The Church Executive™ — Family Demographics

Introduction

The Family Demographics module of *The Church Executive*™ is one of the most-used modules within the program — addresses for families, persons, and envelopes are all looked up from here.

Since individual people are recorded in several other parts of the program (such as classes, event participation, pastor records, etc.), the home address and phone number of an individual are important information that is recorded in just one location: the family demographics module.

Most churches will use three modules of the program on almost a daily basis: Family, Person, and Envelopes:

▸ The Family Demographics table contains the family demographic data, including home address and phone number

▸ the Individual/Person table contains data relevant to each member of the family, including membership, background, interests, hobbies, volunteer services, etc.

▸ the Church Envelope table contains the contribution/donations — there is a different set of contributions records for each calendar year.

Thus, a family of four people (eg. husband, wife, and two children) would have six entries — one family entry, four individual entries (one per person), and one envelope entry. All four people share the same *unit number*.

You will want to record any person and family who is attending your church into the respective tables, regardless of their church status. You will identify the church status for each family *and* person. Follow-up reports may then be generated to obtain a list of the required families or persons.
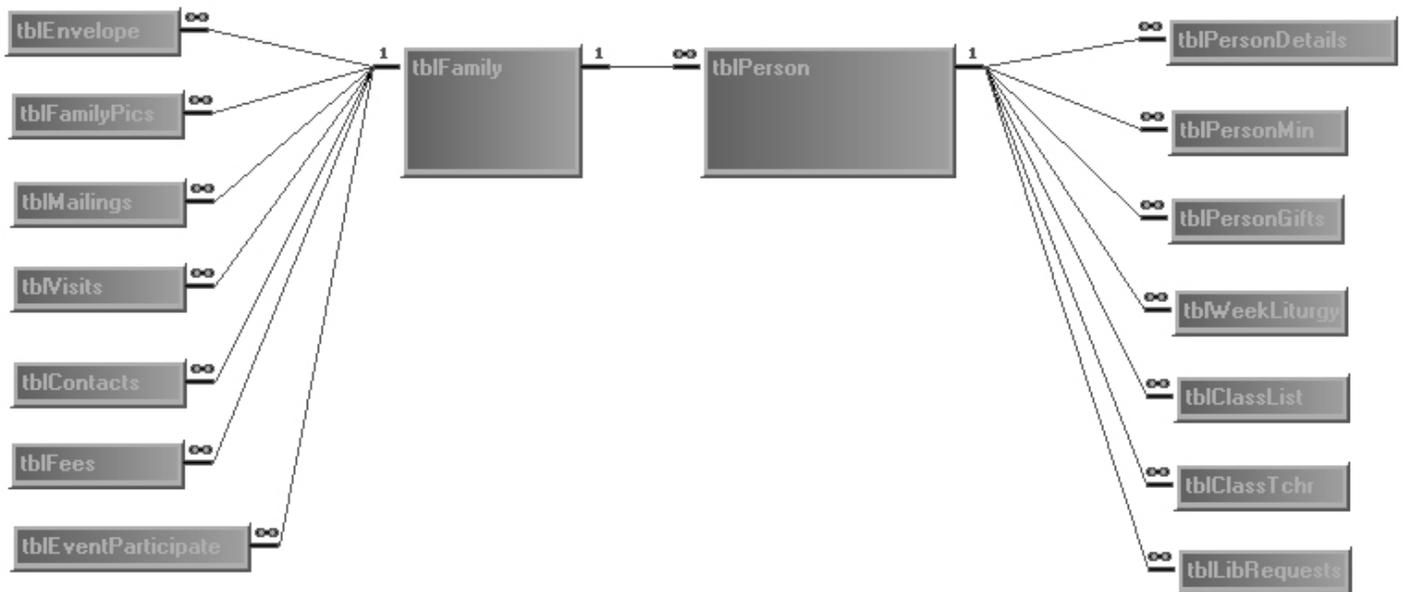
Flow diagram illustrating relationship of Family and Person tables

Definitions

Family

A family is any group of people sharing the same last name and living at the same residence. Each family is assigned a unique *unit number.*

Two other considerations when creating a family unit are:

① the type of entry the family (or individual) would like to have in a church roster, or
② how many people at a particular household should receive a mailing from the church (such as a monthly news bulletin).

In a church roster report each family unit is listed as a separate entity with a sub-listing of each family member. At the same time, each family unit will have only one mailing label printed.

With the above in mind, consider the following scenarios:

▸ two people living at the same residence but with a different last name will need to be listed as two families, each with a unique unit number [*unless* the wife, at the time of marriage retained her maiden name as a part of the husband's name].

▸ two people living at the same residence from the same family (thus the same last name) would prefer to be listed separately in a church roster and each receives a news bulletin would thus be listed as two families, each with a unique unit number. You might assign *separate* family units in these two scenarios:

• two relatives (elderly sisters) living at the same address
• a grown child (aged 18 or older) who is still living at home

Unit number

a unit number is unique for each family. There cannot be two identical unit numbers assigned to two different families. The unit number is used by *The Church Executive*™ to maintain and organize the family demographic data and to provide the necessary links to the related tables (ie. Individual/Person, Church envelopes, Ministry records, etc.).

Person number

each individual in a family is assigned a person number. Generally, the head of the household is assigned **1**, the spouse is assigned **2** and the children are numbered **3** and on [in a single-parent household, the children would still be numbered from 3 and on]. Thus, an individual is identified by a unit number and a person number.

Church status

a method of identifying the involvement of a family (and persons) within your church for a church roster or mailing list. This is not the same as a Membership status.

Family Drop-down Lists

There are a few *drop-down list* fields on the Family screen:

- ▸ Status
- ▸ Title
- ▸ City
- ▸ Province
- ▸ Country
- ▸ Area code
- ▸ District

The drop-down lists are used to ensure that consistent information is entered into your database. As such, you are limited to choosing an item from the list (or none at all).

New items can be added to the respective drop-down lists at anytime, even as you are adding a new family. However, to speed up the process of adding new families, you may want to take a few moments *before* entering lots of information and jot down the most common or appropriate values for each of these fields and enter them into the respective lists.

Add new value to drop-down list

There are two ways to add a new item to a drop-down list:

① via the Look-up Tables module.

This method will likely be used shortly after you have installed the program and getting ready to enter your data. It provides a convenient section where you can browse through *all* drop-down lists used throughout the program.

Tip: clicking the Look-Up Table icon on the Toolbar will open this module.

② double-click in the respective field to display a pop-up dialog box.

This method will likely be used periodically as you are using the program in the months and years to come. It provides the quickest way to add a new value to the field you are currently working with.

Illustrated to the right are the current values found in the Family Status drop-down list as viewed by double-clicking in the Status field on the Family screen (your values will likely differ from those shown here).

✳ A new value is added in the last row of the list, beside the asterisk.
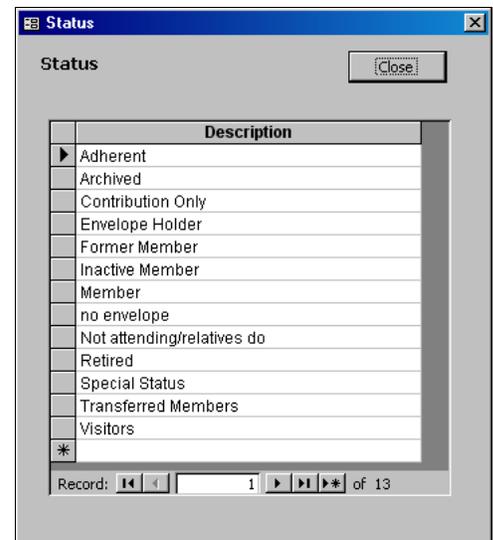
Figure 4
Family Status pop-up dialog box
[Double-click in Status field]

User-defined fields

Two fields on the Family Demographics screen can be *re-named* by you.

These are labelled as "**Option 1**" and "**Option 2**" when the program is first installed.

Both fields will accept up to 50 characters of text or numbers.

Re-naming these fields is done via the Look-up Tables module:

① go to the Look-up Tables module (either via the Main Switchboard or the icon on the Toolbar).

② select **System** — it is the third last radio button on the **Codes (1)** tab.

③ select the **Default Fields** tab on the right side of the "System defaults" settings.

④ the first two values are the user-defined **Family fields** that you can re-name.

⑤ Close the Look-up Tables form to save these values.

When you return back to the Family screen the user-defined field(s) will reflect the new name you provided.

Re-naming either of these fields does *not* change the *data* already recorded in the respective fields for each Family. It only changes the *name* of the reference to the field itself.

Adding new families and individuals to *The Church Executive*™ is relatively straightforward:

New family ① add a new Family to the Family Demographics table. This includes assigning a unique unit number and the recording of the families last name, mailing title, street and mailing addresses, phone number and general comments about the family.

Family members ② record the family members, via the Family Members tab on the right side of the Family Demographics screen, who have the same last name and reside at the same location for the new family unit created in step 1. This includes assigning a person number and identifying the person's church status, name, gender, and membership status (Yes or No).

As you perform this step, *The Church Executive*™ is automatically creating an entry in the Individual/Person table for each of the family members you are adding.

Individual data ③ after you have created a new family and listed the family members, you will want to record the individual data for each person. This is done via the Individual/Person module.

After a new family member has been added and saved (you have gone off of the new row of data), you can double-click on the person number to take you to the Person module where the new individual will be displayed and ready for additional information to be entered into the database.

Figure 9
Family Demographic screen

Family Fields

The fields are listed in the order they appear as you **Tab** through the screen.

Unit #

You must assign a unique family unit number to each family. Only numbers are allowed as input for the unit number.

Unit # | 8284

Just like your social insurance number, the *unit number* is a unique number used by *The Church Executive*™ program to maintain all of the related data for families and individuals.

When you add a new record, the next highest unit number, based on a system default setting is automatically displayed. Under certain circumstances you may need to change this number.

Status

The church Status field is used assign one of your churches classifications to a family.

Status | Envelope Holder

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new status that is not showing in the current list of allowable values, you will need to *add* a new status to the list. See page 3 for details on doing this.

[**Note**: *do not delete* the **Archived** status from the drop-down listing. In order to delete a family, their status must first be indicated as 'Archived'.]

Title

The Title field is the *mailing* title for this family unit, used on mailing labels, envelopes, and the church roster.

Title | Mr. & Mrs.

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new title that is not showing in the current list of allowable values, you will need to *add* a new title to the list. See page 3 for details on doing this.

Name(s)

This field identifies how the family unit is referred to on mailing labels, envelopes, and the church roster.

Name(s) | Robin & Leona

This, along with the Title and Last name fields, are used together, as in:

Mr. and Mrs.	Fred and Mary	Jones
Miss	June	Forsythe
Dr.	R.J.	Hume

Last name

The last name of the family unit.

Last name | Abraham

Street

Enter the home street address for this family.

Address 1 | PO Box 104

If the family *only* has a post office box or similar mailing address, it should be entered *here*.

| Mail | If the family has a *second* line to their mailing address, it would be entered here. | `Mail` `PO Box 398, R.R. 23` |

Both the street and mail addresses are included on a mailing label, envelope, and church roster.

| City | This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list. | `City` `Winnipeg` |

If you require a new city that is not showing in the current list of allowable values, you will need to *add* a new city to the list. See page 3 for details on doing this.

| Prov | This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list. | `Prov` `MB` |

If you require a new province/state that is not showing in the current list of allowable values, you will need to *add* a new province/state to the list. See page 3 for details on doing this.

| PCode | The postal code for this family. | `PCode` `R2J 2B5` |

Lowercase letters are converted to uppercase when you leave the field. In addition, if exactly 6 characters are entered, a space is automatically inserted into the middle.

| Country | Only required for *international* families, otherwise leave the country field blank. | `Country` `USA` |

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new country that is not showing in the current list of allowable values, you will need to *add* a new country to the list. See page 3 for details on doing this.

| Phone | The area code and phone number are two separate fields. | `Phone` `450` `839-3948` |

Only enter an area code (from the drop-down list) if the phone numbers requires it when dialing, otherwise leave it blank.

If exactly 7 digits are entered into the phone number, a dash will automatically be inserted when you leave the field.

The area code field is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new area code that is not showing in the current list of allowable values, you will need to *add* a new area code to the list. See page 3 for details on doing this.

| Cell | If exactly 7 digits are entered into the cell phone number, a dash will automatically be inserted when you leave the field. | `Cell` `376-3873` |

Fax

If exactly 7 digits are entered into the fax phone number, a dash will automatically be inserted when you leave the field.

Fax [894-3981]
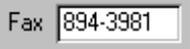
District

This field is used to identify the district (zone or area) within a large city (or rural setting) which can then be used for volunteer work groups or delivery/mailing purposes.

District [NK ▼]

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new district that is not showing in the current list of allowable values, you will need to *add* a new district to the list. See page 3 for details on doing this.

Church Mail Box#

If your church as an mail box system *within the church* and each family unit is assigned one of these, you could record this number here.

Church Mail Box# [23]

Reports can be sorted by this number making it easy to distribute material. The church roster and annual contribution envelope labels each have an option to include the church mail box as part of the report.

Option 1
Option 2

These two fields are used for miscellaneous information that does not already have a field defined. For example, emergency or medical data could be entered.

Option 1 [ ]
Option 2 [ ]

These two fields can be *re-named* by you. See page 4 for details on re-naming either of these fields.

Unlisted data

Five check-box fields are available to identify if any specific data should be designated as unlisted. These include the phone number, cell number, fax number, family e-mail address(es) and the family website URL.

Unlisted data:
Ph ☑ Cell ☐ Fax ☐ Emails ☐ Web ☐

Email
Email2

Two fields are provided for a *family* e-mail address.

Email [rharris@adminware.ca]
Email 2 [ ]

As you exit these fields, a check is made to ensure the validity of the information that was entered. For example, every e-mail address must have the @ symbol.

Individual e-mail addresses should be indicated in the Person/Individual module.

Website

The families website URL, as in:
www.adminware.ca

WebSite [www.shaw.ca/~abraham]

As you exit this field, a check is made to ensure the validity of the information that was entered.

Email the Church newsletter?

A check box field to indicate if this family would like to have the Church newsletter e-mailed to them.

Email the Church newsletter? ☑

Family Members

A tab control on the right half of the Family Demographics screen is used to identify *each* member of the current family. This could range from a single entry to several entries, depending on the number of individuals living at the same address.

Figure 31
Tab control on Family Demographics screen

Information recorded on the **Family Members** tab is actually stored in a "Person" table, which, in turn, stores a lot more information displayed here on the Family Demographics screen.

The **quickest** way to add a new individual (person) to a Family unit is via the Family Members tab on the Family Demographics screen.
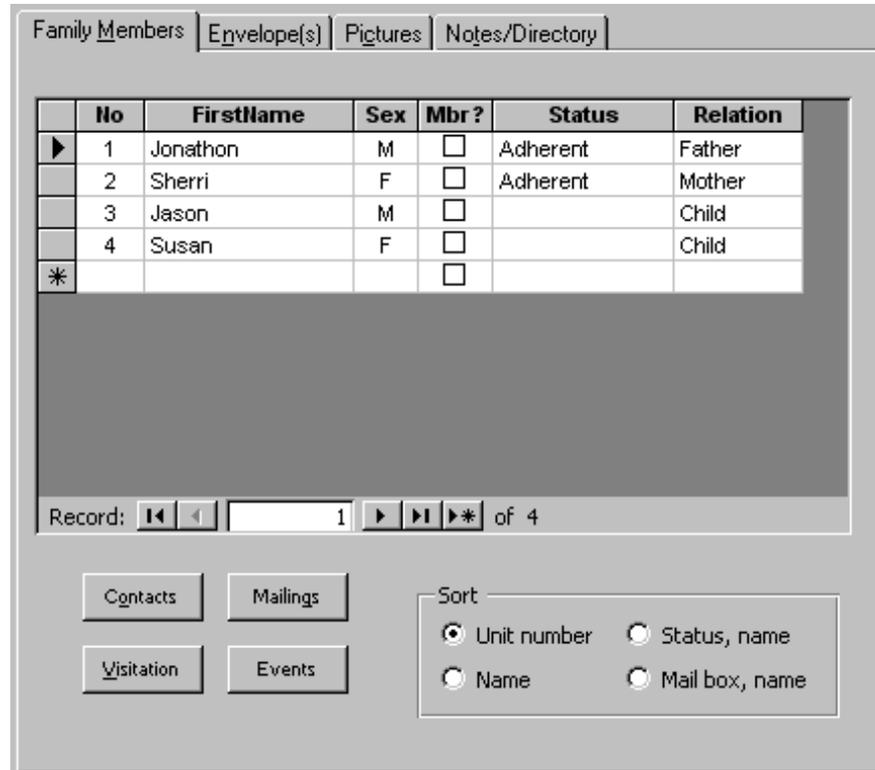
Figure 32
Family Members tab control and listing on Family Demographics screen

Adding a new family member

Add a new person to this family on the blank row in the listing.

Editing

Any of the five fields listed here can be edited (don't forget to first hit the Edit button).

Deleting

A person can*not* be deleted on this screen. This can only be done on the Person/Individual screen.

Family Member Fields

The fields are listed in the order they appear as you **Tab** through the screen.

Fields that are *required* in order to save a new entry are noted with a ◗

◗ No

Each person in a family is assigned a unique *person* number. It is recommended that the following numbering sequence be followed for every family:

No
1

    1   head of household
    2   spouse
   3+ children

In a single-parent household, the parent is given number 1 while the children *still* are assigned numbers starting at 3. In this instance, person number 2 is not assigned (and that is ok!).

◗ FirstName

The first name of the individual person.

FirstName
Jonathon

◗ Sex

The gender of this individual.

Sex
M

Mbr?

Is this individual a member of the church?

Mbr?
☐

Status

The Status field is used assign one of your churches classifications to this individual. The person status may or may not be the same as the family status.

Status
Adherent

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new status that is not showing in the current list of allowable values, you will need to *add* a new status to the list. See page 3 for details on doing this.

Relation

Identify the relationship of this individual within this family.

Relation
Father

This is a user-defined field that displays a list of allowable values in a drop-down list. You are limited to selecting an item from this list.

If you require a new status that is not showing in the current list of allowable values, you will need to *add* a new status to the list. See page 3 for details on doing this.

Family Envelopes

A tab control on the right half of the Family Demographics screen is used to list any church envelopes that have been assigned to this family (or members of this family).

Figure 39
Tab control on Family Demographics screen

Three lists are presented, one for the current year, one for the children's Sunday School envelope(s) and one for last year.
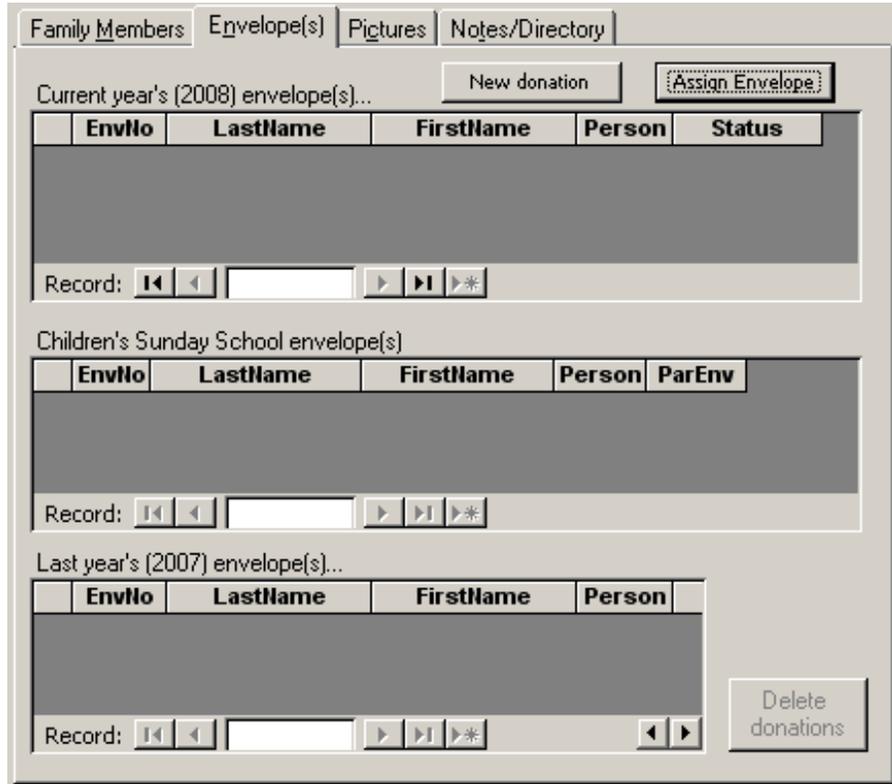
Figure 40
Envelope tab control and listing on the Family Demographics screen

Envelope information cannot be modified or deleted on this screen.

To add a new envelope to this family, use the **Assign Envelope** button (see next page).

Assign Envelope

Assign Envelope

A new envelope can be assigned (for the current year) to this family (or a person within this family) using the **Assign Envelope** button.

The following dialog box will appear:

This screen is very similar to adding a new envelope via the Church Envelopes module.

EnvNo

Enter the new envelope number that is to be assigned to this family (or a person within this family). The **Unused #'s** button will popup a list of envelope numbers that are currently not assigned to anyone in the current year.

Status

This is the *envelope* status. It is either Active or Visitor.

Unit

Cannot be changed. This reflects the current family unit number.

Person

If you are assigning a new envelope to a member within this family, enter the person number here. This is optional. If left blank, the envelope is assigned to the 'entire' family.