Instructions for DioMail – Monthly Census Updates

As updates to parish families come in, use the "Family Keyword" area in Church Office to add the appropriate keyword. The list of frequently used codes are:

DM Add Family
DM Address Change
DM Delete Changed Parishes
DM Delete Inactive
DM Delete Last Member Deceased
DM Delete Left The Church
DM Delete Moved Out of State
DM Delete Moved Out of Town
DM Do Not Send Mail or Contact
DM Name Change (misspelling, different last name etc.)
DM Name Change Divorce (may remove a spouse, change in family last name etc.)
DM Name Change Spouse Deceased
DM Phone Change

1. In PDS go to the "Families" page.
2. On Left hand side click on "Reports"
3. Click on "Family Easy Reports"
4. Click on "DioMail" and then click on "Next"
5. On the Overview Page click on "Next"
6. Select your printer and then click on "Next" (if you require a hard copy)
7. On the Listing Layout page click on "Next" if everything looks okay
8. On the Select Families Screen go to "Additional Selections"
9. Click to add new selection.
10. Click on Family Keyword
11. Click on Description
12. Click to add "is in list" from the drop down menu
13. Click on next section to the right to choose from drop down menu:
13a. You can choose DM Add, DM Delete, DM Name Change, etc.
Only choose one from this menu if you have multiple changes.
14. Hit Preview
15. Click on Print then select Print to File. Save in your Documents to something you can remember. Press OK. If you have multiple changes go back to the Additional Selections Screen and from the drop down menu choose your next "DM" option (13a). Continue with steps 14 and 15. Remember to save each document as something different – DM Deletes, DM ADDs etc.
16. Send email to Census@rockforddiocese.org. Attach each document you saved to your email.
17. In Church Office – go back to each family that you either added, changed or deleted and remove the keyword.

18. For the families you were deleting – you will want to decide to delete them from view or simply mark the "Inactive" box which makes the family name appear in red. If you make them "inactive" it is good to note in "Family Keywords" or "General Notes" field indicating why they were deleted. You can also update the ""Left Parish" date field to refer to the date they were removed.

19. If you chose to "Delete Family", you will be asked if you would like to delete the family and all of its members. Click "Yes".

20. You will then be asked if you would like to save and print the information and just hide it within Church Office. Click "Yes". (This way you can always look in the "deleted families" for information you may need later on.)

You can always call PDS Support for any questions you may have. Their telephone # is: 800-892-5202. You will need your site number when calling for support.

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