Things You Should Know
THINGS YOU SHOULD KNOW....

Our system is easy to learn, so this resource is not a step-by-step walk through of every feature. Instead, we boiled things down to short lists of key points and things you might not catch on your own so your system launch will be quick, informed and just right for your ministry.

🚀 Things You Should Know About Features

People, Fields and Families  Mass Communications (Email, Text & Voice)  Calendar
Groups  Interactions and Notes  Permissions/Account Access/ Security Roles
Attendance  Workflows  Forms
Donations (Including Online)  Searching
Check-in & Other Attendance Collection Options

지도 Things You Should Know About Ministry Improvements/Processes

Assimilation  Preventing Attender Attrition  Increasing Volunteerism
Increasing Online Giving  Increasing Group Involvement
1. Attendance is recorded to groups (not to calendar events).
2. Groups can either be set for summary (a total number only) or individual attendance detail.
3. Attendance is recorded by session, which is just a date a group met. To create a session go to Attendance > Input > Add Session.
4. Because of the group/session function, calendar events are not required for attendance nor are attendance or serving records attributed to calendar events.
5. Attendance data for groups can be summarized into aggregates. To create an aggregate navigate to Groups > Aggregates.
6. Absences are recorded as either “excused” (we know why someone missed) or unexcused (we don’t know). If you don’t like the names, ignore them but choose to see the value in both types of data.
7. When recording individual excused absences, reason codes can be used. The list of reasons is configurable (Navigate to Settings > Attendance > Excused Options).
8. There are 6 distinct applications that can streamline attendance data collection: Check-in Kiosks, the Mobile App, the Check-in App, the Attendance Taker, Mobile Browser Access and RFID Attendance Readers. Follow the Learn More link below for details.
9. When recording attendance you can add a visitor. Visitors are either individuals in your database but not part of the group you’re recording attendance for or an individual not in your database. When adding those not in your database, you have the option to create a full data record or log them in the Visitor List which is found by navigating to Individuals, then List, then the Visitor tab. This system function for visitors is separate from any process you might create using groups to track visitors, regular attenders, etc.
Attendance Lists

- Personal Assessment Checklist
- Implementation Checklist

Attendance Videos

- Attendance
- Visitors

Attendance Graphics

- What is a Session?
- 6 Ways to collect attendance
A session is a date of a group meeting. (Small group, class, worship service, etc.)
Attendance is adding individual names or just head count totals to a session.
Multiple entry options exist to accomplish attendance (adding individual names or head count totals to a session).
Think of the options like vehicles, delivering individuals to sessions.
Attendance—Personal Assessment Checklist

Can you...

- Set a group for individual style attendance?
- Create an attendance session?
- Edit a previously created attendance session?
- Create an aggregate?
- Use the attendance taker on a tablet or smart phone?
- Add a visitor while entering attendance into a session?
- Locate and process the visitor list?
- Create a custom excused absence option?
Attendance—Implementation Checklist

- Make a list of events that need attendance tracking
- Ensure that you have created a group for each event on your list
- In group settings (for each group) set the attendance style (Individual or Total)
- Determine how attendance will be collected (Attendance Taker, App, etc.)
- Determine who will record attendance (staff, volunteers, attenders)
- Determine how/if absences will be recorded/tracked
- Train your attendance takers
THINGS YOU SHOULD KNOW ABOUT...CHECK-IN.

1. Since attendance is recorded to Groups, Check-in is also dependent on Groups. So, create groups that children/people will check in to.

2. For a group to be available for check-in the “use for check-in” checkbox must be engaged in that group’s settings area.

3. Check-in can run in two ways

   - Within the database menu system. Navigate to Attendance > Check-in then choose a Check-in Station
     (Recommended for administration tasks related to check-in)

   - Or in Kiosk Mode. Navigate to Attendance > Check-in then choose “Launch in Kiosk Mode”
     (Recommended for attenders)

4. To access administrative features, while running check-in within the menu structure, click the arrow on the Check-in button.

5. Global settings and station specific settings can be found by navigating to the upper Gear Menu Icon then select Settings > Check-in.

6. Label printing for check-in is affected by settings in multiple places. Use the Learn More link below for details.

7. Check-in transactions can occur via the standard mobile app. For mobile app check-in to work it must be enabled in Settings > Check-in Mode and at least one Check-in Station must be enabled to be used with self-check-in (Navigate to Settings > Check-in Stations)

8. There is a mobile app for iOS only that can be used in lieu of or alongside normal check-in kiosks. This mobile app can run in offline mode in situations where the internet is not available.

9. Additional collection options can be found by following the Learn More link below.
Check-in Lists

- Personal Assessment Checklist
- All Attendance Collection Options

Check-in Videos

- Check-in
- Check-in Setup

Check-in Graphics

- Sample Labels
- Check-in Settings and Their Affect on Labels
Check-in—Personal Assessment Checklist

Can you...

- Run check-in via “admin” mode and in kiosk mode?
- Find a child by name who has checked in?
- Text all parents of checked-in children?
- Edit a child’s check-in note?
- Add a new database record from a check-in station (admin or kiosk mode)?
- Add a visitor, during a check-in transaction?
- Control label and guardian receipt print quantities?

Configure a check-in station to...

- To display a limited selection of groups?
- Allow people to create their own full database records?
- Set a specific group where those new full database records are added?
- Prevent people from checking into groups they are not a member of?
### Check-in Settings and Their Affect on Label Printing

<table>
<thead>
<tr>
<th>Setting Area</th>
<th>Scenario 1</th>
<th>Scenario 2</th>
<th>Scenario 3</th>
<th>Scenario 4</th>
<th>Scenario 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Child</td>
<td>Guardian</td>
<td>Child</td>
<td>Guardian</td>
<td>Child</td>
</tr>
<tr>
<td>Group</td>
<td>1</td>
<td>1</td>
<td>Choose at Check-in</td>
<td>Don’t Print Any</td>
<td>2</td>
</tr>
<tr>
<td>Station</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>End User Entry</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Resulting</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
<tr>
<td>Labels Printed</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Deselecting this checkbox in Check-in Mode Settings will override all guardian receipt printing to 0.
## Check-in Settings and Their Affect on Label Printing

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</tr>
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<td>1</td>
<td>2</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

Deselecting this checkbox in Check-in Mode Settings will override all guardian receipt printing to 0.
Check-in label printout examples

Printed from iOS app

Printed from database
QUICK START—ATTENDANCE COLLECTION OPTIONS (SELF-SERVE)

**Check-in Kiosks**—Any desktop or tablet computer can be configured as a check-in kiosk. Configuration is completed in Settings > Check-in > Check-in Stations > Add a Station. Stations can/should be configured to display only certain groups (using group properties). Guests will be added as visitors when paired with a regular attender check-in (typically used for child guests with parents not present). A visitor list will be in the Individuals menu area. If the “Enable New People To Be Created” option is engaged in Kiosk Mode Setup, you can choose to place new people in a special group for easy viewing and processing later in the week.

**RFID Scanners**—RFID records attendance from a simple card swipe with no additional data entered via keyboard or screen selections. RFID requires special hardware (an RFID scanner) and special cards. To learn more contact our sales team. If you already have RFID equipment, go to in-product help (the question mark icon in the top right corner) and then search “RFID”. You can purchase scanners here: [https://ministrybrands.secure-storefront.com/s/](https://ministrybrands.secure-storefront.com/s/)

**Mobile App**—Search for the app in the App Store or Google Play (ask our sales or support teams for specific search criteria). Once downloaded, app users will enter a portion of your database URL and a user name and password. Once logged in, app users can check in any member of their family and select the location where their labels will print (printer locations are part of kiosk setup). To check in, the user must be within .5 miles of the church.

**Mobile Browser Access** Use any mobile browser and add “/checkin” to the end of your database URL. This mobile version of check-in is designed specifically for adults checking in to classes, groups, worship services or ministry team events. It is the only mobile/self-based check-in pathway where a user can mark themselves as absent with a reason code.

Continued
QUICK START—ATTENDANCE COLLECTION OPTIONS (ASSISTED)

Check-in Only App—This app is not meant to be downloaded by your church attenders. It is instead an administrative app that allows online and offline check-in transactions. The app is only available for iOS devices. Ask our sales or support team for specific search terms to use in the App Store.

Touch Attendance Taker—The Touch Attendance Taker is designed for easy attendance taking during a group gathering. This application is limited; visitors cannot be recorded and the date is not adjustable (it defaults to the current day). The Touch Attendance Taker interface is designed for a tablet computer. To access it navigate to Attendance>Input then select the tab labeled “Touch Attendance Taker”.

Back
1. To access the calendar select the calendar icon from the top right menu bar.

2. To properly setup a calendar, the following steps are followed in order, (some steps are optional):
   
   - (Optional) Enter equipment details (Calendar > Settings > Equipment)
   - (Optional) Enter room setup details (Calendar > Settings > Room Setups) and remember to identify equipment in your setup.
   - Enter a building name and then the rooms in that building (Calendar > Settings > Rooms).
   - (Optional) Identify which room setups are available for each room.
   - Create a calendar organization system using Categories and Properties (Calendar > Settings > Properties). For example a category could be “Small Group Meetings” and the corresponding properties could be “Adult, Youth, Children”.
   - Calendar events can have kitchen, childcare and tech requests. Navigate to Calendar > Settings > Responsibilities to identify users who can approve each request type. In this same location, set who should be notified (not approve) of room and vehicle usage.

2. Once events are created reflecting the setup described above, calendars can be filtered then saved as a View and if needed linked/embedded on your church website.

3. After Views and setup are complete, user access (view/request/edit) is controlled at Calendar > Settings > Permissions.

4. If you want a portion of your calendar viewable by anyone, those with no security role created in item 3 or those with just Account Access (i.e. your congregation) at least one View must be made public. To do so select Views in the lower left corner, then the gear icon of the view to be made public, then engage its “make public” checkbox.
Calendar Lists

- Personal Assessment Checklist

Calendar Videos

- Calendar Settings
- Calendar
- Account Access for Church Attenders

Calendar Graphics

- The Importance of Calendar Views
THE IMPORTANCE OF CALENDAR VIEWS

created by filtering:

ROOMS, BUILDINGS, PEOPLE, VEHICLES, EQUIPMENT, PROPERTIES

used for:

website embeds or feeds

user security restrictions
Calendar—Personal Assessment Checklist

Can you...

- Add an event to the calendar?
- Create a room?
- Filter the visible calendar?
- Remove filters from the visible calendar?
- Create a calendar view?
- Make a calendar view public?
- Describe who specifically can see a public calendar view?
- Locate the website embed code for a calendar view?
- Grant calendar permissions that are restricted by view?
- Grant a calendar permission that allows a user to propose events only?
- Approve a proposed event?
- Set a user to have authority to approve kitchen requests?
1. People (system term Individuals) are separate and must be connected via families.

2. To build a family, mark one person as Primary then add family members using the Family tab on the primary person’s database record.

3. People can have multiple addresses (ideal for snowbirds or college students)

4. Getting the desired mailing label display can be tricky. Review the “Getting the Right Label” picture by following the Learn More link below.

5. There are 10 user-configurable date and 15 user-configurable text fields.

6. Text fields can be “Free text” or “Choose from list” type fields.

7. User-configurable fields are fully searchable and reportable.

8. User-configured fields are created in Settings > Configurable Fields

9. The database automatically creates a report for each configurable date field (go to Reports > Individuals)

10. Ministry assessment data (Personality types, skills, etc.) can be stored in configurable fields or groups.

<table>
<thead>
<tr>
<th>Suggested Text Fields</th>
<th>Free Text or Choose From List?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status</td>
<td>Choose</td>
</tr>
<tr>
<td>Former Church, Church Background, Employer, Job, School</td>
<td>Free Text</td>
</tr>
<tr>
<td>Mail Printed Giving Statement?</td>
<td>Choose</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Suggested Date Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Membership Date</td>
</tr>
<tr>
<td>Transfer Date</td>
</tr>
<tr>
<td>Anniversary</td>
</tr>
<tr>
<td>Staff Hire Date</td>
</tr>
</tbody>
</table>

The system included date fields are:
- Created Date
- Birthday
- Baptism Date

Learn More
People, Fields and Families Lists

- Personal Assessment Checklist

People, Fields and Families Videos

- Individuals & Configured Fields

People, Fields and Families Graphics

- Households vs. Families
- Getting the Right Label

Back
Connecting Individuals to Families

Head
Child 1
Child 2
Spouse

Household Built First

Joined by “Family Relationships”

Primary

Individual
Wife
Daughter
Individual
Individual
Individual
## Getting the Right Label

**Michael Kelley & Beth Milborn**  
Primary and Spouse, both in selected group

<table>
<thead>
<tr>
<th>Group by family</th>
<th>Addressing Option</th>
<th>Result</th>
</tr>
</thead>
</table>
| No              | -                 | Michael Kelley  
Beth Milborn (2 labels) |
| Yes             | The Lastname Family | The Kelley Family |
| Yes             | Mr. and Mrs. Lastname | Mr. and Mrs. Kelley |
| Yes             | Firstname & Spousename Lastname | Michael Kelley & Beth Milborn |
| Yes             | Lastname, Firstname & Spousename | Kelley, Michael & Milborn, Beth |
People, Fields and Families—Personal Assessment Checklist

Can you...?

- Add an individual and connect them to a family?
- Utilize a configured field to track information?
- Set time constrained multiple addresses for an individual?
- Log an interaction, a personal note and a check-in note for an individual?
- From the edit screen, add/remove an individual to/from a group?
- View an individual’s attendance for a specific group/timeframe?
- Set a security role(s) for an individual?
- Unsubscribe an individual from mass emails?
- Send an email to selected individuals that will be logged as an interaction?
- Add a pledge/donation from the Giving Tab gear menu on an individual’s record?
- Print a contribution statement (from an individuals record)?
1. Before entering contributions, set up your giving categories at Settings > Giving > Giving Categories (i.e. General Fund, Missions, Building. Etc.). Take note that you can control the giving category drop-down list order in this settings area as well.

2. Contributions statement format is controlled in Settings > Giving > Giving Letter Template. You can create multiple templates (Yearly format, quarterly, etc.).

3. Loose cash/cash-in-plate giving is entered like other donations but is associated with the “person” Anonymous and is reported on at Reports > Giving > By Anonymous.

4. New people can be entered from the donation entry screen (option appears after a search returns no results)

5. To add notes/pledge information to a contribution hover over the entry, click the button that appears labeled “more”.

6. Giving imports can be used as part of initial data setup but are also helpful for importing donation records from third party online giving solutions or credit card kiosks.

7. If you’ve purchased our online contributions system, a “handshake” must be setup between the giving system and the database. Use the Learn More link below for more detail.

8. Once you have setup your giving account, login here to administer it.

9. Giving provides a Giving (Member) Portal for your donors, but the login is not the same as their Account Access or Mobile App connected to the database. Learn more about all three using the Learn More link below.

10. Some customers choose to use a form for their donations instead of using the Giving Portal. Donation forms allow for comments while the Giving Portal donation screen does not. This can be useful for mission trips where specific trip attendees need to be noted. Check out the Form section of this guide for more detail.
Donation Lists

Personal Assessment Checklist
Giving Integration to Database Step by Step
I’m confused! I just want to setup online giving

Donation Videos

Donations: Input & Import
Check Scanning
Online Giving

Donation Graphics

Giving Portal, Forms, App & Account Access....What's the difference?
Can you...

- Create a giving category?
- Enter a contribution?
- Mark an entry as cash?
- Create a batch?
- Use a previously created batch?
- Mark all entries in a batch as cash?
- Import donations from a CSV file?
- Adjust a contribution statement template?
- Print a single contribution statement?
- Print a group of contribution statements?
- Print a report that shows giving totals by category?
Donations—Online Giving to Database Integration Steps

Step 1—Complete the Application Process

1. Ensure that the Giving sign-up process has been completed. Sign-up begins at the time of purchase, but there is an application that must be completed. After you place your order, you’ll receive an email with login information to the Online Giving Admin Panel (Questions—contact a member of our sales team)

2. Log in and access the application form (click the “Depository Account Information” link). Complete and submit your application, including uploading necessary documentation (i.e. voided check, 501c3 document, etc.)

3. Once the application process is complete an email is sent (subject line—“Congratulations—Welcome to...”) stating that “you can now begin receiving donations”.

Step 2—Create Online Giving Funds

4. Log in again to your giving control panel.

5. Create funds in the giving control panel (Click Organization in the top right corner, then Fund Management). We recommend that you use the same names as your database funds/categories. You only need to create funds that you want to make available for online giving.

Step 3—Map Online Giving Funds to Database Funds

6. Navigate to the ChMS integration page (Click the Organization drop down menu at the top right, click ChMS Integration).

7. Enter your church sub-domain and click Save Settings.

8. Map giving system funds (created in Step 3) to your database funds (created in the database at Settings > Giving > Giving Categories). Set one fund as default - usually the General Fund.

9. Merge your Forms Management Accounts (this step is necessary if you have been creating forms in both your database and your online giving accounts prior to integration).

10. Enable the integration by clicking on the button on the bottom of the page.
Confused about online giving? Follow these steps to clear the confusion.

**Step 1**—Use the chart below to understand the difference between Account Access, Giving Portal (AKA Member Portal), Mobile App and Forms. Decide which one(s) you will promote to your congregation.

**Step 2**—Follow one or more of the options on the following pages.

<table>
<thead>
<tr>
<th></th>
<th>Giving Portal</th>
<th>Forms</th>
<th>Mobile App</th>
<th>Account Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Make one time or recurring donations</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Manage recurring donations</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>See full giving history (electronic &amp; traditional)</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Default login format</td>
<td>Email</td>
<td>Email</td>
<td>First.Last</td>
<td>First.Last</td>
</tr>
<tr>
<td>Custom colors &amp; images</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Download contribution statement</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Manage database record, access church calendar, directory, groups</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
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See the options
Step 3—Option 1—Use the Giving Portal

1. Sign up for your online giving account and watch for emails with instructions on uploading documents (including a canceled check) and login information to access the Giving Admin Utility.

2. Once activated and logged in, adjust your initial online giving settings under the Organization dropdown (logos, designs, cards accepted, etc.)

3. Create giving categories in the database (Settings > Giving > Giving Categories) and Funds in the online giving system.

4. Integrate your database (AKA ChMS) to your online giving system and match at least one database giving category to a fund in the online giving system.

5. Get your Giving Portal link and place it or embed it on your website. (Go to Organization> Settings then select either “View Integration Code” or Edit your Personal URL)

6. Promote the webpage with the link or embed to your congregation.
Step 3—Option 2—Use the mobile app

1. Follow steps 1-3 in the Giving Portal instructions (giving in the app is connected to the online giving system). This setup must be completed, even if you are choosing not to make the Giving Portal available to your congregation.

2. Download the app (available for anyone via Google Play and The App Store).

3. Users will need your database URL.

4. Users can create an account when setting up the app. However, this can cause duplicate records in your database if the data used during setup does not match the information you have on file. So it is better to focus on step 5. The ability for users to create their own accounts can be disabled, to do that go Permissions > Global in the database.

5. You can email login information to your users from the database (Go to Groups, select a group(s), select nearest gear menu icon then choose “Assign and Email Login Information”). Remember the app login is different than the login for the Giving Portal but is the same as Account Access.
Step 3—Option 3 Use a Donation Form

1. Follow steps 1-3 in the Giving Portal instructions (giving in Forms is connected to the Giving Portal). This setup must be completed, even if you are choosing not to make the Giving Portal available to your congregation.

2. Create a form that allows donations and make sure to use the Payment Field labeled Fund Dropdown(s).

3. In Form Settings (the gear at the top right of your form), check the box labeled “enable Member Portal” and “Enable recurring payments”.

4. Link or embed your form on your website.

Step 4 (Optional) Add Account Access
Step 4 - Add Account Access

Account Access is a reporting option, not an online giving option. It is an enhancement to the user experience because it allows users to view their complete giving history and download/print contribution statements.

1. Link your database URL (Your database URL is where you go to login to the database) ... to a page on your website.

2. Users can create an account from the linked login page. However, this can cause duplicate records in your database if the data used during setup does not match the information you have on file. So it is better to email login information to them. (Go to Groups, select a group(s), select nearest gear menu icon then choose “Assign and Email Login Information”)

(The ability for users to create their own accounts can be disabled, to do that go Permissions > Global in the database.)
## Online Giving Tools

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### Images
- **Giving Portal**: A screenshot of the giving portal interface with options to view or schedule donations, with email and account access.
- **Forms**: An example of a donation form with fields for name, amount, and fund choice, highlighting email access.
- **App**: A mobile app interface showing donation options with account access indicated.
- **Account Access**: A section showing account access options with a focus on email and password management.
1. Groupings of people are the fundamental organizational structure in the database. When in doubt about where/how to define something consider making it a group.

2. Groups are used as distribution lists for email, text and phone.

3. When you need to store data about people, and existing fields don’t make sense; groups or configurable fields are the options.

4. Groups are the key to attendance. If you need to record named attendance detail, choose the “Individual Attendance?” option when setting up the group. Without this setting you will only be able to record a number of total present.

5. Check-in depends on groups. (I.e. No groups = No check-in)

6. Group properties and or group views should be used to sub-divide your groups. (Small groups, ministry teams, guests, regular attenders, members, classes, campuses, age groups, personality assessments, etc.).

7. Groups can have multiple properties applied (Ex. A group might be identified as a Ministry Team at a Campus for a particular Age Group)

8. Adding a the same word or word abbreviation in front of similar groups can help (Ex. All Ministry Teams start with the letters “MT” so they all appear in listings together)

9. Groups will be used to track child age groups and there is a procedure for yearly or quarterly promotion. (Use the Learn More link below to find the steps)

10. You can format a tool called Group Finder (Settings>Groups>Group Finder) to allow people to find a group that fits their needs.
You may be thinking small as it relates to groups...

Groups are just for small groups.
Think bigger...

IN卷VEMENT LEVELS

ASSESSMENTS

MINISTRY TEAMS

THE DIRECTORY

SMALL GROUPS

AGE GROUPS

ADMINISTRATIVE LISTS

CLASSES
The Power of Properties

Group Properties enable filtering on the Groups screen of the database system. But properties also have useful implications in other areas.

- **Communication**
  Quickly select multiple groups for communication

- **Check-in**
  Filter which groups show up to check into at a particular station

- **Group Finder**
  Allow people to find certain groups on the Group Finder

- **Dashboard**
  Show information on a Widget for only particular groups
Groups—Personal Assessment Checklist

Can you...

☐ Create a group with two leaders?
☐ Set a group to show in Group Finder?
☐ Create a group property?
☐ Explain to a novice user how groups are used to track information beyond traditional small groups, classes or other literal gatherings of people?
☐ Add people to a group?
☐ Search for everyone in a group who are not in another group (i.e. everyone who is in Mike Jones small group but not in the regular attenders group, hint: Use Advanced Search)
☐ In one transaction assign the same interaction to everyone in a group?
☐ Archive a group?
☐ Deactivate a select group of people from a group?
<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>PROPERTIES IN CATEGORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>TYPE</td>
<td>Status (i.e. used for groups that track Guests, Regular Attenders, etc.), Small Group, Class, Ministry Team, Mailing List, Worship Service, Mission Trip, Staff, Committee.</td>
</tr>
<tr>
<td>AGE GROUP</td>
<td>Nursery, Toddler, Kindergarten, 1st Grade, etc.</td>
</tr>
<tr>
<td>DEMOGRAPHIC</td>
<td>Men, Women, Married, Mixed, Student, etc.</td>
</tr>
<tr>
<td>CHILDCARE PROVIDED</td>
<td>Yes, No</td>
</tr>
<tr>
<td>(This is useful in Group Finder)</td>
<td></td>
</tr>
<tr>
<td>SERVICE HOUR</td>
<td>First, Second, Saturday, etc.</td>
</tr>
<tr>
<td>(Useful for limiting check-in kiosk display)</td>
<td></td>
</tr>
<tr>
<td>GROUP PURPOSE</td>
<td>Outreach, Education, Fellowship, etc.</td>
</tr>
</tbody>
</table>
Groups—Child/Student Promotion Steps

• To move everyone in 12th grade to the College group:
  • Click on the 12th grade group to see the list of members
  • Check the box at the top to select all the members at once
  • Click Gear > Move People, then select the College group

• If you have groups with multiple grades like Children’s Church Elementary and you just need to move just the 6th graders to the Junior High group...
  • Click on the group to see the list of members
  • Click on Fields (a dropdown list below the Gear) and make sure birthday and age are selected
  • Then sort by birthday by clicking the heading so the oldest children are at the top
  • Check the box for the first one, then scroll down to the youngest one you are promoting, hold the shift key and check that child’s box so all the records in between will be highlighted.
  • Click Gear > Move People, then select the Junior High group
THINGS YOU SHOULD KNOW ABOUT...MASS COMMUNICATIONS

1. You can send mass emails, texts or voice messages anytime a list of people is displayed (search results, reports, etc.) by selecting the nearest gear menu icon or by navigating to Groups > Mass Contact.

2. You can change the name of sender and the email address, for more detail use the Learn More link below.

3. To insert photos, upload them to your website or to a free Drop Box account, then insert the image URL.

4. There are no saved content templates. However, you can get creative by using the “send later” email option. Schedule emails to be sent in the distant future (i.e. the year 2100). Then retrieve them each time a “template” is required. If needed, each ministry could have their own year (i.e. Youth = 01/01/2105, Women’s = 01/01/2107, etc.)

5. An unsubscribe link will appear on all emails and will unsubscribe from “all” church communication. If you don’t want this to be prominent, you can add multiple blank lines at the end of your emails.

6. All texts come from Short code 29988—(Short codes are used for mass texting because mobile carriers blacklist texts as spam if they come from 10 digit numbers and are sent to more than 250 phone numbers on their system)

7. Texting has to be activated and has associated costs, for details contact our sales team.

8. Activating texting also activates mass voice calling. Mass voice is great for weather related service cancellation/adjustment messaging.

9. There are size and quantity limits to mass communications. For details use the Learn More link below.
Mass Communication Lists

- Making Reply Name Adjustments
- Mass Communication Limitations

Mass Communication Videos

- Mass Communications
1. To send with a different name, simply type the name of the person in the “From Name” field. The email will show as coming from that person and from a “no-reply” email address.

2. To send with a different name and a different reply to email address, you have two options...

   If you are an admin -
   
   Navigate to the person you want to send on behalf of
   
   Go to Account and click “login as this user”
   
   Send your mass email as that person

   If you are not an admin -

   Add the person’s email as your Secondary Email. Then it will appear as an option in the From Email Address box.
   
   The email will still show as coming from a “no-reply” email address, but if the recipient does reply, it will go to the “From Email Address”.

3. If you need to send on behalf of more than one person, you will need to create another user account with the desired reply email addresses and log into it.
1. There is currently a limit to the number of recipients for any kind of mass communication (5,000)

2. Length of email limit (number of characters) is roughly 21,844 Characters. This includes any HTML markup going on behind the scenes as well as some technical language of our own and all of the user id's of the recipients. Unfortunately there's not really a way to know you're approaching or exceeding the limit.

3. Email File size limit - 10MB per file; there is no known maximum number of files or maximum size of all attached files (we've tested and attached 180MB files); at some point, however, recipient email clients will reject due to file size (varies by email provider, but Gmail limit is 50MB, for example)

4. Voicemail attachment size limit/duration limit - The file size is limited (currently) to 10MB. There is a time restriction of 5 minutes for all voice calls.
1. Interactions can either be logged or assigned to be completed later.
2. There are three standard interaction types; Phone Call, Email and Visit.
3. You can create custom interaction types (Navigate to Settings > Interactions > Add Interaction).
4. Prayer requests are a common custom interaction type.
5. Limiting user security role by interaction type allows an interaction type to be private (Try creating an interaction type called Private Note).
6. All forms of mass contact (Utilities > Mass Contact) can be logged as an interaction.
7. The interaction type drop down menu sort order can be controlled using drag and drop at Settings > Interactions.
8. Anyone in your church can report a completed assigned interaction (Without logging into the database) by following simple instructions in their notification email or by replying to the email.
9. There are two types of notes, personal and child check-in. However view/edit rights are controlled for both simultaneously. Interactions, as noted above, should be used for recording private notes.
10. Child check-in notes will appear on child check-in labels and can be edited by parents during the check-in process.
Interactions—Personal Assessment Checklist

Can you...

- Log an interaction to an individual’s record?
- Assign an interaction to an individual?
- Complete an assigned interaction (with and without logging in)
- Create a custom interaction type?
- In one transaction, assign the same interaction to all people in a group?
1. A security role is not required for basic Account Access to the database.
2. To adjust Account Access options select the upper right corner gear menu icon and then Permissions.
3. Account Access includes:
   - View, edit or propose edit access to your own record
   - View access to the Directory (if enable) if you are in the Directory Group
   - View access of any public calendar
   - Access to the Group Finder
4. Security roles can be restricted by Group. For example a role could be created that allows a user to edit only the records of people in a certain groups(s).
5. To communicate login information to a group of people (including those with just Account Access, navigate to Groups then select a group(s) via the left side checkboxes, then select the closest gear menu icon and select “Assign and email login information”
6. Special security roles, known as Leader Roles, can be created. These roles do not have to be granted one at a time, they will instead be set for anyone who is a group leader of the groups associated with the Leader Role.
Permissions Videos

Account Access for Church Attenders

Permissions
Basic Search:

- Combo searches are always OR, not AND (In other words if you search Smith Maple it would return people who have Smith or Maple in their name, address or email. Not just people last name Smith who live on Maple)
- All words put in the search box can be partial words.
  - For instance, typing "jo" will match words containing "jo". Like: Joe, John, Rojon, etc.
- Multiple words function like "OR" and return even more results.
  - Ex. John OR Smith. Your results will include people who match any of those words.
- You can put words in quotes to get exact matches including spaces. Ex. "Main St" will find Main St, Main St., and Main Street, but will not bring in records that just have an "St" like Steve or Park St.
- You can use a question mark to replace a single letter. For example, if the person you’re searching for has the surname "Johansen" but you aren’t sure if it’s spelled -son or -sen, you can search [Johans?n], and that will return results for both “Johanson” and “Johansen,” as well as other variations.
- You can use an asterisk to replace multiple letters. If you think there might be a double S in the surname “Johansen,” searching for [Johan*n] will return results for “Johansen” and “Johanssen,” in addition to “Johanson,” “Johansson,” and other possible spellings.

Advanced Search:

- To search for blanks in a field type: <empty>
- To search for any data in a field type: *
- Searching for “Primary” in the Family Relationship field can help identify # of households in your database
- Age - “Greater Than” actually means “Greater Than or Equal To.” To find elementary kids (ages 6 to 12), use Greater than 6 and Less than 12.
- Last Attended date can be used for absence tracking to keep people from falling through the cracks
  - Example: Groups include Visitors, Regular Attenders and Members; Last Attended Date equals 4 Sundays ago as the date to find all who missed the last 3 weeks, but not 4 or more weeks.
  - If you have mid-week services, Saturday services, or track attendance for home groups choose a 7 day date range for last attended.

Use your browser search function to search a page you are viewing.

- For example using Google Chrome, select CRTL+F on your keyboard when viewing an absence report to find specific people.
1. Create the following groups: Guest (Recent), Guest (General), Regular Attender.
   Options:
   - Create other groups for more detail (Member, Contributor Only, No Longer Attending, Deceased)
   - Create groups for children (i.e. Guest - Child (Recent), etc.)
   - Use a name or code before each group (i.e. “Status-Guest (Recent)”)

2. As new people are added to your database, place them in Guest (Recent)

3. Create a Workflow that sends an email to anyone placed in Guest (Recent)
   Options:
   - Create other workflows that assign interactions for more personal communications immediately or a few weeks after they attend

4. As people become more involved (based on attendance or giving or both), change their group (i.e. Guest to Regular Attender) manually or automatically using a Workflow.
   Options:
   - Remove them from the older group completely or,
   - Mark them inactive in the old group to maintain a history (set the Group Joined Date as the date they moved and note that it doesn't have to be today’s date).

5. If nothing happens with a Guest (Recent) person for 30 days, move them to Guest (General) manually or using a Membership Duration Workflow.
THINGS YOU SHOULD KNOW ABOUT...WORKFLOWS

1. Workflows create, automate and track ministry processes using triggers and actions.
2. Workflow attendance triggers run once a week on the day the workflow was created and other triggers will run every 15 minutes.
3. Once a workflow is created, do not move the triggers and actions around as it can cause the workflow to not run properly.
4. Workflows are also a great way to keep your data updated (Trigger on a lack of attendance or giving and take appropriate actions to reclassify a person’s involvement level group).
5. A single workflow can have multiple triggers.
6. A workflow that checks for attendance (or absence) will look at past data. You can add test data and then click Play, then adjust the data and it will still work.
7. In any Action window, select this icon to experiment or test your workflow.
Workflow Lists

- Personal Assessment Checklist
- Workflow Samples
- 2 Uses for the Update Progress Action

Workflow Videos

- Workflow Basics
- 8 Workflow Examples
Workflows—Personal Assessment Checklist

Can you…

- Create a workflow that triggers on group duration with an action that assigns an interaction to someone?
- Create a workflow that sends a text to anyone who donates to a certain fund?
- Create a workflow that sends an email to anyone who is absent 3 times in the last 6 weeks?
- Create a workflow that sends an admin message when someone becomes a new regular giver?
- Create a workflow that adds a person to a group, when that person completes and submits a form?
Workflow Samples

First Time Visitor follow-up:
- If a person is added to the group: Status - Guest,
- Email them with a welcome email
- Create an Interaction assigned to your follow-up coordinator for guest related follow-up tasks
- To go further, if someone is Status - Guest with a duration of 5 days, create a group duration workflow that assigns an interaction of guest follow-up call from a pastor
- To go even further, if someone is Status - Guest with a duration of 4 weeks, create a group duration workflow that assigns an interaction of another form of guest follow up.

Giving
- Create a workflow that sends an admin message if a person in the Status - Guest group gives "over $.01" so you can consider moving them to a Regular Attender
- Or an admin message for large donations (i.e. over $1,000)
- Or for anyone who creates their own Pledge

Automatic Status Changes
- Consider a workflow that when an individual with/in group Status - Guest AND has given 2 or more times in 51 weeks OR attends 4 or more times in 51 weeks,...
  - Adds them to group Status - Regular Attender, and...
  - Removes them from the group Status - Guest

Automatic Group Maintenance
- For keeping your children’s check-in / attendance groups up to date: If last time attended x group (Ex. Harvest Kids Preschool) is over 51 weeks ago, Remove from that group
**Workflow Examples Video**

![SCREENSHOT FROM THE EXAMPLES VIDEO](image)

Watch the Video
2 Uses for Update Progress

When should I use “Update Progress”? 

1. Use it to ensure a trigger isn’t triggered again for the triggering person. Ex. A trigger is set to assign a phone interaction to a person who has been a particular group for 1 week. The actions take place but 15 minutes later when the workflow runs again the trigger is still valid and another interaction would be assigned.

2. Use it with workflows that require linear steps where 2 things need to be true before doing the action(s). Ex. Added to the Status-Guest group and attended the Worship Service group 5 times before moving into the Status-Regular Attender group.

   Without Update Progress, if you have a workflow with 3 triggers: Trigger1 will run if its criteria is met AND trigger2 will run if its criteria is met AND trigger3 will run if its criteria is met.
THINGS YOU SHOULD KNOW ABOUT...INCREASING ONLINE GIVING

1. The following steps assume you’ve already setup online giving.

2. Link your online giving solution to your church website. To find your link, in the Giving admin panel navigate to Organization > Settings > Test Giving Launch or edit your personal URL.

3. Alternately or in addition you can provide a Quick Give Widget to your website. To get the HTML snippet for this, login to your Giving Admin Panel look to the upper right corner and navigate to Organization > Settings > View Integration Code.

4. Create rollout documents or announcement slides similar to these and make them available at one or more of your weekend services.

5. Plan multiple services to promote the giving options.

6. Consider “demoing” how to give online or via the app from your stage to show how easy it is.

7. If you need help with appropriate giving related sermon content or overall generosity advice we recommend The Rocket Company. They have plans, programs and sermon content to help. Visit https://therocketcompany.com/giving/ for more information.
Sample Handouts to Promote E-Giving

Bridgewater’s Online Giving

We believe God’s plan to change the world involves His people faithfully giving to their local church. We understand that life gets busy... Between paying bills, running errands, and remembering birthdays and anniversaries, giving can easily get put on the back burner. We have a way that you can literally schedule your giving in two minutes. Go ahead, give your brain a break. It deserves it!

3 simple steps to setting it up online:

1) Go to bwater.org/give

2) In the "My Online Donation" box, enter an amount and click the "Go" button to be redirected to the giving page.

3) From this screen you will see you can add a payment method, choose how much to give, and you can even set the gift as a “Recurring Donation”. Once done, just click the "Submit" button and you’re all set!

In this example, Bridgewater Church, has set a page on their website that links to the giving login (which is typical) but also has set a page that links to Google Play or The App Store. You could also just direct users to those app stores.

Elexio Community Giving

If you have an Android or Apple smartphone, you can download the Elexio Community App from bwater.org/app and use that app to easily give to Bridgewater Church.

3 simple steps to give via the app:

1) Go to bwater.org/app to download, install and get directions on how to login to the Elexio Community App.

2) Once logged in, click the "Give" button.

3) From this screen you can choose how much to give, add a payment method, and you can even set the gift to be a “One Time” or “Recurring” Donation. Once done, just click the "Next" button and then the "Give" button on the window that pops up.

More samples
Sample Handouts to Promote E-Giving

New City Church
Elexio Online Giving Portal

Online Giving Overview

Early in 2017, New City Church acquired a new online giving tool to better serve our members, called Elexio Giving. This tool is now available for you to use. The purpose of this overview is to give you a glance at the features and share some tips for setting up and using your new online giving account.

All donations made in Elexio Giving will synchronize with your account in the NCC Community member database – online giving, cash gifts, and paper check donations, all in one place.

Step 1: Create Your Account

- Create your account from a computer or smartphone
- Provide your NCC security information
- Create a password

Step 2: Start Using Your Account

- Login to your account
- Select the “Give Now” button & choose “First Time?” to start
- Select the “Parental Giving” or “Sustaining Giving” options

Elexio Giving is Level 1 PCI Security Certified. The payment card industry has very strict standards to protect your sensitive payment information and Elexio carefully adheres to their standards. You can securely update payment methods, schedule future & recurring gifts, and view online giving history.

Important: If you had recurring donations in our old system, you can securely set those up again here.

Step 3: Make Online Donations or On The Go: Text Your Gift

Payment methods are: Electronic Check, Debit Card, Visa, MasterCard and Discover. Our newest form of giving is by electronic check. We’re delighted to be able to offer this method to you so the fees that the church incurs when you use this method, are greatly reduced.

When you login to your account, you’ll see “Scheduled Giving” on the left side toolbar where you can set-up automatic recurring gifts or scheduled donations. You can also choose “My Account” to access your account information or view your online giving history.

Note: Only your online giving history is stored in Elexio Giving. Gifts made by cash or paper check are stored along with your online giving in the NCC Community Database.

Text Your Donation Amount and Specify the Fund

The first time you give by texting, send a text to 770-786-8102 that specifies the dollar amount and fund name of your gift. You will receive a response with a link to a short billing set-up. After the initial set-up you’ll just text the gift amount and fund name to the same number and you’re done.

Note about text giving: When texting your gift, specify the fund name after the amount of your gift. Example: $50 Impact & City Bridges Ministries Donations. Text the word “FUNDS” to 770-786-8102 for a list of funds.

Funds for Tithes and General Offerings (specify one):
- Passion Campus Tithes & Offerings
- Ponce de Leon City Campus Tithes & Offerings
- Passion Students Tithes & Offerings
- Funds for Missions and Outreach (specify one):
- Impact & City Bridges Ministries Donations
- Save R Kids Intern Donation
- Missions General Donation
- Outreach Benevolence Donation
- Funds for City Interns (specify one):
- City Interns Donation
- City Interns Tuition Payment
- City Interns Housing Payment
- Funds for Other Ministries (specify one):
- Men’s Ministry Event Registration
- Women’s Ministry Conference RAIN
- Dance Class Donation
- Thrive Event Payment

If you have questions about how to set-up your account or experience problems, we’re here to help you. Please call the church office at [phone number] or email [email] for assistance.
To increase group involvement the Group Finder will be used. (Group Finder is an interactive group sign-up tool). Follow these steps to set it up.

1. Ensure all your small groups are listed in the Groups area along with a leader, location, meeting day and time.

2. Consider Group Properties that will help those looking for a group find a group that fits and assign those to groups as needed.

3. In the settings area for each group, choose whether you will allow people to add themselves directly to the group or request to join the group. (With either option the group leader will be notified by email)

4. Enable the Group Finder in your database (Settings > Groups > Group Finder). Select the Group Properties you want displayed for use in the Group Finder.

5. Identify a location on your church website to host the Group Finder and use the website embed code found at Settings > Groups > Group Finder to place it on the identified page.

6. If Group Finder is enabled it will automatically be made available when users connect to your database via Account Access (our video library includes a video on Account Access)
1. Forms can be accessed via the database or via the online giving admin panel.

2. Forms can be used for anything (event reg. and payment, donations, simple data collection, etc.)

3. Forms can be connected to a person’s Giving account via their Member Portal login. If you want form users to login to a form to recall saved account information, when editing a form choose the gear icon to the right of the form title and then look for the checkbox labeled “enable member portal”.

4. Forms support the following features; custom themes, discount codes (aka coupon codes), conditional field display, user-defined payment amount fields and recurring payments.

5. To send an email to the person who completed the form; when editing a form, choose the gear icon to the right of the form title then click the Email tab, use the placeholder #Email# in the “To:” field.

6. To connect form submissions to database records use a Workflow.

   - Create a new workflow with a form submission trigger
   - Choose your form
   - Map your fields
   - Choose how you want to handle new people and new data
Form Lists

Personal Assessment Checklist

Forms Videos

Forms for Events
Can you...

- Set up a simple contact form?
- Set up conditional formatting for a field on a form?
- Explain the difference between how “checkbox” and “radio button” fields function in a form?
- Add a payment field to a form?
- Add multiple payment fields to a form, and explain how they affect the “total” cost for the form?
- In one transaction, assign the same interaction to all people in a group?
- Apply a discount code to a form?
- Apply a timed discount to a payment field?
- Set up a donation form?
- Add a person to the database (using workflows) from a form submission?
THINGS YOU SHOULD KNOW ABOUT...PREVENTING ATTENDER ATTRITION

1. Use groups to track your attenders (Guests, Regulars, Members, etc.)

2. Take adult attendance. If you are serious about tracking attender attrition some form of adult attendance must be recorded. There are several collection options to make adult attendance more convenient (Review the Quick Start for Attendance).

3. When recording attendance, anyone not marked present is marked as an “unexcused” absence. Don't shy away from the feature because you don't like the term unexcused. Think of it as an unknown absence (if you know why someone was absent mark them as excused)

4. Every 6 (or fewer weeks) run the absence report for the group used to take adult attendance.

   - Filter the report for absences greater than 3 (or a number of your choice) in the last 6 weeks. This report only displays people with unexcused absences.
   - Select the email icon in the header of the report to email the people who are absent.

5. Alternately, create a workflows that trigger of:

   - Attendance: Anyone marked unexcused in the last x number of days/weeks
   - Giving-No Longer Giving
Things you should know about...Increasing Volunteerism

For General/On-going Serving Team Needs:

1. Use groups to track your ministry teams, for each group set a group leader and mark the group as available for Group Finder,

2. Create Group Properties that define the ministry team for use in Group Finder when potential volunteers are looking for a team to serve with (i.e., Serving Frequency, Training Required, Background Check Required, etc.)

3. Promote the Group Finder; embed it on your website page(s) devoted to serving or send a mass email/text with a direct link.

For Urgent “We need 10 Volunteers this Sunday” Team Needs:

1. Create form describing your need and include pertinent contact fields. Create one form for each need (1st Hour Nursery Volunteers, 2nd Hour Nursery Volunteers)

2. In settings for each form (access settings by click the gear near to the right of the form title) select the Sub-mission tab and set the maximum number of for submissions to equal the number of volunteers needed.

3. Promote the form link or page where the form is embedded.

For help increasing volunteerism, in general, at your church consider connecting with The Rocket Company. They provide a turn-key solution to increasing volunteers at your church or ministry.