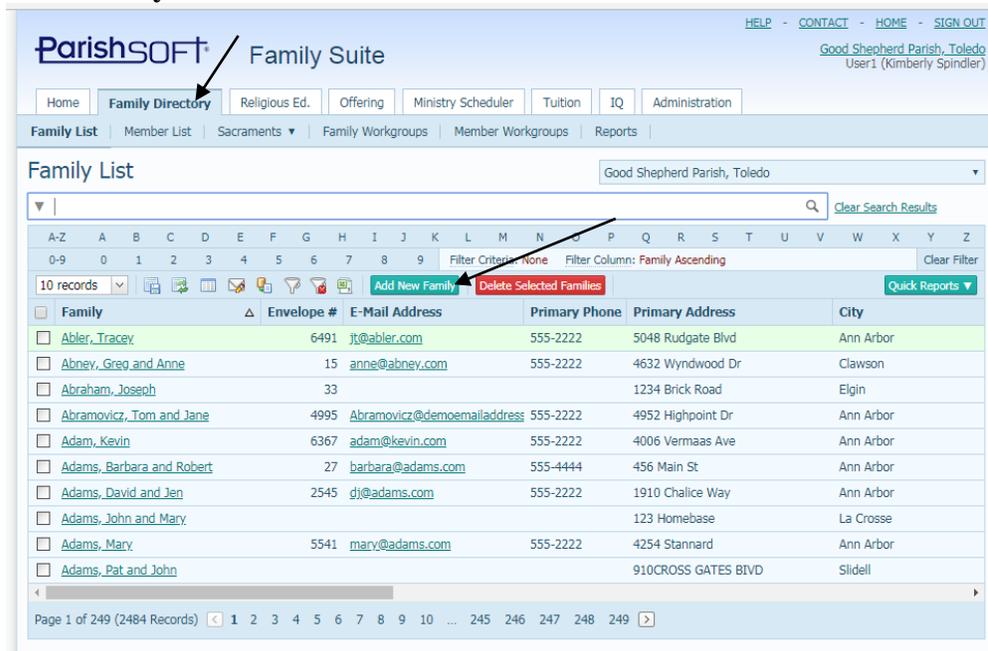


## Adding new families and members into ParishSOFT

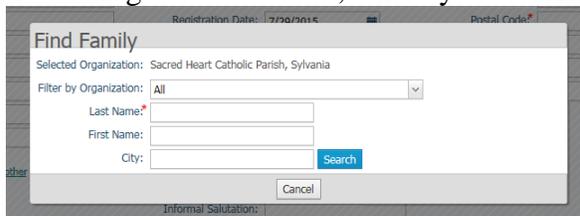
1. After logging into your ParishSOFT site. You will see a screen similar to below



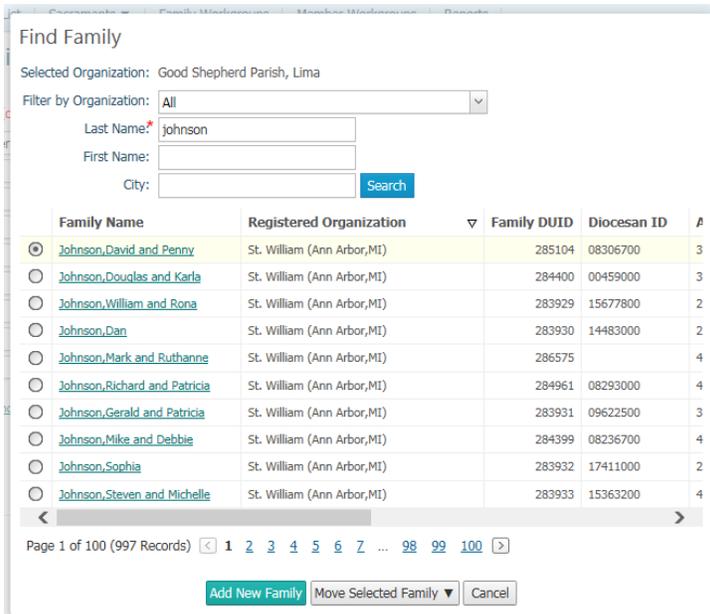
2. Click on the **Family Directory** tab and you will see a screen similar to below. Click the **Add New Family** button as indicated below:



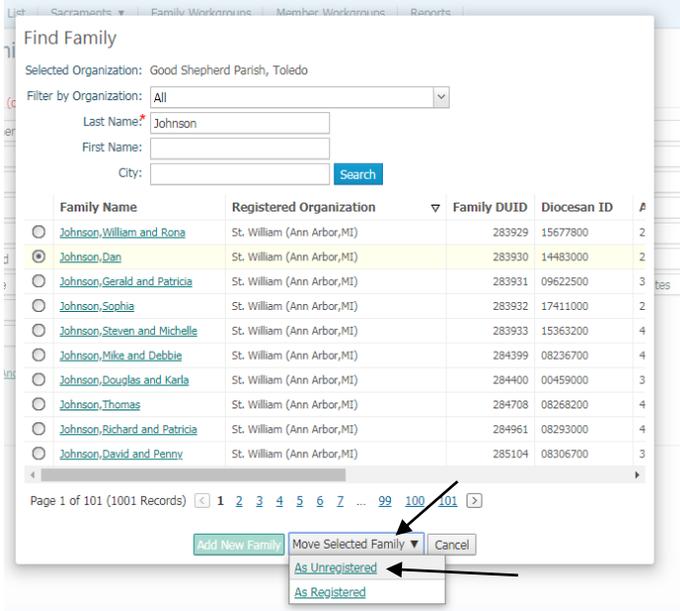
3. You will get a new screen, where you can first search for the family:



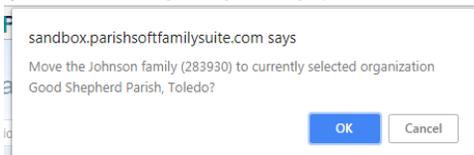
4. Enter in the family name and then click **Search**



- In the example above, we only found the listing for the family, but since we do NOT want to register them for our parish and only wish to share the information, we'll click on the **Move Selected Family** button and select **As Unregistered** as seen below:



- You will see a confirmation that you want to add the family, as seen below:



- Click OK. (Please note, this will NOT take the family away from the parish where they are registered, if you'd selected to move/add them to your parish as Unregistered)

- You will now be back on **your main Family Directory** screen. Click in the search field and search for the family.

The screenshot shows the ParishSOFT Family Suite interface. At the top, there are navigation links for HELP, CONTACT, HOME, and SIGN OUT. Below that, the user is identified as 'Good Shepherd Parish, Toledo' and 'User1 (Kimberly Spindler)'. The main navigation bar includes Home, Family Directory, Religious Ed., Offering, Ministry Scheduler, Tuition, IQ, and Administration. The 'Family List' section is active, showing a search for 'johnson' in the 'Good Shepherd Parish, Toledo' dropdown. The search results table has columns for Family, Envelope #, E-Mail Address, Primary Phone, Primary Address, and City. The table lists 10 records, with 'Johnson, Dan' highlighted. An arrow points to the 'Clear Filter' icon in the toolbar above the table.

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
Johnson, Bill and Ann				123 Nowhere Rd	Madison
Johnson, Dan	1597	Johnson@demoemailaddress.co	555-2222	2631 Westbrook Dr	Ann Arbor
Johnson, David and Penny	6781		555-2222	3232 Orchard Trail Dr	Ann Arbor
Johnson, Gerald and Patricia	1601		555-2222	3641 Swallow Tail Ln	Ann Arbor
Johnson, Greg and Lorie				702 S High Point Rd	Madison
Johnson, Mark and Ruthanne	7893		555-2222	4121 Barbara Dr	Ann Arbor
Johnson, Michael	16	Johnson@demoemailaddress.co		12546 Michigan	Plum
Johnson, Mike and Debbie	3721	Johnson@demoemailaddress.co	555-2222	4514 Talmadge Green Rd	Ann Arbor
Johnson, Richard and Patricia	6161		555-2222	4214 Caravelle Dr	Ann Arbor
Johnson, Sophia	1605		555-2222	2631 Westbrook Dr	Ann Arbor

*\* You may need to change/adjust your filter icon to see all families by selecting the clear filter icon, as seen by clicking the icon below, if you can't see the family you just added.*



- Click on the family you just added to open the record. You will see the record similar to the one below, where the “parish of registration” is NOT your own. However, information in the RED fields are what the status of this family now is, in your parish. (typically the families pull in as Active family groups, and you’ll want to switch them to something else, like Contributor or Religious Ed Only)

Adjust the red fields to correctly reflect your parish information, similar to the screen below, where we have a “Contributor Only” family.

Make sure to look at the Envelope number, remove it and check that the Send Contrib. Env. is NOT checked, or this family will get an envelope from your parish.

Mrs. Penny Johnson (285104)

Family Details Member Details (5)

This family record is not owned at the selected organization, therefore only data with red text can be edited.

Family Information Notes

Church of Registration: St. William, Ann Arbor  
 Details Modified On: Wednesday, September 07, 2016 6:34 PM  
 Family Group: Contributor Only  
 Registration Status:   
 Registration Date: 8/1/1987  
 Unregistered Date: Not Available

Last Name: Johnson  
 First Name(s): David and Penny  
 Formal Mailing Name: Mrs. Penny Johnson  
 Informal Name: Mrs. Johnson  
 Formal Salutation: Mrs. Penny M. Johnson  
 Informal Salutation: Penny Johnson  
 Email Address:  
 Primary Phone: 555-2222  
 Emergency Phone: 555-3333  
 Emer. Ph. Desc.:

Primary Address: Home Address  
 Home Mailing Other  
 Country: United States  
 Postal Code: 48108  
 Address Line 1: 3232 Orchard Trail Dr  
 Address Line 2:  
 City: Ann Arbor  
 State/Region: Michigan  
 Phone Number: 555-2222

Envelope #: 0 Next  
 Diocesan ID: 08306700  
 Annual Gift \$: 0 Giving History  
 Map Code:

Send Mail:   
 Send Contrib. Env.:   
 Publish Address:   
 Publish Photo for Pictorial Directory:   
 Publish Phone:   
 Publish Email:   
 Send Magazine:

Edit Details Close

Change Family Group to status of the family in YOUR parish

10. Make sure to check the Member Details also, and adjust them to Inactive/Active, etc. to reflect the correct information for this family.

Penny Johnson

Family Details Member Details (5)

This member record is not owned at the selected organization, therefore only data with red text can be edited.

Penny David Emily Katie Lindsey Add Import

Gender: Female  
 Title: Mrs.  
 First Name: Penny  
 Nick Name: Penny  
 Middle Name: M.  
 Last Name: Johnson  
 Suffix:  
 Maiden Name:  
 Role: Head  
 Status: Inactive  
 Birth Date: 12/22/1953  
 Birth Place:  
 Age: 62  
 Date of Death:  
 Religion: Catholic  
 Language:  
 Ethnicity:  
 Marital Status: Single  
 Envelope #: 0 Next  Send?

MemberDUID 667867  
 Special Needs

General Contact Sacraments Faith Formation Misc.

Contact Information  
 Email Address:  
 Home Phone: 555-1234  
 Cell Phone: 555-9090  
 Work Phone: 555-5678  
 Pager:  
 Fax:

Edit Details Close