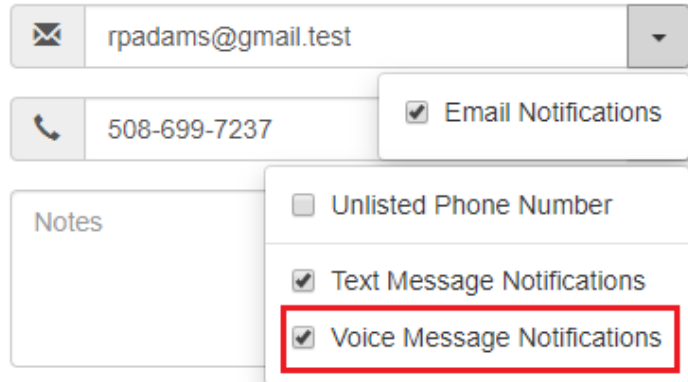


This guide will help you set up your One Call Now integration as well as what action is required once the integration is set-up.

Prior to setting up the integration be sure all your family and member records that would like to receive notifications and you would like to integrate with OCN have the proper notification boxes checked.

1. Before you begin please contact One Call Now and ask them to give you the **Persistent Login Token**. You should also have your **Group ID** and **Login** information for OCN. You will need this information prior to creating a connection with OCN.

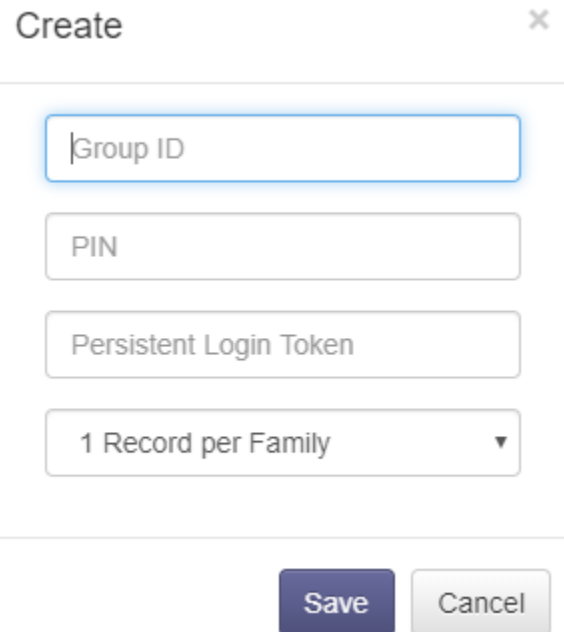


The screenshot shows a contact record form with the following fields and settings:

- Email: rpadams@gmail.test
- Phone: 508-699-7237
- Notes: (empty)
- Notification settings:
  - Email Notifications
  - Unlisted Phone Number
  - Text Message Notifications
  - Voice Message Notifications (highlighted with a red box)

2. To begin the set-up scroll to the **Administrative > Church Maintenance** and scroll to the bottom of the page where you will see the External Systems options list. Click **Create** and the **Create** pop-up screen will appear. Fill in your **Group ID**, **Pin**, and **Persistent Login Token** numbers. You will also have the option of creating **1 Record per Family** or **1 Record per Member**.

3. Once this information is saved the initial integration between Gabriel's family records and OCN family records will need to go through a matching process where you will have to approve or disapprove the records to be synched. As you go through this initial matching process please keep in mind that data is never copied into Gabriel and the purpose of the matching process helps to map an OCN record with Gabriel's family record (and its members indirectly). To begin this process, scroll to the **Administrative** tab > **Church Maintenance** and scroll to the bottom of the page where you will see the **External Systems** options list. Click **Results** and you will be presented with a list of records that will fall into one of the following categories that require you to act so the records will synch correctly.



The 'Create' pop-up form contains the following fields and options:

- Group ID (text input)
- PIN (text input)
- Persistent Login Token (text input)
- 1 Record per Family (dropdown menu)
- Save (blue button)
- Cancel (grey button)

**IMPORT OCN** - Any family that falls into this category has a family record in Gabriel but not in One Call Now. If you would like the Gabriel record to synch to OCN then you need to **Approve** the record. If you do not want this record to synch, then you would **Unapprove** the family. Any family that you approve will move over to the **AUTO\_SYNC** category.

- If the family does not currently have a record in OCN only families in Gabriel with the status of **Active, New Register, Contributor, Visitor or Seasonal** will fall under this category. Families with another status' (**Deceased, Inactive, Moved, Religious Ed, Sacrament Only and School Only**) will be ignored and will not synch with OCN unless you change the status.
- If for example, you approved a family to **AUTO\_SYNC** and the family wishes to no longer receive notifications from OCN you simply go into Gabriel and uncheck the notification box - **Voice Message Notification** in the family and member record. If a family wishes to begin receiving notifications again then you can check the box - **Voice Message Notification**.
- If you have a family that is newly added to Gabriel and/or is a **New Register**, then this family will be listed in the **IMPORT\_OCN** category. *The exception is for churches who use **Stripe** as their online provider where a family with the First and Last Name of Anonymous may appear as a **New Register**. Families with this name will never appear in this category or any other category.*

**MATCH** - Families that fall into this category include family records that are in OCN and have been matched with family records in Gabriel. When you review this category the families that are matched are assigned a Matched Confidence % which will range from 0% to 100%. This value is simply giving you an idea of how certain the program is in matching the family records between OCN and Gabriel. If you would like the Gabriel record to synch to OCN then you need to **Approve** the record. If you do not want this record to synch, then you would **Unapprove** the family. Any family that you approve will move over to the **AUTO\_SYNC** category.

**NO MATCH** - Families that are included in this category do not exist in Gabriel but are in One Call Now. If a family falls into this category the Parish Admin will need to decide whether to add a record to Gabriel or delete the family entirely from One Call Now. If you choose to add the family to Gabriel the synching process will move the family to **Match** where it will require you to **Approve** or **Unapprove**. Most likely you would choose to **Approve** if you went to the trouble of creating the record in Gabriel.

**PARTIAL** - Family records in OCN have partial matches with Gabriel's family records. Clicking on details will give you the detailed records of what is and is not matched. The Parish Admin can choose to add the missing information to Gabriel. Partial requires you to **Approve** or **Unapprove**.

**AMBIGUOUS** - The info in OCN appears in more than one family record in Gabriel. This might happen for an elderly parent that has their own address but the email and phone number in Gabriel is one of the elderly's sons or daughter who are also members of the church. The ambiguity needs to be removed before it can be moved to another category where you can **Approve** or **Unapprove** the record.

**EXCLUDE** - Families in this category have a record in OCN and are found in Gabriel but have a Family Status of Inactive, Moved, or Deceased. These families will never be part of the synchronization regardless of any matches found. If for example, a family has moved, and they move back you can change the status and the family will require you to Approve before the sync can take place.

**AUTO\_SYNC** - Are all records that have been Approved and will synch automatically between Gabriel and OCN. This group is the final group of records that are used in OCN to make all their calls. Any changes made to the records on the Gabriel side will auto synch over to OCN. When changes are made to Gabriel family records you will not be required to Approve again. Approvals are matched to the family and member records.

Once a match is "Approved", Gabriel creates a record that maps the OCN record to a Gabriel family record. From that point on, this is what happens with that family's data:

- Email addresses that are in both systems are left alone.
- Email addresses that appear in Gabriel and not in OCN are copied to OCN.
- Email addresses that appear in OCN and not in Gabriel are marked as **inactive** in OCN.
- Phone numbers that are in both systems are left alone.
- Phone numbers that appear in Gabriel and not in OCN are copied to OCN.
- Phone numbers that appear in OCN and not in Gabriel are marked as **inactive** in OCN.

Below is a pictorial of the match process for a typical family that currently exists in Gabriel and OCN.

