

PARISHSOFT FIELDS USED TO EXPORT DATA FOR THE APPEAL AND DIOCESAN PUBLICATIONS

These fields require highest attention. Also, please note "Send Magazine" checkbox.

FAMILY RECORD FIELDS

Last Name
First Name(s)
Mailing Name
Primary Address [Home, Mailing, Other]
Do not Send Mail
Address 1
Address 2
City
State
Postal Code
Primary Phone
Email Address
Family Group
Currently Registered
Membership Date
Notes
Last Updated

The screenshot shows the 'Family Information' window with the 'Families' tab selected. The 'Home' address tab is active, showing details for 424 Jackson Street, La Crosse, WI 54601. The 'Send Magazine' checkbox is checked and circled in red. A blue arrow points from this checkbox to the 'Other' address tab, indicating a transition in the primary address.

Snowbird addresses: *The "Other" address automatically becomes the Primary address for the time span between the dates that are entered; dates need to be entered for this to function.*

MEMBER RECORD FIELDS

Gender
Title
First Name (Formal)
First Name (Nickname)
Last Name
Role [Head/ Husband essential]
Birth Date
Member Status
Date of Death

The screenshot shows the 'Family Information' window with the 'Members' tab selected. The member record for Todd Bailey is highlighted with a red box. The record shows: Gender: M, Title: Mr., First Name: Todd, NickName: Todd, Middle: Bailey, Last: Bailey, Role: Husband, BirthDate: 08-16-1969, Age: 46, Member Status: Active, Religion: Catholic.

FAMILY RECORD FIELDS (CONNECT NOW)

Notes
Details Modified On*
Family Group
Registration Status
Registration Date
Unregistered Date
Last Name
First Name(s)
Formal Mailing Name
Email Address
Primary Phone
Primary Address
[Home, Mailing, Other]
Postal Code
Address Line 1
Address Line 2
City
Send Mail

Mr and Mrs Dennis Anderson (395994) Env#: 3748

Family Details Member Details (3)

Family Information Notes

Church of Registration: St. Jude, Grosse Pointe

Details Modified On: Wednesday, September 09, 2015 2:09 PM

Family Group: Active

Registration Status:

Registration Date: 4/10/2006

Unregistered Date:

Last Name: Anderson

First Name(s): Dennis and Susan

Formal Mailing Name: Mr and Mrs Dennis Anderson

Informal Name: Dennis and Susan Anderson

Formal Salutation: Mr. and Mrs. Anderson

Informal Salutation: Dennis and Susan

Email Address: demo@parishsoft.com

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: 4979 W Dauber Dr

Address Line 2:

City: Ann Arbor

State/Region: Michigan

Phone Number: 555-2222

Envelope #: 3748

Annual Gift \$: 0

Map Code:

Send Mail: Publish Address:

Send Contrib. Env.: Publish Photo:

Publish Phone: Send Magazine:

Publish Email:

Edit Details Close

MEMBER RECORD FIELDS (CONNECT NOW)

Gender
Title
First Name
Nick Name
Last Name
Role
[Head or Husband essential]
Status
Birth Date
Date of Death

Dennis Anderson

Family Details Member Details (3)

Dennis Susan Kevin Add Import

Gender: Male

Title: Mr.

First Name: Dennis

Nick Name: Dennis

Middle Name: S.

Last Name: Anderson

Suffix:

Maiden Name:

Role: Husband

Status: Active

Birth Date: 1/20/1967

Birth Place:

Age: 48

Date of Death:

Religion: Catholic

Language:

Ethnicity:

Marital Status: Single

Envelope #: 0

Text Send?

General Contact Sacraments Religious Ed. Misc.

Contact Information

Email Address:

Home Phone: 555-1234

Cell Phone: 555-9090

Work Phone: 555-5678

IMPORTANCE OF THE FAMILY RECORD “MAILING NAME” TO THE HEAD/MEMBER RECONCILIATION

- When updating Member records, especially the “Role” field of Husband/Head and spouse information, make sure to make the corresponding changes in the Family record Mailing Name and related name fields.
- Also, when a member tagged as “Husband” becomes deceased, make sure to change the wife’s role to “Head”.

This is critical to the diocesan export process needed to update the appeal and diocesan publications database.

IMPORTANCE OF THE “LAST UPDATED” FIELD OF THE FAMILY RECORD

The “Last Updated” field is essential to identifying records that have been updated within a particular time frame. This field is not always automatically updated when changes are made ONLY to a member record. Therefore, when updating ONLY a Member record, e.g., the Birth Date or Member Status, it is necessary to

- return to the Family record
- activate the Update button by tabbing through the address fields until the Update button is no longer “greyed out”
- click Update

The screenshot shows the 'Family Information' window with the 'Mailing' tab active. The address fields (Address, City, State, Zip, Area Code, Phone) are circled in red. The 'Update' button in the bottom right corner is also circled in red. Other fields include Family ID, Last Name, First Name, Mailing Name, Informal Name, Formal Salutation, Informal Salutation, Primary Address, Primary Phone, Emergency Phone, Email, Family Group, Membership Date, Parish of Registration, and Last Updated.

In **Connect Now**, when updating a Member record only, return to the Family record, click “Edit Details” at the bottom, then click “Save” and verify that the date did indeed change to the current date.

The screenshot shows the 'Mr. Jason Ablar (394549) Env#: 6491' window with the 'Family Information' tab active. The 'Edit Details' button at the bottom is circled in red. Other fields include Church of Registration, Details Modified On, Family Group, Registration Status, Registration Date, Unregistered Date, Last Name, First Name, Formal Mailing Name, Informal Name, Formal Salutation, Informal Salutation, Email Address, Primary Phone, Emergency Phone, Emer. Ph. Desc., Envelope #, Annual Gift \$, Map Code, Primary Address, Country, Postal Code, Address Line 1, Address Line 2, City, State/Region, Phone Number, Send Mail, Send Contrib. Env., Publish Address, Publish Photo, Publish Phone, and Publish Email.

This close-up shows the bottom of the 'Edit Details' window. The 'Save' button is circled in red. Other buttons visible include 'Next', 'Send Mail', 'Send Contrib. Env.', 'Publish Phone', 'Publish Email', 'Save & Close', 'Cancel', and 'Close'.