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
5. 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:

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

7. 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)
8. You will now be back on your main Family Directory screen. Click in the search field and search for the family.

* 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.

9. 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.
10. Make sure to check the Member Details also, and adjust them to Inactive/Active, etc. to reflect the correct information for this family.