

# Workgroups

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*Catholic Diocese of Sioux Falls*



Family Suite

## Workgroups

Workgroups enable a parish to tag families. The Diocese of Sioux Falls has two workgroups that we utilize for managing mailings.

**No BB**

**No CFSA**

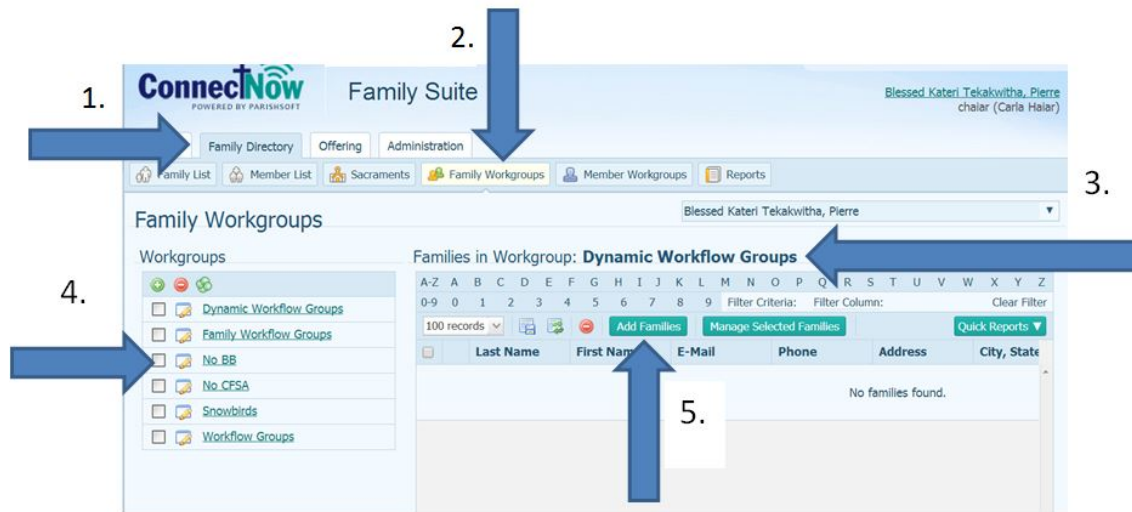
**No BB** represents the workgroup of families that are Registered and Active but do NOT wish to receive the Bishops Bulletin magazine each month.

**No CFSA** represents the workgroup of families that are Registered and Active but do NOT wish to receive the CFSA letter from the diocese.

If a family is a part of this group, they will NOT receive the Bishops Bulletin (No BB) or a CFSA Letter (No CFSA). This only applies to families that are Registered and Active. All other families are excluded due to their Registration Status or Family Group.

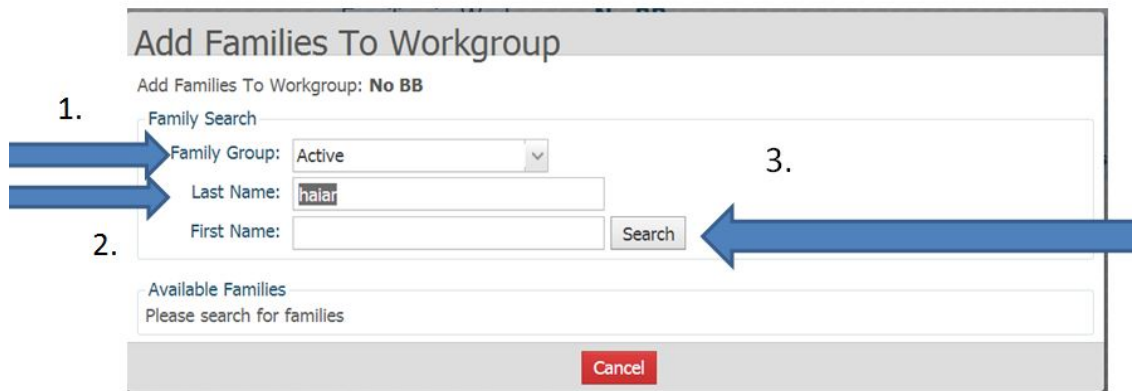
For example, the Ralph VanSmith family in the parish of St Thomas More Newman Center are Unregistered and Contributor Only. They will NOT be sent the Bishops Bulletin or CFSA letter for this parish. However, they are Registered and Active in the Holy Spirit Parish. If they call the parish office to say, "Please do not send me a Bishops Bulletin, I read it on my iPad", you would need to add them to the **No BB** workgroup.

The steps to add them to a Workgroup are listed below. Be sure the TEXT spelling of your workgroup name is exactly as listed above.



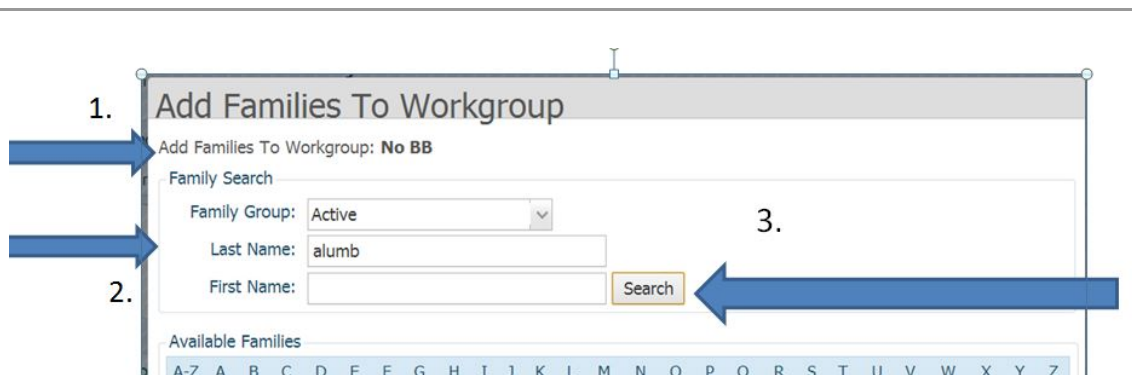
This screen would display any current members of the selected workgroup and enable you to add or delete new families.

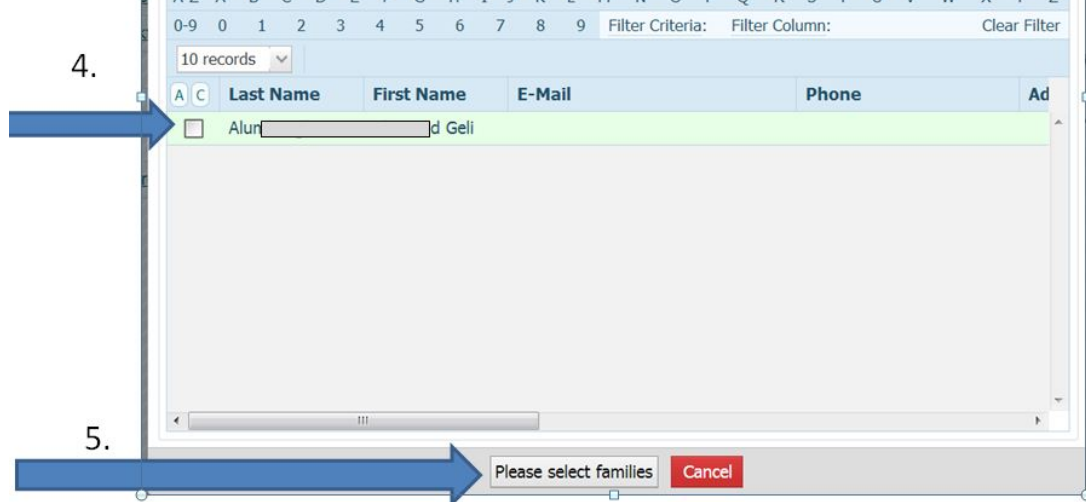
1. Family Directory.
2. Family Workgroups.
3. Dynamic Workflow Groups.
4. No BB.
5. Add Families



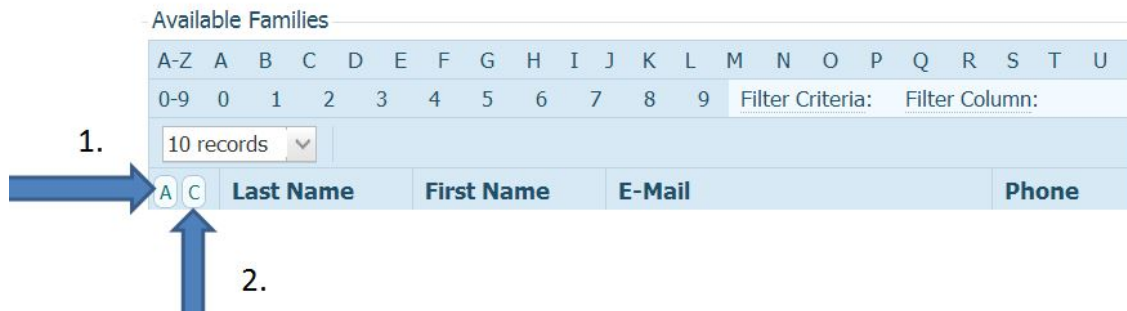
1. Note the Family Group box, default is Active families.
2. Search by last name only.
3. Click on Search.

This first search screen will return a list of names that satisfy your search criteria.



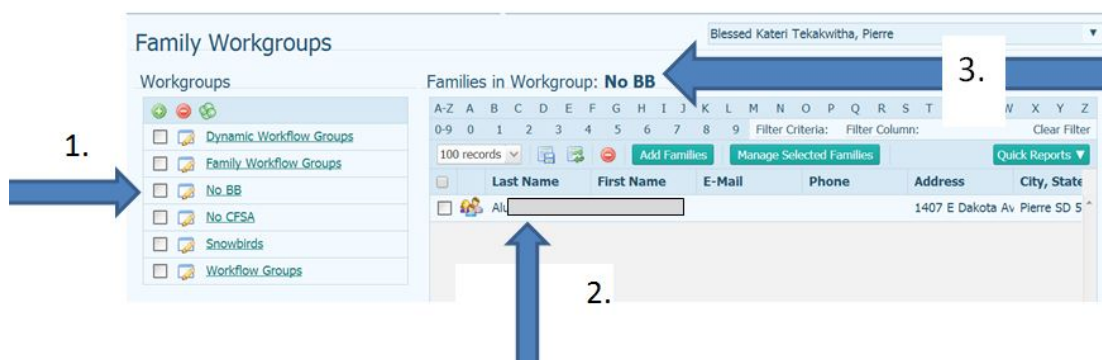


1. Note the Workgroup you are adding a member to.
2. The Family Group and Last Name are displayed from the previous page.
3. Clicking Search will list names meeting this criteria below.
4. Check the box next to the name you wish to add to this Workgroup.
5. Once a family is selected (check the box to the left of the name), this button will change to Accept.



1. Click the A to select ALL on this page.
2. Click the C to Clear your selection.

These buttons function this way on MANY pages.



1. Select the Workgroup on the left
2. Names will be listed that are members of the Workgroup.
3. Verify the workgroup displayed.



2.

Pastoral

Workgroups

No BB

Health Info

Edit Notes Close

1. On the Family Details screen, Notes tab.  
2. Workgroups will display as No BB.

You can create your own family workgroups by simply clicking on the green plus sign below Workgroups. Please keep in mind ALL workgroup families are MANAGED MANUALLY. The only way they are added or removed from a Workgroup is right here.

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