Families

The Families windows display information about a family, such as status, individual members' names, addresses, pictures, and financial activity. You can also add new families to the program here.

Locating a Family

At the top, you can search for a single record based on a family's name, an address, phone number, and so on. Or you can scroll through each record until you find the one you want. For more information, see Locate a Record.

Click the filter icon  to view only active records, only inactive, or both. Additionally, you can select to view only those active/inactive/both records for the family's primary parish or those records for all of the family's parishes. This filter stays applied until you clear it. Clearing the filter sets it to Both Active and Inactive.

Finding Fund History Entries

You can search all family records for certain fund history information. From any family financial window, click **Find History Entries** in the navigation pane. Enter any relevant data for the entries you want, and click **Find Matching Entries**. To view the record associated with an entry, select it in the grid and click **Lookup/OK**.

Adding and Viewing Documents

In several Families windows, you can add and view additional documents that support the information you entered in those windows. For more, see Add and View Documents.

Related Topics

- Add a Family
- Enter Family Mailing and Alternate Addresses
- View Family Members and Funds
- View Duplicate Family Records
- Manage Parishes
- Delete a Family's Record
- Family Quick Posting
- Family Processes