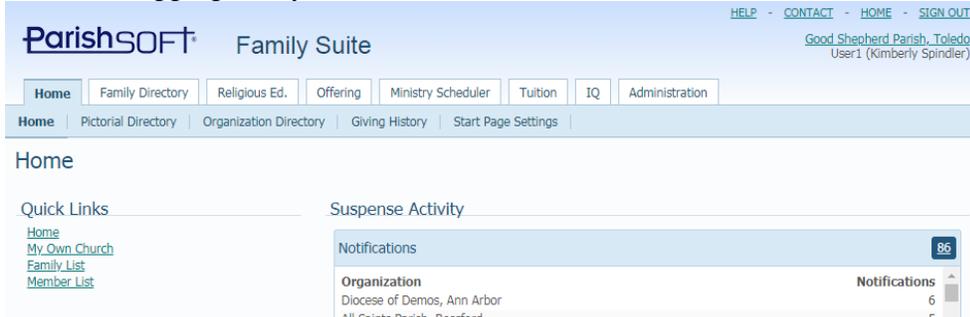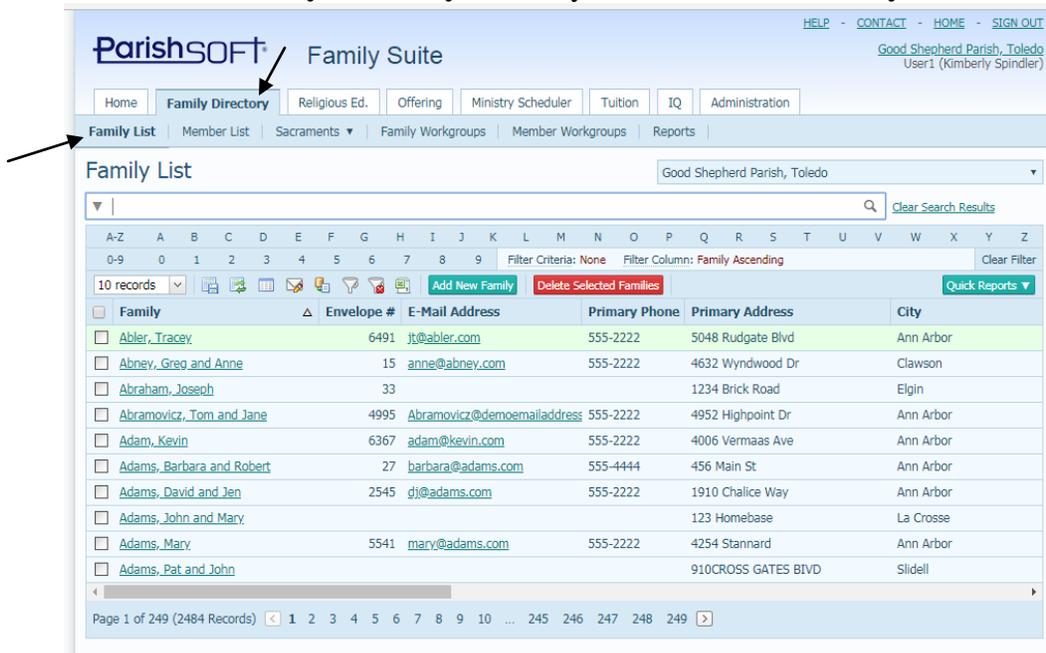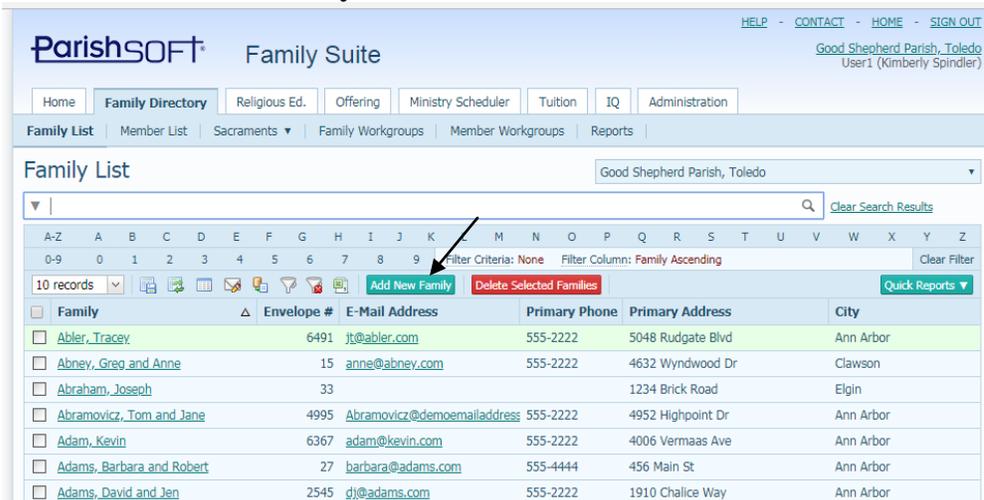**Adding new families and members in ParishSOFT**

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:

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.

8. You will see a screen similar to below.

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 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.

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:

To showing this formal mailing name:

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.

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)

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.**