

Mind Towards

MINISTRY

webinar series

Let's Talk People!

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People

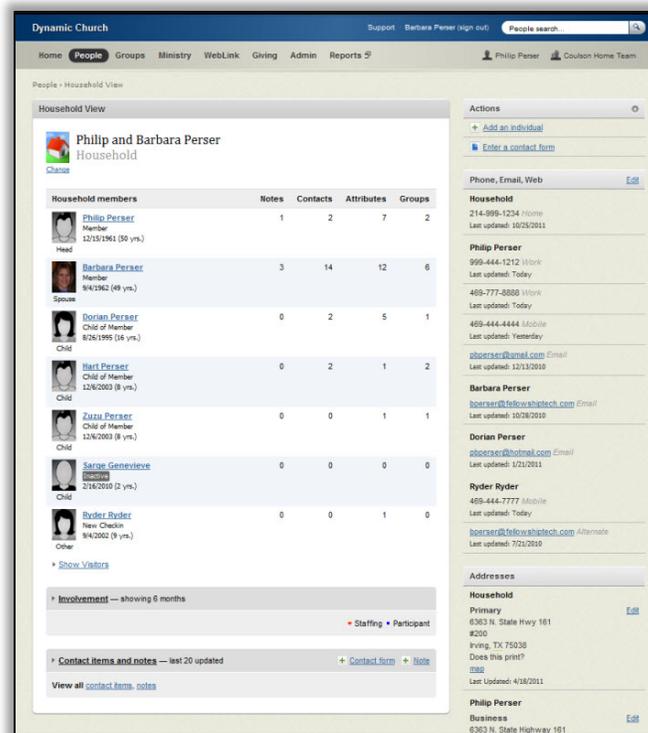
FellowshipOne can provide your pastors and staff members a 360 degree view of every household in your church database. Once the foundational steps are complete, the only thing left to do is enter data about the congregation! The information in FellowshipOne is available anytime via a web browser or smart phone 24/7. All you need is access to the Internet.

Please remember that information displayed is based on security rights. If you don't see what you are looking for, you may need to have security rights added to your portal user account. If that's the case, you should contact your FellowshipOne Administrator.

Here's a list of the things you can see at a glance regarding a household:

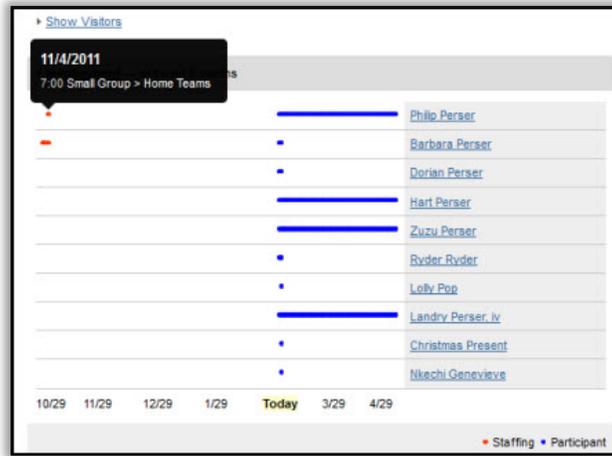
Household Members:

- Photo
- Name
- Status
- Birthday with Age
- Glance at a Closed snapshot of the number of Notes, Contact Items, Attributes and Groups for each member of the household





- Get a graphical view of Closed involvement for each household member which includes attendance (just hover over a dot on the chart)



- Closed Contact items and notes

 Barbara Perser	11/17/2010
I have accepted Christ 11/17/2010 test for error message	
 Barbara Perser	9/20/2010
I would like to update my information 9/20/2010 Called and spoke with this couple. View 1 more note	
 Household	9/20/2010
I would like to update my information 9/20/2010 Called and spoke with this couple. View 1 more note	
 Barbara Perser	4/29/2010
Elder Philip 4/29/2010 Please contact Barbara by 5/1/10	



- Phone numbers, Email addresses and Web addresses

Dynamic Church Support George Gregory (sign out) People search...

Home **People** Groups Barbara Perser

People > Household View

Household View

Philip and Barbara Perser
Household
[Change](#)

Household members	Notes	Contacts	Attributes	Groups
 Philip Perser Member 12/15/1961 (50 yrs.) Head	0	2	7	0
 Barbara Perser Member 9/4/1962 (49 yrs.) Spouse	0	15	14	2
 Dorian Perser Child of Member 8/26/1995 (16 yrs.) Child	0	2	5	1

Phone, Email, Web

Household
214-999-1234 Home
Last updated: 10/25/2011

Philip Perser
999-444-1212 Work
Last updated: 2/29/2012
469-777-8888 Work
Last updated: 2/29/2012
469-444-4444 Mobile
Last updated: 2/28/2012
pbperser@gmail.com Email
Last updated: 12/13/2010

Barbara Perser
bperser@fellowshiptech.com Email
Last updated: 10/28/2010

- Physical Closed Addresses with a link for maps

If you secure the children's area, you might need to know who is authorized to pick up the kids. We can store that information for you!

- With Giving security rights, you can view the family's giving history.

Dynamic Church Support Barbara Perser (sign out) People search...

Home People Groups Ministry WebLink **Giving** Admin Reports

Giving > Contributions > Contributor Details

Contributor Details

[Find contributor](#) **Philip and Barbara Perser**
6363 N. State Hwy 161
#200
Irving, TX 75038
214-999-1234

Choose **Contributions** Pledges Scheduled Accounts

Start date: 1/1/2012 End date: 3/6/2012 Attributed to: - All - Include receipts

Date	Attributed To	Designation	Amount	Split	Reference	Image	Memo
3/6/2012	▲ Philip and Barbara Perser	General	\$100.00		1201	--	⚙
3/6/2012	▲ Philip Perser	General	\$200.00		1204	--	⚙

Individual Record

The individual record is the place to go when you want a picture of what has been or is happening in the life of an individual and his involvement at the church. All details are arranged in informational widgets that allow quick access to important data points which can be used to help care for the individual.

There are many conventions on this page that will allow you to quickly add and manage information. For example, the actions gear to the right of the individual's name provides quick access to other common functions/features. The plus and minus buttons allow you to add and delete information as necessary.

The column on the right side of the page displays actions, household members, personal information, contact information, and addresses. If you have security access rights, you will see Edit links that will allow you to change this information if necessary.

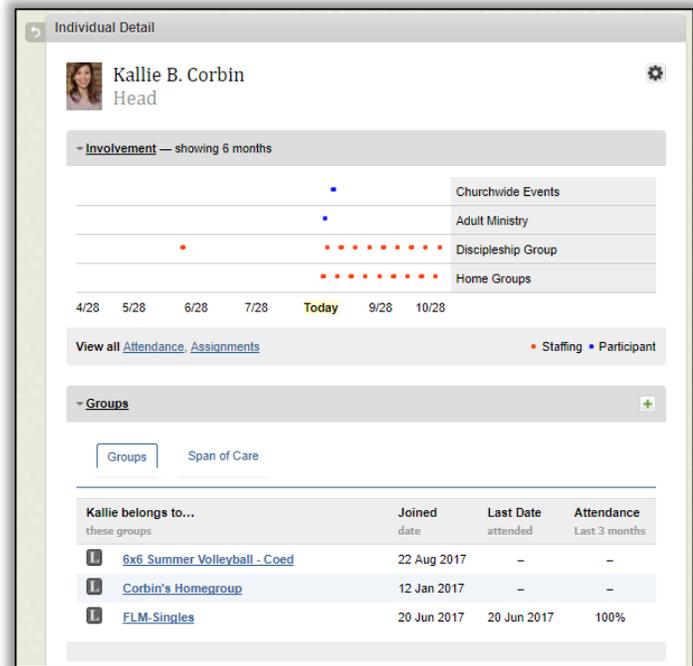


The screenshot displays a user interface for an individual record. It features several sections:

- Actions:** Includes links for "View the household", "Add an individual", and "Edit privacy settings".
- Household members:** Shows a count of 1 member.
- Kallie's information:** Contains fields for Status (Member > FLM), Date (1/18/2015), D.O.B. (12/31/1987 (29 yrs.)), and Marital status (Single). A "Show additional info" link is also present.
- Phone, Email, Web:** Lists contact information for "Household" and "Kallie Corbin", including phone numbers and email addresses. Each entry has an "Edit" link.
- Addresses:** Shows a "Primary" address: "911 Riverchase Dr. Coppell, TX 75015" with a "map" link and an "Add another" button.
- People Lists:** Includes a list titled "Possible Disney Trip- Emails" with 13 people.

Involvement

When looking at an individual's record, there are two areas detailing their involvement in your church. The first one is the *Involvement Widget*. This section gives you a snapshot of their attendance in Activities and Groups. In the example below, we see that this person has a Staffing assignment to a Small Group (first red dot), a Participant assignment to God's Athletes (blue dot) and is a member with attendance to an inFellowshipGroup Type called Bible Study. We show the attendance history as well as future (expected attendance). If you hover over a red dot in the Group Type area (Bible Study), you will see the name of the Group they belong to and their actual attendance.



Groups Involvement

The second widget is called *Groups Involvement*. This widget displays groups the person belongs to, leads or in which they have expressed interest through the InFellowship module on your website. As shown in the image below, this person is a leader of two groups, and has expressed interest in two groups.

The "L" icon in the image below stands for Leader, and the "M" stands for Member.



Notes

Notes are a special area within an individual record where information that does not require action can be recorded and maintained. Notes are organized by Note Type. Notes are a great way to store information about individuals for different purposes such as phone calls, volunteer availability, benevolence, and so on. As long as the information does not require action, Notes is the place to store it.

Adding Notes to Individual Records

When you want to add a note to an individual's record, there are several places where this can be done. The most typical place is in the Notes widget on the individual or household record. Click the plus add button in the widget to add a note.

To add a note:

1. Type a name or partial name in the People Search field and press Enter. A list of search results displays.
2. Click the name of the person you want to work with to display the individual record.
3. Click the plus add button in the Notes widget. The notes form appears.
4. Type your note and select the note type.
5. Click Add this note.

The note will now appear in the Notes widget and can be read by any user who has security access to the selected note type.

Individual Detail

Kallie B. Corbin
Head

▸ **Involvement** — showing 6 months
View all [Attendance](#), [Assignments](#) • Staffing • Participant

▸ **Groups** +

▾ **Notes** — all 2 +

Medical Issues Edit -
She is feeling much better!
Last updated 2/10/2017 at 11:35 AM by Project Manager

Celebrate Recovery Edit -
medical
Last updated 1/17/2017 at 10:43 AM by Project Manager

[View all notes](#)

▸ **Contact Items** — all 0 +
[View all contact items](#)

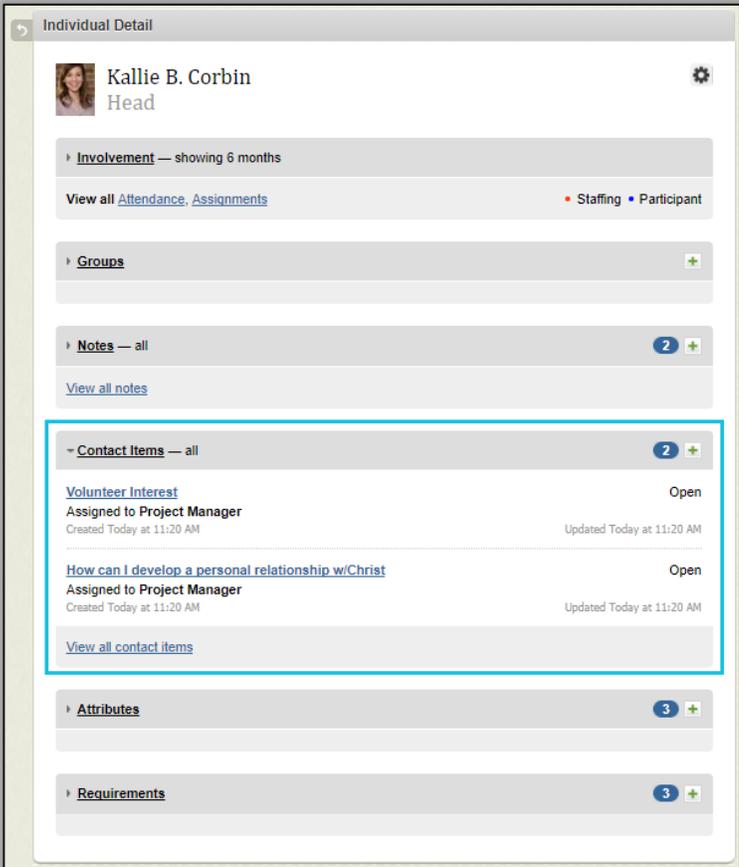
▸ **Attributes** 3 +

▸ **Requirements** 3 +

Contact

In cases where people call or email the church, you may need to enter a single contact item. There's a quick way to do this. Simply type the name or partial name of the person in the People Search field and press Enter to display search results. Click the person's name to display the individual record. Click the plus add new icon in the Contact Items widget.

Select the Contact Form and Contact Item. Optionally, you may also enter a note. The Confidential Contact security access right is required to view confidential contacts.



Individual Detail

 **Kallie B. Corbin**
Head

▸ **Involvement** — showing 6 months
View all [Attendance](#), [Assignments](#) • Staffing • Participant

▸ **Groups** +

▸ **Notes** — all 2 +
[View all notes](#)

▸ **Contact Items** — all 2 +

[Volunteer Interest](#) Open
Assigned to **Project Manager**
Created Today at 11:20 AM Updated Today at 11:20 AM

[How can I develop a personal relationship w/Christ](#) Open
Assigned to **Project Manager**
Created Today at 11:20 AM Updated Today at 11:20 AM

[View all contact items](#)

▸ **Attributes** 3 +

▸ **Requirements** 3 +

Attributes

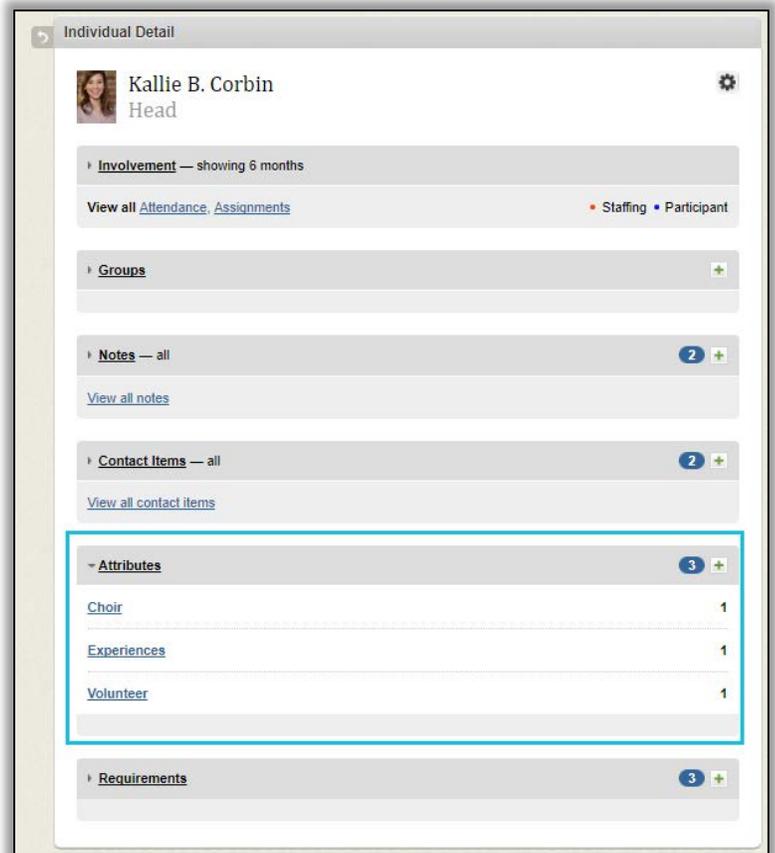
FellowshipOne allows you to track church-specific information about individuals in Individual Attributes. Attributes can be anything you want to track about a person.

To add an individual attribute:

1. Type a name or partial name in the People Search field and press Enter. A list of search results appears.
2. Click the name of the person you want to work with to display the individual's record.
3. Scroll down to the Attributes widget and click the green plus icon to the right of the widget. The Choose an attribute drop-down displays.

You can track the Staff/Pastor involved with the attribute, the Start and End Dates if applicable, and a Comment. Again, the choices available depend upon how the attribute was configured by your administrator.

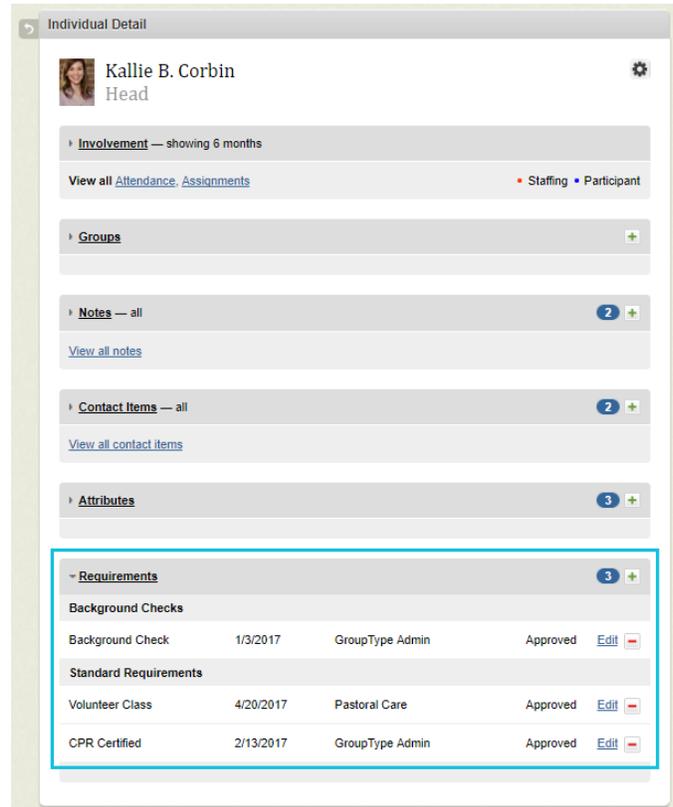
4. Select the attribute to work with from the Choose an attribute drop-down list. The page will update to show the proper choices for the selected attribute.
5. Optionally, select a Staff/Pastor, type a Start Date, type an End Date, and/or type a comment. These features need to be configured by your administrator before they are available to be edited.
6. Click Add this attribute. The attribute has now been added and the individual will appear in any search results that display when you use People Query to find all people with the attribute group or attribute you applied to the record.
7. Optionally, click I'm done adding attributes to hide the attribute entry fields.



Once an attribute has been added to a record, the Attributes widget displays the attribute group only. Click the attribute group to see the attributes that apply to that group.

Requirements

Individual Requirements are typically used for two reasons—to track items that need to be completed before a person can volunteer for a job and to track various stages of membership (i.e., what is required to be member of the church). Requirements are applied to an individual's record and you can quickly find people with certain requirements through reports. For example, there are reports that show you people who are currently volunteering that have expired requirements and people who have requirements but are not volunteering.



The screenshot shows the 'Individual Detail' page for Kallie B. Corbin, Head. The page includes sections for Involvement, Groups, Notes, Contact Items, and Attributes. A blue box highlights the 'Requirements' section, which contains a table of requirements.

Requirements			
Background Checks			
Background Check	1/3/2017	GroupType Admin	Approved Edit
Standard Requirements			
Volunteer Class	4/20/2017	Pastoral Care	Approved Edit
CPR Certified	2/13/2017	GroupType Admin	Approved Edit

Tips & Tricks

When viewing or editing people records, shortcuts are great for minimizing time and efforts. Below are a few tips and tricks to remember:

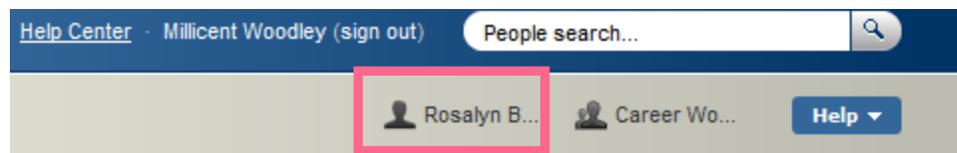
Searching for people records

Always search at least two (2) ways before adding an individual to the database. Use these search tips to minimize the time.

Search String	Description	Example Results
, sha	Searches for all goes by or first names that begin with "sha"	Shannon Smith
har,	Searches for all last names that begin with "har"	George Harrison
jon	Searches for all goes by, first, or last names that begin with "jon"	Jonathan Smith Kerry Jones
cur har	Searches for all goes by or first names that begin with "cur" and all last names that begin with "har"	Curtis Harris
bus, geo w	Searches for all goes by or first names beginning with "geo" that also have middle names beginning with "w" and all last names beginning with "bus"	George W. Bush
,ma j	Searches for all goes by or first names beginning with "ma" that also have middle names beginning with "j"	Mary J. Smith
,{ma j}	Searches for all first or goes by names that are composed of two names—one that begins with "ma" and the second beginning with "j"	Mary Jane Brown
{de la}, g	Searches for all first or goes by names beginning with "g" and last names composed of two names—the first beginning with "de" and the second beginning with "la"	Gordon De La Cruz
{-bet}	Searches for the second part of a hyphenated name	Mary-Beth Johnson

Last Individual Record

Ever need to go back to the previous record? Click on the Individual's name underneath the Quick Search field.



Save Page Settings

Don't need to see all of the information on the Individual's record? Collapse and expand all the groupings on the Individual's record. Then click the **Action Gear** button to the right of the individual's name and click **Save Page Settings**.

Add Additional Authorizations

In those cases when someone other than the individuals in the household need to pick up a child in the household, you can always add the person's name and driver's licenses number in the Authorization area at the bottom right portion of the Individual's record. When the individual comes to pick up the child, they will be required to show their ID before you release the child.

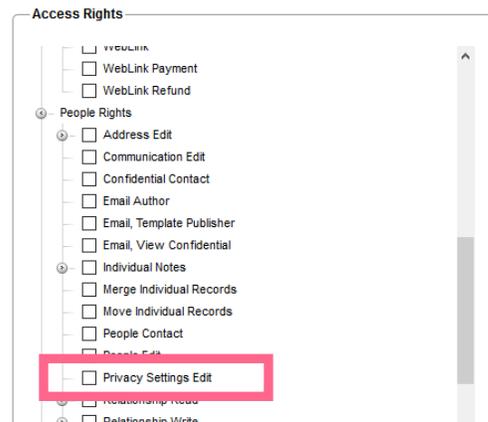
Map/Directions for a Household or Individual

You can quickly map the location of the Household or Individual's address. Click **Map** right below the address and **Google Maps** will appear.



Delete an Individual's inFellowship Account

In cases where a congregant no longer uses the email address attached to their inFellowship account, you can delete the account from FellowshipOne if you have been granted **Private Settings Edit** security rights.





Update Multiple Individual Records in Household

When entering data for household, one quick way to edit all the household members is to have each individual in the household on the screen at the same time. You can do this by clicking on **Edit household/individuals** in the top right corner of the household view and then edit the records.

Household Members

George and Rosalyn Burke

Phone: 972-555-1777

Email:

[Switch to single-page view](#)

Communications | Status/Sub Status | Position/Marital Status

▼ Edit Household Communications

Home phone number

Home email

Shared by all members of the household

▼ Edit Individual Communications

George Burke

Member

Head

Type	Phone Number	Preferred
📍 Mobile	<input type="text"/>	<input type="radio"/>
📍 Home	972-555-1777	<input type="radio"/>
📍 Work	<input type="text" value="972-555-1426"/>	<input type="radio"/>
📍 Emergency	<input type="text"/>	<input type="radio"/>
This number should be from outside the household		

Type	Email Address	Preferred
📍 Personal	<input type="text" value="georgeburke@snail.net"/>	<input type="radio"/>
📍 Home		<input type="radio"/>

Reporting

When reporting on Individual Records, the go to report would be the Core **P9400**. This report allows you to pull information pertaining to all aspects of the individual; Involvement, Groups, Notes, Contact, Attributes, Requirements.

There are other Core and Non-Core Reports that would narrow down your output into a specific area of the individual.