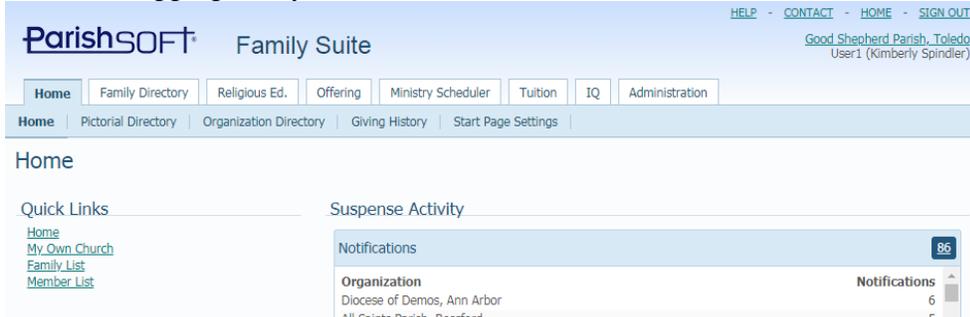
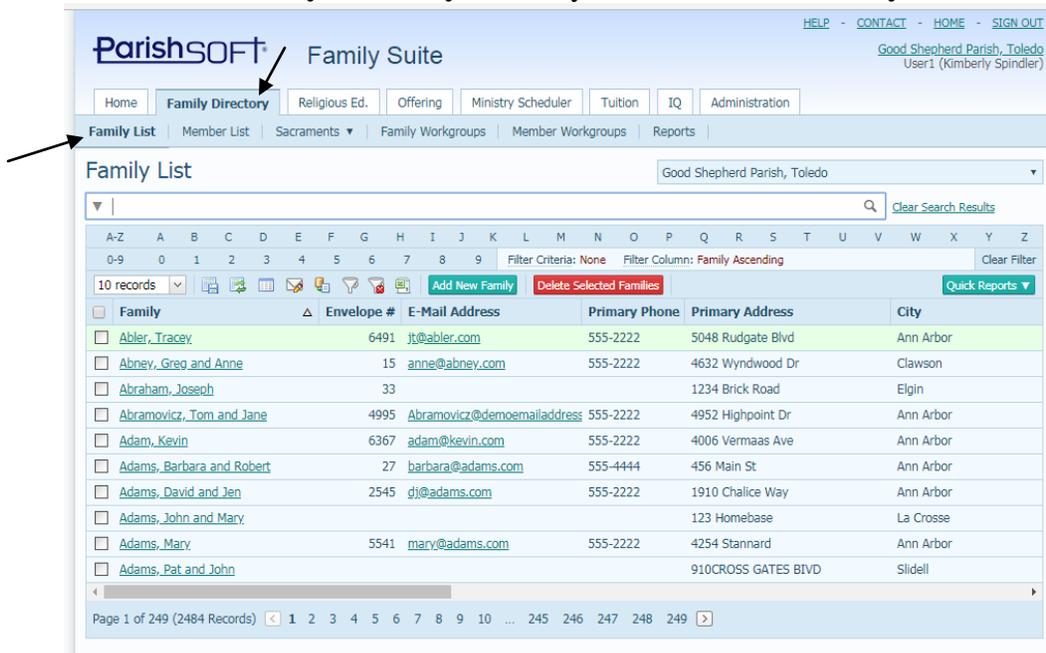


# Adding new families and members in ParishSOFT

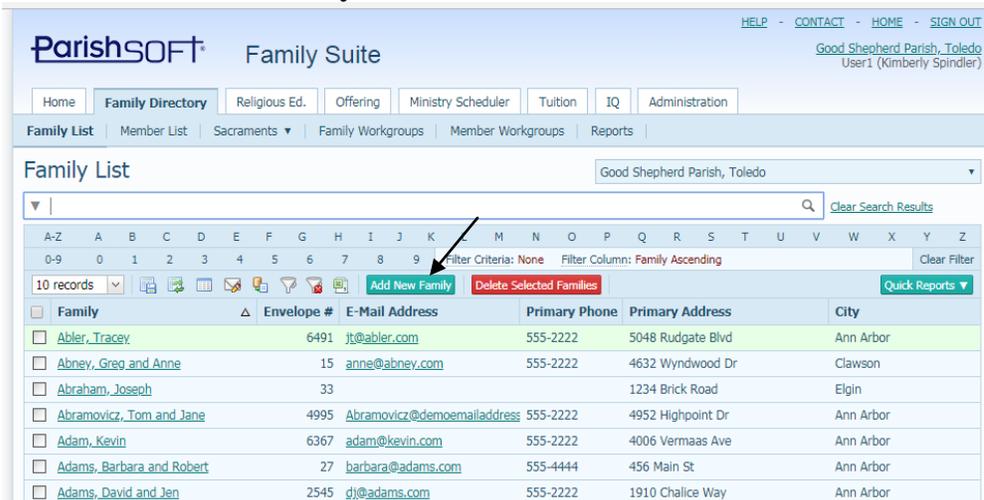
1. After logging into your Connect Now site. You will see a screen similar to below



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



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



- 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: Search

Cancel

- 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: Search

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

Add New Family Move Selected Family Cancel

- 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**.
  - 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: Search

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

Add New Family Move Selected Family Cancel

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 a member, until you are looking at the last member you need to enter into the family.

*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, Daughter, etc.*

ParishSOFT<sup>®</sup> Family Suite

Good Shepherd Parish, Toledo  
User1 (Kimberly Spindler)

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

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. First Name: Barbara Nick Name: Barb Last Name: Albertson Suffix: Type: Wife Gender: Female Birth date: E-Mail Address:	Family Group: Active Send Magazine: Registration Status: <input checked="" type="checkbox"/> Registration Date: 9/19/2018 <a href="#">Auto Fill Family Names</a> Last Name: First Name(s): Formal Mailing Name: Informal Name: Formal Salutation: Informal Salutation: E-Mail Address:	Address Type: Home Address Line 1: Address Line 2: Postal Code: City: State/Region: Country: United States

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

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 you’ve added all the members, next we’ll fill in the information in the middle column, working our way from left to right on the screen. Under the **Family Information** area, verify the registration box is checked or not, depending upon what type of record, set the family group if needed, and set the registration date.

When finished at the top, click the **Auto Fill Families Names Link**, indicated below, to have the screen fill in the information based upon who is the head, husband, and wife. Finally, edit the **Formal Mailing Name** field, as that 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 below:

ParishSOFT<sup>®</sup> Family Suite

Good Shepherd Parish, Toledo  
User1 (Kimberly Spindler)

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

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. First Name: Barbara Nick Name: Barb Last Name: Albertson Suffix: Type: Wife Gender: Female Birth date: E-Mail Address:	Family Group: Active Send Magazine: Registration Status: <input checked="" type="checkbox"/> Registration Date: 9/19/2018 <a href="#">Auto Fill Family Names</a> 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:	Address Type: Home Address Line 1: Address Line 2: Postal Code: City: State/Region: Country: United States

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

To showing this formal mailing name:

ParishSOFT® Family Suite HELP - CONTACT - HOME - SIGN OUT  
Good Shepherd Parish, Toledo  
User1 (Kimberly Spindler)

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

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. First Name: Barbara Nick Name: Barb Last Name: Albertson Suffix: Type: Wife Gender: Female Birth date: E-Mail Address:	Family Group: Active Send Magazine: <input type="checkbox"/> Registration Status: <input checked="" type="checkbox"/> Registration Date: 9/19/2018 Auto Fill Family Names 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 E-Mail Address:	Address Type: Home Address Line 1: Address Line 2: Postal Code: City: State/Region: Country: United States

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

12. Next, in the far right side, under the **Family Address** area, fill in the address of the family. 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 to specify which you want.

ParishSOFT® Family Suite HELP - CONTACT - HOME - SIGN OUT  
Good Shepherd Parish, Toledo  
User1 (Kimberly Spindler)

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

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. First Name: Barbara Nick Name: Barb Last Name: Albertson Suffix: Type: Wife Gender: Female Birth date: E-Mail Address:	Family Group: Active Send Magazine: <input type="checkbox"/> Registration Status: <input checked="" type="checkbox"/> Registration Date: 9/19/2018 Auto Fill Family Names 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 E-Mail Address:	Address Type: Home Address Line 1: 1234 Home St Address Line 2: Postal Code: 53562 City: Madison State/Region: Wisconsin Country: United States

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

13. When finished, click the **Save & Edit** button at the bottom. You almost always will click **Save & Edit**, so that you can add in family phone numbers, envelope numbers, etc. after the family is created.

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

15. After you're finished adding more details on the family, click **Save**.

16. 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 Email:  MLNA:

Publish Address:  Publish Photo for Pictorial Directory:  Send Magazine:  Do Not Call:  Do Not Solicit:

Save Save & Close Cancel Close

17. 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