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INSTRUCTIONS FOR adding a new parishioner to finalsite

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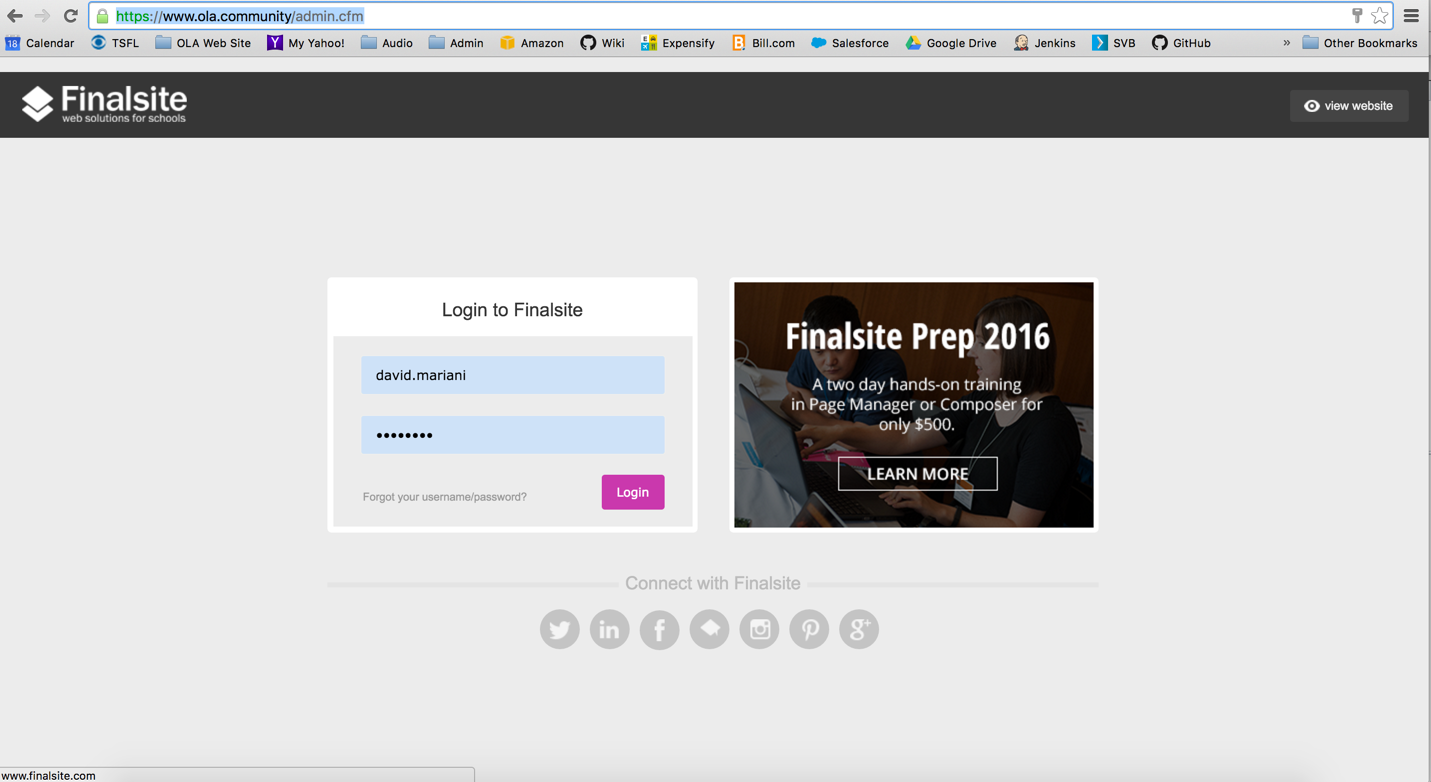
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# Add a new parishioner

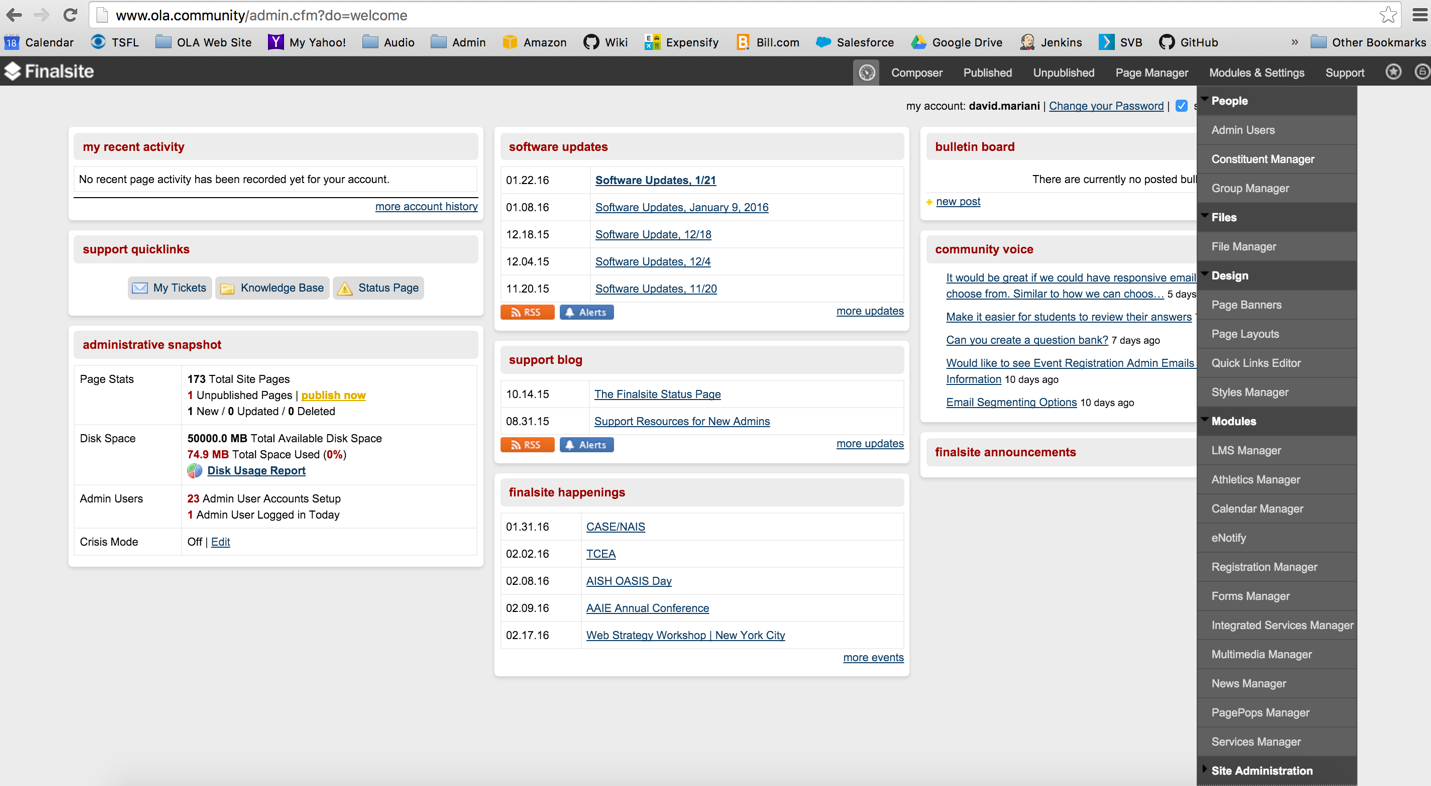
First launch your web browser and enter the following address: <http://angels.finalsite.com/admin.cfm>

## Step 1: Login to Finalsite

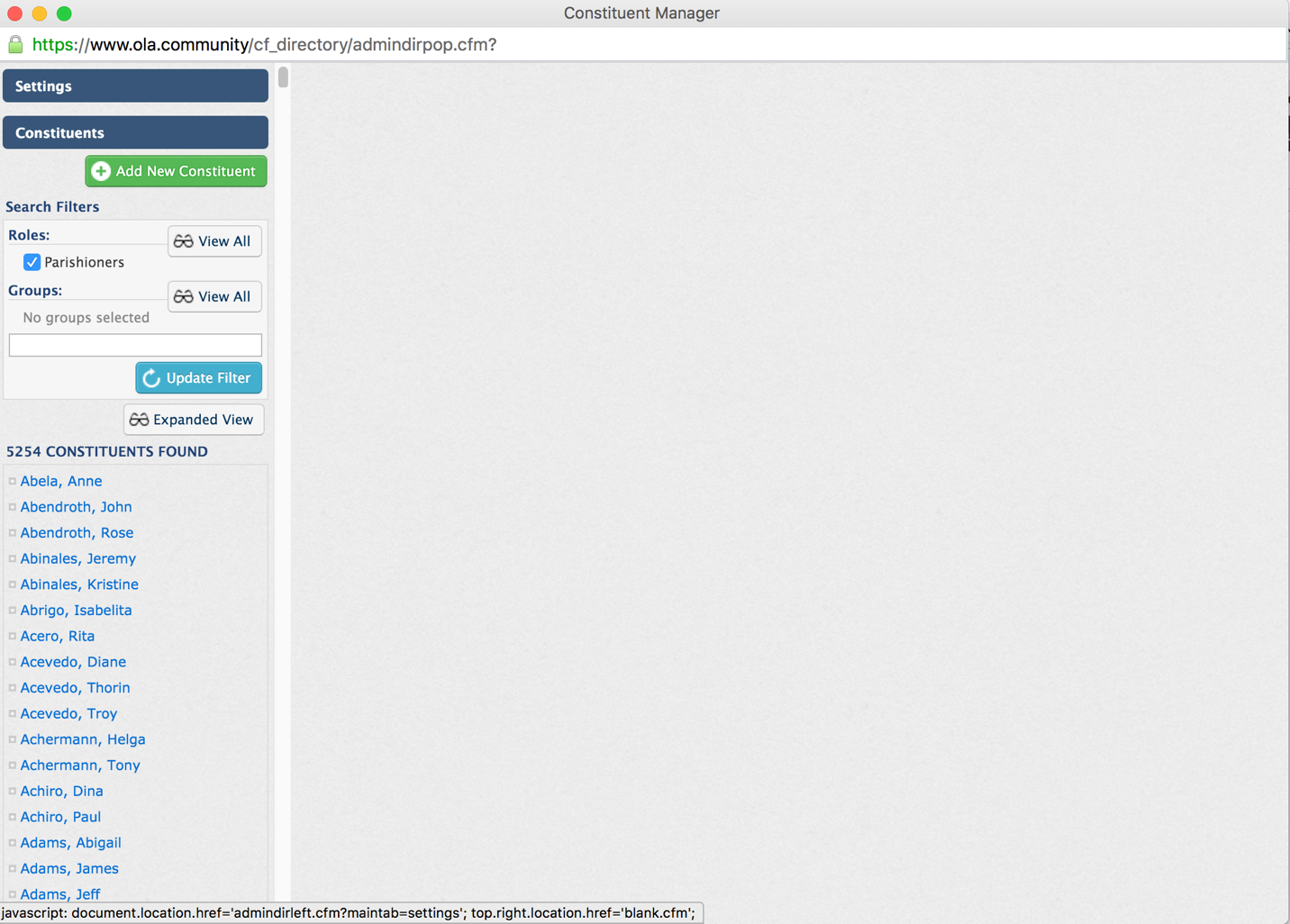
Login to Finalsite and choose **Constituents Manager** from the drop down



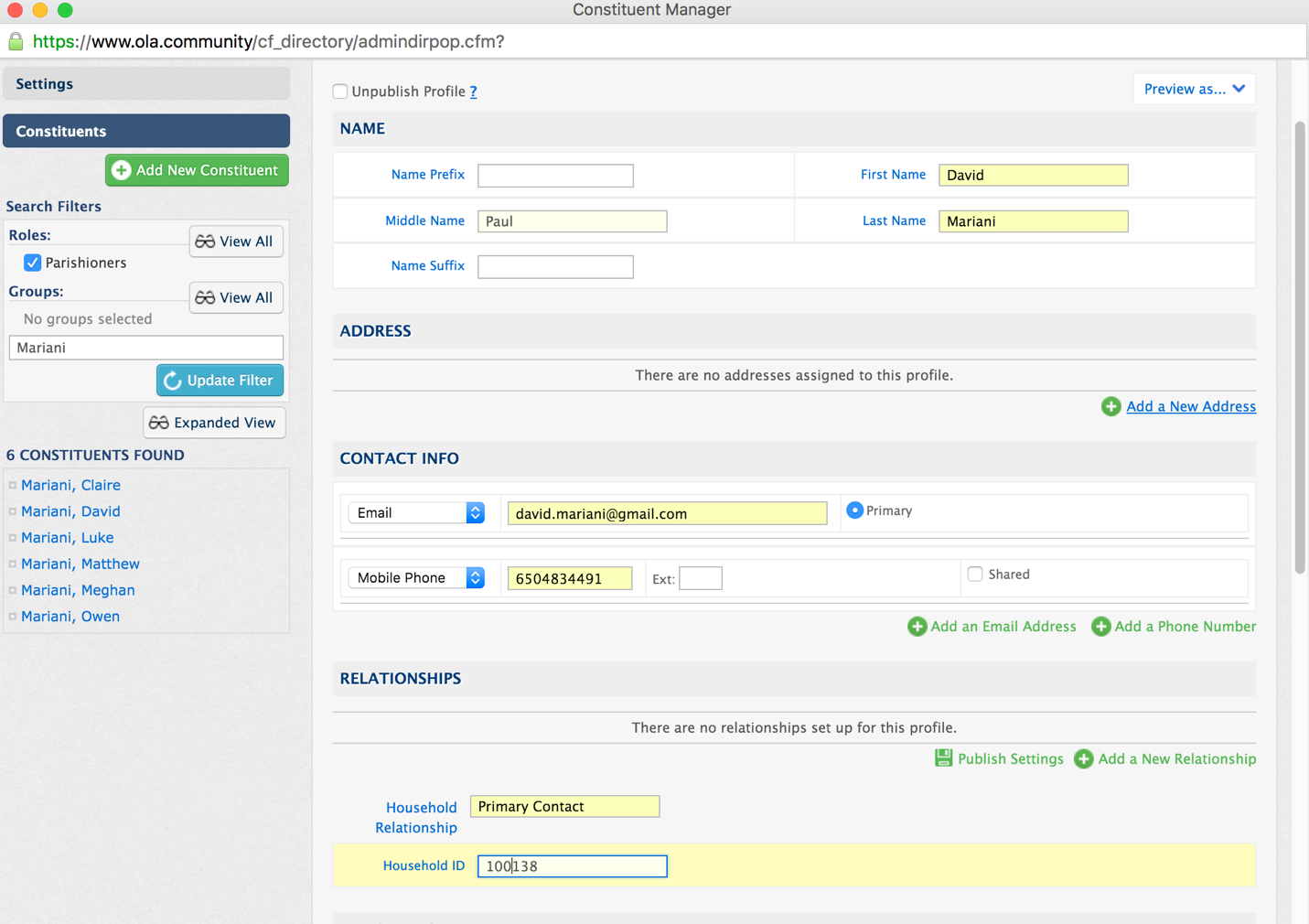
## Step 2: choose **Constituents Manager** from the drop down



## Step 3: click on the **add new constituents** button

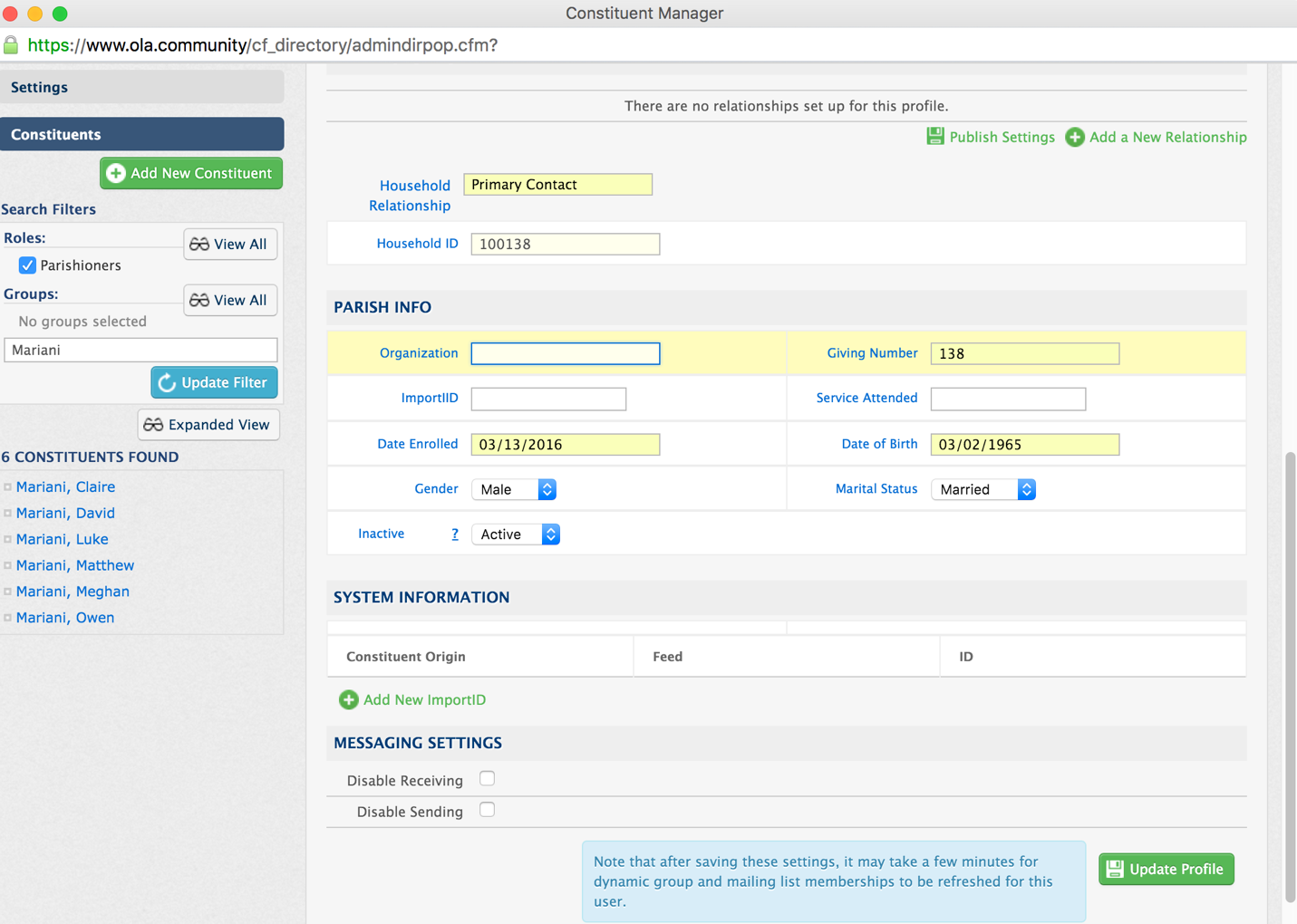


## Step 4: fill in **name, contact** sections and **household relationships** fields

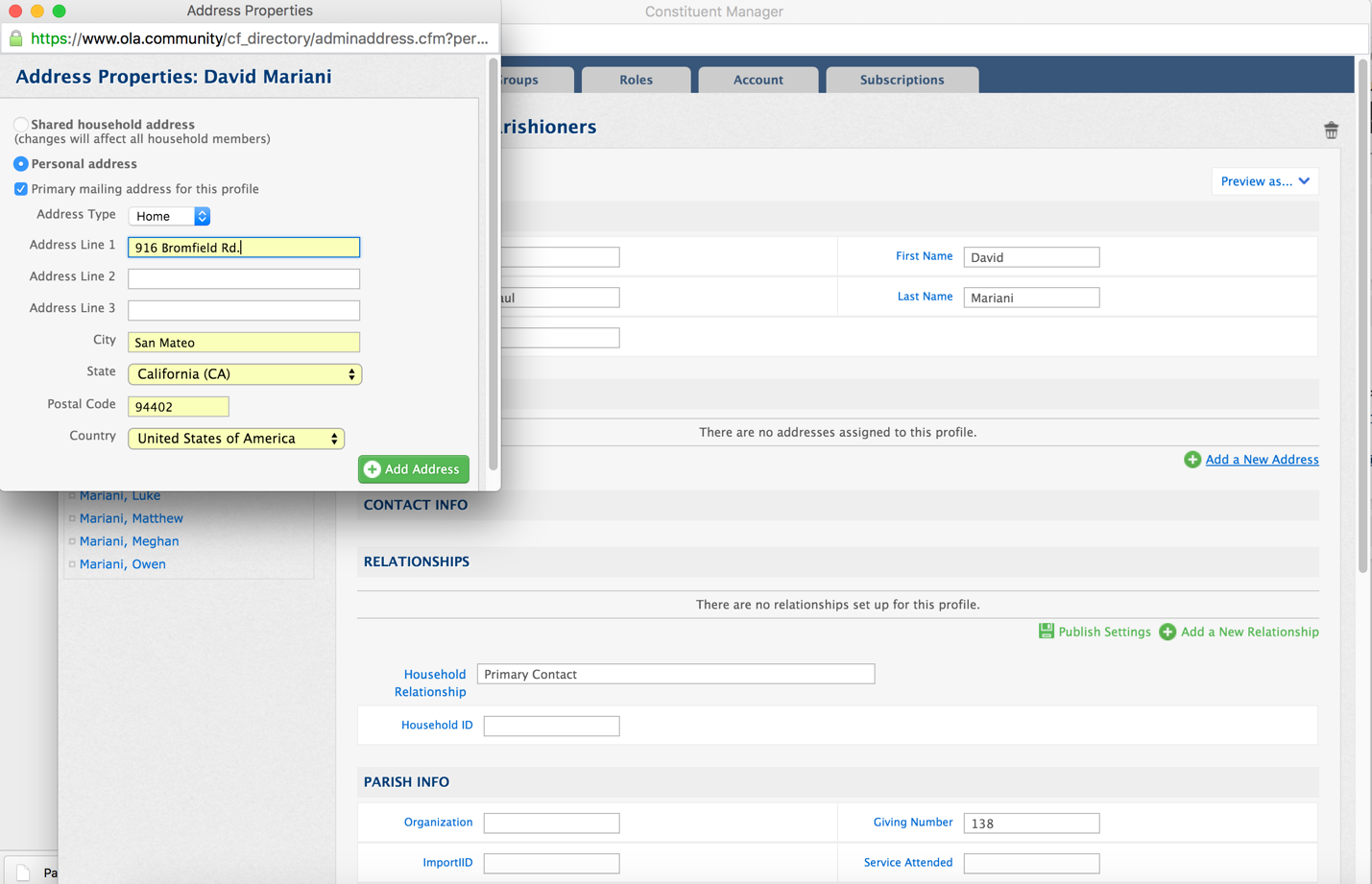


Note: Use “Primary Contact” for the head of household. Otherwise, use “Spouse” or “Child”. Also, make sure to use **PHONE NUMBER** for the “Household ID” field.

## Step 5: fill in the **parish info** section and click **update profile** button

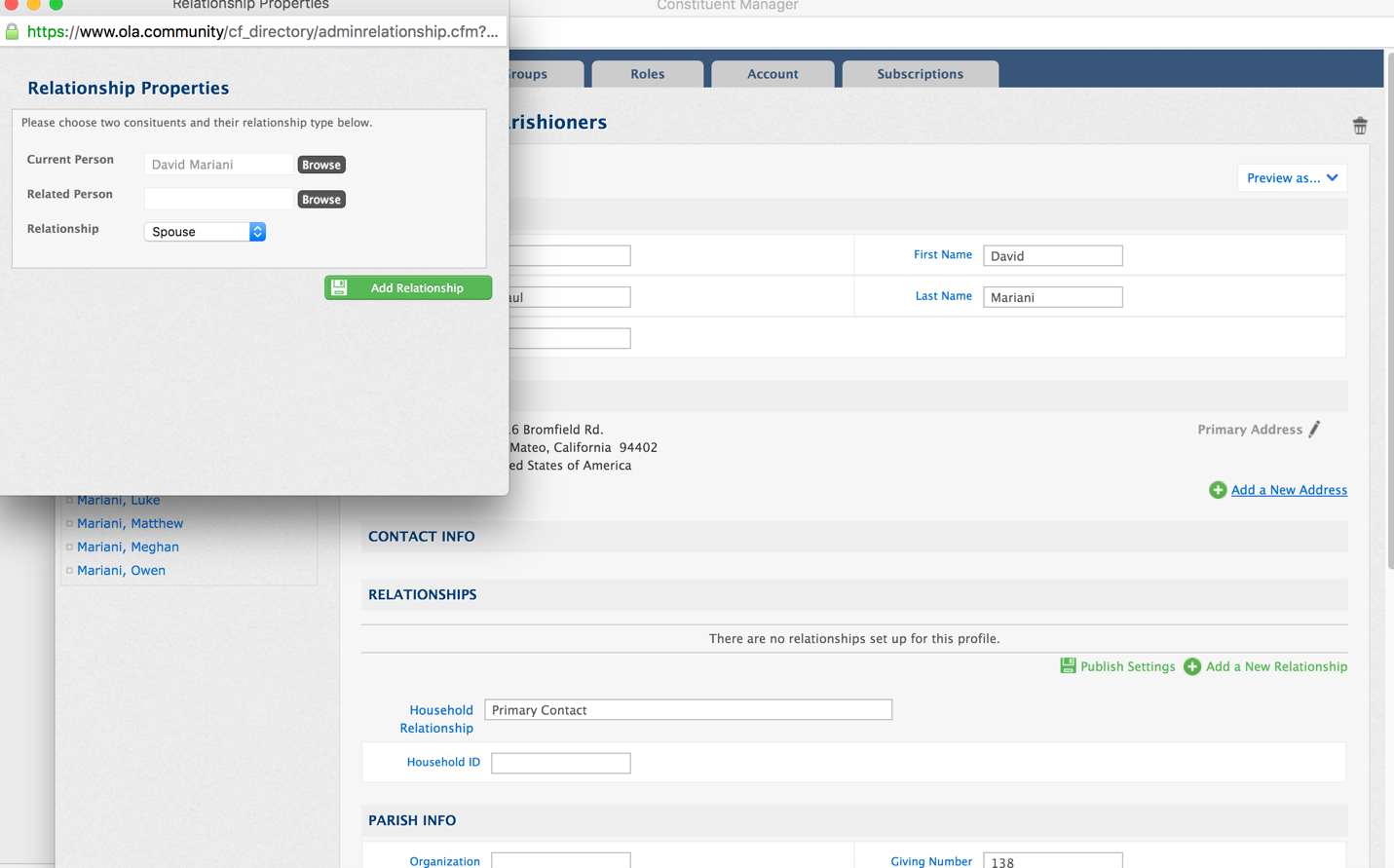


## step 6: Click on the **add a new address** link, fill in the form, click **Add address**



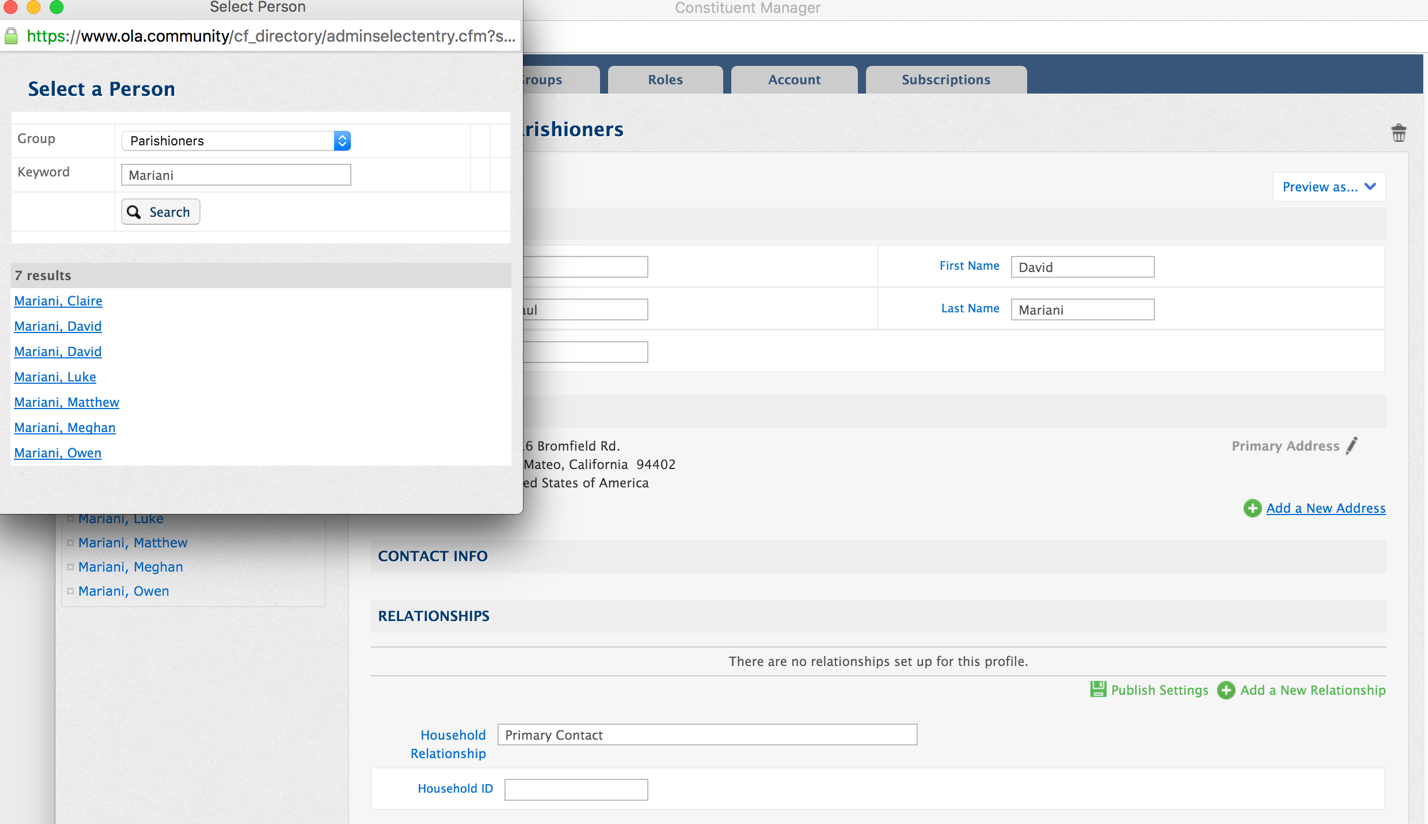
Note: Add each member of the family by repeating Steps 3-6 before proceeding to next step

## step 7: click on the **add a new relationship** link & click **browse** button

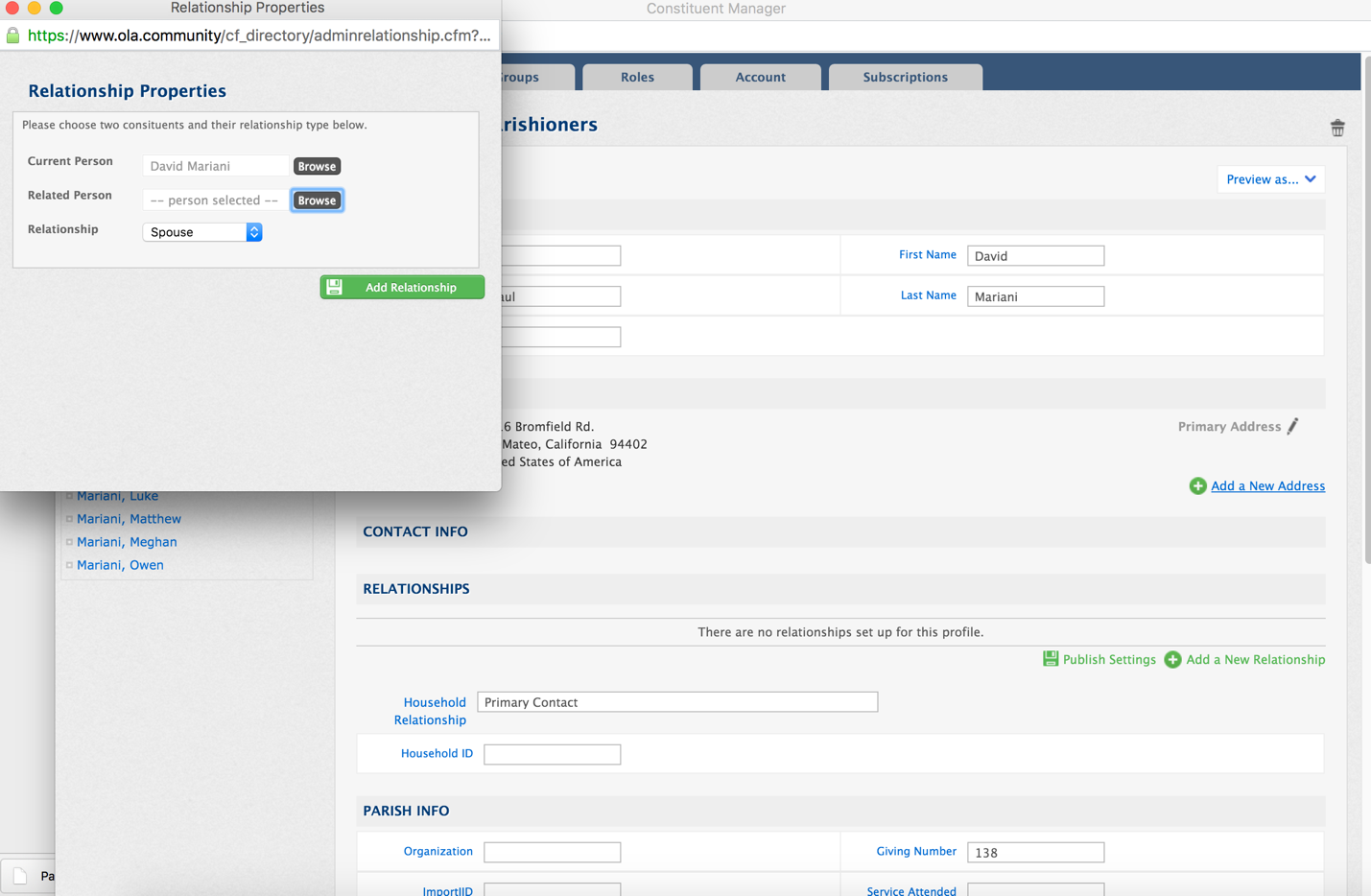


Note: This step is only necessary for the “Primary Contact” profile.

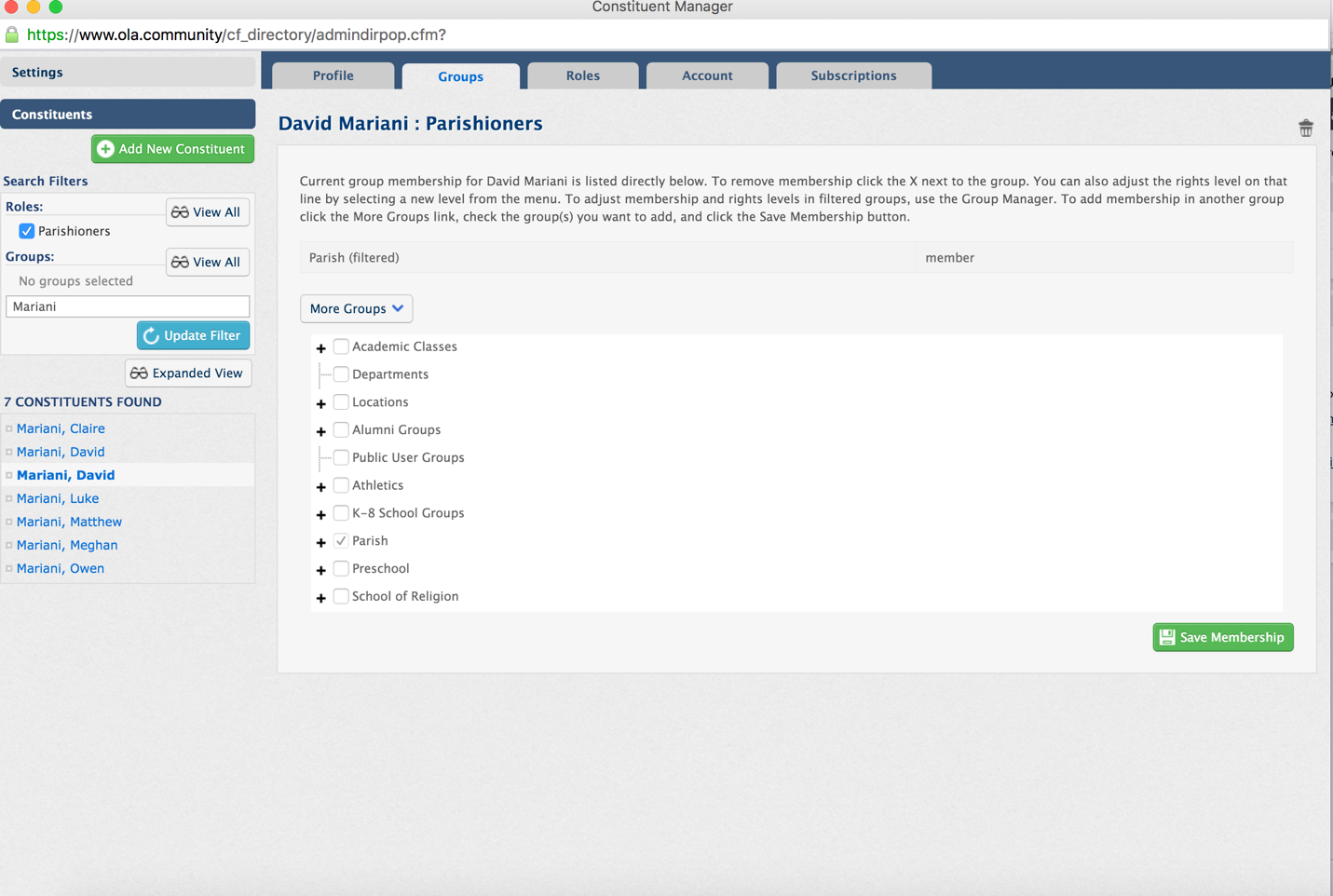
## Step 8: select **parishioners** group and select related profile



## step 9: click on the **add relationship** button & repeat steps 7-9 if necessary

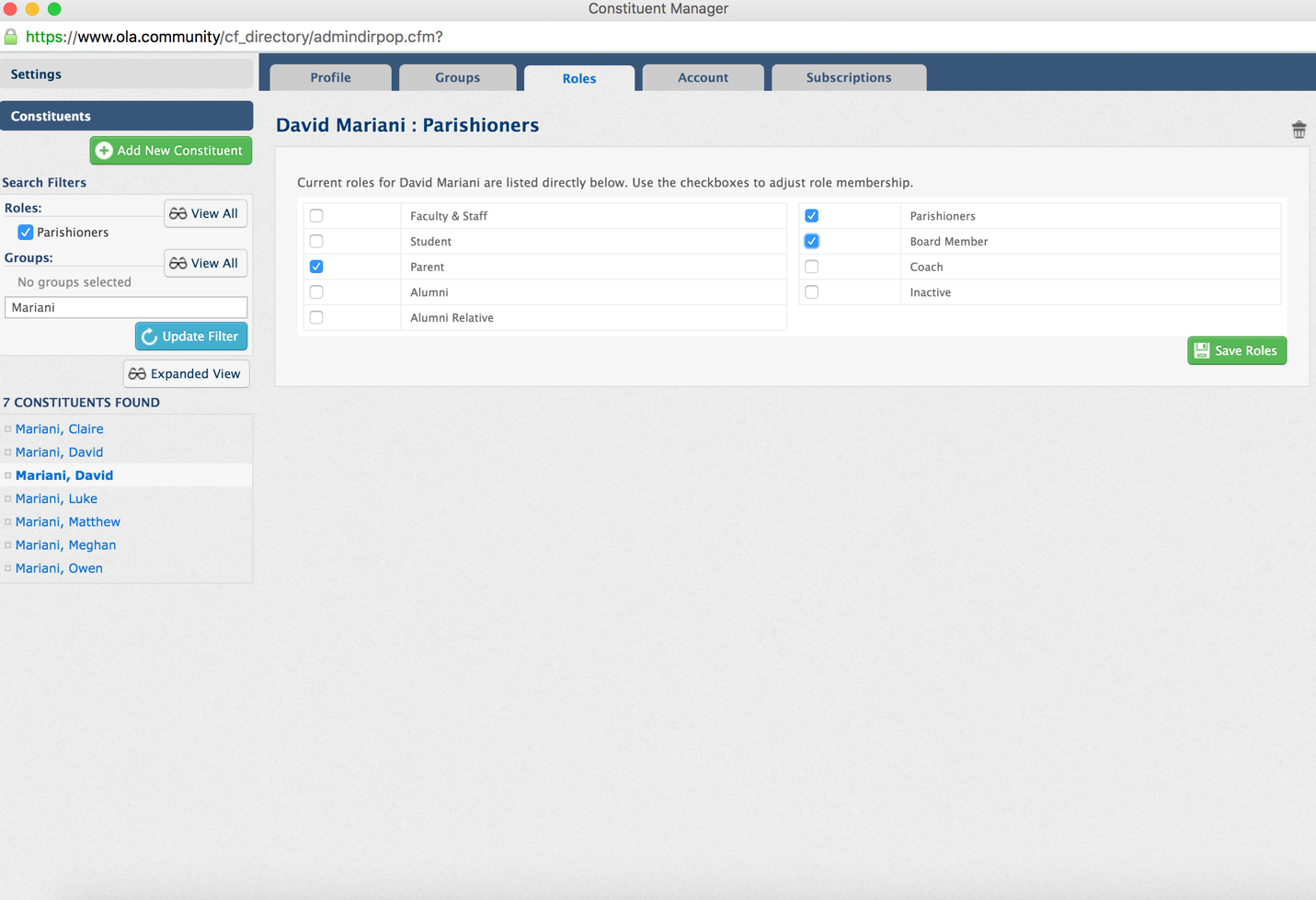


## step 10: click on the **groups** tab, click on the **more groups** & click **save mem..**

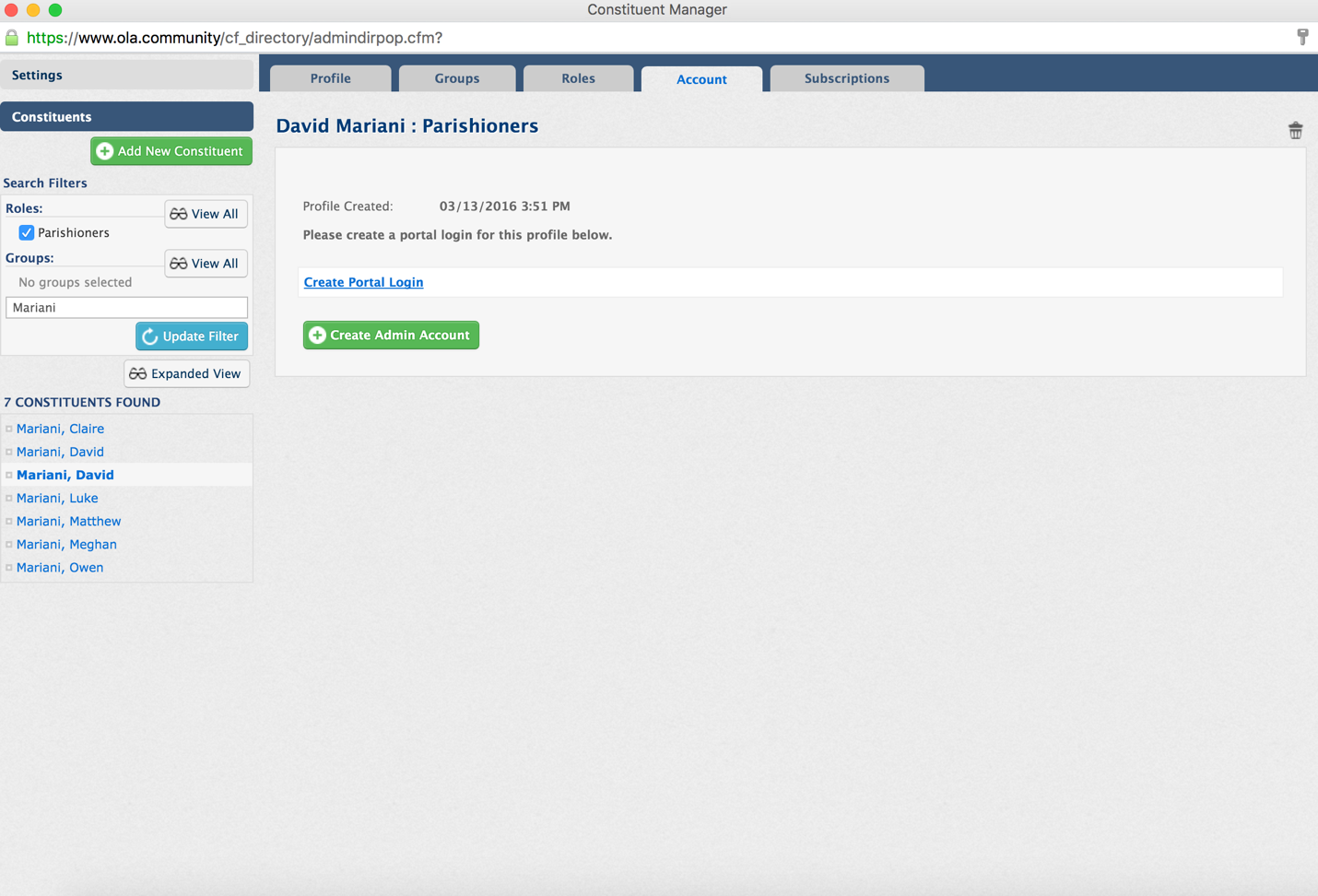


Note: If this is a K-8 school family, make sure to check the appropriate classes for parent or child

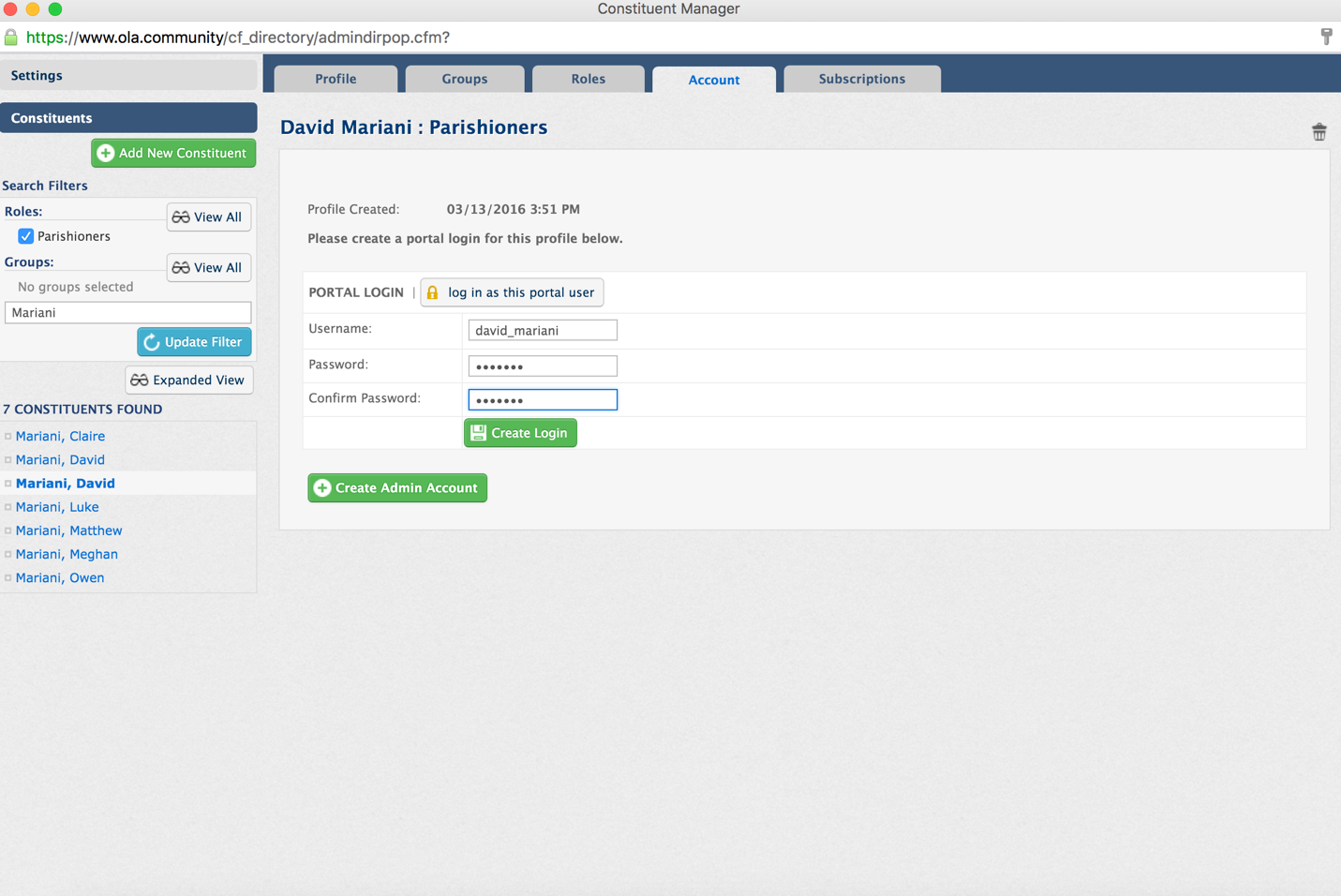
## step 11: click on the **roles** tab & check the roles & click the **save roles** button



## Step 12: click on the **account** tab and click on the **create portal login** button



## step 13: fill in **username** and **password** and click the **create login** button



Note: User a **FIRSTNAME\_LASTNAME** format for the **Username** field and choose “welcome” for the password