Standards For Adding A New Family

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Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This newsletter will be sent periodically to assist in utilizing the product. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

Catholic Diocese of Sioux Falls

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Family Suite

Standards for Adding a New Family

Adding a new family to your ParishSOFT directory is easy to do! Be sure to SEARCH for the family BEFORE creating a NEW one. This newsletter reminds you of standards for naming conventions and address formatting.

Before adding a new family, you must conduct a search to make sure that the family is not already in the database and registered to another parish in the diocese. Searching for a family before adding its records to your organization helps to reduce the number of duplicate records in the system.

Find Family

Organization: Little Flower, Grosse Pointe
Last Name:*
First Name:
City: Search

Add New Family   Cancel

3.   In the **Find Family** window, enter the family or member's last name (required), first name, and city. Then, click Search.

Family Member (one or more required)

Family Member

All fields with the red asterisk are required fields.
Each record needs a HEAD or HUSBAND in the

TYPE field. If there is a Husband, you can click on Add Another to add a Wife. This will allow the Auto Fill of Family Names to fill with a husband and wife name.

To clarify, any single adult in their own family record should be marked Head.

There should be NO spaces in the Last Name field nor surrounding punctuation and hyphenated names.

Examples:

O'Connor
VanDekamp
Smith-Jones

Family Information

All families should be Active with Registration Status as checked. All families marked as such will receive our monthly magazine, Bishops Bulletin. Our diocese manages the list so you are unable to check Send Magazine. Please disregard this field.

Next, click on the Auto Fill Family Names. This will populate all names fields.

After the completion of the Auto Fill Family Names, remove the periods in the Formal Mailing Name.

Mr. and Mr.s Jarod Smith should show as Mr and Mrs Jarod Smith OR you can keep with the informal naming convention of Jarod and Jenny Smith.

Family Information

Please be sure the Formal Mailing Name contains NO periods. Also, **this is the field we use for ALL diocesan correspondenace such as the Bishops Bulletin and CFSA letters**. Usually, most parishes prefer the Informal Name format. The Formal and Informal may be the same for family records.

Formal Mailing Name:	Mr and Mrs Jarod Smith
Informal Name:	Jarod and Jenny Smith
Formal Salutation:	Mr. and Mrs. Smith
Informal Salutation:	Jarod and Jenny
E-Mail Address:	

[Save & New] [Save & Edit] [Save & Finish] [Cancel]

Family Address

Address Type:	Home
Address Line 1:*	2200 E Tamarac Dr
Address Line 2:	
Postal Code:*	57103
City:	Sioux Falls
State/Region:	South Dakota
Country:	United States

Family Address

The Address Type drop down indicates the type of address you are entering.

Home: the physical address of the home residence
Mailing: PO Box type of address
Other: snow bird address with date (mm-dd) parameters. ParishSOFT will "activate the Other address during the time frame given.

The Zip Code must be entered to populate the City, State and County.

Once again, NO puncutation should be entered in the Address Line fields.

Click the appropriate Save Buttons.

Save & New: family record will be saved and the screen set back to search and add another family
Save & Edit: family record will be saved and opened for you to edit (usually needed to add a family phone number).
Save & Finish: family record will be saved and you will be returned to the Family List screen.

The United States Postal Service Standards Document for further reference can be found at:

http://pe.usps.gov/cpim/ftp/pubs/Pub28/pub28.pdf

A few highlights:

- Secondary address unit designators, such as APARTMENT or SUITE, are required to be printed on the mailpiece for address locations containing secondary unit designators. The preferred location is at the end of the Delivery Address Line. The pound sign (#) should not be used as a secondary unit designator if the correct designation, such as APT or STE, is known or is shown in the ZIP+4 file.
  - Example   102 Main St Apt 101
- If the pound sign (#) is used, there must be a space between the pound sign and the secondary number.
  - Example 425 FLOWER BLVD # 72
- With the exception of the hyphen in the ZIP+4 Code, punctuation should be omitted in the delivery address block.

A few common abbreviations:

Avenue - Ave
Street - St
Drive - Dr
Boulevard - Blvd
Highway - Hwy

Our mailing address is:
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523 N Duluth Ave
Sioux Falls, SD 57104

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