

# Keeping Data in PDS Consistent

## 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.

PDS has developed a method for sending this information to the Diocese. It is called the "Reason For Change". Turn this feature on using these instructions.

1. Open Church Office
2. Click on the **Setup/Admin** tab and click **Setup Options**
3. Choose **Initial Setup** from the drop-down menu.
4. Put a check next to **Ask for Reason on Significant Changes**.
5. Please also make sure there is a check next to **Default Synchronize with Diocese to True**.
6. Now, Church Office will ask you for a quick explanation when you make significant changes. This feature will help you remember why you've made certain changes and it will help the Diocese as well.

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 gives everyone a chance to easily see what has been changed.

When you see addresses come down through the sync with "Undeliverable as Addressed" in Address 1, please contact the parishioner to ascertain their correct address. Sometimes the national post office and the local post office do not agree. If you have verified with the parishioner that you have the correct address, please let Brenda know so she can mark the record accordingly.

## Use of ALL CAPS

Do not enter contact information in all caps. That format makes it impossible for us to use the address for letters from the Bishop. If you are using ALL CAPS so your mailings fit formatting needs of the US Post office, PDS has a solution for you.

While in Church Office...

1. Click **Families** and then **Reports**
2. Choose reports from the "**Label/Envelope Reports in Upper Case**" list. These labels and envelopes will all print in upper case and the punctuation will be hidden.

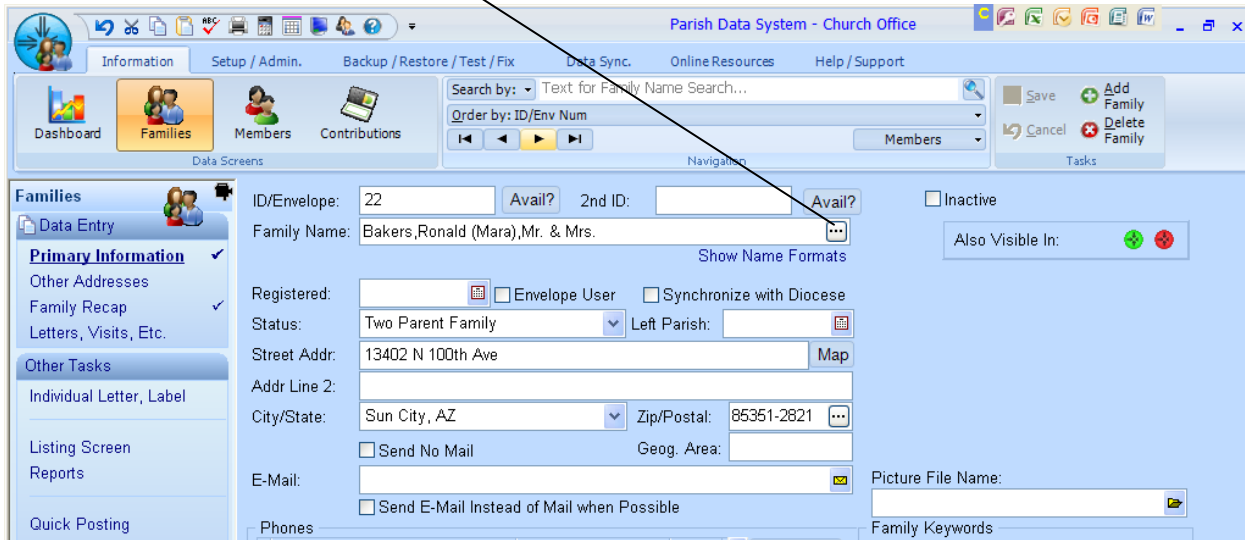
If you find yourself with the need to create custom reports – like for a letter that would be stuffed into a window envelope for example - even those reports can be turned into UPPER CASE.

1. Create an Advanced Report the way you would normally.
2. Once you've added the fields to your report, they will look like this <Fam Mailing Name>. Change ALL field names to add the word Postal. So for example, <Fam Mailing Name> becomes <Postal Fam Mailing Name>.

## Salutations

In order to facilitate more personal letters to parishioners from both you and the Bishop, please enter correct salutation information so the mailing name and formal salutation are correct.

Click on this button with three dots



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

A screenshot of the 'Family Name' dialog box. It is divided into two sections: 'Information for the Head of Household:' and 'Information for the Spouse:'. Under the head of household section, there are fields for 'Last Name: Bakers', 'First Name: Ronald', 'Title: Mr. & Mrs.', and 'Suffix:'. Under the spouse section, there are fields for 'Last Name:', 'First Name: Mara', and 'Title:'. Below these sections are fields for 'Name: Bakers,Ronald(Mara),Mr. & Mrs.', 'Mailing Name: Mr. & Mrs. Ronald Bakers', 'Formal Salutation: Mr. & Mrs. Bakers', and 'Informal Salutation: Ronald & Mara'. Each of the last three fields has a 'Recalculate' button to its right. At the bottom of the dialog are 'Apply/OK' and 'Cancel' buttons.

Please select appropriate Titles from this list to ensure that the Mailing Name and Formal Salutation are correct.

If the Recalculate button next to Mailing Name or Formation Salutation highlights after changing a title, please click the button