

Go to *Membership>People*

There are two options to open *People*

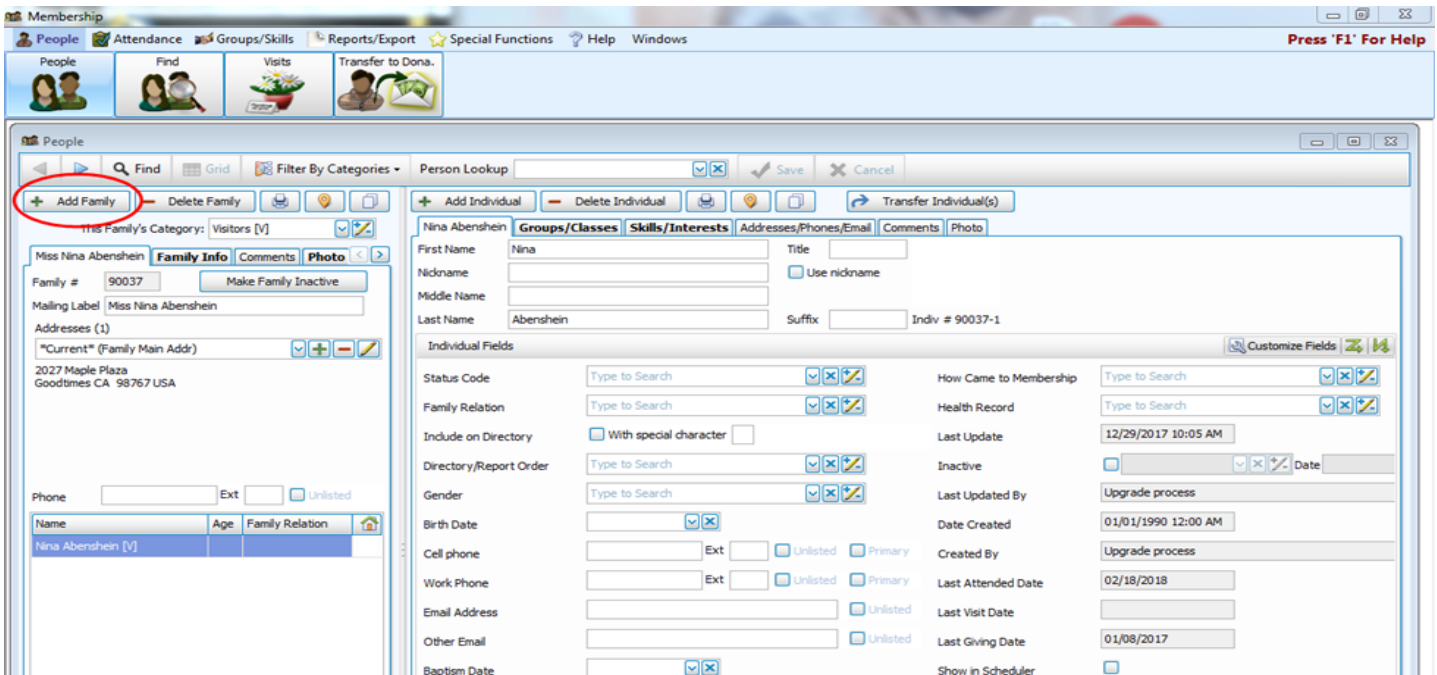
- Click *People* on the *Button Bar* and then Click *People* on the *Menu Button* OR
- Click *People* on the *Shortcut Menu*



Add a Family

Even if you are only adding a single person, you must first add a *Family* record. The *Family* record fields are on the left side of the *People* screen.

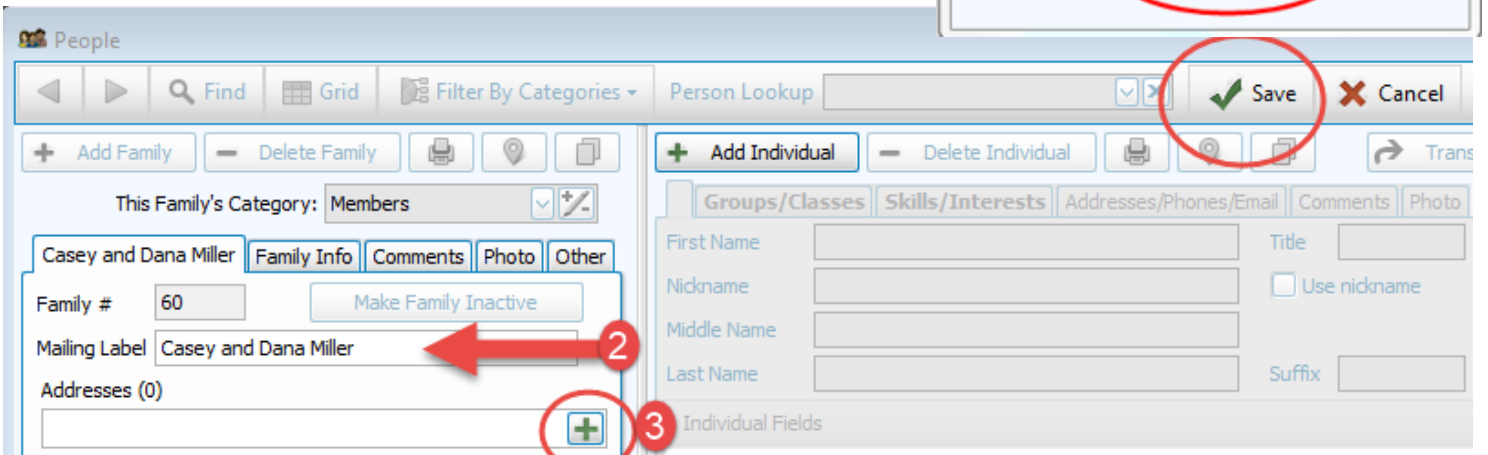
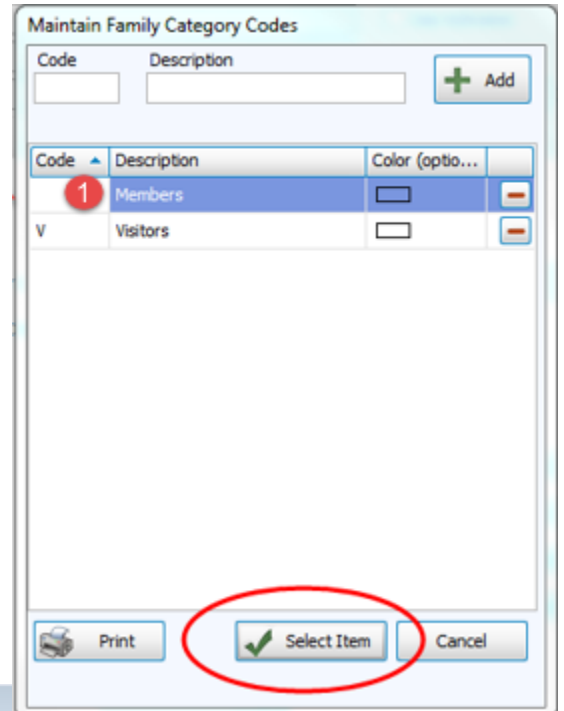
- Click the **+ Add Family** button



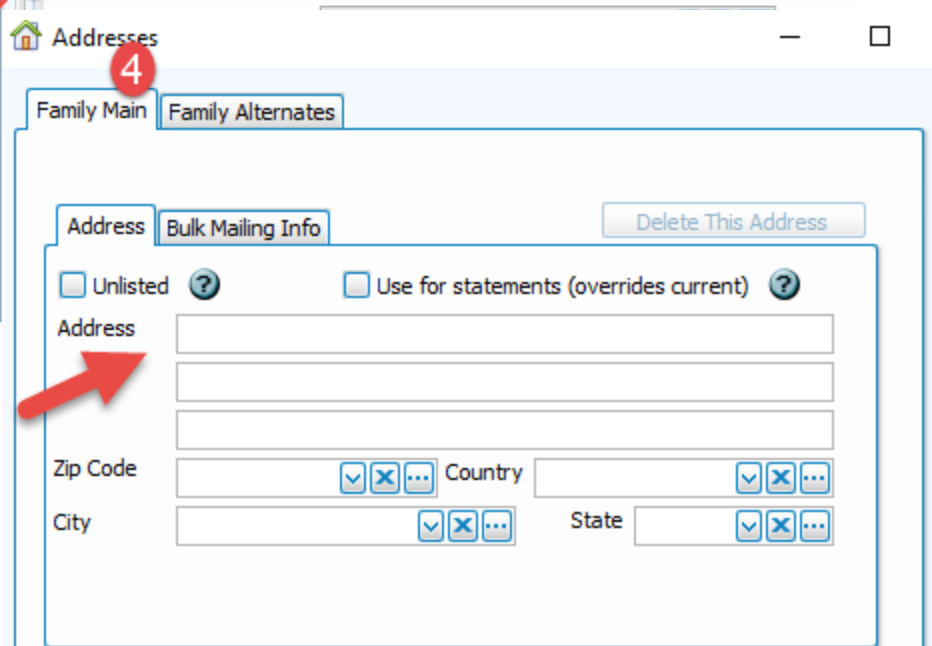
1. Select one of the *Family Categories* from the pop-up window and click the *Select Item* button to assign it to the family.
2. In the *Mailing Label field*, enter the *Family name* as you would like it to appear on Labels. This is a required field. We always recommend consistency when entering data.

Examples for the Mailing Label:
 Mr. and Mrs. William Smith
 Ms. Joan Thomas
 Casey and Dana Miller
 The Jones Family

The example for this document uses Casey and Dana Miller.



3. To enter the *Family Main Address*, click the + button at the address selection field.
4. The *Address* pop-up window appears. Enter the *Family Main* address and any *Family Alternates* address information.



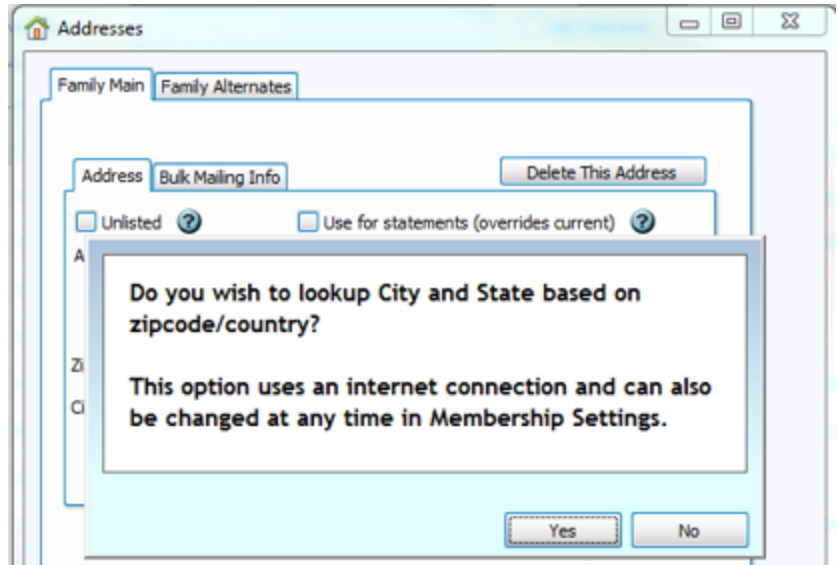
Note: Addresses of up to 30 characters may be placed in each of the 3 address lines. The second and third address line are typically be used for PO boxes, suite or apartment numbers or any extra address information needed. Address lines may also be left blank.

Put a checkmark in the *Unlisted* box to exclude the address from *Directory* reports.

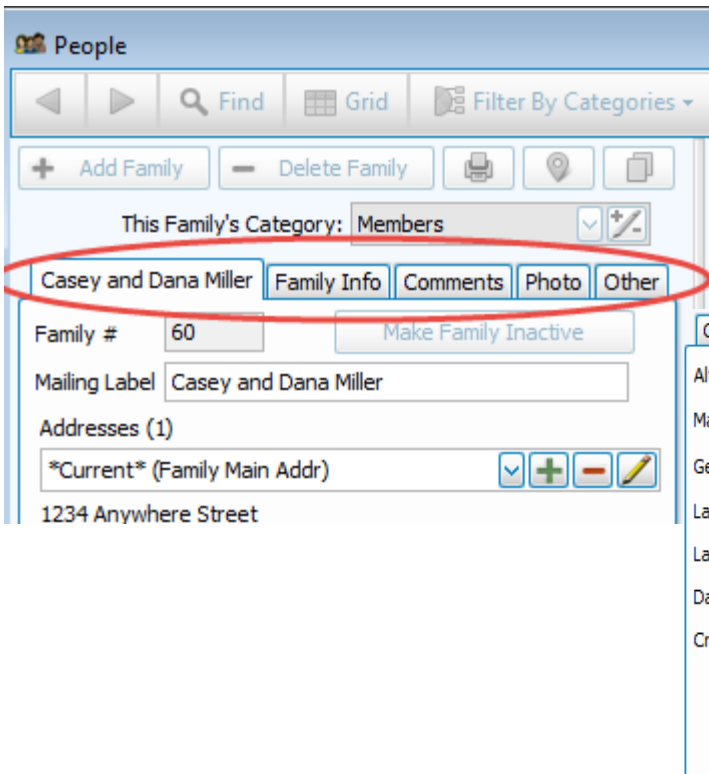
Put a checkmark in the *Use for Statements* box to have *Donation Statements* use the selected address for statements which overrides dates in effect for alternate addresses and the main address.

Once you have completed the address entry, press the *OK* button to return to the *People* entry screen.

Based on your *Membership* settings, you may be prompted to use the *City* and *State* lookup feature in the system. If you choose *Yes*, the *City* and *State* will be filled in based on the zip code. This feature requires an internet connection. Clicking *No*, requires manual entry.



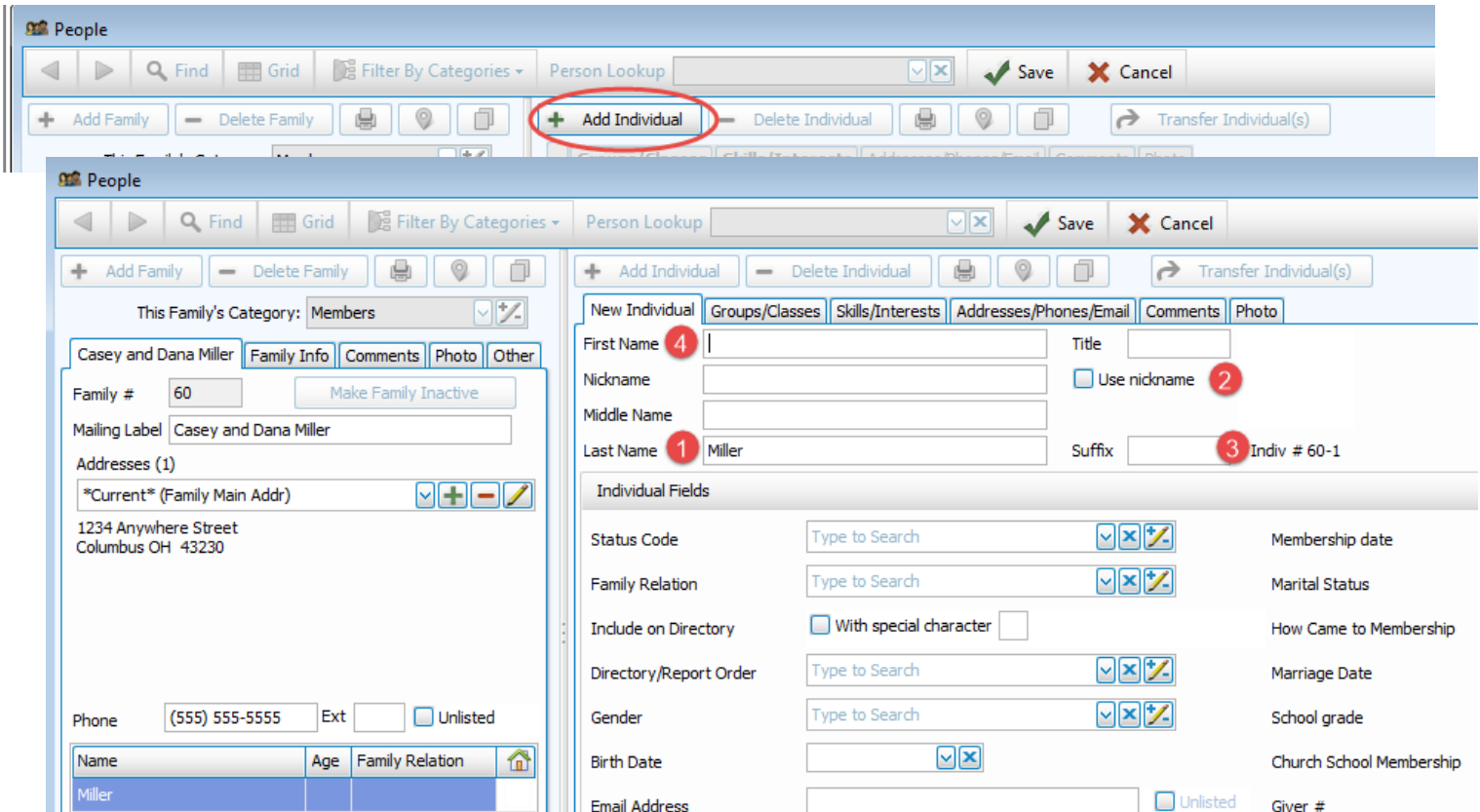
You have the option to enter additional family information by clicking on the information tabs labeled *Family Info*, *Comments*, *Photo* and *Other*.



Note: *Family Info* tab holds the *Mailing Code* which is a list field that allows you to designate how the family will receive mailings. You may add/modify codes to best suit the needs of your church.

After you have finished entering information to the Family Record Fields, you are ready to click **Add Individual** and create each Individual in the family.

The Individual Record Fields are on the *right* side of the *People* screen:



1. When you are entering a new individual, the *Last Name* field defaults to the last word in the *Mailing Label* field.
2. If this person would like their nickname used on reports and directories, check *Use Nickname*, then the Nickname will be the name shown.
3. If a person has a suffix after their last name, it is very important that the suffix be entered into the *Suffix* field. It is important that the *Last Name* field contain only the last name with no commas or suffixes. The system will insert a comma in between the last name and the suffix automatically on reports.
4. If you enter a *First and Last name* which are exactly the same as an existing person in your database you will receive a warning including the Family Number and of the existing person. It will ask you to confirm if this duplication is intentional.

There is a person by the name of Casey Miller already in the following family(s):

Family Number: 8
Mailing Label: Mr and Mrs Mel Miller

Do you still want to add this person?

Copy message to clipboard Yes No

Individual Fields

Directory Report Order is a **required field** for the creation of Reports and Labels. *Include on Directory* is required when creating a directory.

Directory Report Order - tells the computer how members of the family relate to one another. The codes are:

1 - *Primary* - This denotes the person whose name should appear first in the directory listing. One and only one person in each household must be designated as 1-Primary.

2 - *Secondary* - This denotes the person whose name should appear second in the directory listing. *Only one person* in each family should be designated as 2-Secondary, however it is not required to have a Secondary person in every household.

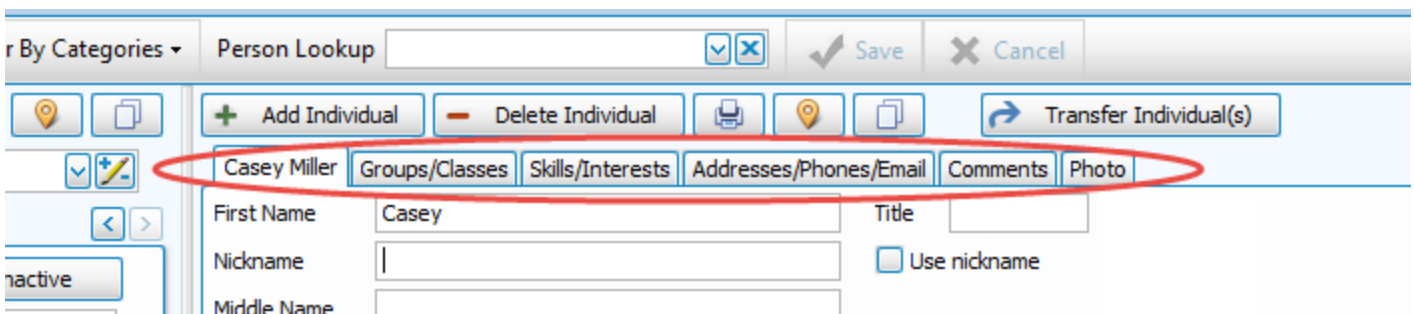
3 - *Child (w/family)* - This denotes a child's name that should appear with the family in the listing, below the 1-Primary and 2-Secondary people. Give all children in each household a code of 3-Child. If any children have a different last name from the Primary person, that child's last name will also be printed in the directory.

4 - *Secondary/primary separately* - This code is assigned to people who would ordinarily be the 2-Secondary person, however, choosing 4-Secondary/primary separately denotes that the family should be listed in the Directory twice, once in *1-Primary/2-Secondary* order and once in *2-Secondary/1-Primary* order.

5 - *Individual separately* - This code is assigned to people who are considered members of the family, but should appear by themselves in their own, separate entry on the Directory.

Enter the rest of the Individual information that is maintained by your church. Additional information can be added at any time.

You also have the option to enter additional information by clicking on the individual information tabs labeled *Groups/Classes*, *Skills/Interests*, *Addresses/Contacts*, *Comments* and *Photo*.



After you have finished entering information into *Individual Record Fields*, the Save button becomes active. Click Save to save your information.

If there are additional family members to enter, click *Add Individual* to add more people to the family.

The next page shows the example of an Individual - Casey Miller.

Membership

People Attendance Groups/Skills Reports/Export Special Functions Help Windows Press 'F1' For Help

People Find Visits Transfer to Dona.

Find Grid Filter By Categories Person Lookup Save Cancel

+ Add Family - Delete Family + Add Individual - Delete Individual + Transfer Individual(s)

This Family's Category: Members

Family Info Comments Photo Other

Family # 60 Make Family Inactive

Mailing Label Casey and Dana Miller

Addresses (1)

Current (Family Main Addr)

1234 Anywhere Street
Columbus OH 43230

Phone Ext Unlisted

Name	Age	Family Relation
Casey Miller	30	Adult

Right-click to rearrange

Casey Miller Groups/Classes Skills/Interests Addresses/Phones/Email Comments Photo

First Name Casey Title

Nickname Use nickname

Middle Name

Last Name Miller Suffix Indiv # 60-1

Individual Fields Customize Fields

Status Code	1 - Active Member	Membership date	12/07/2014
Family Relation	A - Adult	Marital Status	M - Married
Include on Directory	<input checked="" type="checkbox"/> With special character <input type="checkbox"/>	How Came to Membership	1 - Confession of Faith
Directory/Report Order	1 - Primary	Marriage Date	11/26/2011
Gender	M - Male	School grade	Type to Search
Birth Date	10/25/1988	Church School Membership	Type to Search
Email Address	cmiller1985@gmail.com <input type="checkbox"/> Unlisted	Giver #	555
Cell phone	(555) 555-5555 Ext <input type="text"/> <input checked="" type="checkbox"/> Unlisted <input checked="" type="checkbox"/> Primary	Date Created	04/29/2019 3:57 PM
Baptism Date	11/27/1988	Last Update	04/29/2019 4:43 PM
Confirmation Date	05/05/2002	Inactive	<input type="checkbox"/> <input type="text"/> Date

Showing: Members Visitors Refresh