

Church Census System

Update-View: Part I



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Raiche Consultants Church Census System Owner's Manual

Update/View Part 1 – Family Information

Overview

View/Edit selection brings you to the main set of screens for the Census Program. Divided into several pages, you are able to input and edit all the information relating to an entire family (Pt. 1) and each individual member (Part 2).

Once you enter this section, you are able to move to each section by way of buttons designed to get you in and out quickly with a minimum of steps.

Much effort has been taken to make this very important area simple and easy to use by both the novice and the experienced user.

It is not necessary to press a special “save” key when inputting your data. The program automatically saves your data as you move from field to field.



Selecting **View/Edit** from the Census Menu opens the first page of the *family record*.

NOTE:
**As in all sections of this manual,
all of the data shown is fictitious for demonstration purposes.**

Locate a family

There are three ways to locate a family:

FIND FAMILY

The screenshot shows a software interface titled "Family Membership Record". On the left, there is a sidebar with a "Find Family:" button highlighted in yellow. Below it are labels for "Personal Information", "Last Name:", "Secondary Name", "Salutation:", and "Head Of House:". The main area displays a dropdown menu with "Crasher" selected. Below the dropdown is a scrollable list of family members with the following data:

Crasher	John		44	St. Peter Ln.	7023
Cream	Thomas		85	Walnut St.	3240
Daniels	James		19	Pine St.	5040
Dawn	William	J	1781	Eastern Ln.	1296
Dicer	Thomas		35	Blue Blvd.	3748
Dorman	Barry		2	Cliff Dr.	5362
Driver	Lucy		74	Global Dr.	1254
Elmerson	Janet		10	Coffee Rd.	1061

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1. Click the arrow on the **Find Family** drop-down list and a scroll list appears.
2. Begin typing the last name and the list will come to the top of the list as you type.
3. Click on the name you need and the family record will appear on the page.

Notice all the information that is available in the drop-down list. This design will help you select the correct family if there are many families with similar information.

Fields shown are *last name; first name; middle initial; house number; and street.*

The four-digit number shown on the right is the *Family (Envelope) Number.*

FIND BY MEMBER

The screenshot shows a software interface titled "FIND BY MEMBER". A search dropdown menu is open with "cracola" entered. Below the dropdown is a scrollable list of members with the following data:

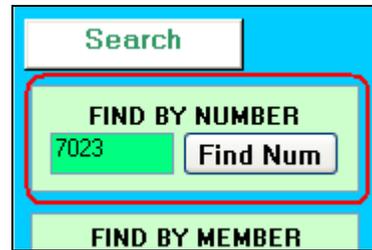
Cracola	Nicole		D	2414
Cracola	Mary	T W		2414
Cracola	Joseph		S	2414
Cracola	Christopher	H	S	2414
Cracola	James		HH	2414
Cracola	James	M	S	2414
Crasher	Kathleen		F D	7023
Crasher	John		D HH	7023

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- Click the drop-down list under the title **FIND BY MEMBER**. A complete listing of every member of the parish appears listed alphabetically by last name.
Fields shown are *last name; first name; middle initial; relationship and Family (Envelope) Number.*

- Select the member and the entire family record will appear on the page.

FIND (BY FAMILY) NUMBER



The image shows a search interface with a blue background. At the top is a white box labeled 'Search'. Below it is a green box containing the text 'FIND BY NUMBER'. Underneath this text is a green input field containing the number '7023' and a white button labeled 'Find Num'. Below the green box is another green box containing the text 'FIND BY MEMBER'. A red rectangular box highlights the 'FIND BY NUMBER' section, including the input field and the 'Find Num' button.

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- Click inside the empty field under the Find Num button and type in the Family Number.
- Click the Find Num button, or press Enter TWICE, and the family record will appear on the screen.
- NOTE: if no family information appears on the page has (fields blank) the number is not in use. Simply try again or select a family using any of the previous methods.

This is the end of Find a Family.

Name

Personal Information	
Last Name:	Crasher
Secondary Name:	Magnus
Salutation:	Mr & Mrs
Head Of House:	John
Middle Initial:	D
Full Middle Name:	Daniel
NickName:	
Suffix:	
Spouse's 1st Name:	Susan

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- Last Name:** The Name of the family
- Secondary Name:** The Name of another family who is living at this address. One example is the wife's parent. Last name would be different.
- Salutation:** By default, Mr. & Mrs. May be changed to whatever is appropriate.
- Head of House:** Census Program requires a designated Head of Household. You select the person's first name and enter it here. This name will appear on various reports and forms.
- Middle Initial:** Refers to the Head of Household. Use is optional.
- Full Middle Name:** Used by certain nationalities where the middle name is vital.
- Nickname:** Refers to the Head of Household. Not used in reports. Most common use is with Word mail merge features. Use is optional.
- Suffix:** Refers to the Head of Household. Ex.: Sr., Jr., III., etc. Use is optional.
- Spouse's 1st Name:** First name for spouse who is NOT Head of Household.

Address

Family Number and Contact Information

The screenshot shows a software interface with a light blue background. At the top right, there is a yellow box labeled "Family Number:" with the value "7023" entered. Below this are several input fields with labels in blue boxes: "Street Num:" (44), "Street Name:" (St. Peter Ln.), "P#O# Box:" (empty), "City/Town:" (MyTown), "State:" (MA), and "Zip Code:" (11025). To the right of these fields are two buttons: "Move to Prior" and "View Prior". Below the address fields are phone and email fields: "Home Phone:" (413-555-1212), "Business Phone:" (413-555-8654), "Fax Number:" (413-555-8699), "Family Cell Num:" (413-889-1212), and "Family E-mail:" (crasher@someplace.net). An "Unlisted:" checkbox is checked with the letter "N".

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Family Number: This is the envelope number, placed here automatically by the program, and is used to identify this family and internally track all records for this family. It is taken from the *Add New* options on either *Manage Family* (family tab) or from the *Family Membership Record* screen. *This is a required field.*

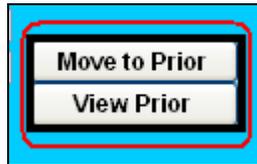
>>> Address information used for all mailing labels. <<<

- Street Number:** House ID only. Can accept alpha characters (i.e. 334W)
- Name (street):** Street name - entered this way for alphabetical listings of street names.
- P#O# Box:** For PO Box No., or commonly used as a second address line
Examples: apt 413; second floor; Suite 3B
- City/Town:** full name of city or town
- State:** two alpha characters per US Postal Service
- Zip:** can be 5 or 5+4 (your option)

Contact Information

- Home Phone:** Main telephone number for reaching the family.
Can be marked as Unlisted (Y/N)
- Business Phone:** If available; for greater ability to contact the family.
- Fax numbers:** If available; for greater ability to contact the family.
- Family Cell Num:** Best number, chosen by the family, for reaching anyone in the family.
- Family E-mail:** Best address, chosen by the family, for reaching anyone in the family.

Change of Address/Prior address



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Before you change an address, press the **Move to Prior** button. This takes the current address and moves it to a history file. Then you can enter the new address.

NOTE: Each time you press this button an entry will appear in the history file. Duplicate files can be deleted from within the history file itself.

To see the history file, press **View Prior**. You will see the complete history of this family's address changes.

Change Date	Family Number	Street Number	Street Name	P#O# Box	Town	State	Zip
10/5/2006	7023	44	St. Peter Ln.		MyTown	MA	11025
	0						

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Note the **Change Date** field. This allows you to see when a family's previous address was changed, and when the change was made. This is useful if an address was changed in error, so the correction can be made. Also shows you if there are duplicate entries.

History

Approx Yr Joined:	2000
Date Joined:	2/5/2000
Previous Parish:	St. Joseph, Attleboro, VT
Last Update	
10/20/2009	

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Approx Yr Joined: Reference field to identify approximately when a family joined the parish.

Date Joined: Actual date the family registered

Note: both of the above fields have reports connected to them to help you track join dates for “length of membership” inquiries i.e. 5- 10- 25- year anniversaries, or how many families join in a particular quarter of the year.

Previous Parish: Comment-only field to identify family’s pervious parish.

Last Update

Last Update: Click this button and today’s date appears in the field. Date is taken from your computer’s internal clock/calendar.

Home Communion

Home Communion:	N	Name:	
Home Communion Minister:			
Home Communion Comment:		Home Visits	

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Home Communion: A Y/N field. If marked Y, name and pertinent data will appear on appropriate reports.

Name: Name of person requiring home communion. Field will hold up to 25 characters and can accommodate 2 names.

Home Communion Minister: Name of minister assigned to your family.

Home Communion Comment: Long comment-only field below the Home Visits button, does not appear on any report.

Home Visits



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Clicking **Home Visits** opens the following screen:

	Visit Date	Reason For Home Visit	Home Visit Comment	Return Date
✎	7/21/2007	Family request	Add a comment here	9/15/2007
*		Request volunteering		
		Welcome		

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Although Eucharistic Minister visits can be scheduled here, this can also be a history of any type of visit, and/or a calendar for projected/requested visits. All of the information entered here is available on reports. See **Reports>More Family Tab>Home Visits** in the **Reports** manual, or in the Census Program itself.

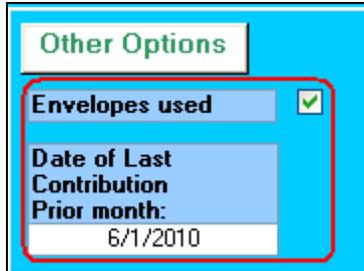
Visit Date: Date a visit occurred.

Reason for a Visit: This is a drop-down list (shown open) of pre-defined categories. You create and maintain this list. For more information, see **Census/Table Updates** in the **Overview/Census Menu** manual.

Home Visit Comment: Comment field to describe either the reason for the visit or the outcome.

Return Date: Schedule a date for a return visit. There is a report to see all return dates.

Envelopes Used / Date of Last Contribution, Prior Month



The screenshot shows a blue-bordered window titled "Other Options". Inside, there are several fields. The first field is "Envelopes used" with a checked checkbox. Below it is a larger field for "Date of Last Contribution Prior month:" containing the date "6/1/2010". A red rectangle highlights the "Envelopes used" and "Date of Last Contribution" fields.

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Envelopes Used and **Date of Last Contribution – Prior month** are automatically entered in these fields when envelope usage is entered in the **Funds module** of the census program. (See: **Funds Menu** document for more information.) They show you, at a glance, if this family is actively contributing to the support of the parish without revealing the amount of support. You cannot change the contents of these fields from this screen.

Briefly, funds are entered each week. At the end of each month, the month is “closed”. Once closed, these fields are updated. If a family is new and the month is still open, these fields will be blank.

Label Select

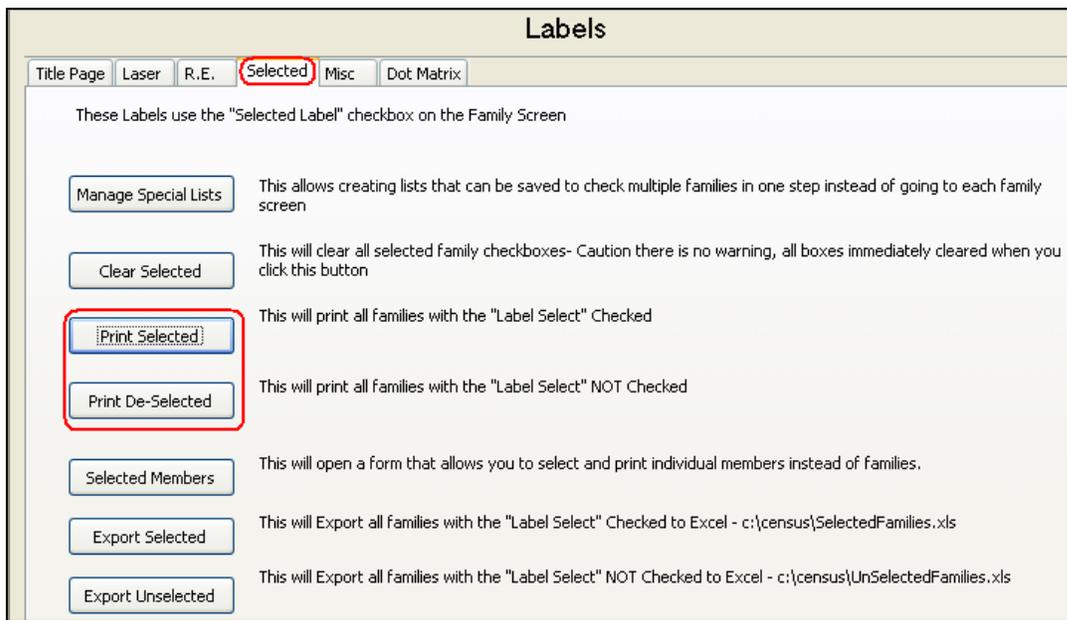


The screenshot shows the same "Other Options" window. In addition to the fields seen in the previous screenshot, there are two more fields at the bottom: "Label Select" and "Primary Record", both with checked checkboxes. A red rectangle highlights the "Label Select" field.

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In the **Reports** and **Label** areas of this program, there are a variety of ways to obtain mailing labels. However, you may have a special need to reach families that do not fall into the given categories. To help you meet your special need, the **Label Select** field allows you to “check off” the people you wish to contact and create mailing labels for them.

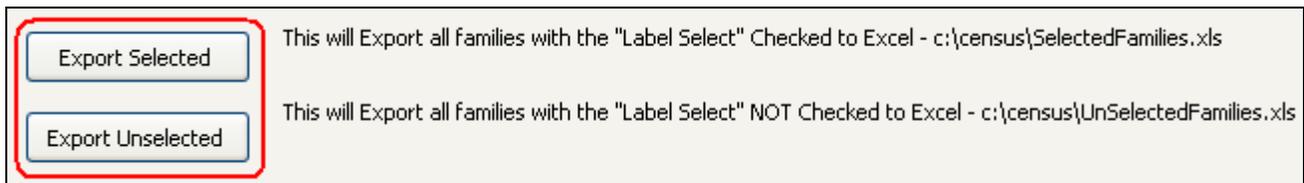
Once you select the families you need, go to the **Labels** menu (shown below) and choose **Print Selected** to print the labels. (The names will first appear on the screen, and then you can print from there.)



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Notice in the example above that the second option is for **Unselected Families**. This allows you to print labels for everyone that you did NOT select.

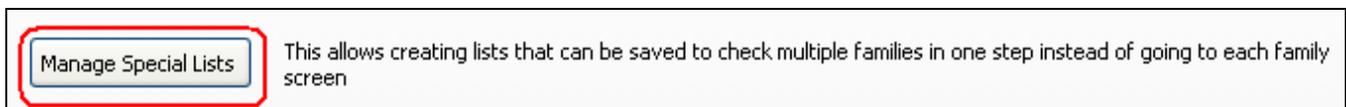
Once you have completed your work, choose **Clear Selected** and all the checkboxes become blank.



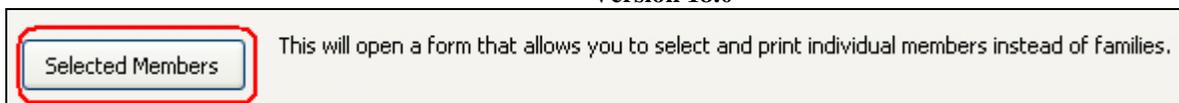
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At the bottom of the **Labels Menu** is an option to **Export Selected and Un-selected Families**. We mention it here to complete the scope of the **Label Select** feature.

Other functions and utilities are available on this menu as shown below:



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Go to the **Label Menu** manual for a complete description of all these features.

Primary Record

In some parishes the situation exists where several adult members of a family living at the same address receive separate envelopes. When a mailing goes out, each member would receive a copy of the same mailing (i.e. newsletter, message from the pastor, special announcement, etc.).

Other Options

Envelopes used

Date of Last Contribution Prior month:
6/1/2010

Label Select

Primary Record

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To eliminate these costly duplicate mailings, we have created a **Primary Record** feature. When you encounter the situation described, determine whose name should appear on the address label. They become the Primary Record. Then, simply “uncheck” the other members living at the same address.

Labels

Title Page **Laser** R.E. Selected Misc Dot Matrix

5160 Laser Labels

Alpha	Prints in alphabetical order all families with an envelope number less that the Inactive - Mail End number on the parish screen.
Alpha w/Secondary	Prints in alphabetical order all families with an envelope number less that the Inactive - Mail End number on the parish screen, this includes the secondary name field.
Family w/number	Prints in alphabetical order all families with an envelope number less that the Deceased/Moved start] number on the parish screen, this includes Family Number.
Alpha w/secondary zip	Prints in Zip then alphabetical order all families with an envelope number less that the Inactive - Mail End number on the parish screen, this includes the secondary name field. and a report showing the total labels in each zip code.
Zip Order	Prints in Zip then alphabetical order all families with an envelope number less that the Inactive - Mail End number on the parish screen, this includes a report showing the total labels in each zip code.
Numeric Order/Zip	This brings up a screen so that you can select a family number range to Print in Zip/ alphabetical order OR numeric order - all families with an envelope number less that the Inactive - Mail End number on the parish screen.
Family with no members	Prints all families that have no member records, this allows you to mail a census form to these families to get the member information
Primary Record	Prints in alphabetical order all families with an envelope number less that the Inactive - Mail End number on the parish screen, AND have the "Primary Record" check box checked. This is meant when there are multiple members at one address and only 1 label is desired.

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The **Label Menu** has the option (shown above) to print only **Primary Record** families, which will eliminate the unnecessary duplication.

Please note: Each time a new family record is created, the Primary Record box is “checked” by default.

Temporarily Inactive

You have the ability to temporarily deactivate a family number by clicking a check box on the Family Membership Page. You can also enter a reason for the deactivation, as shown below. However, checking this box does NOT remove the family from mailings. You still need to change the Family Number, putting it in the Inactive-Mail or Inactive-No Mail ranges. See Manage Census manual for more information.



Other Options

Envelopes used

Date of Last Contribution Prior month:
6/1/2010

Label Select

Primary Record

Temporarily Inactive

Reason:
Staying in a rehab center.

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To obtain a report for all Temporarily Inactive numbers go to the Reports Menu, click the Parish tab and select Temporarily Inactive as shown below.



Reports

Title Page Family More Family Members Sacraments E-Mail **Parish**

Parish Status Parish Status report for Diocese

Parish Stewardship Manage and report on Parish Stewardship

Clear Stewardship Clear Parish Stewardship to be ready for a new campaign

Zartarian/Envelope export Disk Exports a parish list with envelope number for selected range ASCII format

Parish Export with Phone Exports a parish list with envelope number for selected range ASCII format includes phone number

Temporarily Inactive Produces a report based on the Temporarily inactive Checkbox

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Shown here is a sample report:

<i>Temporarily Inactive Report</i>			
<i>Family Name</i>	<i>Street</i>	<i>Town</i>	<i>Temp Inactive - Reason</i>
Adams , Mr. & Mrs. James	8 Church St.	Your Town, MA 22022	
Cascade , Mr & Mrs Ronald	45 Slave St.	Hungary, MA 01195	Staying in a rehab center.

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Counters

Located at the bottom of the Family Screen are two counters labeled **Family Members** and **Notes**. These are designed to count and display the number of “records” in each of these areas.

Family Members:	3	Notes:	1	Section:	D	Area:	4
RELIGIOUS EDUCATION - Family Information							
# Children in Program	1	Fee Paid:	\$30.00				
Registered, no fee due	<input type="checkbox"/>						

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Family Members

This counter tells you how many members are entered for this family. This is useful when you are quickly entering in new families. Some parishes add the family name/address only to activate the family, but plan to enter the individual members at a later date. As you add each member to a family, the program keeps track of the members, and updates this counter automatically when the page is reopened. Each time you open this page, you can see if any members are entered.

Notes

You can enter a note, or series of notes, concerning each family in the database. This procedure is described under **Notes** (see Table of Contents). As described above, the notes are counted by the program and displayed for you. When you see a number in this counter, you will know that a note is entered. Selecting the Notes button (at the bottom of the screen) will give you access to the notes.

Section/Area

Located to the right of the counters are two entry fields named **Section** and **Area**. These are used to geographically divide your parish into small, manageable areas. Originally designed for a diocesan-wide fund-raising campaign, this feature can be used for any purpose. However, its use is optional.

Suggestions to use this feature: First, using a street map, divide your parish into a series of large “sections”. Name them whatever you choose. In this example we used capital letters (sections A, B, C, etc.). Next, divide each section into smaller “areas”. In this example, we used numbers for identification. Once you have created this “map” of the parish, you can place your families in their own Section/Area.

The reports for this feature are located on the FUND Menu under Annual Appeal Lists. See Fund Menu for more information.

Religious Education – Family Information

This section is used primarily when assessing fees for religious education families. Since each parish uses a different method for determining and applying fees, this section helps determine if the fee is billed and when it is paid.

Family Members:	3	Notes:	1	Section:	D	Area:	4
RELIGIOUS EDUCATION - Family Information							
# Children in Program	1	Fee Paid:	\$30.00				
Registered, no fee due	<input type="checkbox"/>						

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In this section, located below the counters, are entry fields relating to the parish religious education program. *Data in these fields is entered manually* as described below:

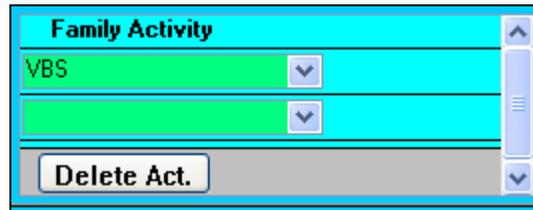
Children in Program: Determine the number of children registered and participating in religious education classes and enter the value here.

Fee Paid: Enter the amount due by this family. **NOTE:** There is another entry screen for entering fees for the entire program at the same time. For more information, go to **Religious Education Menu – Fees** tab, *Enter Fees* button.

Registered; no fee due: This checkbox is used when the parish has determined that, for special circumstances, the fee is waived. Entering this checkbox can also be done in the Enter Fees area as described above.

Family Activities

This feature allows you to identify and track various types of activity for each family. A variety of reports are available relating to this feature.



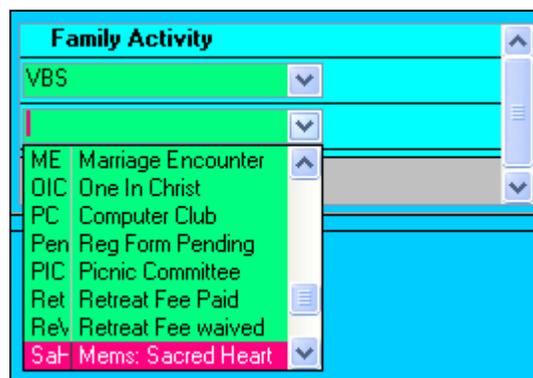
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Family activities are selected from a drop-down list created in *Manage Census – Table Updates – Family Act.*

See **Overview/Census Menu** manual for more information on creating/maintaining this list.

Entering Activities

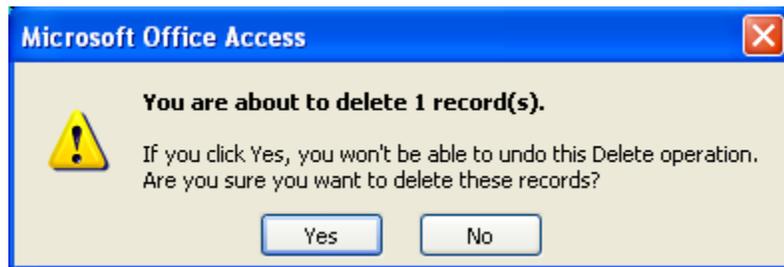
Simply open the list and select the desired entry. Another empty list automatically appears for you. There is no limit to the number of activities each family can have.



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Deleting an activity

To delete an entry, click in the entry to delete, and click on the **Delete Act.** button. This message will appear. Click YES and the entry is deleted.

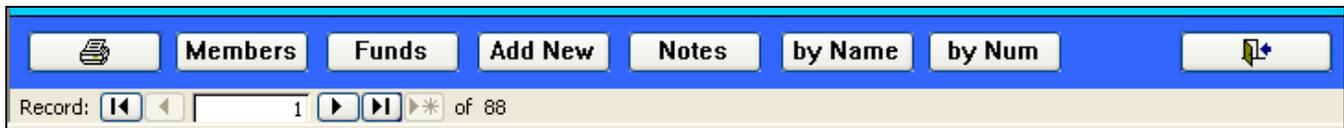


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Clicking NO will stop the operation and return you to the regular screen.

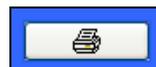
Button Bar

Several functions are controlled with the buttons located at the bottom of the Family Page.



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Printer Icon



Click to print a Confidential Census Form for the family on the screen. The sample shown below is a partial image of the form that is displayed first on screen, and then you can print it if you choose.

St. Columkille Parish
1400 Saint Jude Ln.
Southbridge, MA 11544

Confidential Census Information Printed 6/28/2007

Family number 1171 **Date Joined:** **Last Census Update:** 5/5/2005

Family Name: Mr. & Mrs. James Adams **Secondary Name:**

Street: 8 Church St. **City/Town:** Your Town MA 22022

Home Phone: 413-444-2323 **Unlisted:** N **Previous Parish:** Blessed Sacrament, Holyok

Business Phone: 413-555-1212 **Shutins at home:** N **Home Communion Name:**

Family e-mail: **Family Cell Phone:**

Name: James Adams **Relationship:** Head of House **M/F:** M **Date of Birth:** 10/9/1951

Occupation/School: Business Manager **Date deceased:**

Maiden name: _____ **E-Mail:** usb@msn.com **Cell Phone:** 413-555-1212

Handicapped: **Handicap comment:**

Religion: Other **Marital status:** M **Attend mass:**

Married by priest: Y **Marriage Date:** ___/___/1975 **Marriage City:**

Baptized: Y 05/12/1952 **First communion:** N ___/___/___ **Confirmed:** N ___/___/___

Activities:

Euch. Min. - Home

Name: Kristen T Adams **Relationship:** Daughter **M/F:** F **Date of Birth:** 3/10/1986

Occupation/School: Waitress **Date deceased:**

Maiden name: Adams **E-Mail:** Me@Me.com **Cell Phone:** 413-555-1212

Handicapped: Hearing Imp. **Handicap comment:** Hearing Impaired

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Members



This button opens the windows for entering in all the members of a family.

See: *Update/View – Part 2 Member Information* for complete details.

Funds



This button is password protected, and will open a special page showing the family's current giving. The password is the same used to open the FUND menu. See: **Fund Menu** manual for complete information.

A dialog box titled "CHECK PASSWORD" with a blue border and standard window controls (minimize, maximize, close). The text inside reads "Please Enter Password - Press OK". Below the text is a text input field, which is highlighted with a red oval. To the right of the input field are two buttons: "OK" and "CANCEL", both also highlighted with red ovals.

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Enter the correct password, and then press OK. Your entry will appear as asterisks. (**)
 Pressing Cancel will close the window and return you to the Family screen.
 To change Password, see: **Census: File Menu** manual for details.

Press OK and the following screen will appear:

Funds by Family					
	Ronald	Cascade	Family Number:	1025	
	Regular	Special	Diocese	Maint.	Attendance
Week 1	\$20.00	\$0.00	\$0.00	\$0.00	1
Week 2	\$0.00	\$0.00	\$0.00	\$0.00	0
Week 3	\$0.00	\$0.00	\$0.00	\$0.00	0
Week 4	\$0.00	\$0.00	\$0.00	\$0.00	0
Week 5	\$0.00	\$0.00	\$0.00	\$0.00	0
YTD	\$0.00	\$0.00	\$0.00	\$0.00	0

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The purpose of this screen is to quickly see if a parishioner has contributed in given week, which type of collection received the money, and how much was given. There have been circumstances where a family calls to verify a contribution. This is the quickest way to answer the question.

The Head of Household and the Family Name, and the Family (Envelope) Number appear at the top.

- Each column represents the 4 types of collections tracked.
- The 5 rows are the 5 weeks in the month (5th week once per quarter).
- YTD shows the Year to Date for each column *after* each month is closed, then zeros out all fields for the new month.
- The Attendance column records a 1 when a “Regular” collection envelope is received.

YTD adds them up

Each entry field CAN be edited, but not recommended. The built-in “checks-and-balances” will be overridden and you may lose the accuracy of the financial reports.

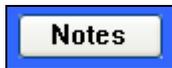
Add New 

This button is an alternative way to enter a new family into the system. It is used most often when you are entering in several families at the same time. You do not have to exit the family page and return to the main title screen.

Clicking this button will open the same screen as going to Census – Add New Family.

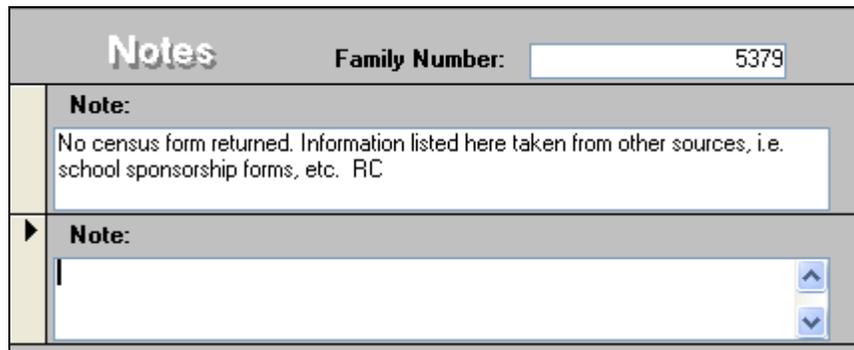
See: **Overview/Census Menu – Add New Family** for complete details on this feature.

Notes



Notes from this button are for complete families only. There is another option for individual member notes which will be discussed in Pt. 2 of this manual.

Clicking Notes will open the following screen:

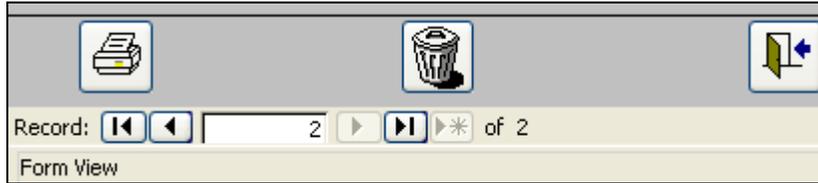
A screenshot of a software interface titled "Notes". At the top, it says "Notes" in a large font, followed by "Family Number:" and a text box containing "5379". Below this, there are two note entries. The first entry is titled "Note:" and contains the text "No census form returned. Information listed here taken from other sources, i.e. school sponsorship forms, etc. RC". The second entry is also titled "Note:" and is currently empty, with a vertical scrollbar on the right side of the text area.

Version 15

The family (envelope) number appears at the top. Below is a window where you can type in as little or as much as you choose. When you begin to type, a new blank window will appear below. There is no limit to the number of note windows you have, and there is no limit to the size of each note.

You are not limited to the amount of text in each note. A scroll bar appears on the right if the text exceeds the window. Although you cannot sort on any information within the notes, you can print the contents of the notes page. See below for more information.

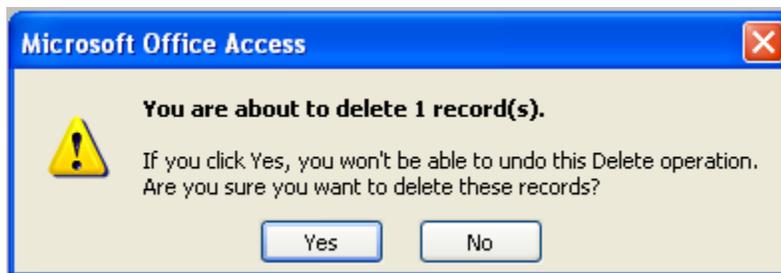
At the bottom of the Notes page there are 3 buttons:



Version 15

Printer icon: will display all notes to the screen. There is a button to send the notes to a printer.

Trash Can: click in a note window, and then press the Trash Can. This window will appear to confirm the delete.



Version 15

Clicking “Yes” will delete the selected message; “No” will cancel the action.

Arrow pointing to door: Exit the Notes page and return to the Family Record page.

by Name button



by Num button



These 2 buttons sort the families on the **Family page**.

By Name sorts the records alphabetically by last name.

By Num sorts the records by family (envelope) number.



Version 18.5

You can rapidly scan the records using these “VCR” buttons.

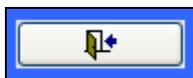
The single triangle goes one record at a time according to the sort you have chosen.

By holding this button down, the data quickly scans the records until you release it.

The line/triangle (left) brings the database to the first record.

The triangle/line (right) brings the database to the last record.

Door/arrow



This closes the database window.

***This concludes the Update/View: Family Information Part 1 manual.
Update/View: Member Information Part 2
continues with Members Information.***