

Diocese of Sioux Falls is utilizing ParishSOFT for parish management. This newsletter will be sent periodically to assist in your transition. Please encourage other ParishSOFT Users in your organization to subscribe. Thank you! Carla Haiar

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Catholic Diocese of S



Family Suite

Family Directory - Filters and Paging

At this time of year, it is important to review and filter your family directory to be assured registrations and family groups are accurate. I have found many records that are REGISTERED with a Family Group of Deceased. To see if any exist in your database, click on Family Directory, Family List and the filter icon. Select the following filters.

A screenshot of the "Filter" dialog box in the Family Suite software. The dialog box has a title bar "Filter" and a subtitle "Please enter and or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any values from the 'Filter search' box, or change the 'Filter' dropdowns if you do not want these additional constraints." The main area contains three dropdown menus: "Membership:" set to "Registered", "Family Group:" set to "Deceased", and "Send Envelopes:" set to "(Any)". To the right is a section titled "Family Work Groups" with checkboxes for "Bishops Bulletin" and "Bishops Bulletin". Below these is an "Advanced Options" section with a dropdown arrow and an "Exact Search:" checkbox. At the bottom are "Apply", "Clear", and "Cancel" buttons. Three blue arrows with numbers indicate the steps: 1. points to the "Membership:" dropdown, 2. points to the "Family Group:" dropdown, and 3. points to the "Apply" button.

1. Select Registered.
2. Family Group as Deceased.
3. Click Apply.

1.

	Family	Envelop	E-Mail Addr	City	Regist	Family C	Family
	Aikin			own	Yes	Deceasec	
	Bolc			own	Yes	Deceasec	9
	Hoh			ell	Yes	Deceasec	9
	Kays			ell	Yes	Deceasec	9
	Scheld, Mancy			Highlands Rank	Yes	Deceasec	9

1. Click on the first name in the List. This will open the Family Details screen.

1.

Family Information

Notes

Church of Registration: Holy Spirit, Mitchell

Details Modified On: Monday, January 20, 2014 4:06 PM

Family Group: Deceased

Registration Status: ☒

Registration Date: 1/16/2014

Unregistered Date:

Change Delete

Last Name: A

First Name(s): L

Formal Mailing Name: L

Informal Name:

Formal Salutation:

Informal Salutation:

Email Address:

Primary Phone:

Primary Address:

Home Mailing Other

Country: United States

Postal Code: 00000

Address Line 1:

Address Line 2:

City: Unknown

State/Region:

2.

1 Click Edit Details, Uncheck the Registration Status box, Click Save.

2. Click on **Next Record** icon.

This Next Record icon appears on ALL lists. It enables you to page through the previous screens list of records WITHOUT closing current screen. Be sure to Click Save before going to the next record.

Also note that the length of the list is dependant on the number of records displayed (10 records is the default). Once it hits the end of the list, it will go to the first record on the list.

Send No Mail

Filter

Please enter and/or select the criteria for searching. Only entered and selected values will be applied to by the filter. NOTE, clear any values from the 'Filter search' box, or change the 'Filter' dropdowns if you do not want these additional constraints.

1. Membership: **Registered** Family Group: **Active** Send Envelopes: **(Any)**

Family Work Groups

2. Advanced Options

Filter By: **Diocesan ID**

Enter ID:

First Name:

Last Name:

Address:

Phone #:

Registration Date: ☐

E-Mail Address:

E-Mail: **(Any)**

Postal Code:

City:

State/Region:

3. Show 'Send No Mail' Families: **Send No Mail**

Show 'Do Not Publish' Families: **(Any)**

Show Families With E-Mail: **(Any)**

Exact Search:

4. **Apply** Clear Cancel

On Family Directory, Family List, click on the filter icon.

1. Select Registered and Active.

2. Click on the triangle after Advanced Options.

3. Select Show 'Send No Mail' Families as Send No Mail.

4. Click Apply

The list returned will match your criteria of Registered and Active but Send No Mail is checked.

For Labels and Lists that Honor the Send Mail function, Be sure to select Send Mail from this drop down.

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