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**

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:
  - 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.
2. To group people together, such as K of C members, parish council officers, etc.   3. True, via the red minus button
4. Green "bubbles" merge button   5. True, via the Quick Reports pull-down menu