# ParishSOFT | Workgroups

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# Workgroups

These allow you to create database sub-groups of families or members. From those groups, you can run reports, labels, and communicate with them via email or mail merge creation.

### Creating a workgroup exercise

- 1. Click the Member Workgroup tab
- 2. Click icon to Add Workgroup
- 3. Type Festival Committee
- 4. Click Save

### Adding members to a workgroup exercise

- 1. Click Add Members
- 2. Member Status Active
- 3. To add a specific family
  - a. Type your last name in the Last Name field
  - b. Can add first name
- 4. Click Search
- 5. Place a check beside your name
- 6. Click Accept

### Merging workgroups exercise

- 1. Click on Family Workgroups
- 2. Check the boxes next to School Families and School Families 2015-2016
- 3. Click the merge icon and create a new name (i.e. All School Families)
- 4. Click Save

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## Adding multiple families exercise

- 1. With the Last Name search box empty, click Search
- 2. Click the letter **C**
- 3. Place a check beside the name of 3 families
- 4. Click the letter T
- 5. Place a check beside the name of 2 families
- 6. Click Accept

#### **Email exercise**

- 1. Select 4 families from the family list by marking the checkboxes
- 2. Click on the E-Mail icon
- 3. Use the Load From Grid option
- 4. Click Send Web Based Email
- 5. Click BCC, but close without actually sending
- 6. Click Email icon again
- 7. Choose Load From Grid
- 8. Click Send Outlook Email
- 9. Click BCC

# QUESTIONS FROM CLASS

- 1. What's the difference between a Family and a Member Workgroup?
- 2. Why would I create a Member Workgroup?
- 3. I can remove someone from a workgroup, True or False?
- 4. If I have two similar workgroups, I can use the \_\_\_\_\_ button to combine them.
- 5. I can easily create mailing labels for an entire workgroup, True or False?

# **TIPS & TRICKS**

- You will need to supply ParishSOFT Support with the following information in order to send web-based email:
  - o Email domain name
  - Outgoing port number
  - SMTP address
  - Does the email require SSL, TLS, or no encryption to send out?

### **ANSWER KEY**

- 1. Family workgroups can only include an entire family, while Member Workgroups can include individual members.
- To group people together, such as K of C members, parish council officers, etc.
  True, via the red minus button
  Green "bubbles" merge button
  True, via the Quick Reports pull-down menu
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