Families – Phone Numbers <mark>(Updated: 1/15/23)</mark>

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

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

To begin this project, we suggest that you migrate any phone numbers that belong to individual members to the member that they belong to. If there is a HOME phone number on the Family Screen, please copy/paste it to at least the Head of Household. Any phone numbers 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 phone numbers 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 phone numbers on their Family screen. Highlight and Copy (Ctrl Key + C) the phone number that appears 1st in the list.	Go to a Family that has phone numbers on their Family screen. Click on the phone number 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 phone number 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 phone number should reside.
Paste (Ctrl Key + 'V') the phone number in the proper field. Update the description appropriately, using more generic descriptions ("Mobile" or "Cell" for cell phones, instead of "Molly's Cell" or "Steve's Cell". We will clean up the description list in a later step to remove the more specific and less useful descriptors.	Continue to the next phone in the Family's phone list, if there is more than one remaining and repeat the steps above.
Continue to the next phone in the Family's phone list, if there is more than one remaining and repeat the Copy/Paste steps.	

Step #2 – Clean up the Phone Descriptions:

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

Select: FILE | Keywords | General Keywords | Phone Description Names
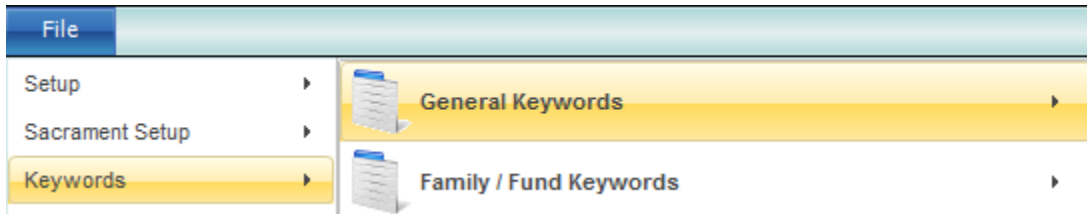

The Phone Description Names Keyword List will look something like this when it is selected:
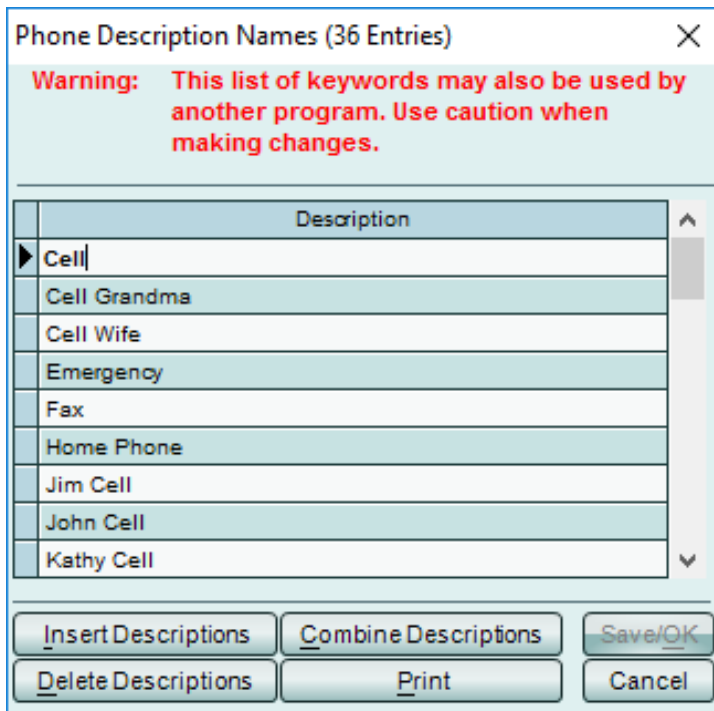
Because we now have all Member phone numbers associated with the proper member in the family, we can scrub out list of the more specific phone descriptions and use more generic descriptions. This will make the data much more functional in our new system. Our first step will be to insert some descriptors that are more generic and will be more useful when running reports. To do this, click on the Insert Descriptions button and we will want to be sure to have 'Cell' , "Work", "Home".

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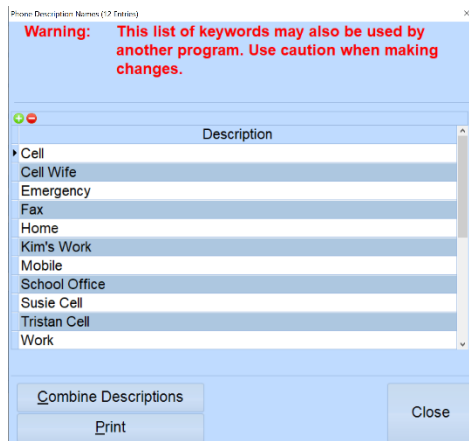
Once we have inserted the new descriptors, we will use the COMBINE DESCRIPTIONS process to move descriptions that are personal to the more generic ones. We want to use the COMBINE process instead of the Delete Descriptions process, so that we can correct those families and members that have the wrong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

Using the COMBINE process, combine all items that include the word 'cell' into 'Cell'. We will also combine all that include 'Work' into 'Work':