Membership



How to Setup New Family (Rev 4/19)

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

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▲ People 愛 Attendance J Groups/Skills Peports/Expo	ort 🛛 🏠 Special Fund	ctions 🖓 Help 🛛 Windo	ws					Press 'F1' For Help
People Find Visits Transfer to	Dona.							
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🕂 Add Family 🕒 Delete Family 😣 💡 🗍	+ Add Individual	Delete Individual			🤿 Trar	nsfer Individual(s)		
This Family's Category: Visitors [V]	Nina Abenshein	Groups/Classes Skills/1	interests Addre	esses/Phone	s/Email Com	ments Photo		
Miss Nina Abenshein Family Info Comments Photo	First Name N	ina		Title]		
Family # 90037 Make Family Inactive	Nickname			🔲 Use n	ickname			
Mailing Label Miss Nina Abenshein	Middle Name							
Addresses (1)	Last Name A	benshein		Suffix		Indiv # 90037-1		
Current (Family Main Addr)	Individual Fields						🕄 Customize Fields 🔀 🚺	
2027 Maple Plaza Goodtimes CA 98767 USA	Status Code	Type to Search		∼ ×		How Came to Membership	Type to Search	~× *
	Family Relation	Type to Search		-×		Health Record	Type to Search	∀ × ∕
	Include on Directo	with special	character			Last Update	12/29/2017 10:05 AM	
	Directory/Report (Order Type to Search		∼ ×		Inactive		VX 1/2 Date
Phone Ext Unlisted	Gender	Type to Search			1	Last Updated By	Upgrade process	
Name Age Family Relation	Birth Date					Date Created	01/01/1990 12:00 AM]
Nina Abenshein [V]	Cell phone		Ext	Unlisted	Primary	Created By	Upgrade process	
	Work Phone		Ext	Unlisted	Primary	Last Attended Date	02/18/2018]
	Email Address				Unliste	d Last Visit Date]
	Other Email				Unliste	d Last Giving Date	01/08/2017	
	Baptism Date					Show in Scheduler		



1. Select a *Category* on the Select a Category for New Family window and click the +*OK* button to assign it to the family.

2. In the Mailing Label field, enter the Family nan you would

like it to appear on Labels. This is a requir field. We always recommend consistency when entering da

> 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.

0	Select a Category for the New Family						
ne as	Members Visitors [V]						
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	🥍 Add/Edit Family Categories 🕂 OK 🗶 Cancel						

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Setup New Family

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▲ ▶ Q Find Grid Filter By Categories Person	Lookup 🛛 🗹 🖌 Save 🗙 Cancel
+ Add Family — Delete Family	Individual 🗕 Delete Individual 🚇 🔍 📝 Trans
This Family's Category: Members	ups/Classes Skills/Interests Addresses/Phones/Email Comments Photo
Casey and Dana Miller Family Info Comments Photo Other	ne Title
Family # 60 Make Family Inactive Nicknam	e 📃 Use nickname
Mailing Label Casey and Dana Miller	ame
Addresses (0)	
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Phone Ext Unlisted	ess Bulk Mailing Info Delete This Address
Name Age Family Relation	listed ③ Use for statements (overrides current) ③
Addre	35
Zip Co	
3. To enter the <i>Family Main Address</i> , click the City	State X
+ button at the address selection field.	
4. The Address pop-up window appears.	



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.



Setup New Family

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

🧯 People		Note: F	Note: Family Info tab holds the Mailing Code which is a lis							
	Grid Filter By Categories	field that receive	field that allows you to designate how the family will receive mailings. You may add/modify codes to best							
+ Add Family - Dele	te Family	suit the	needs of y	your church.						
This Family's Categor	y: Members									
Casey and Dana Miller Famil	ly Info Comments Photo Other	>								
Family # 60	Make Family Inactive	Casey and Dana	Miller Family I	nfo Comments Photo Other	First Name					
Mailing Label Casey and Dana	a Miller	Alt Phone		X 🛛 🗆 🖌	Nickname					
Addresses (1)	1	Mailing Code			Middle Name					
Current (Family Main Addr) •+-/	Geographic Area	Code 🔺	Description	_					
1234 Anywhere Street		Last Update	А	All mailings						
	Last Undated By	В	Out-Of-Towners							
		Dela Cardado,	NL	Newsletter Only						
		Date Created	Х	No Mailings						
		Created By								
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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:

📽 People						
◄ ► Q Find Grid Filter By Categories Per	son Lookup	Save	Cancel			
🕂 Add Family 🗕 Delete Family 🚇 🕥 🗊 🚺	Add Individual Delete	Individual	→ Transfer Ir	ndividual(s)		
	e and the second state the		Community Photo			
Image: Second People Image: Second People	Person Lookup	× ×	Save 🗶 Cancel			
+ Add Family - Delete Family	+ Add Individual – D	Delete Individual 📄 👰	Trans	sfer Individual(s)		
This Family's Category: Members	New Individual Groups/Clas	ses Skills/Interests Addresses/Ph	ones/Email Comments	Photo		
Casey and Dana Miller Family Info Comments Photo Other	First Name 4		Title			
Family # 60 Make Family Inactive	Nickname		Use nickname [2			
Mailing Label Casey and Dana Miller			Cuffer	T-4- # CO 1		
Addresses (1)						
Current (Family Main Addr)	Individual Fields					
1234 Anywhere Street Columbus OH 43230	Status Code	Type to Search		Membership date		
	Family Relation	Type to Search		Marital Status		
	Include on Directory	Uith special character		How Came to Membership		
	Directory/Report Order	Type to Search		Marriage Date		
Phone (555) 555-5555 Ext Unlisted	Gender	Type to Search		School grade		
Name Age Family Relation	Birth Date	\checkmark		Church School Membership		
Miller	Email Address		🔲 Unlisted	Giver #		

- 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.



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Setup New Family





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*.

r By Categories 🕶	Person Lookup	Save 🗶 Cancel
	+ Add Individ	ual 🗕 Delete Individual 🖳 🧇 🗍 🎓 Transfer Individual(s)
	Casey Miller G	roups/Classes Skills/Interests Addresses/Phones/Email Comments Photo
<>	First Name	Casey Title
pactive	Nickname	Use nickname
	Middle Name	

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.



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🏙 Membership						- 0)	X
👗 People 📓 Attendance 💕 Groups/Skills 🕒 Reports/Exp	port 🛛 😭 Special Functions 🦷	Help Windows				Press 'F1' For H	elp
People Find Visits Transfer	to Dona.						
🔄 🕨 🔍 Find 📰 Grid 🔀 Filter By Categories ·	• Person Lookup		Save 🗙 Cancel				^
🕂 Add Family 🗕 Delete Family 🔒 🥥 🗍	+ Add Individual - D	Delete Individual 📙 👰	Transfer	Individual(s)			
This Family's Category: Members	Casey Miller Groups/Classes	Skills/Interests Addresses/Phone	s/Email Comments Photo				
Family Info Comments Photo Other	First Name Casey		Title				
Family # 60 Make Family Inactive	Nickname		🔲 Use nickname				
Mailing Label Casey and Dana Miller	Middle Name						
Addresses (1)	Last Name Miller		Sutfix	ndiv # 60-1			
Current (Family Main Addr)	Individual Fields				2 Custo	mize Fields 🔀 🕠	
1234 Anywhere Street Columbus OH 43230	Status Code	1 - Active Member	✓ × [*] /-	Membership date	12/07/2014		
	Family Relation	A - Adult	∨× *∕	Marital Status	M - Married	▼× *∕	
	Include on Directory	With special character		How Came to Membership	1 - Confession of Faith	V× <mark>%</mark>	
	: Directory/Report Order	1 - Primary	✓ × [*] /-	Marriage Date	11/26/2011		
Phone Ext Unlisted	Gender	M - Male	✓× [*] /-	School grade	Type to Search	✓×≯	
Name Age Family Relation	Birth Date	10/25/1988		Church School Membership	Type to Search	∀×'	
Casey Miller 30 Adult	Email Address	cmiller 1985@gmail.com	🔲 Unlisted	Giver #	555		
	Cell phone	(555) 555-5555 Ext	🖌 Unlisted 🛛 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		/_ Date	
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