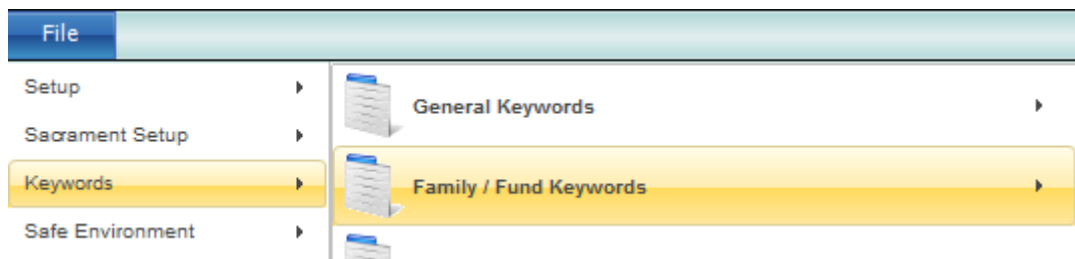## Family – Quick Posting Family Status Values to Other Field Types
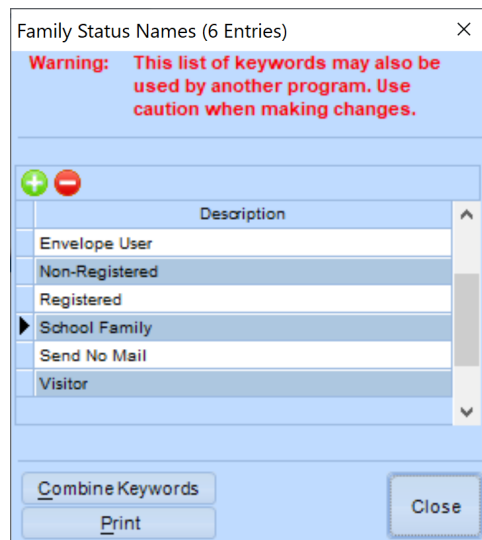
Since the introduction of the PDS Church Office program, most Churches have used the Family Status Field to track Marital Status. In some situations, this field has also been used to track other categories, like *Envelope User*, *Send No Mail*, and *School Family*. Recently, many Churches have found that it can be useful to repurpose that field to track how a family 'fits' into the Parish. We will be changing the use of the Family Status field in WeGather for this purpose.

This "other" information that you have stored in your Family Status picklist will not be lost. It is better tracked in other locations on the family record. The following instructions will walk through how to use the Quick Posting process to update these other field locations prior to cleaning up your Family Status picklist.

To determine what values are available in your Family Status picklist, **Select: FILE | Keywords | Family/Fund Keywords | Family Status Names:**

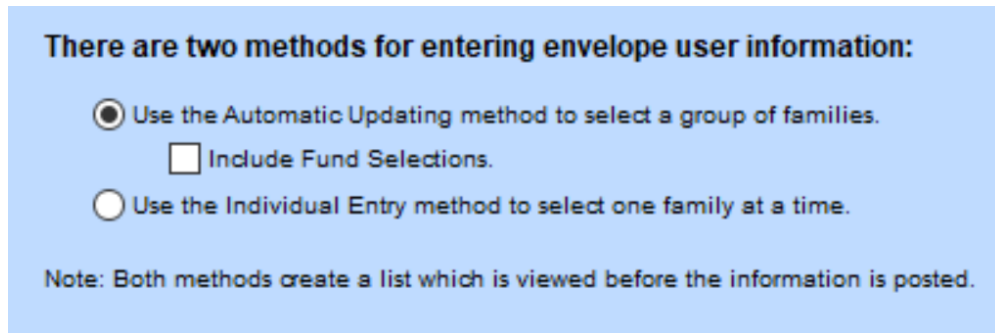An example of your picklist values might look something like the following:

For our example above, we will be:

1. Using the 'Envelope User' value to quick post a check in the 'checkbox' for *Envelope User* that is available on the Family Screen.
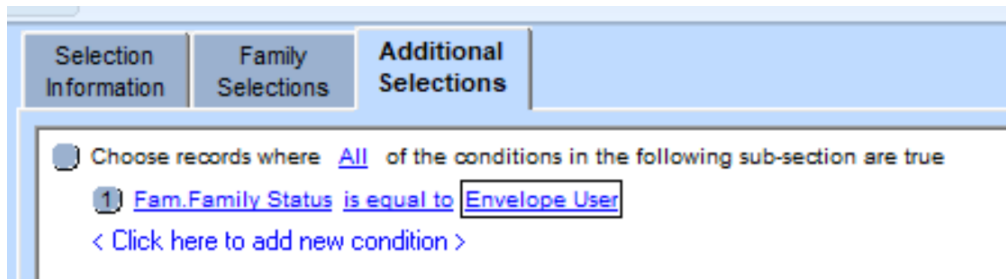
2. Using the 'Send No Mail' value to quick post a check in the 'checkbox' for *Send No Mail* that is available on the Family Screen.

3. Creating a Family Keyword for *School Family* and then quick posting an entry into the Family Keyword list, based upon the value that is in the Family Status field.

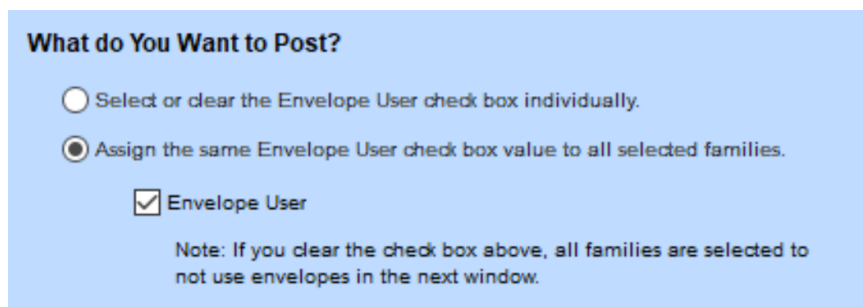**Example #1: *Envelope User* Checkbox Quick Posting**

From the Family screen, select Quick Posting from the left menu, then, select *Envelope User* from the menu. Confirm that your settings appear as follows:

> **There are two methods for entering envelope user information:**
>
> ● Use the Automatic Updating method to select a group of families.
>   ☐ Include Fund Selections.
> ○ Use the Individual Entry method to select one family at a time.
>
> Note: Both methods create a list which is viewed before the information is posted.

Click NEXT to continue. On the Additional Selections tab, enter the following selection and click NEXT:

> | Selection Information | Family Selections | **Additional Selections** |
>
> ○ Choose records where All of the conditions in the following sub-section are true
>   ① Fam.Family Status is equal to Envelope User
> < Click here to add new condition >

Select the second radio button and check the checkbox next to *Envelope User* and click NEXT to continue:

> **What do You Want to Post?**
>
> ○ Select or clear the Envelope User check box individually.
>
> ● Assign the same Envelope User check box value to all selected families.
>
>   ☑ Envelope User
>
>   Note: If you clear the check box above, all families are selected to not use envelopes in the next window.

A list of all the families that match your selection will be presented to you. Be sure that the 'Post Information' checkbox is checked for each family and click NEXT. Uncheck the print checkbox, unless you want a list of all families that were altered, and then click FINISH.

Example #2: *Send No Mail* Checkbox Quick Posting

From the Family screen, select Quick Posting from the left menu, then, select *Send No Mail* from the menu. Confirm that your settings appear as follows:

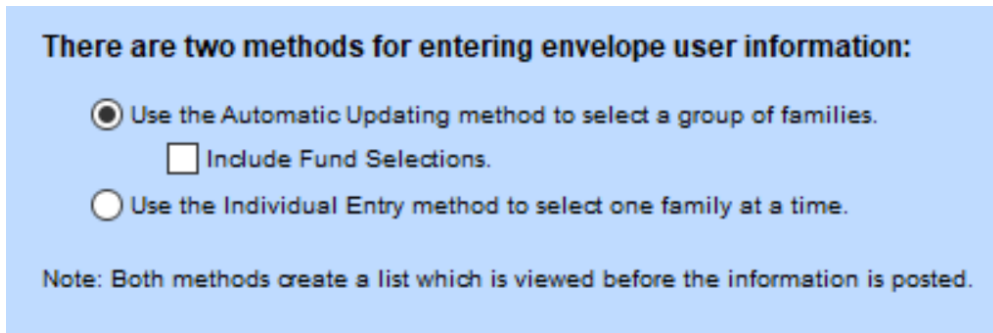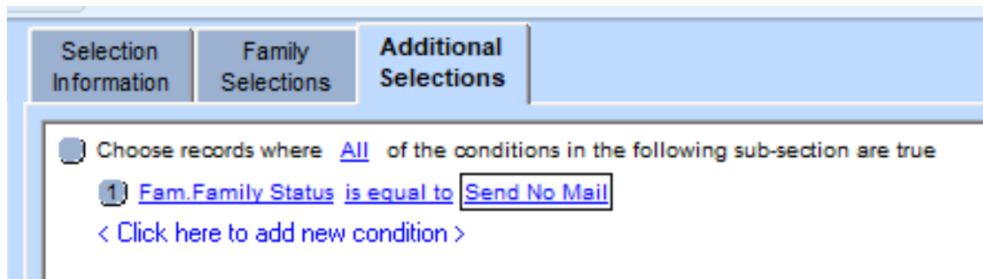Click NEXT to continue. On the Additional Selections tab, enter the following selection and click NEXT:

Select the second radio button and check the checkbox next to *Send No Mail* and click NEXT to continue:

A list of all the families that match your selection will be presented to you. Be sure that the 'Post Information' checkbox is checked for each family and click NEXT. Uncheck the print checkbox, unless you want a list of all families that were altered, and then click FINISH.

Example #3: Quick Post *School Family* Entry to Family Keyword List

Our first step is to create a new value in the picklist for *Family Keywords*. To do this, **Select: FILE | Keywords | Family/Fund Keywords | Family Keyword Names.**

To add a new entry in this list, you will use the ✚ icon to create a line and then enter 'School Family' in the list. Click Save/Ok and Close when done.

Then, select Quick Posting from the left menu and select *Family Keywords* from the menu. Confirm that your settings appear as follows and click NEXT:

Click NEXT to continue. On the Additional Selections tab, enter the following selection and click NEXT:

Select the second radio button and check the checkbox next to *Send No Mail* and click NEXT to continue:

A list of all the families that match your selection will be presented to you. Be sure that the 'Post Information' checkbox is checked for each family and click NEXT. Uncheck the print checkbox, unless you want a list of all families that were altered, and then click FINISH.

NOTE: Please see additional documentation and videos for moving Martial Status values in your Family Status picklist to the Marital Status field on the Member record.