

Marking Families Before Deletion

It is important that you follow the directions below when deleting records from your database. When a parish deletes a record, that record is not removed from our database, but instead is put into a holding file. We periodically delete records from this holding file if we know why a parish has deleted that particular record. Therefore it is important to let us know why a record has been deleted.

We've developed a specific wording to help you identify the reason a family has been deleted from your Church Office. Please indicate the reason by updating the second address line as follows. Make sure to substitute your 5-digit parish code where you see the words "Parish Code" below:

Parish code: Moving out of state

Parish code: Deceased*

Parish code: Marked inactive because _____

Parish code: Other _____

For example, if a family was moving out of state, parish number 9999 would key "99999: Moving out of state" into the Address two field.

Just to be clear, the steps below are the procedure for deleting a record.

1. Make the proper notation in the second address line
2. Do a synch.
3. The diocese then needs to synch BEFORE the church does their next synch.
4. Then the church can delete the record
5. Do a second synch. We would ask that you wait at least on day before doing a second synch after deleting the record.

Please note that if you make the 2nd address change and synch, then delete the record and synch again (before the diocese has a chance to synch) any note made in second address line will be lost.

If you follow these steps, it will ensure we see why a family has been deleted and know what appropriate action is merited.

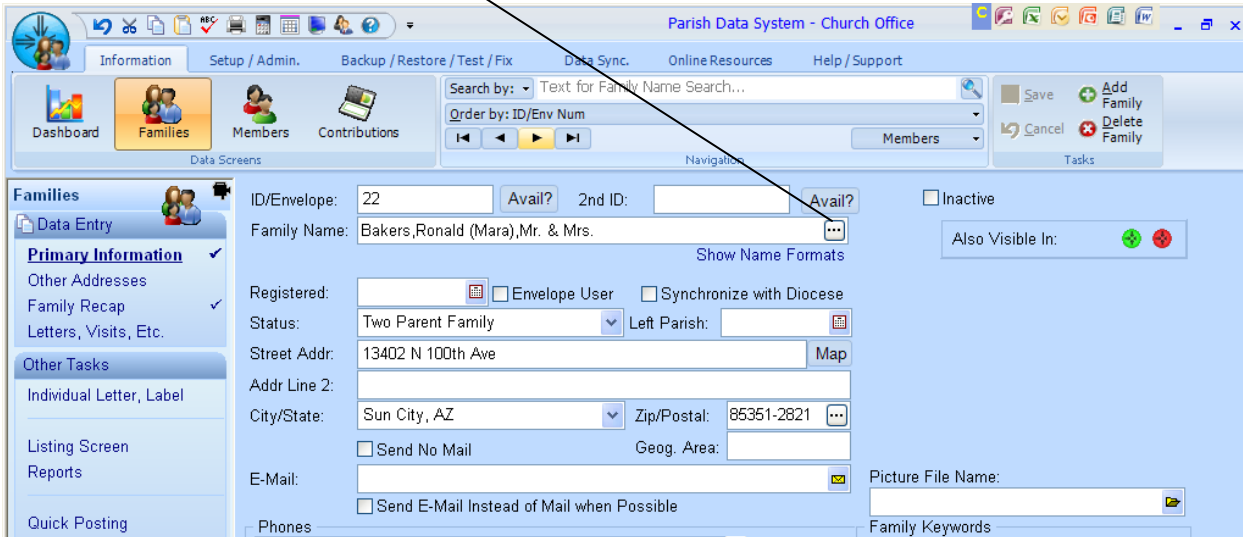
Please also remember that you **should not delete records** (even if a person is deceased) **of anyone who has made a contribution to the CSA in the current year.** That record cannot be deleted until the last CSA export for a given year is sent in March.

Mailings Returned as Undeliverable

For a while now, Brenda Williams has been keying "Undeliverable as Addressed" into the Address 1 field to indicate an address that has been returned to us by the Post Office. Putting the "bad" address in the second line without deleting it gives everyone a chance to easily see what has been changed. Sometimes the Diocese receives address changes from the Post Office's "National Change of Address" system that are, in fact, in error so please remember that it is important to **verify the address with the family.**

Salutations

In order to facilitate more personal letters to parishioners from both you and the Bishop, we encourage you to be sure all your records have an appropriate salutation, both formal in informal. Click on this button with three dots



This will bring up the below screen where you can change salutations.

Family Name

Information for the Head of Household:

Last Name:

First Name:

Title:

Suffix:

Information for the Spouse:

Last Name:

First Name:

Title:

Maximum Characters: 100
Characters Remaining: 70

Name:

Mailing Name:

Formal Salutation:

Informal Salutation:

Please make sure you have appropriate salutations for formal and informal communications.

USE OF ALL CAPS

The information you are collecting has many uses provided it is entered in a specific way. For example, when the names and address of your parishioners is entered using ALL CAPS, this information cannot be readily transferrable to individualizing letters as it seems less personal in nature. Therefore we are requesting that you input the data using Mixed Case and not ALL CAPS. PDS assures us that you can still print your labels and envelopes in ALL CAPS to meet post office requirements. Church Office includes two sets of label and envelope reports. For these, use the reports with POSTAL in the name.