

Adding New Families

Adding new families to the Church Planter Management System is a three-step process. First, the head of the house is added. Then, other records are created for each additional member of the household. Finally, establish the spousal relationships.

This section will review how to add a brand new family to the church records.



Objectives

At the completion of this section, you will be able to:

- Add a new household
- Add records for other household members
- Establish Spousal Relationships

Add a New Household

The first step in adding a new family is to create a new Record for the head of the household.

1. From the first screen, click on Membership.
2. The Main Screen appears.

Membership.cpm
CPMS 4.0 Platinum Edition

Membership Letters Classes Music Pastor Prayer/Timer Management

Prefix First Name MI Last Name Suffix Nickname Gender Directory
Mr. Clair Aleman Male

Household Information +
Head
Clair's Relation to Head Head of House
Household Names Relation to HOH M/F Age
Clair Aleman Head of House Male 70

Member Category Active Church Mail
Active Attender Yes No Yes No

Birthdate Age Over 18? Age Group
Apr 17, 1931 70 Yes No 51-60

Occupation Guest Of
Retired

Marital Status Anniversary Ann. Month
Married

Spouse

Addresses Use HOH's address? +
Main Label Street / City, State & Zip Code

Phone Numbers & Internet Addresses
Main Label Number / Address Ext.
Website

Record 1 (705 of 705)
View List
Search
Print
Add New
Delete
Basic Info
Follow Up
Membership
Discipleship
Shape
Prayer Request
Classes
Giving
Correspondence
Contact Notes

3. Click on **+ Add New**.
4. On the next dialog box, click Continue.
5. Complete the fields in area(s) 1, 2 and 3 as needed.

Membership.cpm
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6. To add the address, click the '+' on the Addresses Bar.

Add a New Household (Continued)

Main	Label	Street / City, State & Zip Code
<input type="radio"/>	▼	
	Delete	

7. The Addresses window will change as shown above to allow entry of an address. Make sure that one address is selected as the 'Main' address. This will be the address that will print on the directories and labels.
8. You are now ready for step two – Adding Other Members.

Adding Other Members

1. To add other people in this family, click the **+** button on the Household Information bar.

The screenshot shows the CPMS 4.0 Platinum Edition software interface. The 'Household Information' section is highlighted in purple. A red arrow points to the '+' button on the Household Information bar. The form contains fields for Prefix, First Name, MI, Last Name, Suffix, Nickname, Gender, and Directory. Below this, there are sections for Household Information, Addresses, and Phone Numbers & Internet Addresses. The Household Information section includes fields for Head, Clair's Relation to Head, Head of House, Household Names, Relation to HOH, MF, Age, Birthdate, Age, Over 18?, Age Group, Occupation, Guest Of, Marital Status, Anniversary, Ann. Month, and Spouse. The Addresses section includes a checkbox for 'Use HOH's address?' and a table for Main, Label, Street / City, State & Zip Code. The Phone Numbers & Internet Addresses section includes a table for Main, Label, Number / Address, and Ext., and a Website field.

2. The following screen will appear.

The screenshot shows the CPMS 4.0 Platinum Edition software interface. The 'Household Information' section is highlighted in purple. A red arrow points to the '+' button on the Household Information bar. Another red arrow points to the 'Use HOH's address?' checkbox. The form contains fields for Prefix, First Name, MI, Last Name, Suffix, Nickname, Gender, and Directory. Below this, there are sections for Household Information, Addresses, and Phone Numbers & Internet Addresses. The Household Information section includes fields for Head, Clair's Relation to Head, Head of House, Household Names, Relation to HOH, MF, Age, Birthdate, Age, Over 18?, Age Group, Occupation, Guest Of, Marital Status, Anniversary, Ann. Month, and Spouse. The Addresses section includes a checkbox for 'Use HOH's address?' and a table for Main, Label, Street / City, State & Zip Code. The Phone Numbers & Internet Addresses section includes a table for Main, Label, Number / Address, and Ext., and a Website field.

3. Notice family members that have been added previously will be listed in the Household Information Section. Any phone numbers already added will also be listed in the Phone Numbers and Internet Addresses section.
4. Complete the Basic Data information as needed, including the 'Relation to Head'. To use the address entered for the head of house, click in the 'Use HOH's Address?' box.
5. Complete the Basic Info, Follow up, Membership and Discipleship tabs as needed. (You can add more information to these tabs at any time.)

Establishing Spousal Relationship

1. Once both the husband and wife have been entered, establish their spousal relationship by clicking on **Edit** to the right of the Spouse box as shown below:

Marital Status: Married
Anniversary:
Ann. Month:
Spouse: **Edit**

2. The following screen will appear:

CPMS 4.0 Platinum Edition
Edit Relationship Information

Selected Spouses

Husband: Bob Rose
Wife: Jan Rose
Wedding Date:

Establish Spousal Relationship
Clear Spousal Relationship

Finished

Pick a Spouse from Bob Rose's household

House of: Jan Rose

Names	MF	Age	Husband	Wife
Jan Rose	Female		✓ select	✓ select
Bob Rose	Male		✓ select	✓ select

Or pick from the church members & prospects

with the Last Name: Ros

Names	MF	Age	Husband	Wife
Ms. Yvonne Ross	Female		✓ select	✓ select
Mrs. Yvonne Ross	Female		✓ select	✓ select
Bob Rose	Male		✓ select	✓ select

Note: Click on the Husband/Wife buttons, in either list on the right, to choose a person's spousal role. After choosing a husband and wife under "Selected Spouses" and optionally including the wedding date, click the "Establish Spousal Relationship" button to implement your selections.

3. Once the husband and wife are listed correctly, click **Establish Spousal Relationship**.
4. Click **Finished**.