

Adding new families and members in ParishSOFT

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

ParishSOFT[®] Family Suite
Good Shepherd Parish, Toledo
User1 (Kimberly Spindler)

Home | Family Directory | Religious Ed. | Offering | Ministry Scheduler | Tuition | IQ | Administration

Home | Pictorial Directory | Organization Directory | Giving History | Start Page Settings

Home

Quick Links: Home, My Own Church, Family List, Member List

Suspense Activity

Notifications: 86
Organization: Diocese of Demos, Ann Arbor (6), All Sainte Parish, Dineford (5)

2. Click on the **Family Directory** tab and you will be on the **Family List** area as seen below:

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Home | **Family Directory** | Religious Ed. | Offering | Ministry Scheduler | Tuition | IQ | Administration

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Family List | Good Shepherd Parish, Toledo

Search: [] Clear Search Results

Filter Criteria: None | Filter Column: Family Ascending | Clear Filter

10 records | Add New Family | Delete Selected Families | Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Tracey	6491	jt@abler.com	555-2222	5048 Rudgate Blvd	Ann Arbor
<input type="checkbox"/> Abnev, Greg and Anne	15	anne@abnev.com	555-2222	4632 Wyndwood Dr	Clawson
<input type="checkbox"/> Abraham, Joseph	33			1234 Brick Road	Elgin
<input type="checkbox"/> Abramovicz, Tom and Jane	4995	Abramovicz@demoemailaddress	555-2222	4952 Highpoint Dr	Ann Arbor
<input type="checkbox"/> Adam, Kevin	6367	adam@kevin.com	555-2222	4006 Vermaas Ave	Ann Arbor
<input type="checkbox"/> Adams, Barbara and Robert	27	barbara@adams.com	555-4444	456 Main St	Ann Arbor
<input type="checkbox"/> Adams, David and Jen	2545	dj@adams.com	555-2222	1910 Chalice Way	Ann Arbor
<input type="checkbox"/> Adams, John and Mary				123 Homebase	La Crosse
<input type="checkbox"/> Adams, Mary	5541	mary@adams.com	555-2222	4254 Stannard	Ann Arbor
<input type="checkbox"/> Adams, Pat and John				910CROSS GATES BIVD	Slidell

Page 1 of 249 (2484 Records) | 1 2 3 4 5 6 7 8 9 10 ... 245 246 247 248 249

3. Click the **Add New Family** button as seen below:

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Search: [] Clear Search Results

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10 records | **Add New Family** | Delete Selected Families | Quick Reports

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Abler, Tracey	6491	jt@abler.com	555-2222	5048 Rudgate Blvd	Ann Arbor
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<input type="checkbox"/> Abraham, Joseph	33			1234 Brick Road	Elgin
<input type="checkbox"/> Abramovicz, Tom and Jane	4995	Abramovicz@demoemailaddress	555-2222	4952 Highpoint Dr	Ann Arbor
<input type="checkbox"/> Adam, Kevin	6367	adam@kevin.com	555-2222	4006 Vermaas Ave	Ann Arbor
<input type="checkbox"/> Adams, Barbara and Robert	27	barbara@adams.com	555-4444	456 Main St	Ann Arbor
<input type="checkbox"/> Adams, David and Jen	2545	dj@adams.com	555-2222	1910 Chalice Way	Ann Arbor

4. You will get a new screen, where you can first search for the family, as seen below.

Registration Date: 9/19/2018 Postal Code:*

Find Family

Selected Organization: Good Shepherd Parish, Toledo

Filter by Organization: All

Last Name:*
First Name:
City:

5. Enter in the family's last name only and then click **Search**.

Find Family

Selected Organization: Good Shepherd Parish, Toledo

Filter by Organization: All

Last Name:* albertson
First Name:
City:

Family Name	Registered Organization	Family DUID	Diocesan
<input type="radio"/> Albertson,James	Friends of the Bishop (Ann Arbor,MI)	220992	18844100

6. In the example above, we only found 1 listings of different families. (with the last name of Albertson) Since none of these was the family that registered, then click **Add New Family**.
- a. If you do find the family in the list, click on the **Move Selected Family** button after clicking the radial button in front of the family you've selected.

Find Family

Selected Organization: Good Shepherd Parish, Toledo

Filter by Organization: All

Last Name:* Albertson
First Name:
City:

Family Name	Registered Organization	Family DUID	Diocesan
<input checked="" type="radio"/> Albertson,James	Friends of the Bishop (Ann Arbor,MI)	220992	18844100

- [As Unregistered](#)
- [As Registered](#)

You will have the option to move the family into your parish as an Unregistered family (where you are “sharing” the family with the main parish of registration) or as a Registered family (if they filled out your Registration form)

*** If in doubt, move the family as Unregistered, as you can always Register them later.**

- If you didn't find the family, in the search, click **Add New Family** seen below.

- You will see a screen similar to below.

- Enter in the **Family Member** information under that section. (the left side) If there is more than one family member, click the **Add Another** link at the bottom, after you've added in all the members, then add in the additional family members.

Please note, that if there is one single adult in the family, they will be marked: Head and if there are two married adults, they will be marked: Husband/Wife. All children's status will be in relation to the heads of household. Typically: Son or Daughter.

ParishSOFT[®] Family Suite

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Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Add New Family to Good Shepherd Parish, Toledo

Family Member (one or more required)

Prefix: Mrs. | First Name: Barbara | Nick Name: Barb | Last Name: Albertson | Suffix: | Type: Wife | Gender: Female | Birth date: | E-Mail Address: | [Add Another Member](#) | [View / Delete \(1\)](#)

Family Information

Family Group: Active | Send Magazine: | Registration Status: | Registration Date: 9/19/2018 | [Auto Fill Family Names](#) | Last Name: | First Name(s): | Formal Mailing Name: | Informal Name: | Formal Salutation: | Informal Salutation: | E-Mail Address: |

Family Address

Address Type: Home | Address Line 1: | Address Line 2: | Postal Code: | City: | State/Region: | Country: United States

Save & New | Save & Edit | Save & Finish | Cancel

10. In the example above, there are only two members in the family, the “Husband” John and the “Wife” Barbara. You can see the earlier members you entered in, by hovering your mouse over the link on the left side that says: **View/Delete (x)** as indicated above by an arrow.

11. After all the members are added, next fill in the **Family Information** in the middle column. Under the **Family Information** area, verify the registration box is checked or not, depending upon what type of record you are setting up and select the correct Family Group. Fill in the Registration Date and IF you’ve filled in the Members correctly, click the **Auto Fill Family Names** and the heads of household should ‘mostly’ fill in correctly.

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Add New Family to Good Shepherd Parish, Toledo

Family Member (one or more required)

Prefix: Mrs. | First Name: Barbara | Nick Name: Barb | Last Name: Albertson | Suffix: | Type: Wife | Gender: Female | Birth date: | E-Mail Address: | [Add Another Member](#) | [View / Delete \(1\)](#)

Family Information

Family Group: Active | Send Magazine: | Registration Status: | Registration Date: 9/19/2018 | [Auto Fill Family Names](#) | Last Name: Albertson | First Name(s): John and Barbara | Formal Mailing Name: Mr. and Mrs. John Albertson | Informal Name: John and Barb Albertson | Formal Salutation: Mr. and Mrs. Albertson | Informal Salutation: John and Barb | E-Mail Address: |

Family Address

Address Type: Home | Address Line 1: | Address Line 2: | Postal Code: | City: | State/Region: | Country: United States

To showing this formal mailing name:

12. Finally, edit the **Formal Mailing Name** field, which is the default of all your reports. (if your parish prefers to address people John and Barb Albertson, you will change the record from the one seen above to the example below:

ParishSOFT Family Suite

Home | **Family Directory** | Religious Education | Offering | Ministry Scheduler | Tuition | IQ

Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Add New Family to Good Shepherd Parish, Toledo

Family Member (one or more required) | Family Information

Prefix: Mrs. | Family Group: Active

First Name: Barbara | Send Magazine:

Nick Name: Barb | Registration Status:

Last Name: Albertson | Registration Date: 9/19/2018

Suffix: | [Auto Fill Family Names](#)

Type: Wife | Last Name: Albertson

Gender: Female | First Name(s): John and Barbara

Birth date: | Formal Mailing Name: John and Barb Albertson

E-Mail Address: | Informal Name: John and Barb Albertson

Formal Salutation: Mr. and Mrs. Albertson

Informal Salutation: John and Barb

E-Mail Address: |

[Add Another Member](#) | [View / Delete \(1\)](#)

Save & New | Save & Edit | Save & Finish | Cancel

13. Next, in the far right side, fill in the **Family Address** area. Please note that when you fill in the zipcode in the Postal code area, it will fill in your city, state, and country, or give you a screen to pick between cities if there are multiple listed for that zipcode.

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Family List | Member List | Sacraments | Family Workgroups | Member Workgroups | Reports

Add New Family to Good Shepherd Parish, Toledo

Family Member (one or more required) | Family Information | Family Address

Prefix: Mrs. | Family Group: Active | Address Type: Home

First Name: Barbara | Send Magazine: | Address Line 1: 1234 Home St

Nick Name: Barb | Registration Status: | Address Line 2: |

Last Name: Albertson | Registration Date: 9/19/2018 | Postal Code: 53562

Suffix: | [Auto Fill Family Names](#) | City: Madison

Type: Wife | Last Name: Albertson | State/Region: Wisconsin

Gender: Female | First Name(s): John and Barbara | Country: United States

Birth date: | Formal Mailing Name: John and Barb Albertson

E-Mail Address: | Informal Name: John and Barb Albertson

Formal Salutation: Mr. and Mrs. Albertson

Informal Salutation: John and Barb

E-Mail Address: |

[Add Another Member](#) | [View / Delete \(1\)](#)

Save & New | Save & Edit | Save & Finish | Cancel

14. When finished, click the **Save & Edit** button at the bottom. You will wish to **Edit** as the screen above didn't have a way to capture family phone, envelope, etc.

15. The family you newly created will now show up. (Already in edit mode, so you can add the phone, etc. right away)

16. After you're finished adding more details on the family, click **Save**.
17. To add in an envelope number, (and select the next available, lowest, envelope number not used in the system, click the **Next** link to the right of the envelope number seen below). The

system will automatically populate the envelope number. It will automatically populate the **Send Contrib. Env** checkbox also. (you will want this checkbox marked, if you try and produce an envelope list from Connect Now)

John and Barb Albertson (538853)

Family Details | Member Details (2) | Good Shepherd Parish, Toledo

Family Information | Notes

Church of Registration: Good Shepherd Parish, Toledo

Details Modified On: Wednesday, September 19, 2018 5:32 PM

Family Group: Active

Registration Status:

Registration Date: 9/19/2018

Unregistered Date:

Last Name: Albertson

First Name(s): John and Barbara

Formal Mailing Name: John and Barb Albertson

Informal Name: John and Barb Albertson

Formal Salutation: Mr. and Mrs. Albertson

Informal Salutation: John and Barb

Email Address:

Primary Phone:

Emergency Phone:

Emer. Ph. Desc.:

Primary Address: Home Address

Home | Mailing | Other

Country: United States

Postal Code: 53562

Address Line 1: 1234 Home St

Address Line 2:

City: Madison

State/Region: Wisconsin

Phone Number:

Envelope #: 41

Annual Gift \$: 0

Map Code:

Send Mail: Send Contrib. Env.: Publish Address: Publish Photo for Pictorial Directory: Publish Phone: Send Magazine: Publish Email: Do Not Call: MLNA: Do Not Solicit:

Save Save & Close Cancel Close

18. If you would like to change any member information, click on the **Member Details** tab in the upper left corner, edit the member and then click **Save & Close**.

John and Barb Albertson (538853)

Family Details | Member Details (2) | Good Shepherd Parish, Toledo

Family Information | Notes

Church of Registration: Good Shepherd Parish, Toledo

Details Modified On: Wednesday, September 19, 2018 5:32 PM

Family Group: Active

Registration Status:

Registration Date: 9/19/2018

Unregistered Date:

Last Name: Albertson

Primary Address: Home Address

Save Save & Close Cancel Close