

Using Family Records as a Merge Data Source

THE “FIRST NAME” FIELD

This field is the source for the salutation in a letter and is very important.

Never leave this field blank!

Do not use ALL CAPS!

Please do not put a person’s initials after their first name in the “First Name Field” since this is the source of the salutation. Otherwise, the salutation would read:

Dear Bernice P.

Do not put just an initial in that field. If you don’t KNOW the person’s first name, and it is not on the registration form, until you are able to find out what the first name is (and it is important that you do), use the formal title in this field. Such as: Mr. Smith

Do not include the person’s middle name unless that is exactly what you would call them when you greet them.

THE “MAILING NAME” FIELD

Never leave this field blank!

Do not use ALL CAPS.

For a proper letter to be addressed, it is critical that the mailing name field contain the proper social titles of the head of household and spouse.

Incorrect: María and Jose J. Ventura
 Mr. and Mrs. Jose and Maria Ventura
 Mrs. and Mr. Maria Ventura

Correct: Mr. and Mrs. Jose J. Ventura

Incorrect: Paul Portee

Correct: Mr. Paul Portee



PARISHSOFT FAMILY RECORDS

DEACONS

Their “mailing name” should be “Rev. Mr. Mark Smith” or “Rev. Mr. and Mrs. Mark Smith”

Several parishes only have “Mr.” or “Mr. and Mrs.” As a result, those deacons received two Annual Appeal Letters. One referred to their deaconate ministry and the other letter was the same letter that went out to the general population.

WHEN **BOTH SPOUSES** ARE DOCTORS

Incorrect: Dr. and Dr. John Smith
Drs. Romulo Parungao

Correct: Dr. Mary and Dr. John Smith *OR* Drs. Mary and John Smith

If you want to include first names for equally titled couples, then normally, the woman's name comes first. For both medical doctors, you would address them as Drs. Mary and John Smith, or Dr. Mary Smith and Dr. John Smith.

WHEN THE WIFE IS THE DOCTOR AND HUSBAND IS NOT

Incorrect: Mr. and Dr. John Smith

Correct: Dr. Mary and Mr. John Smith

The one with the "title" is listed first.

MAN AND WOMAN WITH **DIFFERENT LAST NAMES**

Incorrect: Joe Smith and Mary Jones

Incorrect: J. Smith/M. Jones

Correct: Mr. Joe Smith and Ms. Mary Jones

PARISHSOFT FAMILY RECORDS

TWO ADULT WOMEN

Incorrect: Mary and Jane Smith

Correct: Ms. Mary and Ms. Jane Smith

TWO ADULT MEN

Incorrect: John Powell and George Apple

Correct: Mr. John Powell and Mr. George Appel

USE OF “ / ” IN THE “MAILING NAME”

Please avoid using this!

Incorrect:	M/M	Mr./Mrs.
	Joe/Mary Smith	Joe Smith/Mary James

WHEN SOMEONE DIES OR DIVORCES

Please remember to change both the “first name” and the “mailing name” on the record!

If it is the only name in the record, mark the family record “UNregistered” and “Inactive”.

THE NAME SUFFIX - ABBREVIATIONS AFTER A NAME

Such as Jr., Sr., and academic titles--are set off by commas. They begin with a capital letter and end with a period.

In the mailing name field, if a physicians honorific follows his/her name, then “Dr.” should not be before the 1st name:

Correct: Dr. Joseph Smith *OR* Joseph Smith, M.D.

Incorrect: Dr. Joseph Smith, M.D.

If it is a married couple and HE is a Jr. or Sr., II, etc., include the suffix in the “mailing name” field only: Mr. and Mrs. William Smith, Jr.

PARISHSOFT FAMILY RECORDS

If he is deceased and the widow prefers to go by his name, she retains the suffix.

Correct: Mrs. William Smith, Jr.
 OR
 Mrs. Edna Smith

Incorrect: Mrs. Edna Smith, Jr.

MAILING NAME AND FIRST NAME FIELD MUST AGREE!

If you have *Mr. and Mrs.* in the mailing name, that implies that a letter is being mailed to both spouses and there needs to be *two* names in the first name field.

Correct: Mailing Name: Mr. and Mrs. David Heusinger
 First Name: David and Christine

Incorrect: Mailing Name: Mr. and Mrs. David Heusinger
 First Name: David

Mailing Name: Mrs. Joseph Smith
 First Name: Janet and Joseph

PROFESSIONAL TITLES

certified public accountant	Jane S. Hart, C.P.A.	Dear Ms. Hart:	Dear Ms. Hart:	Very truly yours,	Sincerely yours,
dentist	John S. Hart, D.D.S. (or D.M.D.) (office address) or Dr. John S. Hart (home address)	Dear Dr. Hart:	Dear Dr. Hart:	Very truly yours,	Sincerely yours,
veterinarian	Jane S. Hart, D.V.M. (office address) or Dr. Jane S. Hart (home address)	Dear Dr. Hart:	Dear Dr. Hart:	Very truly yours,	Sincerely yours,
attorney	Mr. John S. Hart Attorney-at-Law or John S. Hart, Esq.	Dear Mr. Hart:	Dear Mr. Hart:	Very truly yours,	Sincerely yours,

PARISHSOFT FAMILY RECORDS

physician	Jane S. Hart, M.D. (office address) or Dr. Jane S. Hart (home address)	Dear Dr. Hart:	Dear Dr. Hart:	Very truly yours,	Sincerely yours,
doctor of philosophy (doctoral degree)	Jane S. Hart, Ph.D. (office address) or Dr. Jane S. Hart (home address)	Dear Dr. Hart:	Dear Dr. Hart:	Very truly yours,	Sincerely yours,