Families –Emails (Updated 1/15/23)

For our implementation, the email addresses will be assigned at the Member level and not at the Family/Household level. That allows us to be more generic in our email descriptions but will require the copying of email addresses from the Family screens to the Member screens in your current PDS.

Prior to data migration, all emails will need to be copied and/or assigned to the actual members that they belong to. We migrate member email addresses listed on the Member screen in PDS. If there is not an email address on the member screen and they are a 'Head of Household' or 'Spouse', we will attempt to migrate the family email listed to the member screens, where possible. In addition, **The only way to guarantee that you have the emails in ParishStaq is for you to copy/paste them to the appropriate member yourself.** In addition, we would like the email descriptions to be 'scrubbed' to the most generic descriptors, so that they are useful in our new system.

To begin this project, we suggest that you migrate any email addresses that belong to individual members to the member that they belong to. An email that remains on the Family screen should also appear on a member screen.

The process for doing this in Version 8 of PDS Church Office is more labor-intensive than in Version 10. In the following steps, we'll give instructions for Version 8 and for Version 10, where they are different.

Step #1 – Move email addresses to the Members that they belong to:

You will want to work in alphabetical or ID number order through your families for this process. You will want to parse this out to several different sessions, so you can do a range of families each time.

| Version 8 Instructions	Version 10 Instructions
Go to a Family that has email addresses on their Family screen. Highlight and Copy (Ctrl Key + C) the 1st email address in the list.	Go to a Family that has email addresses on their Family screen. Click on the email address that you want to assign to a member of the household.
Click on the Members pull-down for that Family and select the Member that this email address should be attributed to. Then, click on the Communications menu option on the left side menu	Version 10 will bring up a window, where you can check a checkbox next to the member(s) where that email address should reside.
Paste (Ctrl Key + 'V') the email address in the proper field.	Continue to the Next email in the Family's email list, if there is more tha one remaining, and repeat the steps above.
Continue to the next email in the Family's email list, if there is more than one remaining and repeat the Copy/Paste steps.	

Step #2 – Clean up the Email Descriptions:

Another one of the keyword lists that can have the most issues is the list of email descriptions, so we'll continue with that one.

**Select: FILE | Keywords | General Keywords | Email Description Names**
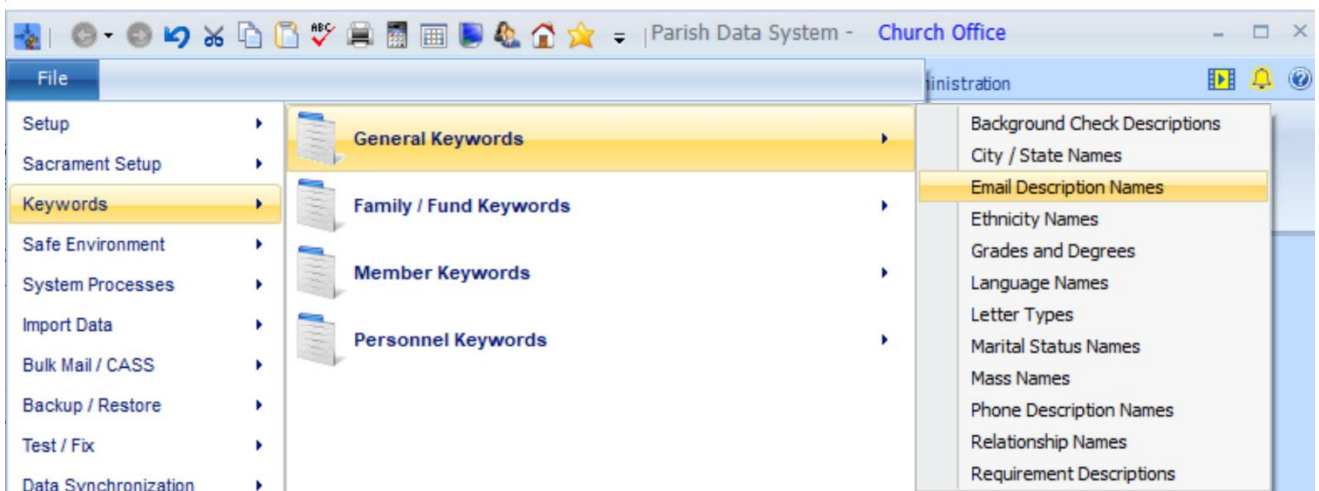
The Email Description Names Keyword List will look something like this when it is selected:
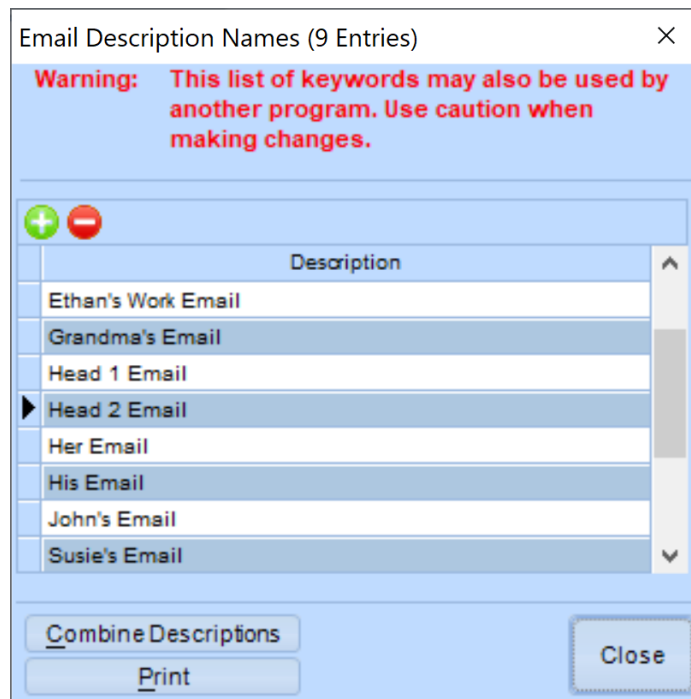
Because we now have all Member email addresses associated with the proper member in the family, we can scrub out list of the more specific email descriptions and use more generic descriptions. This will make the data much more functional in our new system. Our first step will be to insert some descriptors that are more generic and will be more useful when running reports. To do this, click on the green icon and add 'Work', 'Home', 'Private'.

A revised list might look like this:
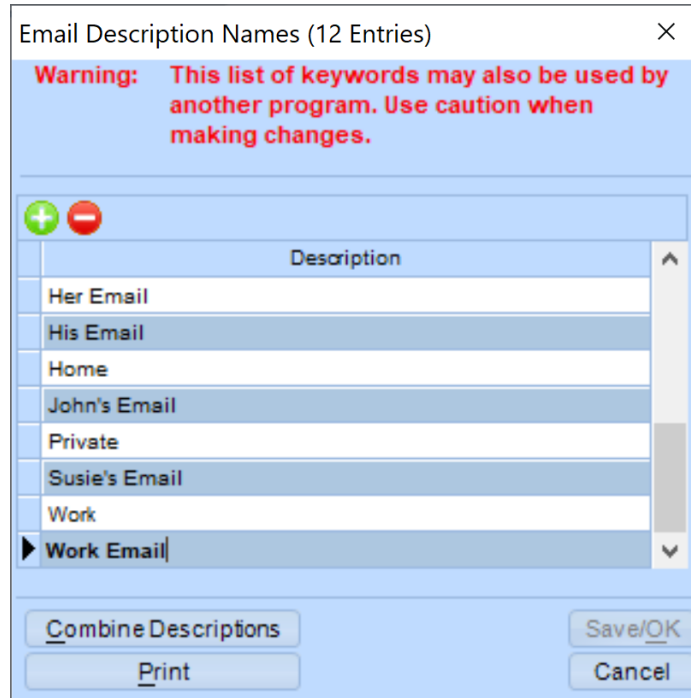
Once we have inserted the new descriptors, we will use the COMBINE DESCRIPTIONS process to move descriptions that are personal to the more generic ones. We want to use the COMBINE process instead of the Delete Descriptions process, so that we can correct those families and members that have the wrong value on their screen. If we just delete the email description from the list, we'll end up with families and members that just have a blank email description.

Using the COMBINE process, combine all items that include the word 'work' into 'Work'. We will also combine all that include 'home' into 'Home':