ConnectNow Family Directory: How to Manage Your Families

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Why Family Directory?

• Input/update basic family information
• Mailings/communication with families/groups
• Gather information for bulletin
• Run reports as requested by pastor
Let’s start at the very beginning …

- Need information to be there first
  - Add New
  - Import*
    - *Must be part of diocese that shares information
    - Registered/Unregistered
Adding New vs. Importing

Add New
• Search
  – Prevent duplicates
  – First name/city refine results
• No results
• Add new

Import*
• Search
• Find results
• Select family
• Move Selected Family
• Registered: family is owned by your parish
• Unregistered: you get a photocopy
New Family

Find Family

Selected Organization: Regina Caeli H.S., Ann Arbor
Filter by Organization: All
Last Name: DiGiovanni
First Name: 
City: 

Refine search using name & city

New
Add New Family
Move Selected Family
Import
Family Members

• Must have at least 1
• Required fields in red
• Type is very important
  – Head, Husband, Wife required to add family
  – relationship to head of household
• “Add Another” to add other members
Family members

• View/Delete shows other members added
  – Shows Name & Type
• Can enter non-required fields if desired
• Starred fields must have information when saving record
Family Information

- Family Group
  - Defaults to “active”
- Registration Status
  - Defaults to “registered”
- Registration Date
  - Defaults to today
- Send Magazine
  - Does diocese send a magazine?
Family Information

- Pulls first/last name of Head, Husband, Wife
- Can have different last names

- Salutations/greetings for labels, letters, etc
- Auto fill short cut
Family Address

• 3 addresses
  – Home, Mailing, Other
  – One is required
• City, state, country depend on zip code entered
• Can enter partial zip code
Family Address

Reorder by clicking on any column header
Click circle beside correct city; click Select
Save Options

- **Cancel**: Cancels the information
- **Save & New**: Saves the family and allows you to add another new family
- **Save & Edit**: Saves current family and opens details to continue editing
- **Save & Finish**: Best option; finalizes record and returns to Family List
Exercise 1

Add your own family
Additional Family Details

1. Family email address
2. Best way to reach family
3. Emergency contact & description (who you’re calling)
Additional Family Details

1. Physical address – where they live
2. Where mail should be sent (not house)
3. Seasonal address (ex: snowbirds)
   • Primary address automatically updated if date range entered
Additional Family Details

• Next – assign lowest unassigned envelope #
• Can type in envelope #
• “Send Contrib. Env.” – must be checked if sending list to envelope vendor
• Publish checkboxes – family preferences
Member Details

• Lots of information for members!

• Tab for each member to view member information
• Add = add a new member to the family
• Import = bring in a member from another family
  – Ex: Marriage
Member Details

• Status must be “deceased” to enter date of death
• Birth date calculates age
• Marital status updates if marriage record entered
• Envelope # - same process as the family record
1. Track contact information for specific members
2. View Only – see basic sacramental information
3. See class/attendance data if using Religious Education module
4. Member strengths & workgroups
Exercise 2

• Add family on registration form
Filtering

• Quick Reports
• Gather information to publish in bulletin
  – Ex: birthdays, anniversaries, etc
• Send communications
  – Email, mail merge
• Requests for information on behalf of members
Advanced Filter – Family List

- Filter is comprehensive – results must meet all selected criteria
  - Same process for Family & Member List
- Save Membership/Family Group
- Can do exact search
Advanced Filter – Family List

- Advanced options have other filters
- Check Registration Date checkbox to see From and To fields
- Click Apply to see results and generate reports, send communication, etc.
Advanced Filter – Member List

• Same process as Family List
• Many more fields available
  – More to filter for individuals than groups
• Save Membership, Family Group, and Member Status
Quick Reports for Families & Members

• Full Envelope – All families/members w/envelope #. *Must have “Send Contrib” box checked*

• Filtered Envelope – families/members w/envelope # who meet the filter criteria. *Also must have “Send Contrib” box checked*

• Family/Member List – families/members who meet the filter criteria with basic contact details

• Family/Member Mailing Labels – mailing labels for families/members who meet the filter criteria
Quick Reports for Members

- Anniversary Report – report of member wedding anniversaries
  - Can select specific anniversary and months

- Birthday Report – report of member birthdays
  - Can filter by age range and month
Exercise 3

• Generate report of envelope numbers for Registered and Active families
Report Results

- Export – use drop-down menu to select file type
  - XLS = export to Excel w/formatting of report
  - CSV = export to Excel as basic spreadsheet
  - RTF = export to Word
Exercise 4

• Generate Member List report
Family Directory Reports

• Sacraments completed at your church
• Select sacrament and enter date range
  – Uncheck start/end dates to get all
• “Click here to view report” opens in new window
Sacramental Registry

<table>
<thead>
<tr>
<th>Record</th>
<th>Name</th>
<th>Baptism</th>
<th>Confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volume</td>
<td>Name: Martha Jamison</td>
<td>Date: 09/04/1982</td>
<td>Date:</td>
</tr>
<tr>
<td>Page Num:</td>
<td>Baptismal Name: Martha Anne Jamison</td>
<td>Location: Regina Caeli H.S. -- Ann Arbor, MI 48108</td>
<td>Location:</td>
</tr>
<tr>
<td>Registry Num:</td>
<td>POB:</td>
<td>Celebrant: Buckmaster, Bruce</td>
<td>Confirmation Name:</td>
</tr>
<tr>
<td></td>
<td>DOB: 08/31/1982</td>
<td>Parents: Barbara Allen</td>
<td>Sponsors:</td>
</tr>
</tbody>
</table>

- Displays in order of date completed
- Blanks on report indicate missing information from sacramental or member record
  - Place of birth/father missing from member record
  - Sponsors missing from baptism record
Family Directory Reports

• Shows statistics for your church

• Can change the date range for Kenedy Statistics
  – Defaults to showing the last year
  – Uncheck start/end dates to include all

• No date range for Parish Statistics
Kenedy Statistics

- Click blue circle arrow to refresh data if date range is modified
  - Census Summary only shows current information in database and doesn’t update
- Can click numbers to see list of members/families
Parish Statistics

- Current snapshot of information in your database right now
  - Doesn’t hold on to historical data
- Numbers are hyperlinks. Can click to see who fits that demographic
Parish Directory

• Does **not** consider registration status
• Can choose specific Family Groups to include
• Can include members
  – List members and member type/role
Registration Forms

1. Choose registration status
2. Auto fill with information from database, or print blank forms
3. Print in English, Spanish, or both
Exercise 5

• Generate Parish Directory
Thank you!