Adding new families and members in ParishSOFT

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

   ![Family Directory Screen](image1)

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

   ![Family Directory Screen](image2)

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

   ![Add New Family Button](image3)
4. You will get a new screen, where you can first search for the family, as seen below.

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

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.

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

![Add New Family](image1)

8. You will see a screen similar to below.

![Family Suite](image2)

9. 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.
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.

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:

![Image of ParishSoft Family Suite with formal mailing name field updated to John and Barb Albertson]

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.

![Image of ParishSoft Family Suite with family address details filled in]

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.

![Family Suite](image)

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

![John and Barb Albertson (538853)](image)

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)

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**.