ALCF Church Management System IA Membership Subsystem

Login Page

0.1 Login

This page allows any staff member with the appropriate privileges to log in to the ChMS.

Usernames are either their Windows Domain network login or their @alcf.net email address.

Passwords are their Windows Domain network

Note that there will be no "Forgot My Password" type of functionality. Any "Forgot My Password" issues should be directed to IT Support.

ALCF Church Management System

ChMS Staff Login

The ALCF ChMS is only for use by authorized ALCF Staff Members. Please log in using your ALCF username and password below.

If you forgot your login credentials, please contact IT support at it@alcf.net.

Username or Email:		
Password:		
·		
	Log In	
		goes to Screen 1.1

It also includes two "quick search" options at the top of the page.

There are two roles for Staff Members who are using the ChMS Membership Subsystem:

- Staff User
- ChMS Administrator

For the most part, ChMS Administrators have the ability to add/delete other users, and also have the capability of setting permissions on each Staff User. Staff Users can have the following permissions set on it:

- CanViewStewardship
- CanViewConfidentialNotes

The **Administration** button and tab (in the navbar) is only accessible to those ChMS Users that have this permission.

ALCF Church Management System

PEOPLE

HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Main Menu





People Manage individual membership records goes to Screen 2.1 Households Manage household records goes to Screen 3.1 Manage group records Groups goes to Screen 4.1

Administration goes to Screen 6.1

Communications

goes to Screen 5.1

Manage administration tasks for the ALCF ChMS

Manage communication lists

ChMS Main IA.graffle Wed Jan 06 2010

Page 2 of 32



Welcome, Joe User

Search for an Individual

This allows the user to search for an any individual

Each individual can be a membership status of

Member

Non-Member/Tithe

To Confirm: Membership Status is based on the individual and not the household. So it is possible to have a household where one is a member and the other one is a non-member/tithe.

Columns can be sorted by any column in either ascending or descending order. By default, it is sorted by Last Name in ascending order.

Clicking any First or Last name for an individual will take the user to Screen 2.2 for that individual.

ALCF Church Management System

Donnelly

<u>Doyle</u>

<u>Duffy</u>

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Search for an Individual

Search / Filter List Refresh List refreshes table below First Name - View All Statuses -Last Name

Results: Viewing people 1-20 of 2141. Previous | Next **LAST NAME** v **Membership Status Address** City **First Name** 41098 Mill Valley Way Page Non-Member Anderson <u>Alexander</u> 1040 La Canada Flintridge Dr. <u>Silvanus</u> **Barry** Non-Member Hercules **Barry** Non-Member/Tithe 76207 Walnut Ave. Irwindale <u>Susy</u> <u>Walden</u> Non-Member 31558 Kerman Blvd. East Palo Alto <u>Barry</u> Member 30811 Palm Springs Road Bell <u>Benedict</u> **Bennett** 88436 Mountain View Road Member Commerce <u>Dandy</u> **Brooks** 54019 Industry Ave. <u>Burleigh</u> <u>Buckley</u> Non-Member Capitola Non-Member/Tithe 59216 Reedley Dr. Antioch <u>Bass</u> <u>Burke</u> Agoura Hills **Amorita** <u>Chang</u> Member 30200 Elk Grove St. Non-Member/Tithe 25835 Emeryville Blvd. Hillsborough **Worthington** Coleman <u>Lula</u> **Collins** Non-Member 80939 Canyon Lake Dr. Colton 2279 Sonora Road <u>Minna</u> <u>Cook</u> Member Lakeport <u>Cullen</u> Non-Member 83531 Chico Blvd. Biggs <u>Tilda</u> Russell Cunningham Member 54957 Hughson Way Laguna Niguel Non-Member/Tithe 56850 El Cajon Road West Sacramento <u>Abbie</u> <u>Davis</u> La Mesa <u>Davis</u> Non-Member/Tithe 33924 Fullerton St. <u>Martie</u> 41077 Dorris Dr. Truckee <u>Toinette</u> <u>Davis</u> Member Non-Member 37431 Santa Monica St. Salinas <u>Bowie</u> <u>Doherty</u>

Non-Member/Tithe

Non-Member/Tithe

Member

65033 Cudahy Blvd.

77280 Redwood City Way

12497 La Habra Road

Blythe

Indian Wells

Fort Bragg

<u>Griz</u>

<u>Tina</u>

<u>Beverly</u>

Depending on the type of individual, the screen the individual would show up on would be on one of the following wireframes:

 Individual that is part of a single household would be displayed on Screen 2.2

Individual that is not part of any households (e.g. single person) would be displayed on Screen 2.2.1
Individual that is part of multiple households would be displayed on Screen 2.2.2

Any fellow household members for all households that an individual belongs to is also listed on the page.

Position in household can be one of the following:

- Head • Spouse
- Child
- Parent (e.g. for a household with an adult Head of Household, "Parent" would be the grandparent in that household)
- ınaı nousenon • Other

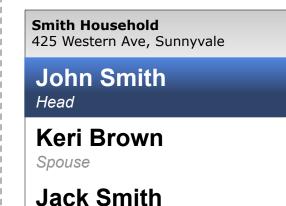
There can only be one Head of Household.

Clicking on any of the names will take the user to the **Screen 2.2**, **Screen 2.2.1** or **Screen 2.2.2** for that individual, depending on the individual him/herself according to the rules detailed above.

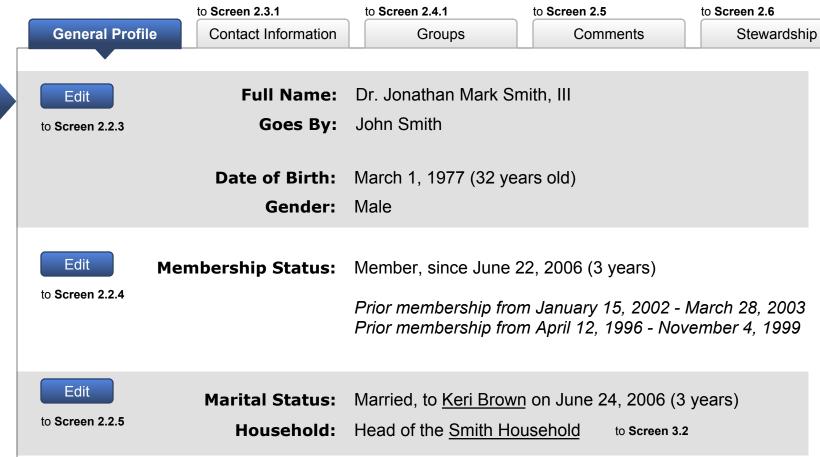
ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith



Child



408-555-1212 jsmith@gmail.com

Sunnyvale, CA 94086

Primary Contact Info: 425 Western Avenue

Record last updated on February 23, 2009 by Doris Cohen

Details

to Screen 2.3.1

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.5

ALCF Church Management System IA Membership Subsystem 2.2.1 View Individual, Gen Prof, No Household

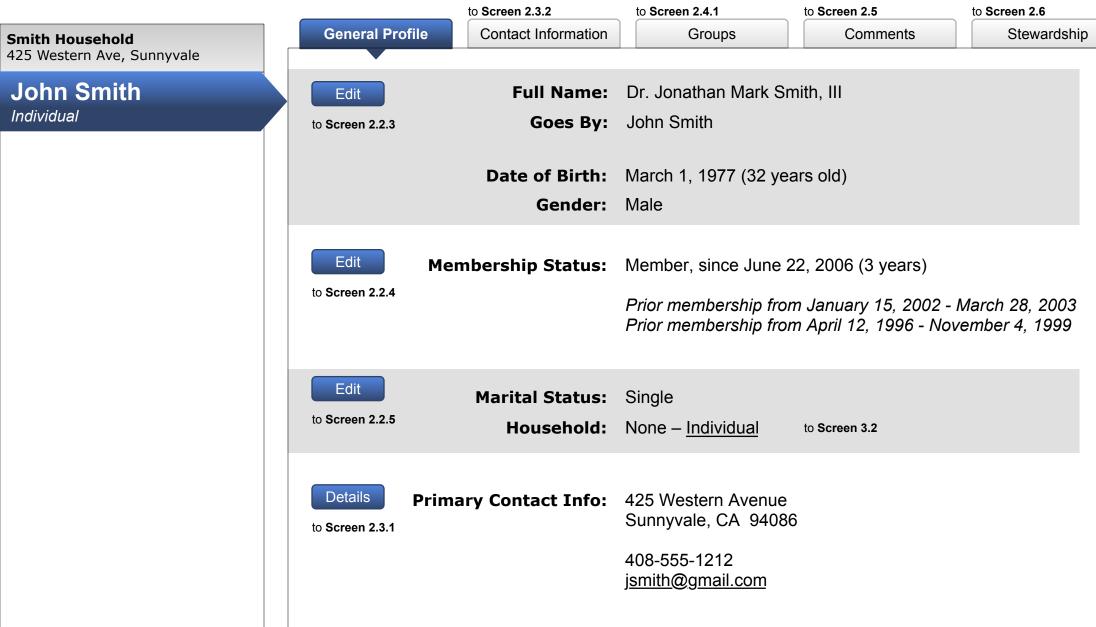
View an Individual - General Profile Tab Not Part of Any Household

See Screen 2.2 for notes.

ALCF Church Management System

Welcome, Joe User **LOG OUT GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION**

Individual: John Smith



View Change Log Record last updated on February 23, 2009 by Doris Cohen

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Edit

to Screen 2.2.5

ALCF Church Management System IA Membership Subsystem 2.2.2 View Individual, Gen Prof, Multiple Households

View an Individual - General Profile Tab Multiple Households

See Screen 2.2 for notes.

ALCF Church Management System

Edit

to Screen 2.2.5

Details

to Screen 2.3.1

GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION LOG OUT

Individual: John Smith



to Screen 2.3.1 to Screen 2.4.1 to Screen 2.5 to Screen 2.6 **General Profile** Contact Information Stewardship Groups Comments Full Name: Jonathan Mark Smith, Jr. Edit Goes By: John Smith to Screen 2.2.3 **Date of Birth:** March 1, 2007 (2 years old) **Gender:** Male Edit Membership Status: Non-Member to Screen 2.2.4

> **Households:** Child in the Smith Household to Screen 3.2

Child in the Adams Household -Child in the Westfield Household

Primary Contact Info: 425 Western Avenue Sunnyvale, CA 94086

Marital Status: Single

408-555-1212 jsmith@gmail.com

Clicking on any of the other households will refresh

Adams Household 123 Main Street, Palo Alto

Westfield Household

1852 Mary Ave, Sunnyvale

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

Edit

to Screen 2.2.6

the accordion, showing the members of that

household and the individual's role in that

household.

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ALCF Church Management System

Edit an Individual – General Information

This screen allows a user to edit an individual's General Information, including name, church status, DOB and gender.

Date of Birth allows the user to enter in either just a Month/Day combination OR a full Month/Day/Year combination.

Update will save the form data and then close the window (taking the user back to where he or she _came from).

Cancel will simply close the window (taking the user back to where he or she came from) without saving anything to the database.

ChMS Main IA.graffle Wed Jan 06 2010 Page 7 of 32

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith to Screen 2.3.1 to Screen 2.4.1 to Screen 2.6 to Screen 2.5 Ganaral Profile **Smith Household Edit Name Information** 425 Western Ave, Sunnyvale **John Smith Name Information** Head Keri Brown Dr. Title: Spouse Jonathan **First Name: Jack Smith** Middle Name or Initial: Mark Child **Last Name:** | Smith Ш Suffix: to Screen 2.2.5 John Smith Goes By: To be used for emails, mailings, etc. If left blank, "Dr. Jonathan Mark Smith, III" will be used. **Biographical Information** Date of Birth: mm/dd/yyyy **Gender:** Male Update Cancel Record last updated on February 23, 2009 by Doris Cohen View Change Log

ALCF Church Management System IA Membership Subsystem 2.2.4 Edit Individual, Membership Information

Edit an Individual – Membership Information

This screen allows a user to edit an individual's Membership Information.

Note that the actual Membership Status is calculated based on the start and end date of an individual's membership period.

Only if the Individual is currently **not** a member, a "Add a Membership Period" button will be visible. - This button will go to the dialog box on **Screen 2.2.4.1**.

Close will simply close the window (taking the user back to where he or she came from).

Clicking on any of the dates will change the dialog box to what is seen in **Screen 2.2.4.1**



Close

425 Western Ave, Sunnyvale

John Smith

Keri Brown

Jack Smith

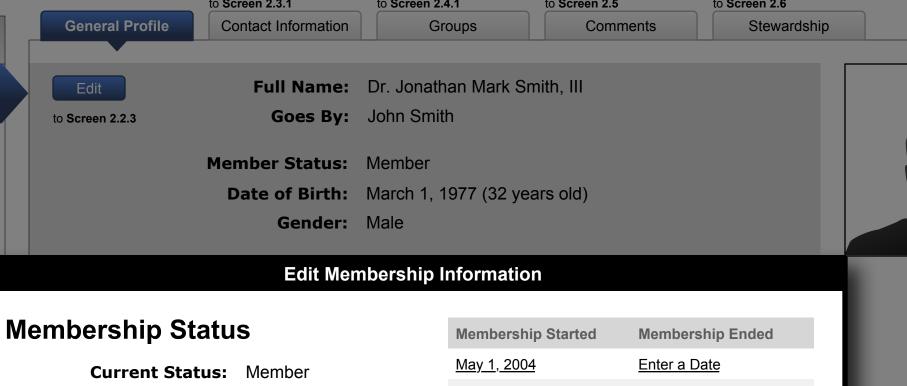
Head

Spouse

Child

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith to Screen 2.3.1 to Screen 2.4.1 to Screen 2.5 to Screen 2.6 **General Profile Contact Information** Stewardship Groups Comments **Smith Household**

Add a Membership Period



Mar 4, 1999

Jul 23, 1994

<u>Jul 23, 1994</u>

Apr 24, 2001

Sep 15, 1997

Sep 15, 1997

Record last updated on **February 23, 2009** by <u>**Doris Cohen**</u>

View Change Log

Welcome, Joe User

to Screen 2.2.5

ALCF Church Management System

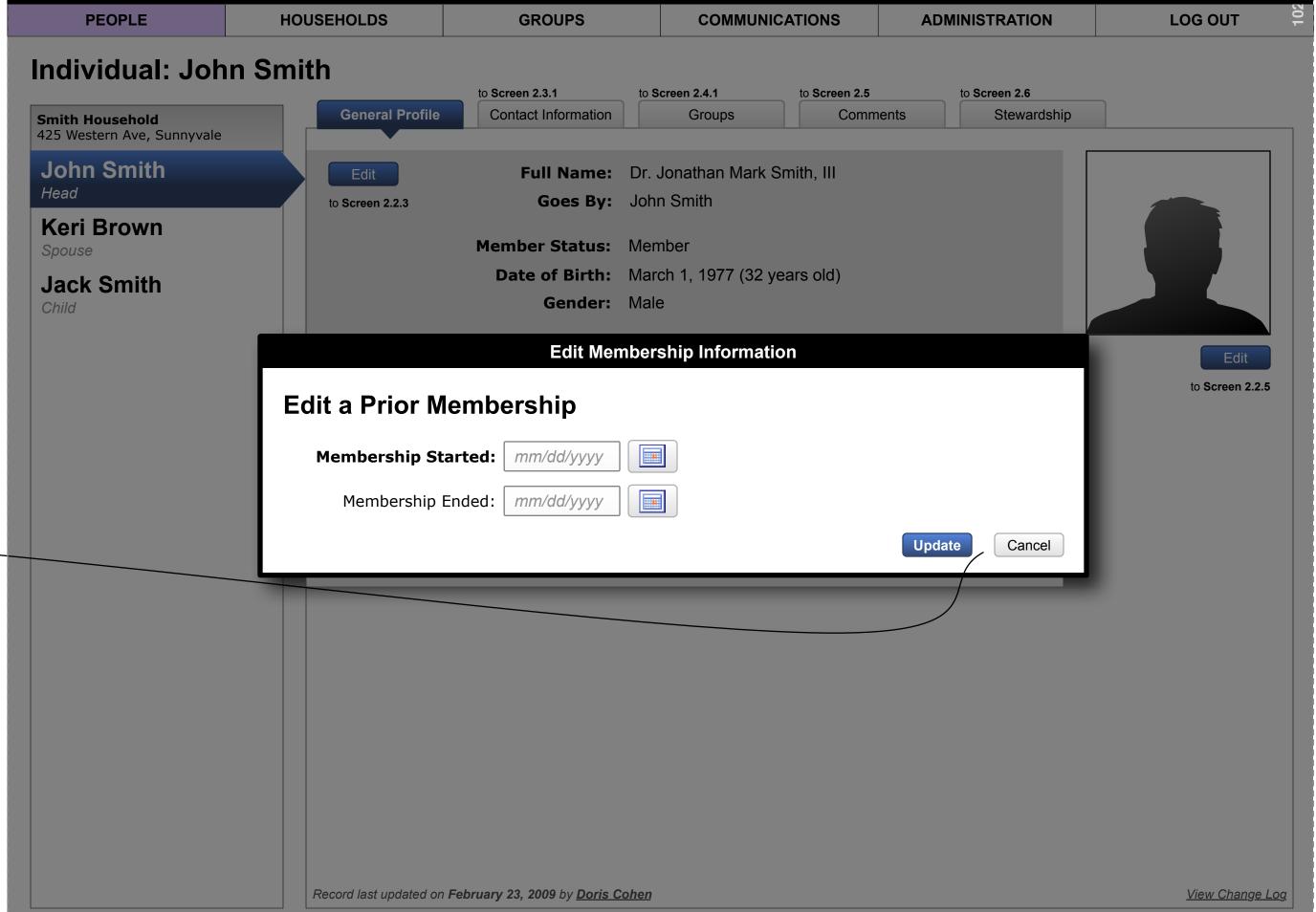
Edit an Individual – Membership Dates

This screen allows a user to edit the dates for an individual's specific membership (or in adding a new membership).

The "Start" date is required. The "End" date is only required if we are editing an old membership and there is a current, active membership in place. Otherwise, it is not required.

If we are entering a new membership or editing the current membership, the title will be updated to reflect that.

Both buttons take us back to the dialog box in **Screen 2.2.4**



ALCF Church Management System IA Membership Subsystem 2.2.5 Edit Individual, Family and Households

Edit an Individual – Family and Households

This screen allows a user to edit an individual's status in families and in households.

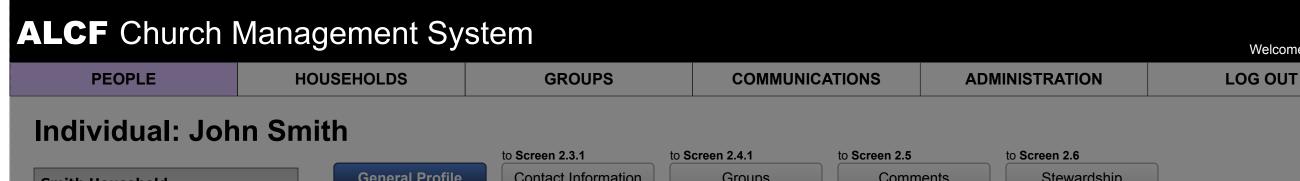
If a "Married To" name is entered, that name **must** be associated with an actual database record for

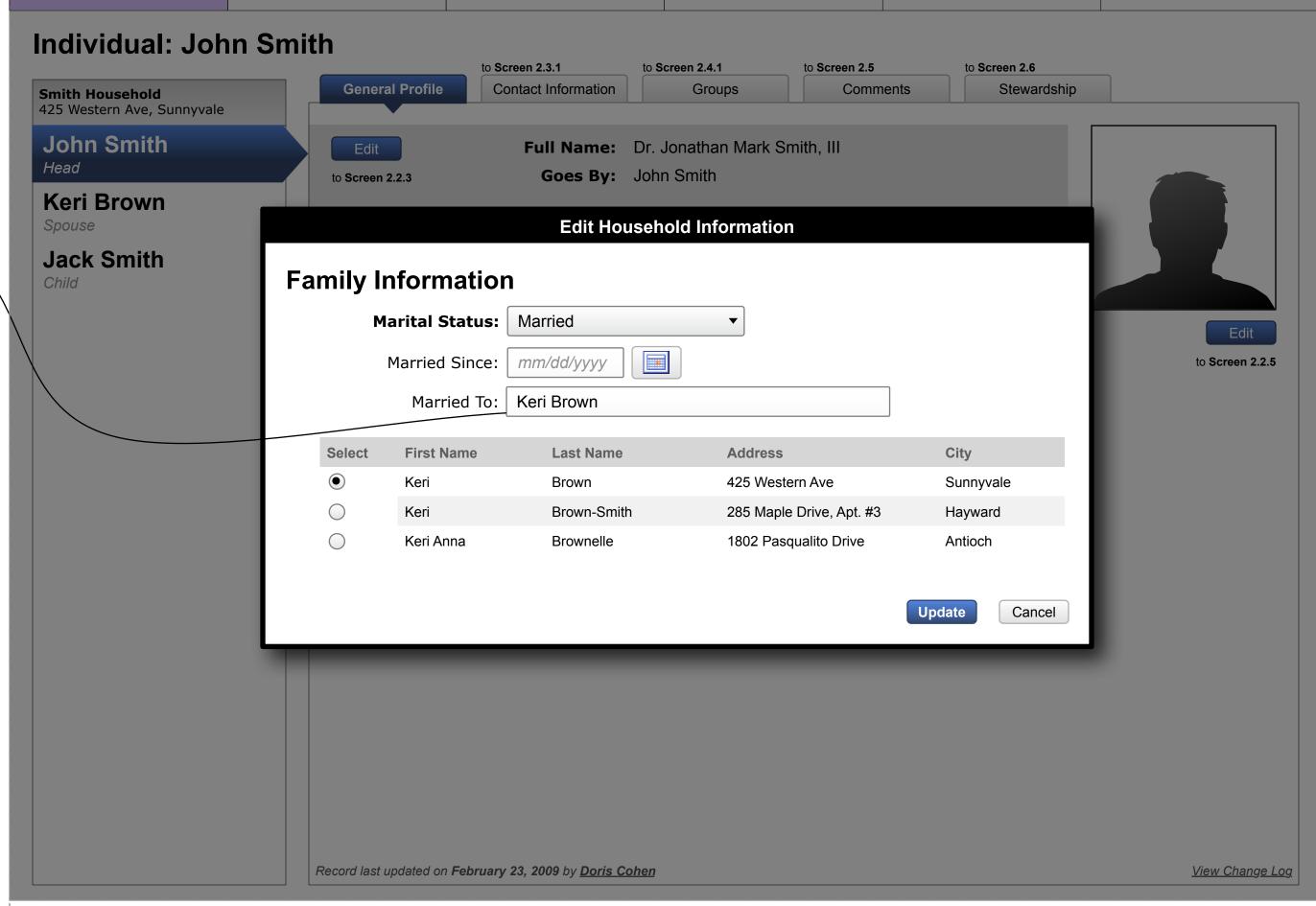
Therefore, changing the name will refresh the datagrid of individuals. If a name is entered, the individual must be selected — if none is selected, then the user will be prompted "Create a new database record for 'Keri Brown' as a new Individual?" The user must either specify "Yes" or must enter in another name to find the Individual's

If a new individual is created, then the individual will automatically be added to this person's household. If an existing individual is selected, then the user will be prompted "Merge into a single household?"

Update will save the data and then close the window (taking the user back to where he or she

Close will simply close the window (taking the user back to where he or she came from) without saving anything to the database.





Welcome, Joe User

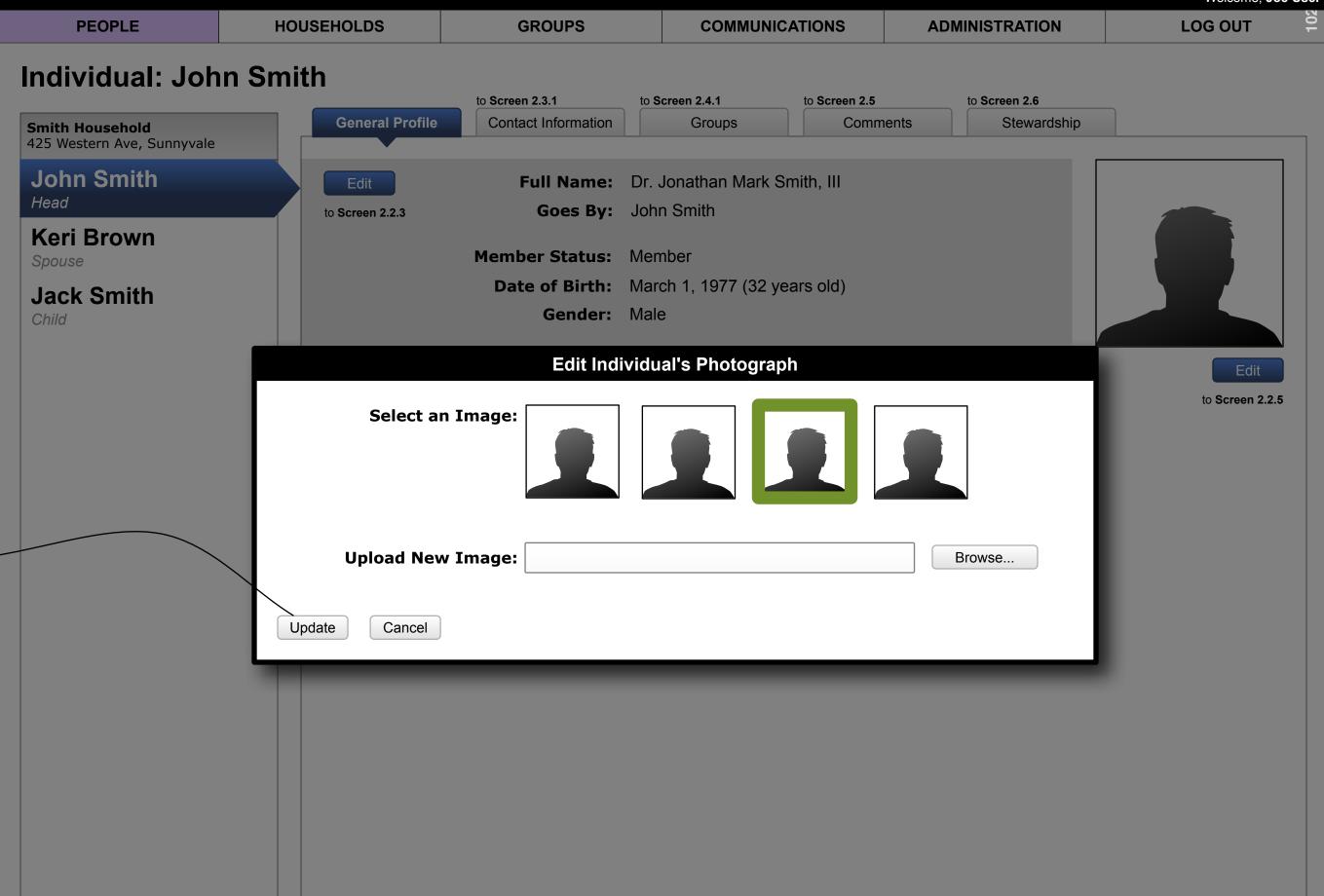
ALCF Church Management System

Edit an Individual – Photograph

This screen allows a user to edit an individual's photograph. The user can either select one from a set of previously loaded images, or the user can upload a new one.

window (taking the user back to where he or she came from) .

Update will set the new image will close the



Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF Church Management System IA Membership Subsystem 2.3.1 View an Individual, Contact Information Sinale Household

View an Individual - Contact Information Tab

This screen shows all the various contact informations for this Individual, both through his/her household (e.g. home phone and home address) as well as individual contact information (e.g. business phone and business address, email, etc.)

The Add New button is used to add a new current home address for the household — in essence, it's to be used when the household is reporting a move

Clicking on any of the addresses allows the user to edit the address information -- but it's primarily to be used to edit/fix mistakes. If a new address is to be reported (e.g. due to a move), the **Add New** button should be used instead, so that old/historic home address information can be kept in the system.

Clicking on any address or the Add New button will redirect the user to Screen 2.3.2.

Clicking on **Set as Current** will simply relabel the address as the "Current Home" address. Any "Current Home" address will be set as a Previous

For multi-person households, changes will apply to all members of the household.

Clicking on any address in "other addresses" or the Add New button will redirect the user to Screen

Address Types for "other addresses" can be:

- Current Work
- Previous Work
- Previous Home (only for individuals who are in at least one multi-person household)

Clicking on non-home telephone or the **Add New** button will redirect the user to Screen 2.3.4

Note: the only way to edit/add/remove a Home phone is to go through the "Home Address and Phone for the Smith Household" at the top of the page (e.g. through Screen 2.3.2)

Telephone Types for "Phone Information" can be:

- Home (only editable via Screen 2.3.2)
- Mobile Work
- Only one phone can be set as "Primary".

will redirect the user to Screen 2.3.5.

Clicking on email address or the **Add New** button

Clicking on any "Other Contact" or the Add New

button will redirect the user to Screen 2.3.6

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ALCF Church Management System

GROUPS

COMMUNICATIONS

ADMINISTRATION

LOG OUT

Welcome, Joe User

to Screen 2.3.2

to Screen 2.3.3

Add New

Add New

Individual: John Smith

PEOPLE

Smith Household

John Smith

Keri Brown

Jack Smith

Head

Spouse

Child

425 Western Ave, Sunnyvale

General Profile

HOUSEHOLDS

to Screen 2.2.1

Contact Info

to Screen 2.4.1

Groups

to Screen 2.5 Comments to Screen 2.6 Stewardship

Home Address and Phone for the Smith Household

Current	Address	City/State	Zip Code	Home Phone
Current Home	425 Western Ave	Sunnyvale, CA	94086	408-555-1212
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnyvale, CA	94087	408-421-1725

Other Addresses for John Smith

 Address Type	Address	City/State	Zip Code
Current Work	401 El Camino Real	Mountain View, CA	94043
Previous Home	818 Third Street	San Francisco, CA	94107
Previous Home	2811 Hillsdale Road, Apt. #412	Hillsdale, CA	94401
Previous Work	801 Canal Street, Suite #27A	Redwood City, CA	94402

Phone Numbers for John Smith Add New

 Primary?	Phone Type	Phone Number
Primary	Home	408-555-1212
[set as primary]	Home	408-281-2381
[set as primary]	Mobile	<u>415-552-9138</u>
[set as primary]	Work	650-228-1248
[set as primary]	<u>Work</u>	650-228-1200
[set as primary]	<u>Other</u>	626-291-2481

Email Addresses

Primary?

Primary

Add New **Email Address**

john smith@gmail.com

to Screen 2.3.5

[set as primary] jsmith1231@yahoo.com [set as primary] john.f.smith@company.org

Other Contact Information for John Smith

to Screen 2.3.6 Add New

Contact Type	Value
AIM Screen Name	jsmith48421
Facebook ID	<u>28410241</u>
Twitter Account Name	john smith 4 17
Yahoo! Messenger Name	jsmith1231

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

ALCF Church Management System IA Membership Subsystem 2.3.2 Edit Individual, Household Address and Phone

ALCF Church Management System

Edit an Individual - Household Address and

This dialog box allows the user to add a new or edit an existing Household home address and phone. This is to be used by all individuals, regardless of household status.

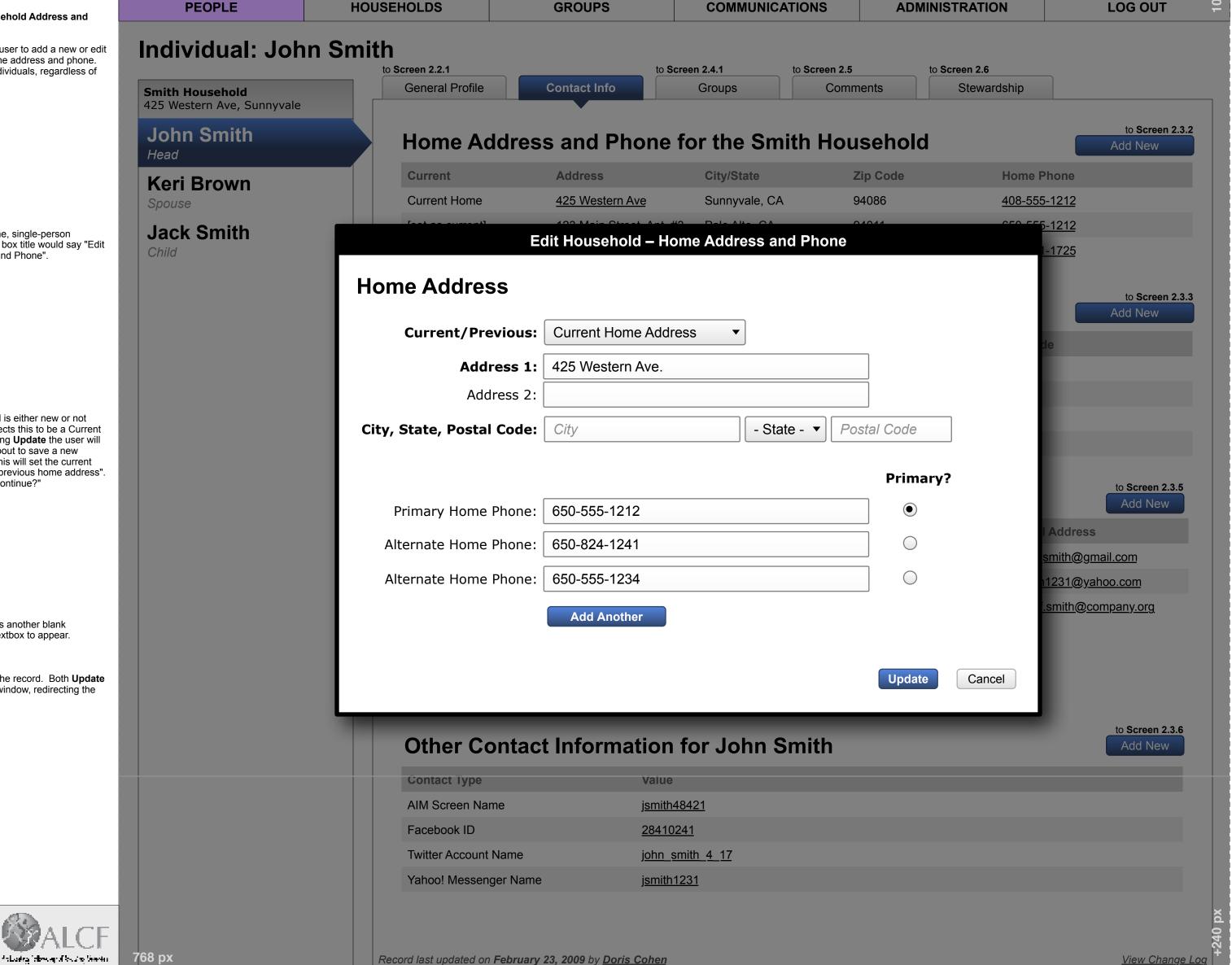
If the individual is in just one, single-person household, then the dialog box title would say "Edit Individual Home Address and Phone".

Options are: Current Home Address Previous Home Address

If this address being edited is either new or not current, and if the user selects this to be a Current Home Address, upon clicking Update the user will first be warned "You are about to save a new Current Home Address. This will set the current home address to being a "previous home address". Are you sure you want to continue?'

Clicking **Add Another** adds another blank "Alternate Home Phone" textbox to appear.

Clicking **Update** will save the record. Both **Update** and Cancel will close the window, redirecting the user back to Screen 2.3.1.



Welcome, Joe User

ChMS Main IA.graffle Wed Jan 06 2010 Page 13 of 32



ALCF Church Management System IA Membership Subsystem 2.3.3 Edit Individual, Other Address

Edit an Individual – Other Address

This dialog box allows the user to add a new or edit an existing "other" address. This is only applicable for individuals that are part of at least one multiperson household.

See Screen 2.3.1 for address type information.

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.

ALCF Church Management System Welcome, Joe User **PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith** to Screen 2.2.1 to Screen 2.4.1 to Screen 2.6 to Screen 2.5 General Profile **Contact Info** Stewardship Groups Comments **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.3.2 John Smith Home Address and Phone for the Smith Household Add New Head Current **Address** City/State **Zip Code Home Phone** Keri Brown **Current Home** 94086 425 Western Ave Sunnyvale, CA 408-555-1212 Spouse 123 Main Street, Apt. #3 Palo Alto, CA 94011 650-555-1212 [set as current] Jack Smith 1852 Mary Ave 94087 Sunnyvale, CA 408-421-1725 Child [set as current] to Screen 2.3.3 Other Addresses for John Smith Add New **Edit Other Address Address Information Address Type: Current Work** 2810 Coleman Avenue Address 1: Address 2: to Screen 2.3.5 Add New Postal Code **City, State, Postal Code:** - State - ▼ Address mith@gmail.com Update Cancel 1231@yahoo.com smith@company.org [set as primary] 650-228-1248 <u>Work</u> 650-228-1200 <u>Work</u> [set as primary] 626-291-2481 [set as primary] to Screen 2.3.6 **Other Contact Information for John Smith** Add New **Contact Type** AIM Screen Name jsmith48421 Facebook ID 28410241 **Twitter Account Name** john smith 4 17 Yahoo! Messenger Name jsmith1231

View Change Log

Record last updated on February 23, 2009 by Doris Cohen

ChMS Main IA.graffle Wed Jan 06 2010 Page 14 of 32



768 px

ALCF Church Management System IA Membership Subsystem 2.3.4 Edit Individual, Phone Number

Edit an Individual – Phone Number

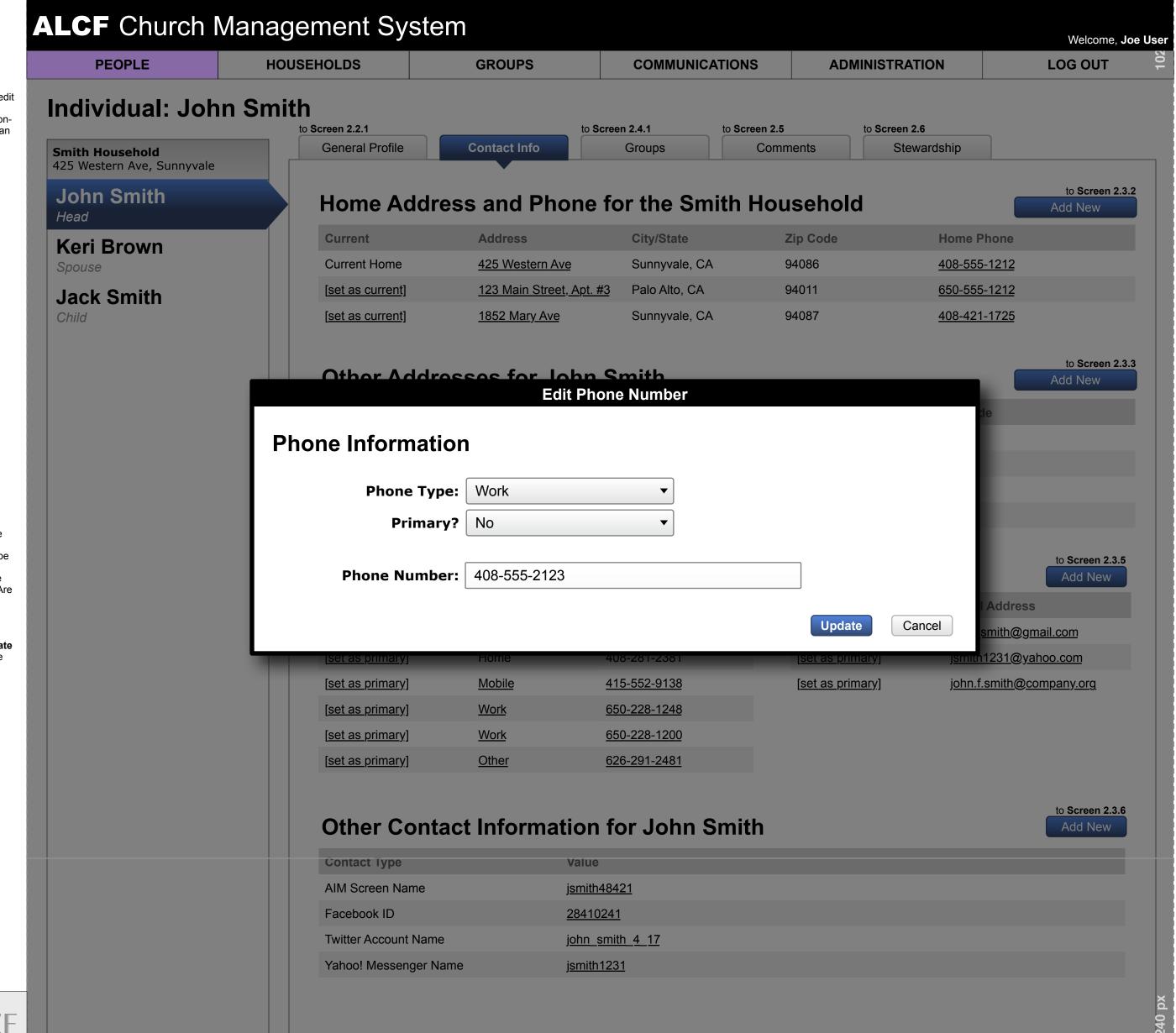
This dialog box allows the user to add a new or edit an existing phone number assigned to this individual. Note that this is only applicable for nonhome phone numbers. Home phone numbers can only be edited through **Screen 2.3.2**.

This dialog box is to be used for all individuals, regardless of household status.

See Screen 2.3.1 for phone type information.

If this phone being edited is either new or not the Primary, and if the user selects this to be the Primary, upon clicking **Update** the user will first be warned "You are about to make this the Primary phone number for this individual. This will cause the current primary to no longer being primary. Are you sure you want to continue?"

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



View Change Log

Record last updated on February 23, 2009 by Doris Cohen



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768 px

ALCF Church Management System IA Membership Subsystem 2.3.5 Edit Individual, Email

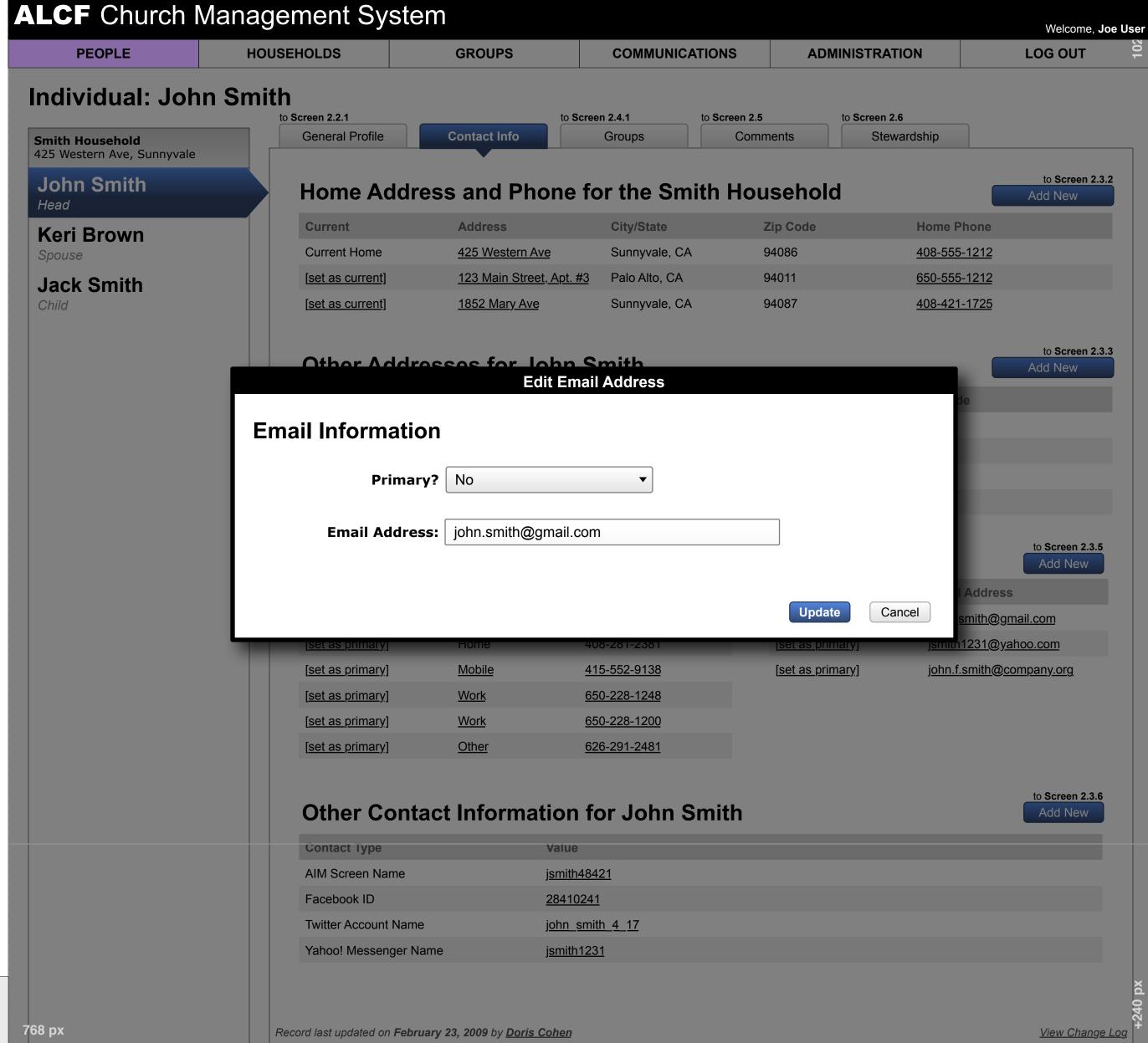
Edit an Individual - Email

This dialog box allows the user to add a new or edit an existing email addresses assigned to this individual.

This dialog box is to be used for all individuals, regardless of household status.

If the email being edited is either new or not the Primary, and if the user selects this to be the Primary, upon clicking **Update** the user will first be warned "You are about to make this the Primary email address for this individual. This will cause the current primary to no longer being primary. Are you sure you want to continue?"

Clicking **Update** will save the record. Both **Update** and **Cancel** will close the window, redirecting the user back to **Screen 2.3.1**.



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ALCF Church Management System IA Membership Subsystem 2.3.6 Edit Individual, Other Contact

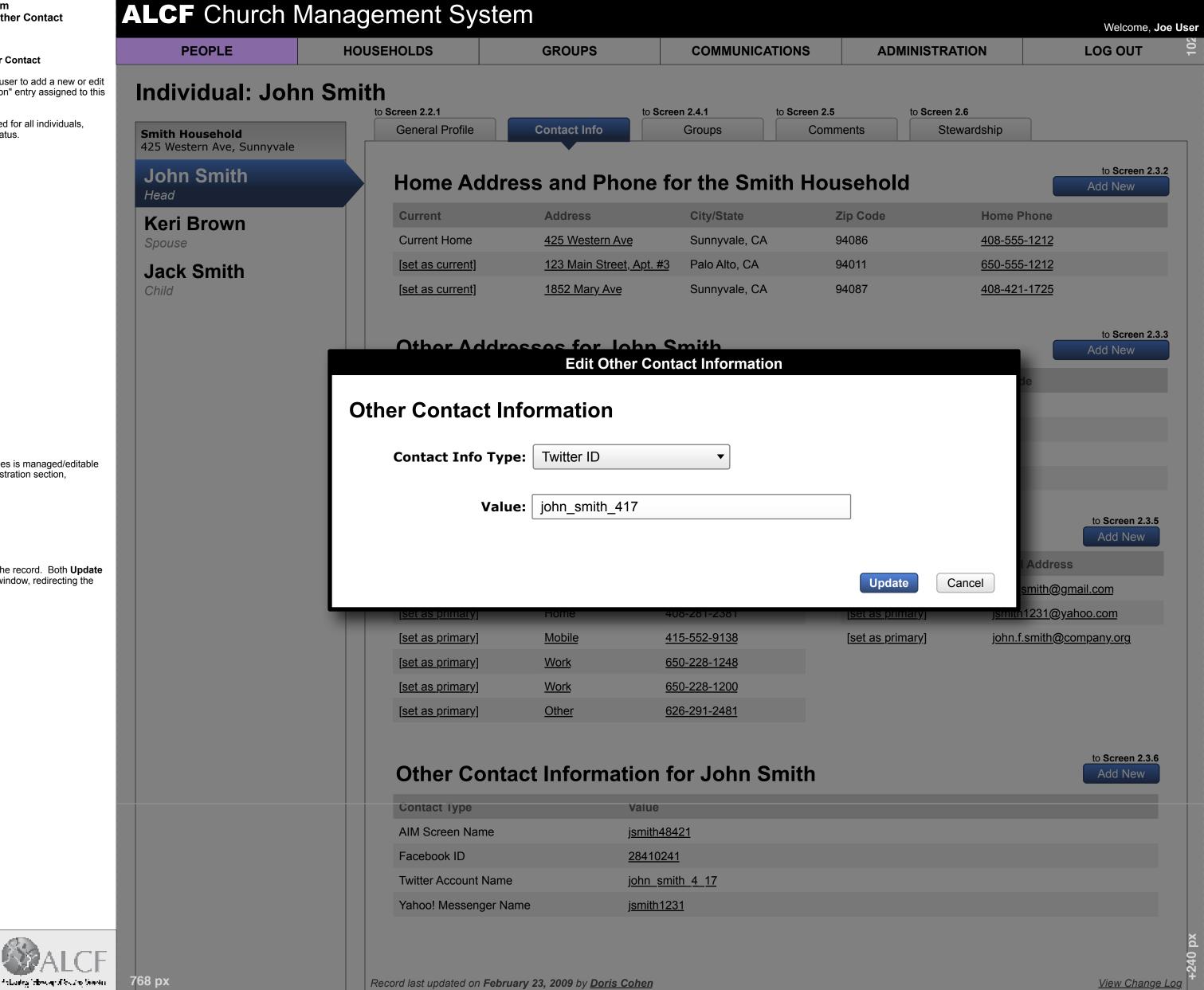
Edit an Individual - Other Contact

This dialog box allows the user to add a new or edit an "other contact information" entry assigned to this

This dialog box is to be used for all individuals, regardless of household status.

The list of Contact Info Types is managed/editable by the Admin in the Administration section, Screen ?.?.?.

Clicking Update will save the record. Both Update and Cancel will close the window, redirecting the user back to Screen 2.3.1.



ChMS Main IA.graffle Wed Jan 06 2010 Page 17 of 32



ALCF Church Management System IA Membership Subsystem 2.4.1 View an Individual, Groups

View an Individual – Groups

This screen shows all the ministry groups and communication lists that this individual is a participant of.

Clicking on any of the ministry names will allow the user to edit role(s) and date(s) of involvement for this individual with that ministry.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS LOG OUT COMMUNICATIONS ADMINISTRATION

Groups

Individual: John Smith



Keri Brown

Spouse

Jack Smith

Child

Ministry Participation

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

Ministry	Role	Dates of Involvement
Safari Kids	Volunteer	April 2009 - Present May 2007 - September 2008
Growth Groups > Mountain View 2	Participant	January 4, 2004 - Present
Real World Young Adults	Small Group Leader	September 24, 2007 - May 2008

to Screen 2.5

Comments

to Screen 2.6

Stewardship

Communication Lists

to Screen 2.4.3 Add New

Unsubscribe?	Communication List	List Name
<u>Unsubscribe</u>	Dessert Night Planning Meeting	dessert_night_planning@groups.alcf.net
<u>Unsubscribe</u>	Social Fun Campaign	social_fun@groups.alcf.net
<u>Unsubscribe</u>	IT Team Developers	it_team_devs@groups.alcf.net

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768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Welcome, Joe User

to Screen 2.4.2

Add New

ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Ministry Participation

Edit Individual — Ministry Participation

This dialog box is to be used when editing an existing ministry participation or in creating a new

In order to better manage ministries and subministries, ministry drop-downs could be

Roles can include an "other", where a textbox will appear and a new role can be entered.

Clicking on any date will show a date-textbox to

Add a Membership Period appears only if there is no current participation. When clicked, a new row will appear where the dates can be clicked to edit.



PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT Individual: John Smith to Screen 2.2.1 to Screen 2.3.1 to Screen 2.5 to Screen 2.6 General Profile Contact Info Groups Stewardship Comments **Smith Household** 425 Western Ave, Sunnyvale to Screen 2.4.2 **John Smith Ministry Participation** Add New Head **Ministry** Role **Dates of Involvement** Keri Brown Spouse April 2009 - Present Volunteer Safari Kids May 2007 - September 2008 **Jack Smith** Growth Groups > Mountain View 2 Participant January 4, 2004 - Present Child Real World Young Adults Small Group Leader September 24, 2007 - May 2008 **Edit Ministry Participation Participation Started Participation Ended Growth Groups** Ministry: Enter a Date May 1, 2004 **Sub-Ministry:** Mountain View 2 Mar 4, 1999 Apr 24, 2001 Role: Participant Jul 23, 1994 <u>Sep 15, 1997</u> Jul 23, 1994 Sep 15, 1997 Save Cancel Add a Membership Period

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Welcome, Joe User

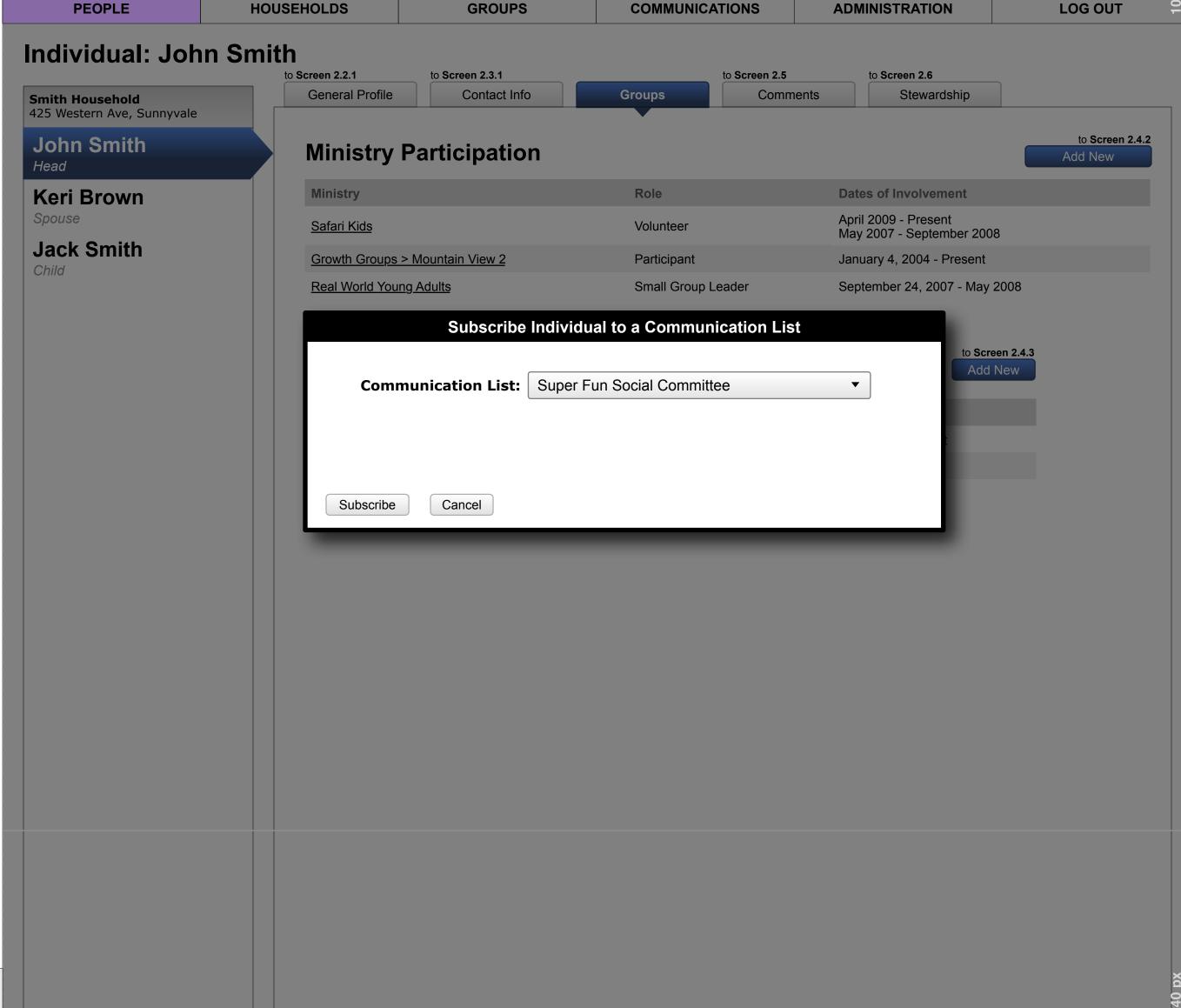
ALCF Church Management System IA Membership Subsystem 2.4.2 Edit Individual, Communication List

Edit Individual — Communication List

This dialog box is to be used to subscribe this individual to a Communication List (e.g. email list).

ALCF Church Management System

Welcome, Joe User



View Change Log

Record last updated on February 23, 2009 by Doris Cohen

ChMS Main IA.graffle Wed Jan 06 2010 Page 20 of 32



768 px

to Screen 2.5.1

Add New

This screen shows all the staff, general and pastor comments for this individual.

There are three levels of comment privacy: Confidential – can only be viewed by pastors and executive staff members

 Staff Comments – can be viewed by any ALCF staff member • General Comments – can be viewed by anyone

with access to the ChMS, including lay ministry

"Posted By" filter will only list the names of users who have posted a comment on this individual.

"Comment Type" filter will be any of the levels of comment privacy that this user is allowed to see.

"Edit" is only available for comments that the user has actually entered — no one is able to edit a comment that they didn't enter. Clicking on "Edit" brings up a similar dialog box to that in Screen

"Hide" will hide the comment for all users. It can reappear if the user chooses to "include hidden comments" and then "unhides" the comment.

ALCF Church Management System

GROUPS PEOPLE HOUSEHOLDS COMMUNICATIONS ADMINISTRATION LOG OUT

to Screen 2.4.1

Groups

- View All -

Individual: John Smith



Keri Brown

Smith Household

Spouse

Jack Smith

Child

	Comm	ents a	and N	lotes
--	------	--------	-------	-------

to Screen 2.3.1

Contact Info

to Screen 2.2.1

General Profile

- View All -

Filter by Posted By: **Filter by Comment Type:**

Filter by Hidden State:

quis metus. Mauris lectus. Quisque erat nunc.

Stewardship

to Screen 2.6

Comments

✓ Include HIdden Comments

Edit / Hide	Posted By	DATE v	Туре	Comment
[Hide]	Ronalda Lee	2001-02-21	Staff	In hac habitasse platea dictumst. Nullam commodo arcu sit amet turpis. In hac habitasse platea dictumst. Proin sem neque, adipiscing vel, commodo et, tempus vitae, purus. Aliquam vitae libero. Phasellus quis urna quis turpis.
[Hide]	Ramon O'Reilly	2001-09-12	Confidential	Ut euismod, urna ac rhoncus hendrerit, erat metus blandit nunc, vel molestie felis massa eget turpis. Suspendisse non elit.
[Hide]	Diane Bailey	2002-05-04	Staff	Suspendisse potenti. Maecenas sed urna. Morbi sagittis. Integer pellentesque lacus ut nibh. Integer ut libero. Praesent interdum, turpis quis faucibus sagittis.
[Hide]	Rudolph McLaughlin	2003-07-31	Staff	Pellentesque in mauris. Ut euismod, urna ac rhoncus hendrerit, erat metus.
[Edit] [Hide]	Lauren Nelson	2004-02-29	Confidential	Fusce iaculis, urna sit amet hendrerit imperdiet, erat nulla placerat metus, ut pretium sapien lectus sed urna. Pellentesque eu sem. Suspendisse potenti. Praesent.
[Hide]	Hayes Griffin	2004-09-26	General	Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Fusce fringilla. Nunc posuere felis id nisi. Vestibulum.
[Hide]	Connie Jenkins	2005-09-07	Confidential	Nam id enim. Suspendisse condimentum. Praesent in ipsum eu massa tempus euismod. Mauris pulvinar. Suspendisse potenti. Sed sollicitudin, quam ut pulvinar posuere, ipsum.
[<u>Unhide</u>]	Ilana Doyle	2007-03-04	Confidential	Ut et risus quis justo iaculis vestibulum. Ut sapien eros, gravida nec, placerat et, luctus eu, libero. Mauris.
[Hide]	Aspasia Power	2007-03-11	Staff	Integer mollis. Aliquam erat volutpat. Vivamus eget magna. Aenean blandit. Fusce nisi arcu, rutrum a, ultrices ac, convallis quis, nisl. Aliquam ultricies accumsan urna. Phasellus varius dolor. Vestibulum mollis, sapien et varius hendrerit, nisl.
[Unhide]	Tavy Smith	2008-08-03	General	In porta rhoncus libero. Mauris tristique lacinia tellus. Maecenas egestas, mauris sit amet suscipit pretium, massa lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur

ChMS Main IA.graffle Wed Jan 06 2010 Page 21 of 32

768 px

Record last updated on February 23, 2009 by Doris Cohen

View Change Log

Edit an Individual - Comments

This dialog box allows the user to create a new comment, or to edit one of the user's existing

A user can only edit his/her own comment.

Comment Types dropdown is limited to the comment types that the user is allowed to see. See Screen 2.5 for more information on **Comment** Types.

After hitting Save or Cancel, the user is taken back

ALCF Church Management System **PEOPLE HOUSEHOLDS**

Smith Household

John Smith

Keri Brown

Jack Smith

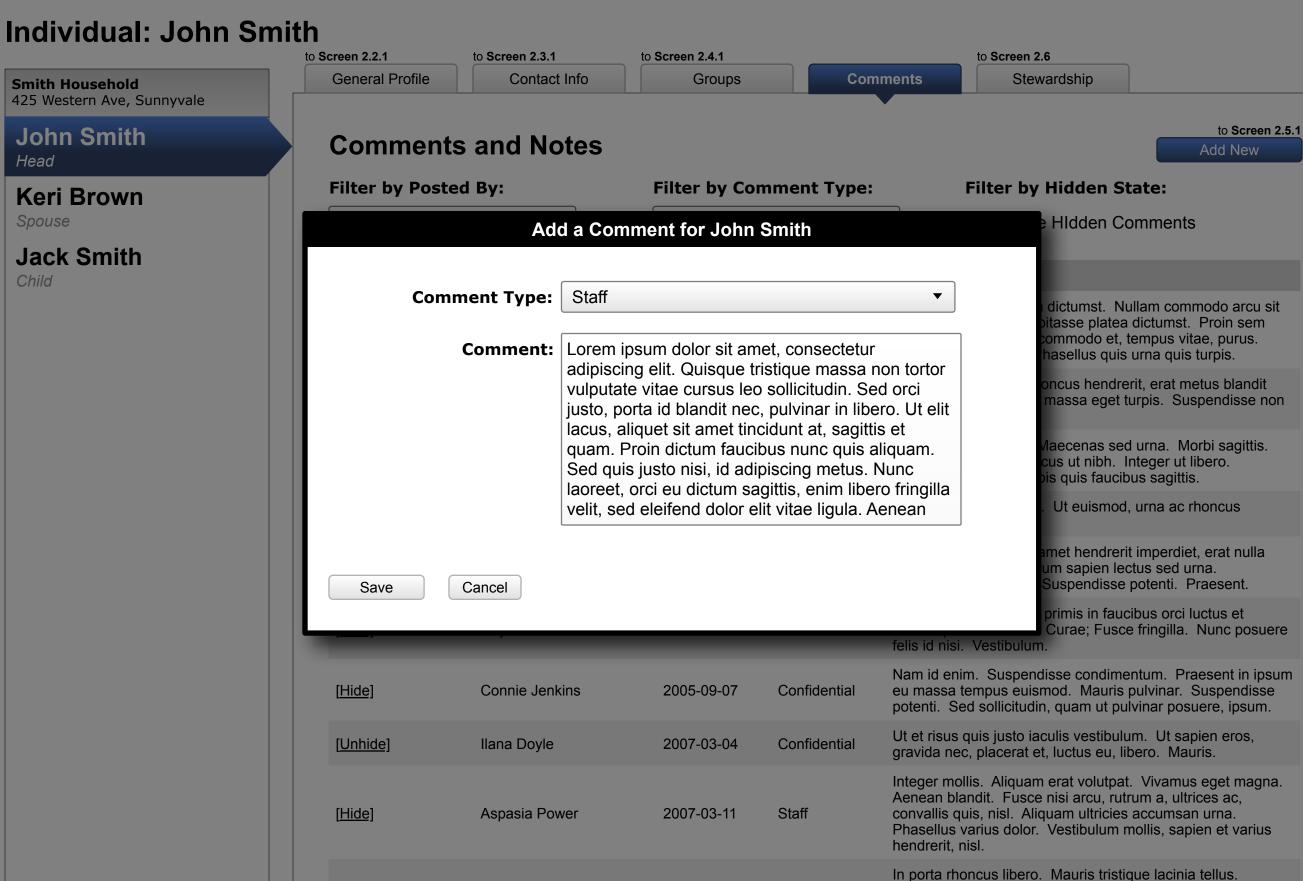
Head

Spouse

Child

425 Western Ave, Sunnyvale

Welcome, Joe User **GROUPS COMMUNICATIONS LOG OUT ADMINISTRATION**



2008-08-03

General



Tavy Smith

[Unhide]

Maecenas egestas, mauris sit amet suscipit pretium, massa

lacus facilisis eros, eu sodales dui eros eu nisl. Curabitur

quis metus. Mauris lectus. Quisque erat nunc.

HOUSEHOLDS

to Screen 2.2.1

GROUPS

to Screen 2.3.1

all household members

ADMINISTRATION

LOG OUT

View an Individual - Stewardship

The entire Stewardship section (e.g. everything under 2.6.x including this 2.6 screen) can only be viewed by folks in the Stewardship team. There will be a special permission that is required in order for a user to be able to view anything in this section.

Every stewardship item must be associated with one and only one person. Reports (e.g. reports that can be mailed out to the individual) can be run against individuals or against households.

Date Range includes things like "View All", "Year to Date", "Month to Date", etc. See any program like Quicken for an example of date ranges to use.

Funds can be one of the following:

- Tithes/Offering
- Building Fund
- Specific to a Given Ministry
- Scholarship to a Given Event
- Support for a given individual or cause

List of specific ministries, events, and individuals or causes can be edited by anyone in the Stewardship committee in the Administration section. See Screen ?.? for more information.

In addition to the set list above, individual campaigns and additional funds can be created by anyone in the Stewardship Committee. Examples of additional funds include: Imagine Campaign

Transaction Types can be one of the following:

- Cash
- Check (needs a check #) Credit Card (Online)
- Credit Card (Recurring)
- Corporate Match (Pre-Taxed)
- Corporate Match (Post-Taxed) Stock Donation
- Car/Automobile

Note that any pre-tax Corporate Match contribution should NOT be calculated in receipts used for taxdeductible purposes.

All transactions also have an internal "notes" or "comments" type of field, which can be edited and viewed only by folks in the Stewardship committee.

Clicking on any Check # will pop up a graphic with the check image. See dialog box in **Screen 2.6.2** for more information.

Clicking on any Date will pop up a dialog box similar to that in Screen 2.6.1 allowing the user to edit or even delete the transaction.

Questions:

 Do we need to deal with Anonymous contributions? How are those to be handled? Do we ever need to "flag" a given transaction (to be looked into at a later time)?

ChMS Main IA.graffle

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Individual: John Smith

Smith Household 425 Western Ave, Sunnyvale

John Smith Head

PEOPLE

Keri Brown

Spouse

Jack Smith

Child

General Profile	Contact Info	Groups	Comments	Stewards	hip	
Stewardsh	ip		report of the list of transaction / given the specified filtering criter		Report	to Screen 2.6.1 Add New
Date Range:	Filter b	y Fund:	Filter by Transacti	on Type:	View Enti	re Household:
- View All -	- View	AII - ▼	- View All -	•	✓ View conf	tributions by

to Screen 2.5

COMMUNICATIONS

to Screen 2.4.1

DATE v	Contributor	Fund	Transaction	Contributed	Cleared
2001-03-22	Jack Smith	Ministry > Student Ministries	Credit Card (Online)	\$31.01	\$25.00
2001-08-24	Jack Smith	Ministry > Student Ministries	Corp. Match (Pre-Tax)	\$333.89	\$333.89
<u>2001-11-10</u>	John Smith	Ministry > Safari Kids	Cash	\$976.54	\$976.54
2001-12-29	John Smith	Tithes/Offering	Credit Card (Online)	\$995.02	\$945.28
<u>2002-11-16</u>	John Smith	Ministry > Student Ministries	Check <u>#2141</u>	\$763.91	\$763.91
2003-08-28	Keri Brown	Ministry > Benevolence	Corp. Match (Pre-Tax)	\$409.72	\$409.72
<u>2003-09-04</u>	Jack Smith	Ministry > Benevolence	Cash	\$260.54	\$260.54
2003-11-24	Jack Smith	Imagine Campaign	Cash	\$994.58	\$994.58
2004-07-29	Keri Brown	Ministry > Safari Kids	Corp. Match (Post-Tax)	\$802.85	\$802.85
2004-08-13	Keri Brown	Imagine Campaign	Check <u>#2251</u>	\$307.21	\$307.21
2004-10-07	Jack Smith	Ministry > Safari Kids	Check <u>#2376</u>	\$555.35	\$555.35
2005-10-20	John Smith	Scholarship > 2010 Marriage Retreat	Credit Card (Online)	\$268.17	\$244.25
2005-10-23	Jack Smith	Scholarship > 2010 Marriage Retreat	Check <u>#2399</u>	\$742.62	\$742.62
2005-12-13	John Smith	Ministry > Benevolence	Corp. Match (Pre-Tax)	\$778.54	\$778.54
2006-01-13	Keri Brown	Scholarship > 2010 Marriage Retreat	Credit Card (Online)	\$274.73	\$251.23
2006-09-22	Keri Brown	Support > Keith Blackford	Check <u>#2462</u>	\$733.11	\$733.11
2008-03-07	Keri Brown	Ministry > Safari Kids	Stock Donation	\$473.41	\$473.41
2008-11-28	Jack Smith	Scholarship > 2009 Ninja Camp	Check <u>#2498</u>	\$982.38	\$982.38
2008-12-29	Keri Brown	Ministry > Student Ministries	Corp. Match (Pre-Tax)	\$502.22	\$502.22
2009-03-29	Jack Smith	Tithes/Offering	Credit Card (Online)	\$270.53	\$250.23

768 px

ALCF Church Management System IA Membership Subsystem 2.6.1 Edit Individual, Stewardship

Edit Individual – Stewardship

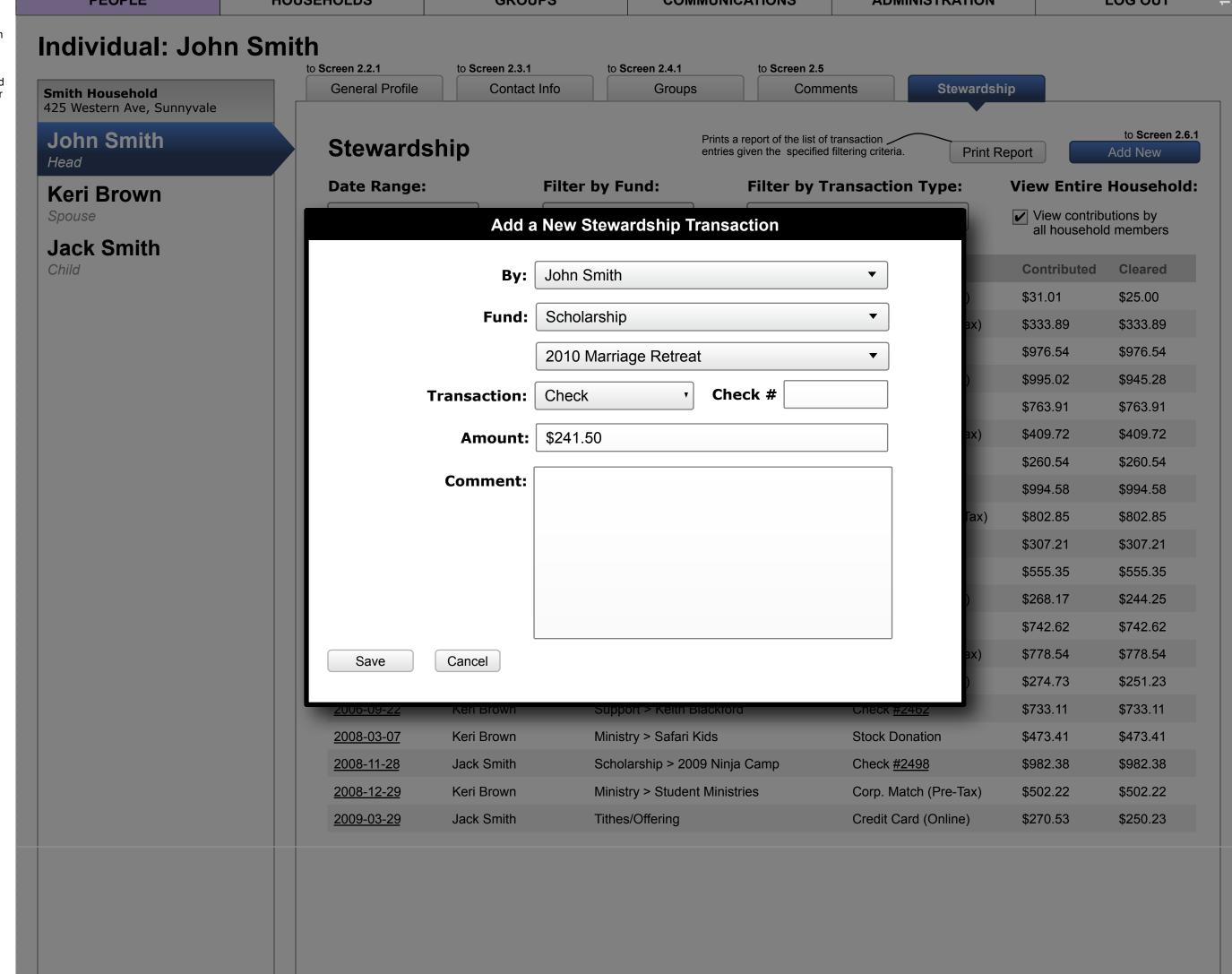
This dialog box allows the user to view, edit or even delete a transaction.

Note that transactions are never actually deleted from the database. A transaction is simply removed from view, and a transaction log will record the user that deleted the transaction.

Funds that have a "sub fund" type (e.g. ministry, scholarship and support) will be required to have the sub fund type specified in a second drop down.

ALCF Church Management System

Welcome, Joe User
PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT



View Change Log

Record last updated on February 23, 2009 by Doris Cohen



Note that roommates (e.g. two friends living in the same apartment) do NOT constitute a single household. If both roommates are single, they would both be in two distinct one-person households that happen to have the same address

Households must have at least one individual in it.

Individuals must be part of at least one household (even if it is a single-individual household).

Individuals may be part of multiple households.

Link will take the user to **Screen 3.2** for that household.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Search for a Household

Search / Filter List Name Address - View All Cities - ▼ Refresh List refreshes table below

Results: Viewing households 1-20 of	of 2141.			Previous Next
HOUSEHOLD NAME V	Address	City	Members	
Allen Household	46618 Port Hueneme Way	Rosemead	Bird Allen, Christy Allen	
Anderson Household	44619 Burbank Dr.	Lynwood	Silvester Anderson, Tonie Anderson	
Bell Household	22326 Kerman Road	Vista	Shirl Bell, Idaline Bell	
Bell Household	52680 Gilroy Road	Mendota	Adalia Bell, Narda Bell, Halsey Bell, Ivar Bell	
Brennan Household	37987 Redding Ave.	El Cajon	Cyril Brennan, Roderick Brennan	
Browne Household	37956 Firebaugh Ave.	Culver City	Delia Browne, Bram Browne, Cleopatra Browne, Berton Browne	
Bryant Household	4005 Lakeport Dr.	Laguna Niguel	Bethany Bryant, Dominique Bryant, Pierce Bryant, Jessy Bryant	
Burke - Individual	52229 Moraga Road	Fremont	Sandy Burke	
Burns Household	82919 Torrance Blvd.	San Juan Bautista	Alston Burns, Jody Burns, Oxford Burns	
Byrne Household	55209 Aliso Viejo Ave.	Yucaipa	Laurina Byrne, Aiken Byrne	
Campbell - Individual	27444 Point Arena Terrace	lone	Hester Campbell	
Campbell Household	27772 San Carlos St.	Sausalito	Sylvana Campbell, Kacey Campbell, Benny Campbell, Elin Campbell	
Carter Household	97011 Lakeport Road	Maywood	Daphne Carter, Alexandrina Carter, Hennie Carter	
Chan Household	29180 Ventura St.	Pleasanton	Shaw Chan, Oscar Chan	
Chang Household	27041 Alameda Way	National City	Davy Chang, Aloysia Chang, Romeo Chang	
Clarke Household	12844 Vista St.	Maywood	Becky Clarke, Lucie Clarke, Morrie Clarke	
Clarke Household	86680 Cupertino Way	Bellflower	Ginnie Clarke, Lorelei Clarke, Valora Clarke	
Coleman - Individual	42923 Suisun City Terrace	Rancho Palos Verdes	Mikey Coleman	
Coleman Household	24834 Fowler Blvd.	Morro Bay	Kilby Coleman, Mordy Coleman	
Collins Household	98748 Paso Robles Way	Lodi	Karsten Collins, Milburn Collins	
Cullen Household	32401 Rancho Mirage Terrace	Atwater	Leanne Cullen, Merlin Cullen, Gregg Cullen	
Cunningham Household	54818 Colma Terrace	Ontario	Samson Cunningham, Vernon Cunningham, Aggie Cunningham	



Welcome, Joe User

within rules for a household.

Screen 2.2 for that individual.

PEOPLE

HOUSEHOLDS

GROUPS

COMMUNICATIONS

ADMINISTRATION

to Screen 3.3

to Screen 3.4

Edit Roles

LOG OUT

This notice only appears if this household was recently split with another. The link will redirect the user to this same screen for that household.

Clicking on any individual will take the user to

Interactions to manage home address and phone information matches the interactions from **Screen** 2.3.1

Household: Smith Household

Note: This household was recently split with the **Brown Household** by Doris Cohen on February 23, 2009.

Household Members

Role	Name	Email	Phone
Head	- <u>John Smith</u>	jsmith@gmail.com	415-555-1212
Spouse	Keri Brown	kbrown@gmail.com	415-555-2211
Child	Jack Smith		

Home Address and Phone for the Smith Household

Current	Address	City/State	Zip Code	Home Phone
Current Home	425 Western Ave	Sunnyvale, CA	94086	<u>408-555-1212</u>
[set as current]	123 Main Street, Apt. #3	Palo Alto, CA	94011	650-555-1212
[set as current]	1852 Mary Ave	Sunnvvale, CA	94087	408-421-1725

to Screen 3.5
Add an Individual

to Screen 3.6

Remove an Individual

to Screen 3.7

Split this Household

to Screen 3.8

Merge Households

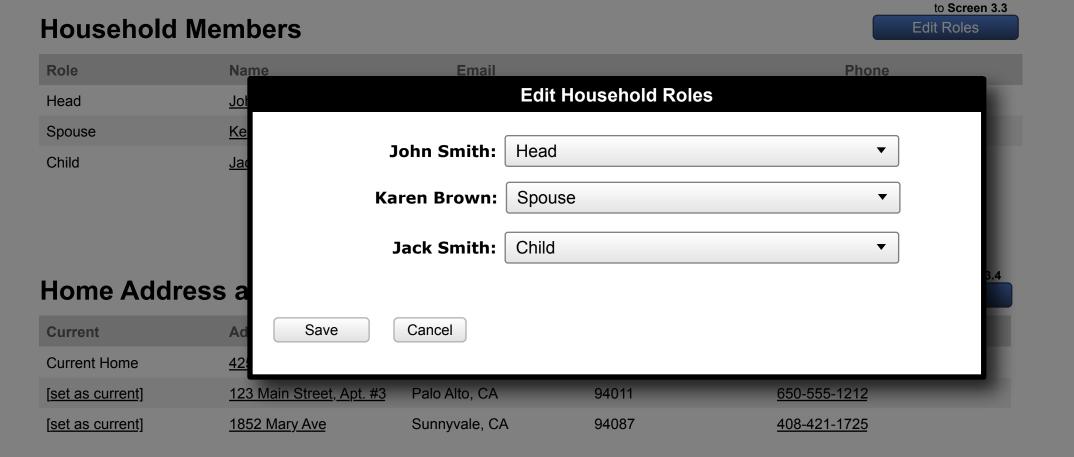
ALCF Church Management System

HOUSEHOLDS

Welcome, Joe User **LOG OUT COMMUNICATIONS ADMINISTRATION**

Household: Smith Household

PEOPLE



GROUPS

to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8 Merge Households

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ALCF Church Management System IA Membership Subsystem 3.4 Edit Household, Address and Phone

Edit Household - Address and Phone

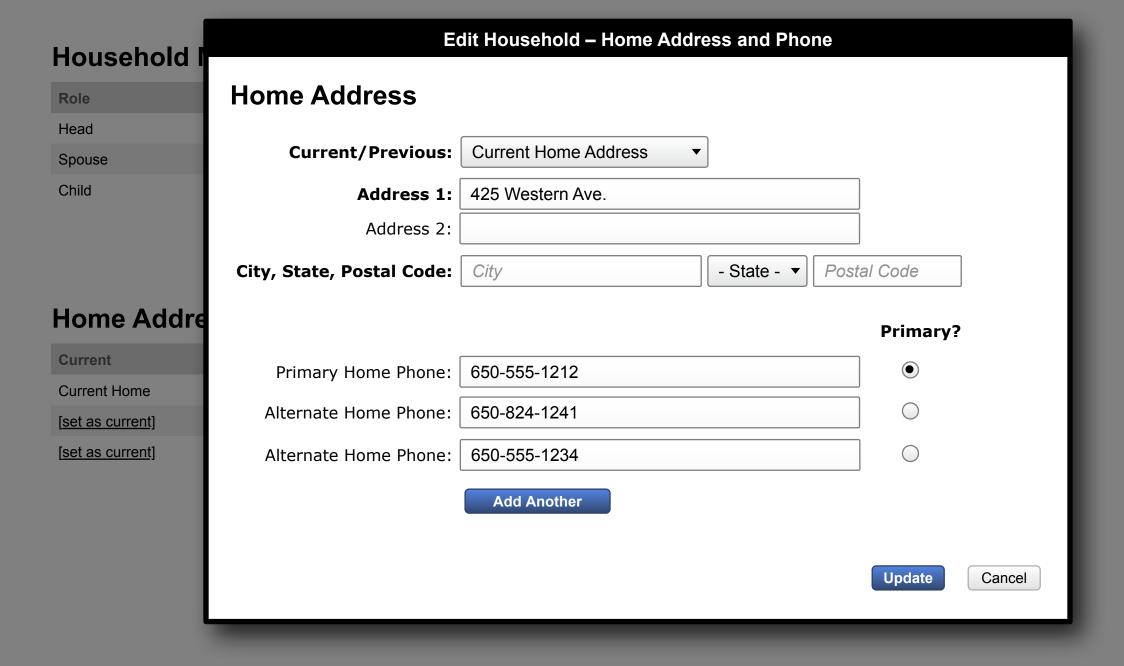
The interactions here match the interactions from

ALCF Church Management System

Welcome, Joe User

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT

Household: Smith Household



to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8 Merge Households

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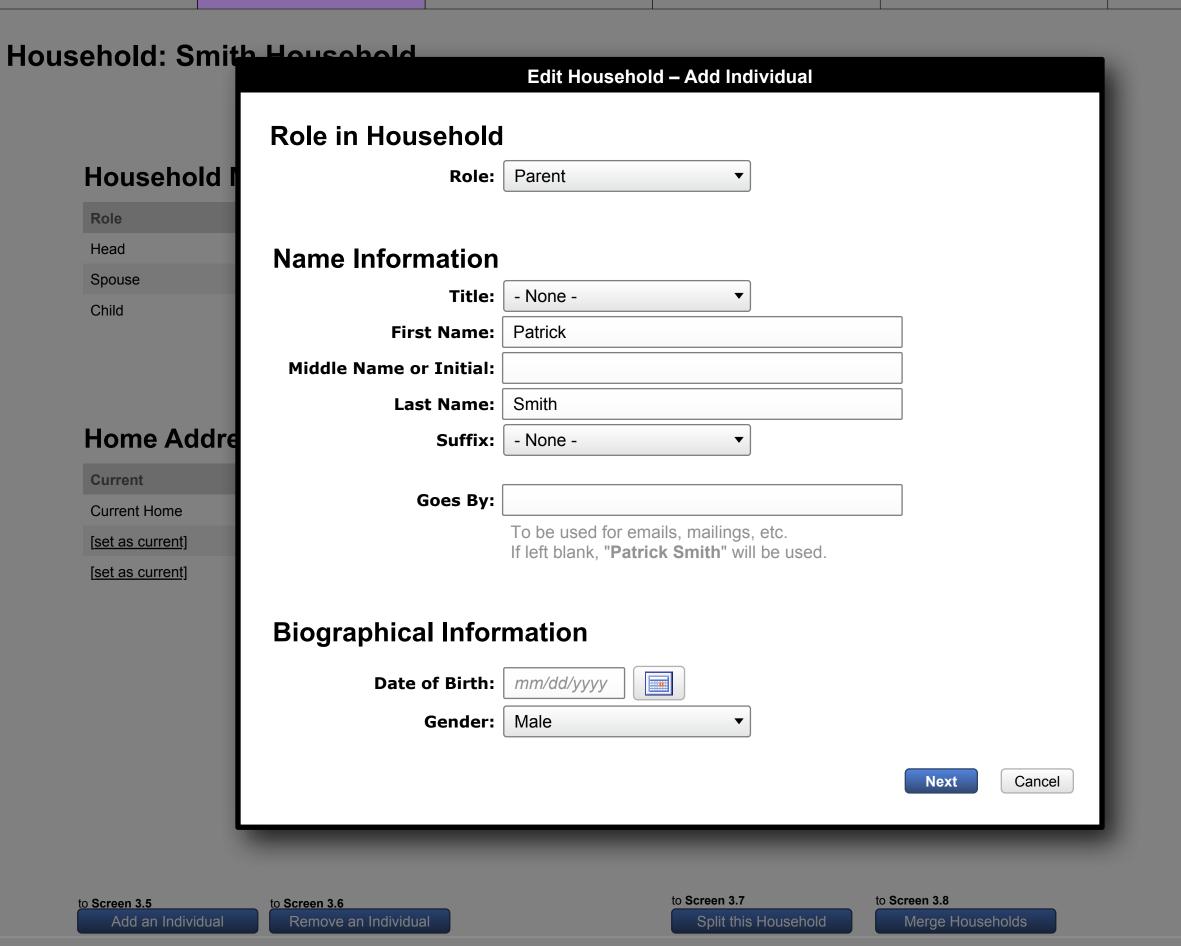
If "Head" is selected, the current Head will be changed to "Other" and this individual will be set as

Upon clicking "Next", the system will search to try any similarly-matched names in the system: * If at least one similarly-matched names exists, the user will be directed to Screen 3.5.1

* If no similarly-matched names exist anywhere, then the individual will be created and added to this household and the dialog box will close (redirecting the user back to **Screen 3.2**)

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT



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Welcome, Joe User

Edit Household - Reconcile Added Individual

This screen allows the user to attempt to reconcile an added individual to the household with an existing individual in the system, in order to prevent duplicate records.

"Back" will take the user back to Screen 3.5.

"Create..." will create the entry as a new individual and will place the newly created individual into this household. The dialog box will then close and the

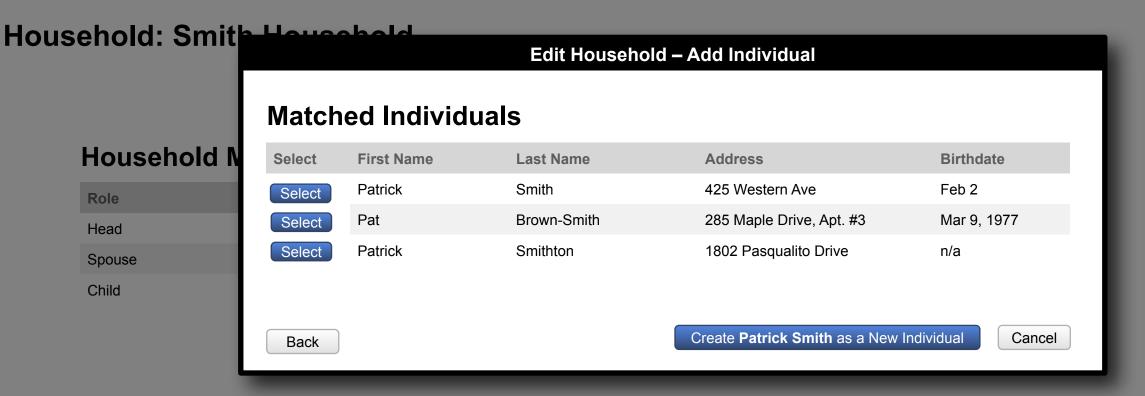
"Select" will have the system check to see if the individual is already part of a multi-person household:

- * If yes, then the system will add the individual into this household.
- * If no, then the system will merge the individual's single-person household into this household. Either way, the dialog box will then close and the user will be taken back to Screen 3.2.

"Cancel" will close the dialog box the user will be taken back to Screen 3.2.

ALCF Church Management System

PEOPLE HOUSEHOLDS GROUPS ADMINISTRATION LOG OUT COMMUNICATIONS



Home Address and Phone for the Smith Household Add New Current Address City/State **Zip Code Home Phone Current Home** 94086 408-555-1212 425 Western Ave Sunnyvale, CA 123 Main Street, Apt. #3 Palo Alto, CA 94011 650-555-1212 [set as current]

Sunnyvale, CA

94087

to Screen 3.5

[set as current]

to Screen 3.6

1852 Mary Ave

to Screen 3.7 Split this Household to Screen 3.8 Merge Households

to Screen 3.4

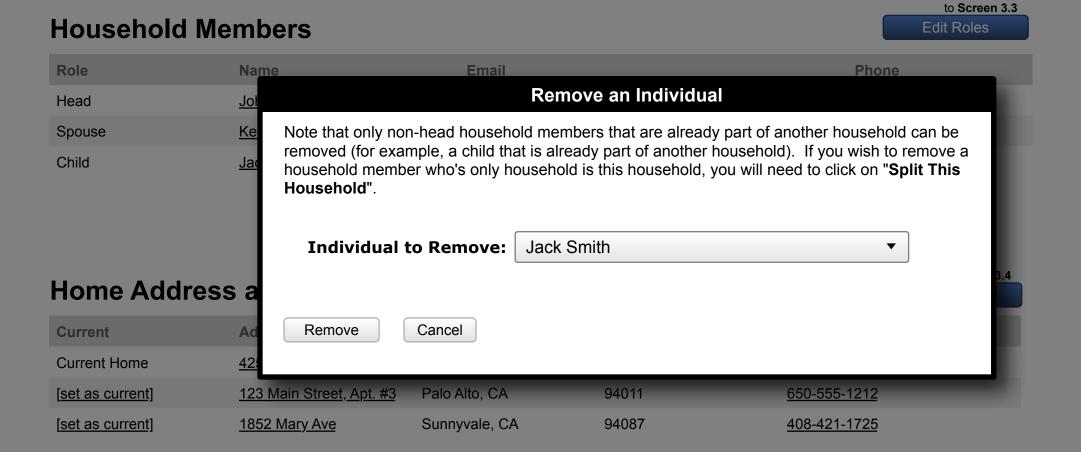
408-421-1725

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ALCF Church Management System

Welcome, Joe User **PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS ADMINISTRATION LOG OUT**

Household: Smith Household



to Screen 3.5

to Screen 3.6

to Screen 3.7 Split this Household to Screen 3.8 Merge Households

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This will cause the current household to be split into

Note that the head of the current household must stay in this household. Only non-head household members can be split off.

All shared "previous home address" information will be copied over to the new household, and from this point forward they will be managed independently

The new address will be saved as the current home address for the new household. The current home address will be saved as a previous home address for the new household.

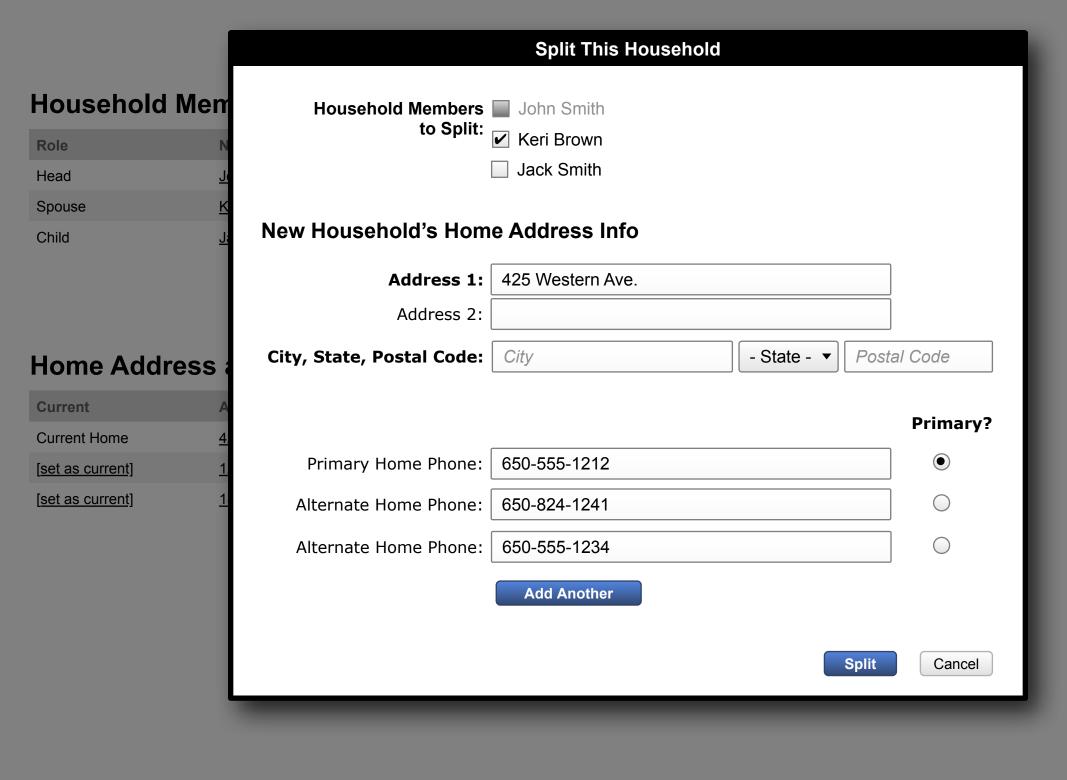
Current home address information for this household will remain unchanged.

After hitting "Split", the dialog box will close, redirecting the user to Screen 3.2 for the old household. However, as a convenience a notice of the split will appear at the top of Screen 3.2 for 2 weeks, with a link to "the other household".

ALCF Church Management System

ADMINISTRATION PEOPLE HOUSEHOLDS GROUPS COMMUNICATIONS LOG OUT

Household: Smith Household



to Screen 3.5

to Screen 3.7 Split this Household to Screen 3.8 Merge Households